



The Bid Generator

Streamlining Procurement and Automating RFP Creation

1:30pm - Saturday, November 9, 2019

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Bid Development Challenges

- Time consuming
 - Starting a Bid from scratch takes time
 - Quicker to “recycle” past bids
- Confusing language
 - Bids and regulations are written in “legalese”
- Regulations
 - Always evolving, regulations can lack clarity
- Share other challenges



About the Bid Generator

- Free to School Food Authorities
- Based on best practices of formatting and language compiled by CAFF
- Based on regulations guiding procurement within USDA School Nutrition Programs and additional program requirements selected to add to each bid solicitation (i.e. USDA Fresh Fruit and Vegetable Program).
- Language used to develop each bid is based on best practices developed over four years of research and collaboration with SFAs, vendor feedback, and review from technical experts.



How It Works

- Read through BG Guide to understand the Bid Development Process.
- Review standard and customized language options
- Fill out BG Survey
- Fill out Bid List Attachment Workbook and share past Usage Reports and desired items with CAFF staff
- CAFF will create a draft produce formal RFP bid solicitation for you to review and provide feedback and revisions.
- You will receive an editable Final Draft formal RFP bid solicitation to share with School Board and Legal Counsel for final review and approval.



Bid Generator Components

- Standard Language Section
- Customizable Language Section
- Attachment A: Bid Generator Survey
- Attachment B: Bid Generator Delivery and Bid List Attachment Workbook



Standard Language Section

- Covers topics that will be included in the majority of RFPs
- The Standard Language section includes highlighted Customizable Language areas that will be filled based on your responses to the Bid Generator Survey.



Customizable Language

- Each area highlighted yellow will be filled with an answer to the corresponding survey question.
- The superscript number in each area highlighted yellow matches with the survey question number corresponding to that highlighted area.
- Areas highlighted blue will be filled out by the SFA before posting the RFP publicly; this includes Submission Dates and the RFP number.
- Areas highlighted green will be populated with information the SFA provides in the “Bid Generator Delivery and Bid List Attachment Workbook”

The Guide

**INSERT SCHOOL DISTRICT⁵
NUTRITION SERVICES DEPARTMENT⁶**

**REQUEST FOR PROPOSALS FOR
Fresh Produce - Fruits and Vegetables⁹**

20XX-20XX¹⁰ SCHOOL YEAR

RFP Number: **INSERT RFP NUMBER**
Date Due: **INSERT DATE/TIME DUE**

**CONTACT NAME, TITLE³
INSERT ADDRESS³
Phone: INSERT PHONE²
Email: INSERT EMAIL²**

DATE	ACTIVITY
INSERT DATE	Distribution of RFP
INSERT DATE	Advertise RFP
INSERT DATE/TIME	Deadline for Submitting Questions
INSERT DATE/TIME	Bids Due
INSERT DATE/TIME	Opening of the Bids
INSERT DATE	Award of Contract

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Statement of Pricing	Bidder
HACCP Plan / Food Security and Safety Program include Pest Control Policy & Recall Procedures	Bidder

The Guide

a. Notice to Bidders

i. The **INSERT SCHOOL DISTRICT⁵** ("District") is requesting submission of statements of qualifications and proposals ("Proposals") from qualified persons, firms, partnerships corporations, associations or professional organizations ("Bidder(s)") for the provision and delivery of **Fresh Produce- Fruits and Vegetables⁷** ("Services") to the District, as further described herein.

b. General Information about the District

i. The **INSERT SCHOOL DISTRICT⁵** is located in **INSERT COUNTY⁴** and has a projected student enrollment for the **INSERT SCHOOL YEAR¹⁰** school year of approximately **INSERT NUMBER¹⁴** students. The District has **INSERT PRODUCTION SITES¹⁵** that serve **INSERT NUMBER¹³** elementary, middle, high, alternative and contract schools¹². The District serves approximately **INSERT NUMBER¹¹** meals per day. The District is seeking proposals from qualified companies to procure and deliver fresh produce to **INSERT NUMBER⁹** sites. This RFP defines the program, the products and the services that are being sought from the Bidders and generally outlines the program requirements.

ii. The District is committed to offering seasonal menu items and purchasing from local farmers whenever possible. Bidders should be making an effort to procure and offer California grown produce to schools and indicate these products on price lists and invoices. The District prefers locally grown products whenever possible and has a goal of procuring, at minimum, **40%²⁴** locally grown and produced. The District's definition of local includes **three tiers²¹**: 1) Grown within a **75²⁷** mile radius of **INSERT CITY⁴**, 2) Grown within a **250²⁷** mile radius from **INSERT CITY⁴**, 3) Grown within the state of California²⁷.

iii. The District is seeking to:²⁸

1. Ensure that students are receiving high quality produce,
2. Purchase high quality produce at the best possible price,
3. Offer more produce that is locally grown
4. Utilize the expertise of our produce vendor to incorporate produce items that are in season, through maintained vendor communication regarding produce availability and market conditions,
5. Utilize the expertise of our vendor to provide training information for our department staff on best practices for purchasing, receiving, storing, and preparing fresh fruits and vegetables,
6. Partner with a produce vendor that will provide excellent customer service.

i. Delivery Requirements and Locations

i. **Delivery Specifications** – The Successful Bidder will partner with the District over the term of the contract resulting from this RFP to procure and deliver fresh produce to the District. Delivery to site(s) must be completed within the designated delivery timeframe; on the designated delivery days as indicated below. District reserves the right to designate an alternate delivery location if designated site is unable to receive deliveries for any reason. The District also reserves the right to revise delivery times as required. Additional product and service requirements are outlined within the RFP. The District's preferred delivery days are **INSERT DAYS²⁵**. The District would like **INSERT NUMBER²³** deliveries per week

Delivery Locations						
	Location	Address	City, Zip Code	Delivery Times	Preferred Delivery Days	Number of Deliveries Per Week
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

Bid Generator Survey

The purpose of the Bid Generator Survey is to collect unique information based on your purchasing needs to create a custom Request for Proposal (RFP) for vending fruits and vegetables for your School Nutrition program. After completing reviewing the Bid Generator Guide, please plan on taking 20-30 minutes to fill out this survey. Please plan to fill out this survey at one time, as answers cannot be saved.

Thank you for piloting the CAFF Bid Generator Survey. After you fill out this survey, we will follow up with a draft RFP for your review.

*All questions with an asterisk require an answer.

* 1. Contact information of person filling out this survey:

Name	<input type="text"/>
School District	<input type="text"/>
Address	<input type="text"/>
City/Town	<input type="text"/>
State/Province	<input type="text"/>
ZIP/Postal Code	<input type="text"/>
Email Address	<input type="text"/>

* 22. Which of the following formats would you like responding vendors to use to submit the Itemized Bid List? (Data Storage Device submission is recommended)

- | | |
|---|---|
| <input type="checkbox"/> Hard Copy - Mailed | <input type="checkbox"/> Data Storage Device - Hand Delivered |
| <input type="checkbox"/> Hard Copy - Hand Delivered | <input type="checkbox"/> Email |
| <input type="checkbox"/> Data Storage Device - Mailed | <input type="checkbox"/> Fax |
| <input type="checkbox"/> Other (please specify) | |

* 23. Which of the following do your District Food Service methods include?

- | |
|--|
| <input type="checkbox"/> Heat and Serve |
| <input type="checkbox"/> Scratch Cooking |
| <input type="checkbox"/> Central Kitchen |
| <input type="checkbox"/> ... |



Price Verification

- An optional section in the Bid Generator that helps ensure Districts will get the best possible price
- The district selects 10 to 20 items that they would like to confirm prices for
- RFP respondents must provide past invoices of these items sold during November and/or July.
- Past invoices must be in a reasonable range of the price listed in the RFP response

Price Verification Language

iii. **Price Verification** – For the purposes of award review, price quoted on the Item Bid List must be the Bidder's lowest pricing from within thirty (30) days of November 30, 2017 INSERT YEAR^{10&37} and/or July 31, 2018 INSERT YEAR^{10&37} pricing. Please submit copies of at least one invoice including each of the "price verification items" from November 2017 INSERT YEAR^{10&37} and July 2018 INSERT YEAR^{10&37} invoices, from different school districts or other comparable food service, to verify pricing. If an invoice does not include price markup amounts, then provide the price markup amounts with invoice copies. The following items are "price verification items" that require invoice copies for price verification: **INSERT PRICE VERIFICATION ITEMS**. The District has the right to request invoices of additional items for price verification. The specifications of these items are listed in further detail in the "Itemized Bid List".

iv. **Modifications of Contracted Price Lists to Acquire Additional Goods or**

Item List in the RFP

Attachment "15"
ITEMIZED BID LIST
 TO BE SUBMITTED WITH BID

A copy of the "Itemized Bid List" document must be saved on a data storage device and submitted with the RFP. This data storage device will not be returned.²²

INSERT SCHOOL DISTRICT INSERT DEPARTMENT NAME ³ Bid List																	
Vendor Name:										Please indicate \$ _____ fixed fee mark up per unit.							
Item	Varieties Accepted	Description (i.e. sliced, organic)	Quantity	Preferred Pack/ Size	Variety Offered	Pack/Size Offered	Adjusted Quantity (if applicable)	Show math used for pack size conversion (if applicable)	Description Offered	Origin: Timeframe Offered	Bid Price	Unit Price	Unit Description	Extended Price (Total)	Price Verification Required?	Month of Price Offered	Notes
Apple	Seasonal	Organic	236.00	12/3#Case	Pink Lady	N/A	N/A	N/A	Organic	CA: Aug-Feb, WA: Rest of Year					Yes	November	
Apple	Standard	Conventional	70.00	138ct Case	Red Delicious	N/A	N/A	N/A	Conventional	Year Round					Yes	July	



Solving Bid Challenges

- Time consuming
 - BG saves time compared to conventional bid development
- Confusing language
 - BG Survey asks simple questions
- Regulations aren't always clear
 - BG Template language abides by USDA guidelines. Always take Bid to legal counsel before release
- How do I develop a new item list?
 - CAFF team will analyze Usage Report history



Questions?



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