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To: All Vendors

From: M. Angela Foraker *MAF/SA*
Executive Director of Purchasing

Date: November 27, 2017

Re: RFP #21235 Providing a School Nutrition Management Software Solution –
ADDENDUM 1

Below is Addendum #1 for RFP #21235. This addendum supplements and amends the items in the Specifications. This addendum must be noted on the Addendum Acknowledgement Form found on page 9 of the RFP. Failing to acknowledge this Addendum on the Addendum Acknowledgement Form may cause the proposal to be rejected.

Below are questions and respective answers received for RFP #21235 Providing a School Nutrition Management Software Solution

Comprehensive Question and Answer List

- 1. Please confirm the total number of serving lines is 134.**

The total number of serving lines per school is represented in Appendix A.

- 2. How many total serving sites need their own reporting that serve meals?**

Individualized reporting per school site is needed.

- 3. Should expenses for training and go live be included in the pricing?**

Yes.

- 4. Please provide the number of site managers, cashiers, and central office staff who will need to be trained.**

In Appendix A: Site List, the approximate number of staff in each site is listed. A detailed staff list for each site will be provided via Addenda.

- 5. Should hardware be quoted? If yes, please indicate how many POS terminals and/or input devices like pinpads/scanners should be quoted.**

Hardware should not be included in solution proposal. CMSD will collaborate awarded vendor to purchase appropriate hardware for POS operation.

On Appendix C: Evaluation Questionnaire #8, please provide a list of recommended non-proprietary hardware to efficiently operate your software solution.

- 6. Should hardware extended warranties be included?**

Hardware should not be quoted in solution proposal.

- 7. Should online Free & Reduced applications be included? Some CEP districts still require applications.**

Though we are currently CEP, we are interested in a software that can support both CEP and Free & Reduced. Please include F&R. This application is not in our current implementation plan, but we may decide to purchase this application at a later date from the awarded vendor.

- 8. Should scanning be included?**

In regards to meal applications, scanning is not a requirement and does not need to be included.

- 9. Can you please clarify the amount of claiming sites and feeding sites?**

- a. Page 56 reads, *"Over 100 instructional and non-instructional sites."*
 - b. Page 61 reads, *"91 school sites, 114 schools hosted within sites" ... "food service operations at 88 of the school sites."*
 - c. Appendix A: Site List on page 71, lists 93 sites.
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- a. This information is accurate. There are over 100 total sites (instructional/non-instructional/administrative) that make up the Cleveland Metropolitan School District. 91 of these sites are school buildings.
 - b. A school building may host instructional services for more than one school, which is why it is listed that there are 114 schools. For example, the John F. Kennedy school building hosts JFK E3agle Academy and JFK PACT. FCNS reports per school building, not individual school within the building. 93 of the CMSD sites are utilized by Food & Child Nutrition Services, whether that be for administrative purposes or as a school site.

- c. 91 of the 93 sites are school sites (the other two are administrative FCNS sites). Each of these 91 are claiming and feeding school sites.

10. On page 10, Section II: Acknowledgement reads, *"We further agree that if awarded the contract, we will submit the required Performance Bond and Insurance Certificate within five (5) days of written notification that the District has adopted a resolution authorizing the encumbrance of funds for the project."* Is Performance Bond a requirement?

No Performance Bond is required.

11. On page 19, Question 9 of the Section III: Proposer Qualifications Form reads, *"Are you legally qualified to do business in Cuyahoga County and licensed by the City of Cleveland?"* PrimeroEdge is a state of Texas, and we already work with school districts in Ohio. To clarify, is this question applicable to the software vendor? Is there a specific license needed? If so, please name the license necessary or send a link.

To clarify, is this question applicable to the software vendor? Yes.

Is there a specific license needed? No.

12. Page 56 reads, *"The Cleveland Metropolitan School District... is soliciting proposals to establish contracts with one of more qualified vendor to provide Cab and Van Services on an "As Needed" basis for eligible students."* Is "Cab and Van Services" an error?

Yes, please delete 'Cab & Van Services' this RFP is for 'Providing a School Nutrition Management Software Solution'

13. On page 62, Section 1.c. RFP Schedule for School Nutrition Management Solution, lists vendor questions are due on 11/15/2017. However, page 4 states: "All questions and correspondence related to this RFP must be submitting in writing ONLY by 12:00 pm on November 21, 2017." Please clarify the deadline to submit questions pertaining to this Request for Proposal #21235.

Yes, please delete.

14. As noted on page 62, CMSD is not currently using software for the current menu planning process. PrimeroEdge needs more information about the operations to create a plan.

- a. How many menu items will be on the POS?
- b. How many ingredients? Is the information easily copied into a spreadsheet or PrimeroEdge?
- c. How many menus and menu cycles? Are they in a format that is copy/paste ready for PrimeroEdge?

- d. How many inventory items? Is the information easily copied into a spreadsheet or PrimeroEdge?
- a. This could vary per program.
 - b. CMSD would need to see the capabilities of software to know what details from current database need to be exported.
 - c. At this time, two menus each contain 4 cycle weeks as well as After School Snack and Fresh Fruit and Vegetable Program
 - d. Approximately 200 items

15. On page 63, Section 2.a. System Implementation, reads, *"It is the vendor's responsibility in their proposal to outline which modules are implemented in what order and the logic for that sequence."* However, the order CMSD wants to follow is in the chart below. Should the vendor design the schedule or follow what CMSD has listed?

PRE-PHASE	PHASE I	PHASE II
January 2018	February 2018 – March 2018	April 2018 – July 2018
Discovery phase	Central Office & Warehouse: Menu Planning & Nutritional Analysis, Inventory, Ordering, Accountability and Reporting Point of Sale in High Schools	Point of Sale in K-8 Schools

CMSD would like to implement the software solution in the following sequence:

PRE-PHASE	PHASE I	PHASE II	PHASE III
Discovery phase	Central Office & Warehouse (Menu Planning & Nutritional Analysis, Inventory, Ordering, Accountability and Reporting)	High Schools (POS, Ordering, Inventory)	Elementary Schools (POS, Ordering, Inventory)

Implementation dates on original implementation timeline will be removed via Addenda, as well as a modification to phases. "It is the vendor's responsibility..." statement will be edited via Addenda to "It is the vendor's responsibility to provide a high level timeline in their proposal on the phased-in approach desired by the District."

16. On page 69 Section 4.a. Change Management, the document reads *"The vendor should provide change management processes, tools and techniques for managing the people-side of change. Vendors should provide information on best practices during roll out for communicating with district and school-based staff. Change management processes must include not only a change in the systems, but also a focus on the workflow, process improvement and improvement of organizational functions the software can bring."* Page 90 also lists, *"The vendor should provide change*

management processes, tools and techniques for managing the people-side of change."

Please elaborate on this requirement. Can CMSD provide specific examples of what is expected here?

CMSD expects standard operating procedure on the change management side of the project. As stated in the above-mentioned section, vendors should provide information on best practices during roll out.

It is expected of the vendor to provide physical and electronic training tools for training all FCNS staff. As far as the people-side of change, going from decades of using paper and pencil to modern technology in the cafeterias is a huge change in operation for the staff. The vendor is expected to provide best practice and techniques from experience on managing the people-side of change.

17. Page 85, the second point reads, *"Has the ability to track fill ratios."* Is fill ratio the same as orders vs. received?

Yes.

18. Page 85 reads, *"Is able to compare/contrast prices of annual bids for multiple baskets by distributor/manufacturer/vendor"* and *"Can calculate and display net market basket per distributor/manufacturer."* Can you please define what is meant by "basket?"

A basket is a category of food, such as dairy, vegetables, fruit, etc.

19. On page 88, the last point reads, *"Supports interface with Financial System, Workday."* What is the expectation?

Workday is the new Financial System at CMSD as of July 2017. The vendor is expected to work with FCNS and the Workday finance team at CMSD to determine what integrations, if any, may be necessary for seamless operation. This may include encumbering financial obligations in Workday on orders created in the School Nutrition Management Software Solution. The vendor should provide demonstrated experience with integrating with Workday, or any other similar financial system and what integrations were developed.

20. Page 89 reads, *"Provides on-site installation, set-up, and training as needed."* Page 89 also reads, *"Provides onsite training and technical assistance prior to and during system implementation."*

a. Can you clarify what is meant by on-site installation?

- b. Can you clarify what is meant by on-site technical assistance?
- c. As the vendor will host the server, do you plan to purchase hardware?
- d. If so, is CMSD asking for POS on-site installation?

- a. On-site installation is assistance software set-up on POS hardware within the school sites through a multi-site deployment method.
- b. Alongside response to a., technical assistance would be working with CMSD's Department of Information Technology to install software seamlessly while navigating firewalls/protocols for all parties.
- c. We do plan to purchase hardware to operate the Point of Sale functionality in the schools, but do not intend on purchasing the server hardware. The server hardware is the responsibility of the awarded vendor.
- d. CMSD is not asking for hardware on-site installation. We are asking for assistance with software installation on the POS hardware and set up with CMSD infrastructure (See a. and b.)

21. Page 89 reads, *"Provides sufficient 'Train the Trainer' training to District personnel so that support can be provided to users on the features and functionality of the system."* What is CMSD looking for in a "Train the Trainer" process?

It is expected that training will be provided for all staff initially. The managers of sites will be retrained if needed and expected to train/reinforce new procedure with staff at their sites.

22. Page 90 lists, *"Can create fully documented, effective, easy to understand training materials by physical and electronic customized to CMSD's configuration of the system which can be made available to all FCNS sites."* What type of training customizations are expected?

Depending on the software configurations that are implemented to fit CMSD process, we expect training materials to accurately reflect the developed process if any software customizations are involved. Processes must reflect CMSD procedures and not be generic training guides for the software.

23. Does the District have a listing of qualified diversity business vendors?

No. The District does not certify DBE/MBE vendors. But the District accepts certification by the City of Cleveland, Cuyahoga County, and State of Ohio. Please refer to those entities for a listing of respective vendors.

24. There is a mention of a performance bond in the RFP documents. Is a performance bond required with this bid?

No.

25. In Section III, in the Proposer Qualifications Form which begins on page 18, are you requesting company ownership information?

Yes.

26. Do you have a preference for how travel expenses are included in the price proposal?

No.

27. Will you need to edit or acknowledge part 2, page 56, section 1 which mentions "cab and van services?"

Yes. See response for #12.

28. On page 59, please provide clarification of what is meant by "Dispute Resolution Methodologies."

Please describe any formal Dispute Resolution methods utilized by your organization (i.e., Arbitration, Mediation, etc.)

29. How many schools are reported to the state of Ohio for purposes of the NSLP and SBP claim?

The 91 school sites listed in Appendix A are reports to the State of Ohio for purposes of NSLP and SBP claim.

30. Does the District desire to have the school nutrition management software solution share data with the eSchoolPlus student information system? If so, what data?

The District expects the school nutrition management software solution to integrate with eSchoolPLUS to share student identification data so that their individualized dietary information can be set up in an account format.

31. Page 68 refers to "The Cleveland Plan goals." Where can we obtain information about The Cleveland Plan?

Information about The Cleveland Plan is located on the District's website, www.clevelandmetroschools.org. Hover over the 'About Us' tab and select 'Strategic Initiatives' from the drop-down menu. Information about the Cleveland Plan is found here.

32. On page 79 in the POS requirements, there is a requirement that reads "Allows for cashier to perform a query during transaction to find students account by name, student ID, school period, pictures." Please define what is meant by school period.

School period indicates if the student informs the cashier of their homeroom or first period classroom (or any period), the cashier is able to search by the classroom of that particular period and locate the student.

- 33. Page 85 – Requirement reads “Is able to compare/contract prices of annual bids for multiple baskets by distributor/manufacturer/vendor.” Please define ‘multiple baskets.’**

A basket is a category of food, such as dairy, vegetables, fruit, etc. Multiple baskets would be

- 34. When there are requirements that list multiple functions, how should we answer if we meet some but not all of the requirements?**

Please indicate ‘Other’ in the Yes/No column of that specific requirement in Appendix B and provide clarification in the ‘Notes’ column.

- 35. On page 87, please explain the “Tracks production by site statistics”**

This is not a requirement and has been removed via addenda.

- 36. Please confirm that the specification “SAAS” refers to a hosted, subscription pricing model as opposed to an on-premise pricing model.**

This is correct.

End of Comprehensive Question and Answer List