

# Wisconsin Department of Public Instruction Food Service Management Company (FSMC) Template

PI-6306A (Rev. November 2025)

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## Request for Proposal (RFP)

### Invitation to Submit Proposal for Food Service Management Company (FSMC) Fixed Meal Price Contract

RFP Reference Number: 2026-1

RFP Release Date: **February 2, 2026**

Completed sealed proposals must be submitted  
no later than **April 14, 2026** by 2:00 PM CST

The Lincoln Academy is planning to expand in the 2027-2028 school year with approximately 372 additional scholars that year, and every following year, adding additional scholars until at full capacity in the 2030-2031 school year with a total of 1566 scholars. FSMC renewals may be adjusted to allow increased enrollment.

### RFP Issued By

The Lincoln Academy  
608 Henry Avenue  
Beloit, WI 53511  
Amber Aulozzi  
Chief Operations Officer  
608-690-5115

**Read SOLICITATION carefully!**

*(Cover Page)*

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## Schedule of Events

Event Type	Event Date	Event Time
RFP Release Date (Public Notice)	2/2/2026	
Deadline for Pre-Proposal Conference questions	2/24/2026	2:00 PM
*Pre-Proposal Conference and Site Visit	3/12/2026	12:30 PM
Deadline for submission of Final Questions <i>No questions will be accepted after this date/time.</i>	3/20/2026	2:00 PM
Answers to Questions Provided	3/31/2026	2:00 PM
**Deadline for Submission of Sealed Proposal	4/14/2026	2:00 PM
Proposals Opening	4/14/2026	2:00 PM
Proposals Evaluation Completed by	4/21/2026	
SFA seeks approval of intent to award from DPI	4/28/2026	
Approval of Winning Proposal (Board Meeting)	6/10/2026	
Notice of Intent to Award Sent to Contractor	6/11/2026	
Contract Signing	6/30/2026	
Anticipated Start Date of Contractor	7/1/2026	

\* 10 days minimum after RFP release date.

\*\* 10 days minimum after Pre-Proposal Conference and Site Visit.

The School Food Authority (SFA) will use its best efforts to adhere to the Schedule of Events. However, the SFA reserves the right to amend the schedule, as it deems necessary, and will post a notice of said amendment.

It is recommended that FSMC contract procurement is completed with a fully executed FSMC contract by February 1, to assist with placing the USDA Foods order. For USDA Foods deliveries, the deadline for selecting a commercial distributor in the WI Ordering System is March 31.

## Definitions

To ensure a clear and consistent understanding of the terms used throughout this Request for Proposal (RFP), the following definitions are provided:

**Applicable credits** shall have the meaning established in 2 CFR §200.406, applicable credits.

**Awarded Contract** is the Contract between the SFA and Contractor that submitted a winning proposal in response to the SFA's RFP. The awarded contract is used by the Contractor to provide the SFA with the services outlined in the RFP.

**Contract** is the award and execution of a contract resulting from this RFP, the contract will be comprised of the following documents, which collectively define the services and products to be provided by the Contractor:

1. This RFP includes all its specified requirements, terms and conditions.
2. The template Wisconsin Department of Public Instruction (DPI) Food Service Management Company (FSMC) Contract, "Fixed Meal Price Contract", as completed and submitted by the SFA and attached to this RFP.
3. Fixed Meal Price Contract Excel Work
4. All attachments, addenda, and documents accompanying this RFP.
5. All attachments, addenda, and documents accompanying the Offeror proposal.
6. Any official amendments or addenda issued during -the RFP process.
7. All written clarifications provided by the SFA.
8. All written clarifications are provided in response to inquiries from prospective Offerors.

**Contractor** is the successful Offeror with whom the SFA executes an Awarded Contract following the evaluation of proposals submitted in response to this RFP. This entity will be responsible for fulfilling the terms and conditions of the resulting Contract.

**Cost Reimbursable Contract** means a contract that provides for payment of all incurred costs to the extent prescribed in the contract, with or without a fixed fee. The fixed fee in a Cost Reimbursable contract includes the contractor's direct and indirect administrative costs and profit allocable to the contract.

**Fixed Price Contract** means a contract with an agreed upon fixed meal price(s) which includes, but is not limited to, the administration of all services identified in the RFP and Contractor's administrative costs and profit allocable to the Awarded Contract.

**Nonprofit school food service account** means the restricted account in which all of the revenue from all food service operations conducted by the SFA principally for the benefit of school children is retained and used only for the operation or improvement of the nonprofit school food service.

**Offeror** is a Food Service Management Company (FSMC) that submits a proposal in response to this RFP.

**Request for Proposal** is a formal solicitation document, also referred to as 'RFP', issued by the SFA to potential Offerors, detailing the required products and services and outlining the process for submitting a responsive proposal. This RFP package includes, but is not limited to:

1. Detailed requirements and specifications for the requested products and services.
2. Terms and conditions governing this solicitation and any resulting Contract.
3. Instructions and Excel Workbook for submitting pricing information (both paper and electronic copies).
4. Any and all Addenda or special written provisions specified by SFA after the issuance of this RFP
5. All official amendments, addenda, or special written provisions issued by the SFA after the initial release of this RFP.
6. Any additional required documents as specified within this RFP.
7. Offeror's Certifications, which must be completed, signed by an authorized representative, and any other required information.

## Procedural and Submission Requirements

This RFP is being issued for the purpose of entering into a contract for the management of food service program operations for **The Lincoln Academy** hereinafter referred to as the **School Food Authority (SFA)**.

The Food Service Management Company (FSMC) submitting a proposal will be referred to as the "**Offeror**", and the "**awarded contract**" will be between the winning Offeror (herein referred to as the "**Contractor**") and the SFA.

This RFP seeks proposals from FSMCs willing to operate the SFA's food service program at all facilities operated by the SFA. The FSMC will provide onsite management and operational support for the SFA food program. Services include but are not limited to consulting, purchasing, receiving, storing, preparation, setting up cafeteria lines, counter service, cleanup, sanitation, training, hiring and supervising personnel, and presenting food in a way

to create optimum student participation. The program will include the use of USDA Foods provided through the Wisconsin Department of Public Instruction's Food Distribution Program.

A complete description of the Scope of Work can be found in Fixed Meal Price Contract.

## A. Proposal Submissions

1. **Submission of  
proposal deadline:**

2:00 PM (CST) on 4/14/2026  
*time month/day/year*

No consideration will be made for proposal(s) received after this date and time listed above. The SFA reserves the right to retain all proposals for a period of at least sixty (60) days and to reject any and all proposal(s) or parts of a proposal and to waive any informalities and/or irregularities contained within the proposal.

2. **Proposals are to be submitted to this address**

Name of Agency

**The Lincoln Academy**

Mailing Address

608 Henry Ave  
Beloit, WI 53511

Physical Address

608 Henry Ave  
Beloit, WI 53511

3. **Submission Instructions**

Deliver a complete proposal package in a sealed envelope labeled as follows:

- RFP ID number and/or title
- Original or Copy (as applicable)
- Envelope number (i.e., 1 of 3)
- Date
- Offeror's Name and Address

Submit one (1) original and three (3) copies of the complete Proposal package.

During the proposal evaluation process, the evaluation team may need to clarify items in an Offeror's proposal. As a result, the Offeror's proposal must include contact information for the person who will be representing the Offeror through the process. Offeror should at a minimum provide proposal contract person's name, title, address, phone number, and email. Furthermore, the Offeror may need to provide proof of authority of the person signing and submitting the proposal. This will need to be available on request from SFA. The Offeror is responsible for delivering the complete proposal package in a sealed envelope along with the requisite copies to the correct location before the proposal deadline.

4. **Late Proposals**

Any proposal received after the exact time specified for the submission of proposal deadline for this RFP will not be considered.

5. **Public Opening**

Public opening will be at: 2:00 PM (CST) on 4/14/2026  
*time month/day/year*

Public opening will take place at: 608 Henry Ave Beloit, WI 53511  
*address*

6. **Pre-Proposal Conference and Site Visit**

A meeting with interested FSMCs to review the specifications, to clarify any questions, and for a walk-through of the facilities with school officials will be on 3/12/2026 at 12:30 PM the following location 608 Henry Ave Beloit, WI 53511 (main office).

- a. **Pre-Proposal Conference and Site Visit:** All FSMCs that intend to respond to this RFP are required to attend the Pre-Proposal Conference and Site Visit. Pre-Proposal Conference and Site Visit will occur during normal operating hours in order to provide Offerors with optimal information needed to make a competitive proposal.

- b. **Questions for Pre-Proposal Conference and Site Visit:** Submit in writing questions regarding the RFP by 2:00 PM CST on 2/24/2026 to Amber Aulozzi via [amber.aulozzi@tlabeloit.com](mailto:amber.aulozzi@tlabeloit.com).
- i. **All exceptions or deviations from the SFA developed RFP must be presented to the SFA during the question-and-answer period.**
  - ii. Questions submitted prior to the Pre-Proposal Conference and Site Visit will be answered at the Pre-Proposal Conference and Site Visit.
  - iii. Questions from the floor at the Pre-Proposal Conference and Site Visit must also be presented in writing. These questions may or may not be answered at the Pre-Proposal Conference and Site Visit.
  - iv. All questions will be answered in writing after the meeting and sent to all individuals that signed in at the Pre-Proposal Conference and Site Visit.
- c. **FSMC Presentations:** FSMC presentations will not be scheduled at this time.
- d. **Written communication:** Written communication will override any verbal communication between any FSMC and SFA.

## 7. Written Inquires

All communication should be directed to:

Contact Person <i>First &amp; Last Name</i> Amber Aulozzi	Contact Person's Title Chief Operations Officer		
Address 608 Henry Ave	City Beloit	State WI	Zip 53511
Email Address <a href="mailto:amber.aulozzi@tlabeloit.com">amber.aulozzi@tlabeloit.com</a>	Phone No. <i>Area Code/No.</i> 608-690-5115		

Email is the preferred form of communication. (Note: School's email systems have very restrictive security systems. If a response has not been received within two (2) business days, contact Amber Aulozzi at 608-690-5115. Any inquiries, disputes, or requests concerning interpretation, additional clarification, or additional information pertaining to the RFP must be made in writing and received by the following date 3/20/2026.

Routine procedural questions will be answered as promptly as practicable; examples of routine procedural could include clarification of the address for proposal submission, key dates and timelines, etc. Substantive questions will be compiled and both questions and answers provided to all Offerors prior to the RFP due date. Examples of substantive could include clarification of discrepancies or errors. A written response no later than the following date 3/31/2026 will be issued; a written addendum is the only official method whereby interpretation, clarification, and additional information can be given. Once issued, all addenda shall become part of this RFP and must be acknowledged on the submitted proposal. All addenda will be issued electronically to each Offeror known by the SFA who has requested a copy of the RFP.

Before submitting a proposal, it shall be the responsibility of each Offeror to contact Amber Aulozzi at [amber.aulozzi@tlabeloit.com](mailto:amber.aulozzi@tlabeloit.com), prior to the proposal due date to determine whether additional addenda were issued.

## 8. Discussions/Negotiations

By requesting a copy of the RFP and subsequent submission of a proposal, the Offeror agrees that during the period following issuance of the proposal and prior to notification of intent and/or award of the Awarded Contract, the Offeror will not discuss this procurement with any party except the designated contact person identified in this RFP. The SFA reserves the right to reject any and all proposals and to cancel this RFP if it is in the best interest of the SFA. The SFA shall not be held responsible for any expenses incurred in the preparation or subsequent presentation of the Offeror's response to this RFP.

The SFA reserves the right, at any time after opening and prior to the award, to request any Offeror clarification, address technical questions, make site visits, review past performance, or seek or provide other information regarding Offeror's proposal. This process may be used for such purposes as providing an opportunity for the Offeror to clarify the proposal in order to assure mutual understanding and/or aid in the determinations of responsiveness or responsibility of the Offeror. The SFA will not consider information

received if the information materially alters the content of the proposal or alters the type of goods and services the Offeror is proposing to the SFA. An individual authorized to legally bind Offeror shall sign responses to any request for clarification.

The SFA reserves the right to contact provided references and other references to assist in proposal evaluation, to verify information contained in the proposal, and to discuss the Offeror's qualifications including capabilities and performance under other contracts.

Issuance of this RFP in no way constitutes a commitment by the SFA to award any contract or agreement. This RFP is designed to provide the Offeror with the information necessary to prepare a competitive proposal. It is not intended to be comprehensive, and each Offeror is responsible for determining all factors necessary for submission of a comprehensive proposal. An RFP may be rejected for various reasons, including but not limited to any one of the following reasons:

- a. Offeror fails to deliver the proposal by the due date and time.
- b. Offeror fails to respond to the SFA's request for information, documents, or references within the time specified.
- c. Offeror's response limits the rights of the SFA.
- d. Offeror's response materially changes a product or service requirement.
- e. Offeror fails to include information necessary to substantiate that it will be able to meet a product or service requirement. A response of "will comply" or merely repeating the requirement is not sufficient. Responses must indicate present capability; representations that future developments will satisfy the requirement are not sufficient.
- f. Offeror provides misleading or inaccurate responses.
- g. Offeror initiates unauthorized contact regarding the RFP with the SFA or employees/agents of the SFA.
- h. Offeror presents the information requested by this RFP in a format inconsistent with the instructions of the RFP.
- i. Offeror fails to include any signature, certification, authorization, stipulation, disclosure, guarantee or other item requested in this RFP.

## **9. Fair and Open Competition**

This RFP is issued to promote fair, open, and unrestricted competition to the maximum extent practicable. Offerors who believe that any language, specifications, terms, conditions, or any combination thereof, unduly restricts competition or limits the requirements of this RFP to a single source, must submit a written notification to the contact person identified in this RFP. This notification must be received by the SFA within ten (10) business days following the date of the RFP's issuance. Failure to submit a timely notification may waive the Offeror's right to challenge the perceived restrictive or single-source requirement later in the procurement process. The SFA will review all such notifications prior to the award of any contract to determine if modifications to the RFP are warranted. However, submission of such a notification does not guarantee that the RFP will be changed.

## **10. Overly Responsive Proposal**

To ensure a level playing field, proposals must not be overly responsive and adhere strictly to the requirements outlined in this RFP. If the proposal is deemed to be overly responsive, the proposal may not be considered for further evaluation and the Awarded Contract. Offerors must confine their proposal to the requirements of this RFP. Examples of overly responsive proposals include, but are not limited to:

- A. Offering guarantees not requested in the RFP,
- B. Providing incentives (e.g., scholarships, free equipment) beyond the RFP's requirements, or
- C. Proposing discounts or supplementary funding for items not sought in the RFP (e.g., Point of Sale (POS) equipment).

## **B. Awarding of the Contract**

To be considered for the Contract Award, Offerors must submit a complete and timely proposal using the forms provided in this RFP. Proposals that exceed the requested scope or include information beyond the specific requests in this RFP may be considered overly responsive and may be returned without further evaluation. To

ensure a fair and consistent evaluation, Offerors must limit their proposal to the requested information and format.

Additional documents submitted with a proposal will not alter the contract provisions or the evaluation process outlined in this RFP. Any modifications to this RFP or the resulting contract require the consent of the SFA and review and approval by the DPI.

Proposals submitted with additional terms and conditions or addenda that are contingent upon the award of a contract by the Offeror will be considered non-compliant, non-responsive, and may be rejected in their entirety. The SFA will not accept or incorporate any such unauthorized terms or conditions into the Awarded Contract. Offerors should submit proposals that fully conform to the requirements and terms set forth in this RFP

### **Evaluation and Selection Process**

The evaluation and selection process will proceed as follows:

1. **Demonstration of Resources:** Offerors will be assessed on their ability to demonstrate the necessary financial, technical, and other resources required to provide the specified products and perform the services outlined in this RFP.
2. **Proposal Scoring:** Proposals will be scored based on the evaluation criteria outlined in this RFP. Only Offerors selected for consideration will have their proposals evaluated for scoring. The SFA's evaluation team will review and score proposals. The evaluation team will conduct a pre-award audit and check references. Offerors may be contacted for clarification and to provide additional information and documentation. Failure to provide requested information and documentation in a timely manner may result in disqualification of a proposal.

The SFA will award each proposal independent of other proposals. As part of the evaluation process, the SFA may request samples of meals or other products and services.

3. **Selection for Award Consideration:** The Offeror with the highest scoring proposal will be considered for the Contract Award.
4. **SFA Recommendation and DPI Review:** The SFA will communicate its selected Offeror to the DPI for the purpose of awarding the contract and provide supporting documentation for the selection of the Contractor. The DPI will review this documentation and either approve or deny the request to award the contract.
5. **School Board Approval:** Approved requests for contract award may require School Board approval.
6. **Notification and Contract Execution:** Upon School Board approval, the SFA will notify the Offeror of their winning proposal and the subsequent timeline for executing the Food Service Management Company (FSMC) Contract.

### **Offeror Responsibilities**

Offerors and their authorized representatives are expected to thoroughly read and fully understand all the terms, conditions, requirements, and specifications outlined in this RFP before submitting a proposal. Failure to do so will be at the Offeror's own risk and will not relieve the Offeror of their obligations related to this RFP.

The SFA is not liable for any costs incurred by the Offeror prior to the signing of the Contract Award by all parties. Furthermore, payments to the Contractor from the Child Nutrition Program (CNP) funds are prohibited until the Contract Award is fully executed.

### **C. Awarded Contract**

The Awarded Contract will be a combination of the specification, terms and conditions of this RFP; the Contractor's proposal, attachments to the proposal and any written clarifications or changes made by SFA and approved by DPI. Exceptions and/or deviations after the due date for questions will not be considered. Any consideration of exceptions and/or deviations will only be considered within the timeline for questions. Allowance of any exceptions and/or deviations will be communicated to all Offerors as part of the answers to the questions. See definitions for the Awarded Contract and Contract.

### **D. RFP Estimations**

The quantities stated in this RFP represent the SFA's best estimate of anticipated needs for the 2026-2027. These estimates include projected increase or decrease resulting from changes in federal guidelines and anticipated changes in student participation in the SFA's food service. The accuracy of this estimate may be

affected by numerous factors including but not limited to budgetary adjustments, meal pricing, availability of federal funds or other subsidies, changing market forces, or unintentional errors or omissions. Actual needs may be greater or less than the estimated quantities provided.

## E. Evaluation Criteria

Proposals will be evaluated based on the following criteria, which reflect the essential requirements and priorities of the SFA's food service program. Each criterion will be assigned a weighted score to determine the overall ranking of each proposal. The SFA will utilize a weighted scoring methodology to ensure a fair and objective evaluation process. The Offeror submitting the most advantageous proposal based on scoring, considering both technical and cost factors, will be recommended for the Award Contract.

### Summary of evaluation criteria:

– (Edit header and points in this section below. Do not edit header and points in the next section for criteria language.)

All sections except cost may be deleted, edited, and expanded by the SFA. Make edits below.

Weight	Criteria
<b>30</b> points	Cost/Financial Proposal
<b>5</b> points	Transparency and Reporting of Rebates, Discounts, and Credits
<b>5</b> points	Guarantees to Food Service Account
<b>5</b> points	Experience, References and Service Capability
<b>5</b> points	Financial Condition/Accounting Reporting Systems
<b>15</b> points	On-site Manager: Food Service Director/Overall Staffing Plan
<b>5</b> points	Professional Development/Training Opportunities
<b>5</b> points	Promotion of the School Food Service Program
<b>5</b> points	Involvement of Students, Staff and Patrons
<b>20</b> points	Menu Selection, Use of USDA Foods, Food Quality, and Portion Sizes (if the 21-day cycle menu is developed by the Offeror)
points	

**TOTAL POINTS: 100**

The maximum possible points are listed next to each criterion. Evaluation and scoring of proposals will be based on the assignment of points by the evaluation team and totaled for a final score which will be used for awarding the contract. Only responsive proposals will be considered for evaluation. For a proposal to be considered responsive, the Offeror will need to read the entire RFP and provide documentation and information required by all sections of the RFP including Fixed Meal Price Contract, Fixed Meal Price Contract, and any other attachments, addenda, and documents accompanying this RFP. The evaluation team will evaluate all qualifying proposals. The evaluation team will evaluate documentation and information requested throughout the RFP and recommend contract award using this documentation and information including the following evaluation criteria as described below:

#### 1. Cost/Financial Proposal: 30 points

– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.

- a. Cost/Financial scoring will be tracked and scored on the DPI template using only Attachment E Profit or Loss from the Fixed Meal Price Contract Excel workbook.
- b. Proposal with the highest return on the Fixed Meal Price Contract Excel workbook, will receive the highest number of points; all other proposals will receive fewer points based on the return reported on the Fixed Meal Price Contract Excel workbook.
- c. Guaranteed Minimum Return will not be factored into cost evaluation and will be scored separately below.
  - Minimum requirements for proposal evaluation
  - Documents required for evaluation of criteria



## **2. Transparency and Reporting of Rebates, Discounts, and Credits: 5 points**

*– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.)*

- a. See section regarding reporting of rebates, discounts, and credits.
  - Minimum requirements for proposal evaluation

Offerors will be evaluated on transparency and effectiveness in negotiating, tracking, and returning all rebates, discounts, and credits related to this RFP and awarded contract. All such financial benefits—whether managed directly or through third parties—must accrue to the benefit of the SFA. This includes any form of direct or indirect remuneration, incentives, price concessions, refunds, or credits affecting costs paid from the SFA's nonprofit food service account.

- Documents required for evaluation of criteria

Offerors must submit a narrative describing their process for tracking and managing rebates, discounts, and credits related to purchases made with the SFA's nonprofit food service account, including those involving vendors, distributors, and manufacturers. Offerors may also describe how their approach differentiates them from other Offerors.

## **3. Guarantees to Food Service Account: 5 points**

*– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.)*

- a. Standard requirements and conditions for any proposed guarantee:
    - i. Scoring of guarantees with a cap in payment to SFA will be reduced in proportion to other proposals with a cap. Guarantee with no proposed cap will receive the highest score with the score reduced by conditions limiting the payment of the guarantee when compared to other proposals without a cap on guarantee.
    - ii. Any proposed guarantee with numerous conditions for payment or that will most likely lead to non-payment of guarantee will be considered nonresponse to this evaluation criteria and as a result will receive zero points for this section of evaluation.
    - iii. The proposed guarantee will be evaluated solely as a criterion and not as a reduction/addition to the profit or loss section listed on Attachment E in the Excel workbook:
    - iv. Any guarantee proposed will be assessed at the end of the School Year on June 31st and payment will be made within 30 days to the Schools Nonprofit Food Service Account.
    - v. The guarantee will be for the life of the Awarded Contract including all renewals.
    - vi. Guarantee amounts may be adjusted annually in proportion to the percentage used for renewal rate adjustments.
  - b. Guarantee will be evaluated on Offeror's proposal response to Minimum Return.
  - c. Any "guaranteed return" must remain in the nonprofit food service account.
  - d. "Returns" cannot be contingent upon multi-year contract duration.
  - e. If the Offeror has selected to guarantee minimum return, then the proposal must contain a description of the guaranteed conditions, forecasting of cost, and settlement of losses and/or surpluses.
    - Minimum requirements for proposal evaluation
- Documents required for evaluation of criteria

Narrative to explain what guarantees food service account could be

## **4. Experience, References and Service Capability: 5 points**

*– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.)*

- Minimum requirements for proposal evaluation

Implementing various strategies, processes, and systems to maximize school resources.

Developing staffing plans and recommendations to meet the varying needs of the SFA

Reference checks; SFA will contact references

- Documents required for evaluation of criteria

Must include at least five references including district name, address, phone number and client administrator capable of commenting on performance.

Narrative describing your continuous process improvement leading to better, faster services at schools; must provide examples and how they are applicable to this SFA.

**5. Financial Condition/Accounting Reporting Systems: 5 points**

*– (Edit header and points in “summary of evaluation criteria” section above. The criteria language below must be added by the SFA.)*

- Minimum requirements for proposal evaluation

Offeror must be able to demonstrate financial stability.

Offeror must be able to demonstrate profitability for the last three years.

Proposal with the most competitive financial package proposed will receive highest number of points; all other proposals will receive fewer points based on financial package and costs proposed.

Financial package includes completion of all attachments and any other information requested in this RFP including but not limited to the following: Projected Operations—Expenditures, Labor Worksheet—FSMC, Fringe Benefit Cost Worksheet—FSMC, Equipment (expendable and nonexpendable) Costs, and Implementation Costs.

- Documents required for evaluation of criteria

Copy of FSMC annual financial report or certified financial statement from the most current year of operation, prepared by a certified public accountant.

Offeror must complete and submit all financial and cost attachments to this RFP and any other documentation that would affect final end of year outcomes.

Proposal must include a two (2) year SFA food service revenue and expenditure operating statement budget projection.

**6. On-site Manager: Food Service Director/Overall Staffing Plan: 15 points**

*– (Edit header and points in “summary of evaluation criteria” section above. The criteria language below must be added by the SFA.)*

- a. The Food Service Director (FSD) must meet the minimum USDA Professional Standards hiring requirements for SFA enrollment.
- b. See required “Employee” section of RFP for detail on hiring requirements for all staff.

- Minimum requirements for proposal evaluation

The Food Service Director (FSD) must have an associate degree (or equivalent) with related academic major in food and nutrition or a related field, with a minimum of two (2) years of experience in a school district of similar size and operational complexity.

The FSD must have proven skills in partnership with existing clients and communities.

The FSD must have experience with large catering events and culinary arts.

Proposal must include a detailed staffing plan.

Assurance with food safety requirements.

- Documents required for evaluation of criteria

Return attachment E

Proposal must contain a copy of the Offerors organizational chart and a detailed plan for the administration, supervision, and staffing proposed under the specifications of this contract.

An Executive Chef should be included in the staffing proposal.

Proposal must include the actual resume and background of the person who will supervise the Resident Food Service Director

The District Manager must be available to the SFA on an as-needed basis.

Describe how your company will ensure the best performance.

Describe in a narrative with supporting evidence (examples) of partnership with your client on desired initiatives.

**7. Professional Development/Training Opportunities: 5 points**

*– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.)*

a. Provide annual training requirements for staff at all levels.

- Minimum requirements for proposal evaluation

Provide annual training requirements for staff at all levels.

- Documents required for evaluation of criteria

Proposal must contain copies of training agendas or other documentation showing that at least one training was held to cover issues such as blood borne pathogens sanitary food preparation, equipment cleaning techniques, worker safety and/or annual civil rights training.

Proposal must include Offeror's personnel and human resource philosophy.

**8. Promotion of the School Food Service Program: 5 points**

*– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.)*

- Minimum requirements for proposal evaluation

Offeror must be able to demonstration how it adds new food items and incorporates USDA Foods items into menu cycle.

Offeror must be able to demonstration it can increase participation including expected trends and strategies to increase breakfast and lunch participation.

- Documents required for evaluation of criteria

**Include new foods or recipes that might be implemented.**

**Include examples of flexibility in the promotion of the school food service program depending on relevant desired outcomes or goals.**

**Provide evidence of partnership with your client on desired initiatives.**

**Share unique ideas for our breakfast, lunch, and ala carte programs.**

**Provide evidence that the Offeror involves employees to use their expertise and experience for innovation.**

**Demonstrate performance in promotion of the school food service program and results of past promotions.**

**9. Involvement of Students, Staff and Patrons: 5 points**

*– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.)*

- Minimum requirements for proposal evaluation

Provide examples from two different clients of involvement of students, staff and patrons.

- Documents required for evaluation of criteria

Proposal must contain examples of your efforts and results regarding involvement of students, teachers, building administrators and parents in program evaluation and selection of menus, discussion of nutritional issues, etc., also include examples of surveys and how results/requests were responded to and what actions were taken.

Proposal must contain documented cooperative education programs.

Proposal must contain examples of Offeror's experience with catering expertise including involvement in evening events and/or community events.

Proposal must contain examples of Offeror's experience with community engagement.

Proposal must contain examples of Offeror's experience of proven customer service excellence to all patrons including references to support the level of involvement.

Proposal must contain examples of Offeror's experience of partnership with clients and how Offeror met goals.

**10. Menu Selection, Use of USDA Foods, Food Quality, and Portion Sizes (if the 21-day cycle menu is developed by the Offeror): 20 points**

*– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.)*

- Minimum requirements for proposal evaluation

Offeror must be able to demonstrate experience with the following:

Daily entrée menu variety

Nutrition requirements

Daily secondary offering bar variety

Appeal and variety

Ability to comply with or exceed the district's nutrition policy

- Documents required for evaluation of criteria

Sample menus

Sample catering menu choices

Document examples of your use of USDA commodities in your menu selection

Provide portion quantities

Examples showing past successes in improving nutritional quality of school food service programs

**11. : points**

*– (Edit header and points in "summary of evaluation criteria" section above. The criteria language below must be added by the SFA.)*

- Minimum requirements for proposal evaluation

- Documents required for evaluation of criteria

**F. Qualifications for Contract Award**

To be considered for the Awarded Contract, the Offeror must demonstrate the following qualifications by providing complete documentation within the submitted proposal. Failure to provide the required documentation for any qualification will result in immediate disqualification of the proposal and no further consideration.

1. The Offeror shall meet the following experience criteria:

- Years of Experience: The Offeror must have a minimum of 5 years of experience in the food business.
  - Business License: The Offeror must maintain a current business license from the State of Wisconsin.
  - Documentation: The Offerors shall provide documentation of applicable license, certification, and/or commercial experience as part of their proposal.
  - Legal History: Offeror will need to provide information in the narrative section regarding any litigation, arbitration, mediation, administrative proceeding, or like matter related to their business activities in which they are currently a party or in which they were a party within the last five (5) years.
2. Business Ethics: The Offeror shall demonstrate commitment to high ethical standards and a satisfactory record of performance. This includes:
- Integrity and Performance: The Offeror must have a high degree of integrity and business ethics, and a satisfactory record of performances.
  - Agency Notification: The Offeror must not have been notified by any local, state, or federal agency with competent jurisdiction that its standing in any matters whatsoever would preclude it from receiving the Awarded Contract.
  - Substantiation of Standards: The Offeror will comply with any reasonable requests to supply any sufficient information to substantiate the proposing entity's ability to meet these minimum standards.
  - SFA References: The Offeror shall not have the right to include the SFA's name in its published list of customers, without prior approval of the named party.
  - Prohibited Public Statements: The Offeror agrees not to publish or cite in any form any comments or quotes from the SFA without prior approval.
  - No Implied Endorsement: The Offeror further agrees not to refer to the Contract Award in commercial advertising in such a manner as to state or imply that the products or services provided are in any way endorsed or preferred by the SFA.
  - No Collusion or Fraud: The Offeror acknowledges that the proposal is made without prior understanding, agreement, or connection with any firm, corporation, or person submitting a proposal for the same products, and is in all respects fair and without collusion or fraud.
  - **No Influence on RFP Development: The Offeror also acknowledges that no one connected to the company has had any connection with the development or drafting of this RFP.**

3. Disqualification Conditions

The offeror will be disqualified from the evaluation process and the opportunity to be awarded a contract under the following conditions:

- Unauthorized Contact: Contacting SFA employee in reference to this RFP outside the person listed as the contact person for this RFP.
- Unauthorized Communication Methods: Contacting an SFA employee in a method not described in this RFP, such as communicating with SFA employees in reference to this RFP using a method other than written letter or email or speaking with SFA employee outside Pre-Proposal Conference and Site Visit.
- Unauthorized Advice: Offering SFA technical or other advice, outside of sealed proposal or request for clarification of proposal, on preparing the RFP, during the solicitation of proposals, or during the evaluation of proposals.
- Misrepresentation: Misrepresenting Offeror's company as a government agency or other entity in an attempt to deceive SFA.

4. Conflict of Interest Declaration:

The Offeror is obligated to identify and disclose any and all relationships, financial interests, or other matters that present an actual or potential conflict of interest. This includes any circumstance that might

influence the Offeror's impartiality or could be reasonably perceived to create an unfair advantage in the proposal process or in the performance of any resulting contract. Such disclosures must be made in full within the submitted Proposal.

Potential conflicts of interest include, but are not limited to:

- Any financial interest, direct or indirect, held by any officer or employee of the SFA, or their immediate family members.
- Any past, present, or planned contractual or employment relationship between the Offeror and any officer or employee of the SFA.
- Any organizational relationships where the Offeror or its affiliates may provide impartial advice, influence procurement outcomes, or gain access to competitively sensitive information related to the scope of this RFP or potential future work with the SFA.
- Any relationships, family or otherwise, with individuals involved in the development of this RFP or the evaluation of proposals.

Failure to fully disclose any such matters in the proposal will constitute a material breach of any awarded contract, render the submitted proposal or resulting Contract subject to immediate voidance, or termination for default.

#### Certification

By submitting a proposal, the Offeror affirms, to the best of its knowledge and belief, that no undisclosed conflicts of interest exist that would preclude its participation in this RFP or receipt of any award related to this RFP.

#### 5. Code of Ethics

The Offeror must maintain a written code of standards of conduct governing the performance of their employees engaged in the award and administration of contracts. The code of standards must include:

- No employee, officer, or agent of Offeror shall participate in selection, or in the award or administration of a contract supported by state or federal funds if a conflict of interest, real or apparent, would be involved.
- The Offeror's officers, employees or agents will neither offer, solicit, nor accept gratuities, favors or anything of monetary value from customers, potential customers, contractors, potential contractors, or parties to sub-agreements.
- Offeror may set minimum rules where the financial interest is not substantial, or the gift is an unsolicited item of nominal intrinsic value. To the extent permitted by law, such standards of conduct will provide penalties, conditions, or other disciplinary actions for violations of such standards by the Offeror's officers, employees, or agents, or by contractors or their agents.
- Offeror's Code of Ethics must be signed by an authorized person and attached with the proposal.

### G. Nondiscrimination Statement

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: <https://www.usda.gov/sites/default/files/documents/ad-3027.pdf>, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail

to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. **mail:**  
U.S. Department of Agriculture  
Office of the Assistant Secretary for Civil Rights  
1400 Independence Avenue, SW  
Washington, D.C. 20250-9410; or
2. **fax:**  
(833) 256-1665 or (202) 690-7442; or
3. **email:**  
[program.intake@usda.gov](mailto:program.intake@usda.gov)

This institution is an equal opportunity provider

## H. DPI Legal Disclaimer

The DPI does not review or judge the fairness, advisability, or efficiency of fiscal implications of the contract. DPI is not a party to any contractual relationship between the SFA and Contractor. DPI is not obligated, liable or responsible for any action or inaction taken by the SFA or Contractor based on this template contract and subsequent changes and/or amendments to this RFP or subsequent Awarded Contract.

**THE UNDERSIGNED HEREBY OFFERS** to provide the services of an FSMC as specified in this proposal.

I understand the SFA reserves the right to reject any or all proposals, and this proposal may not be withdrawn during a period of sixty (60) days from the time of opening of the proposal.

**FURTHERMORE, I CERTIFY** that, consistent with terms and conditions outlined in the RFP I have not exchanged any gratuities, favors, nor anything of monetary value with the SFA, and this proposal is made without prior understanding, agreement, or connection with any other company submitting a proposal for the same type of service and is in all respects fair and without collusion or fraud.

I agree to abide by all terms and conditions of this RFP and attached FSMC Contract, FSMC Workbook, and certify that I am authorized to sign the proposal.

## I. Offeror Required Information for submitting proposal

Instructions: Offeror is required to complete all sections of this form. <b>Offeror Information</b>		
Offeror Company Name:		
E-Mail Address:		
Phone Number:	Toll Free Phone:	
Address:		
City:	State:	Zip:
<b>Offeror Signature</b>		
Name of Authorized Company Representative:	Title:	Phone:
Signature:	Date:	Email:

## Excel Workbook

When the FSMC submits a proposal to the SFA, the **entire electronic Excel workbook** must be submitted with Attachments B, D, and E filled in by the FSMC. Do not enter financial information on alternate spreadsheets unless the school has asked for additional financial information in the RFP. In this case, the spreadsheet cannot replace any of the tabs in the Excel workbook.

The revenue Attachments C1, C2, and C3 cannot be changed by the FSMC in the bid document. All FSMCs must place their bids on the revenue that the SFA has entered into the Excel workbook.

**Revenue cannot be altered on Attachment E.** Revenue on Attachment E is auto populated via a formula, and this formula cannot be overridden. Overriding the formula and changing the revenue will result in the FSMC receiving 0 cost points. Cost points are calculated solely on the Profit or Loss dollar amount on Attachment E via use of the [FSMC Scoring Matrix](#).

The FSMC needs to enter its information on Attachment B for the labor hours, hourly rates, and benefits that they will be providing to the SFA for their bid, and in peach boxes only on Attachments D and E. No other attachments may be altered by the FSMC. **The Excel attachments may not be separated and embedded within the FSMC's proposal.** Proposals submitted without the **entire electronic** Excel workbook are considered incomplete and may be disqualified from the bid process.