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Introduction

WHAT IS A QUICK GUIDE?

Quick Guides are an abbreviated resource developed by the Arizona Department of Education (ADE) Health and Nutrition Services (HNS) Division. Quick guides are intended to compliment ADE's Step-by-Step Instruction: How-to Guides. They do not count towards Professional Standards training hours.

INTENDED AUDIENCE

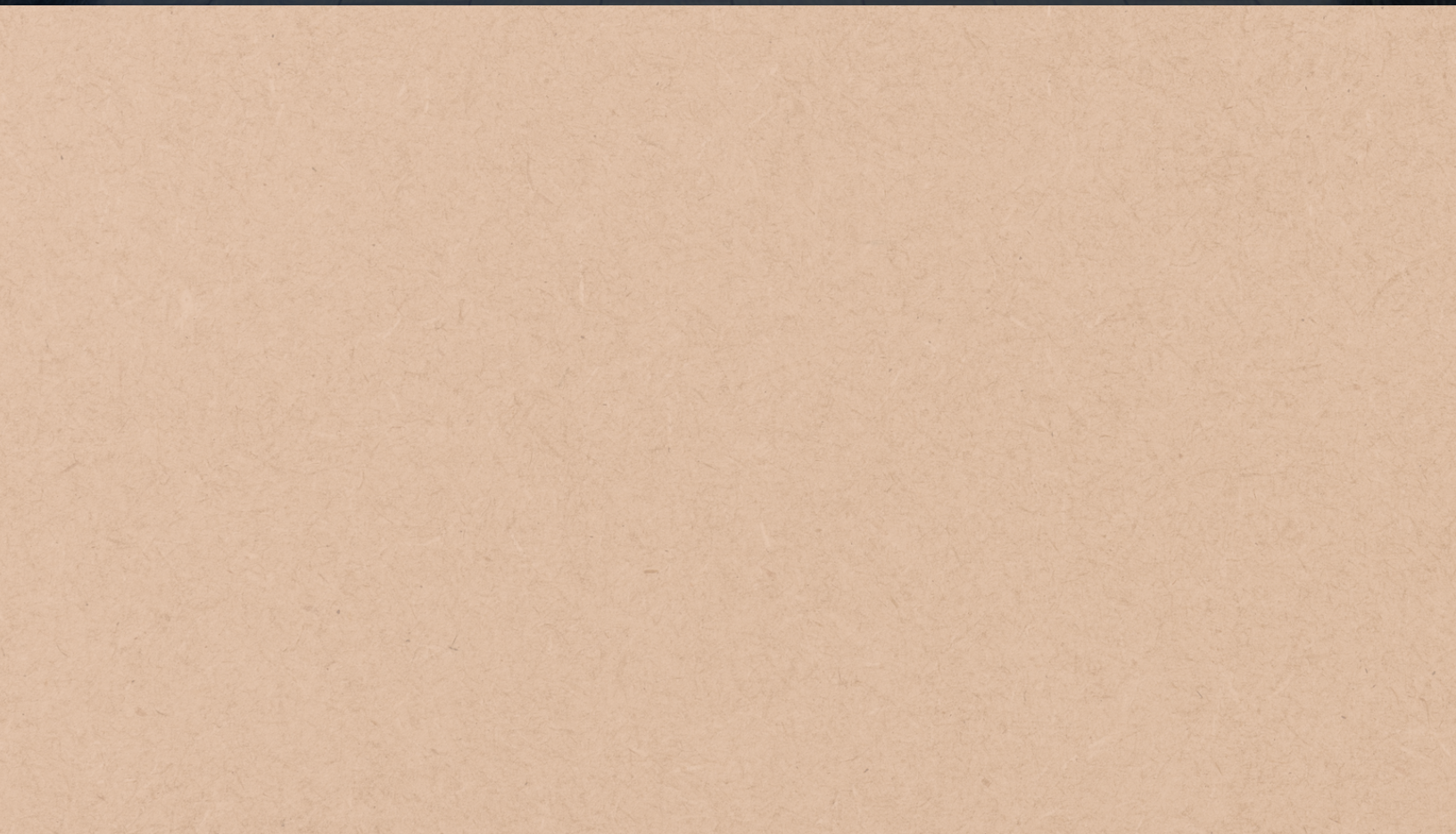
This resource is intended for School Food Authorities (SFAs) participating in the Request for Proposal (RFP) process for a Food Service Management Company (FSMC) contract.

PURPOSE OF THIS QUICK GUIDE

The purpose of this guide is to walk the operator through the process of choosing a procurement method to begin the Request for Proposal process when wanting to contract with an FSMC. The guide will take the operator step by step through the process and forms necessary to complete the FSMC solicitation in accordance with regulatory requirements. This guide is based on the United States Department of Agriculture (USDA) guidance, "[Contracting with Food Service Management Companies: Guidance for School Food Authorities](#)."



Timeline and Procurement Method



Timeline

Allow adequate time for the entire process (up to three months)

- Document creation
- ADE approvals – allow for one week each
- Release
- Evaluation
- Award
- Board Meeting Schedules

Process must be complete before operations begin and before being billed.

“My Schedule of Events” Dates Planner

My Schedule of Events

| Due Date | Activity |
|----------|--|
| | Prepare the Arizona Department of Education Request for Proposal (RFP) and Evaluation Rubric templates |
| | Submit the RFP, Evaluation Rubric, and FSMC RFP Checklist to the ADE Contracts Management Officer for review and approval (allow at least 1 week for ADE approval) |
| | Advertise and Release RFP |
| | Hold Pre-Offer Conference (half way in between) |
| | Proposal Due Date (30 - 45 days from release) and Offer Opening |
| | Complete evaluations and turn in to the ADE Contracts Management Officer for approval (allow at least 1 week for ADE approval) |
| | Proposal to School Board for approval, if needed |
| | Notify FSMC of Award |
| | Turn in Final Paperwork – Must be in before starting meal service |

FSMC RFP Process Overview

- Review this Guide: Guide to Contracting with a Food Service Management Company
- **Prepare Solicitation Documents with ADE Templates**
- Provide Public Release
- Pre-Offer Conference (Optional)
- **Proposal/Offer Opening and Evaluation**
- Award Contract
- Monitor Contract

Needs ADE Approval



Needs ADE Approval



RFP Process Review



Why an ADE Review?

The contract between the SFA and an FSMC should not only be in the best interest of the SFA but must also conform to Federal, State, and local requirements.

The Code of Federal Regulations (CFR) requires ADE to annually review each contract (including supporting documentation) between the SFA and FSMC prior to execution to ensure compliance with all the CFR provisions.

ADE must ensure the procurement documents include all the required provisions and do not contain any unallowable provisions.

Procurement Method

The underlying foundation of all procurement, regardless of the method used, is that the procurement must be conducted in a manner that provides maximum open and free competition.

Procurement procedures must not restrict or eliminate competition.

- Unreasonable requirements
- Noncompetitive practices
- Conflicts of Interest
- Inappropriate practices
 - Documents prepared by the FSMC
 - Entering into discussions before evaluating every proposal that was submitted
 - Providing only certain vendors with the results of the pre-offer conference or the release of proposal contents
- Insufficient time

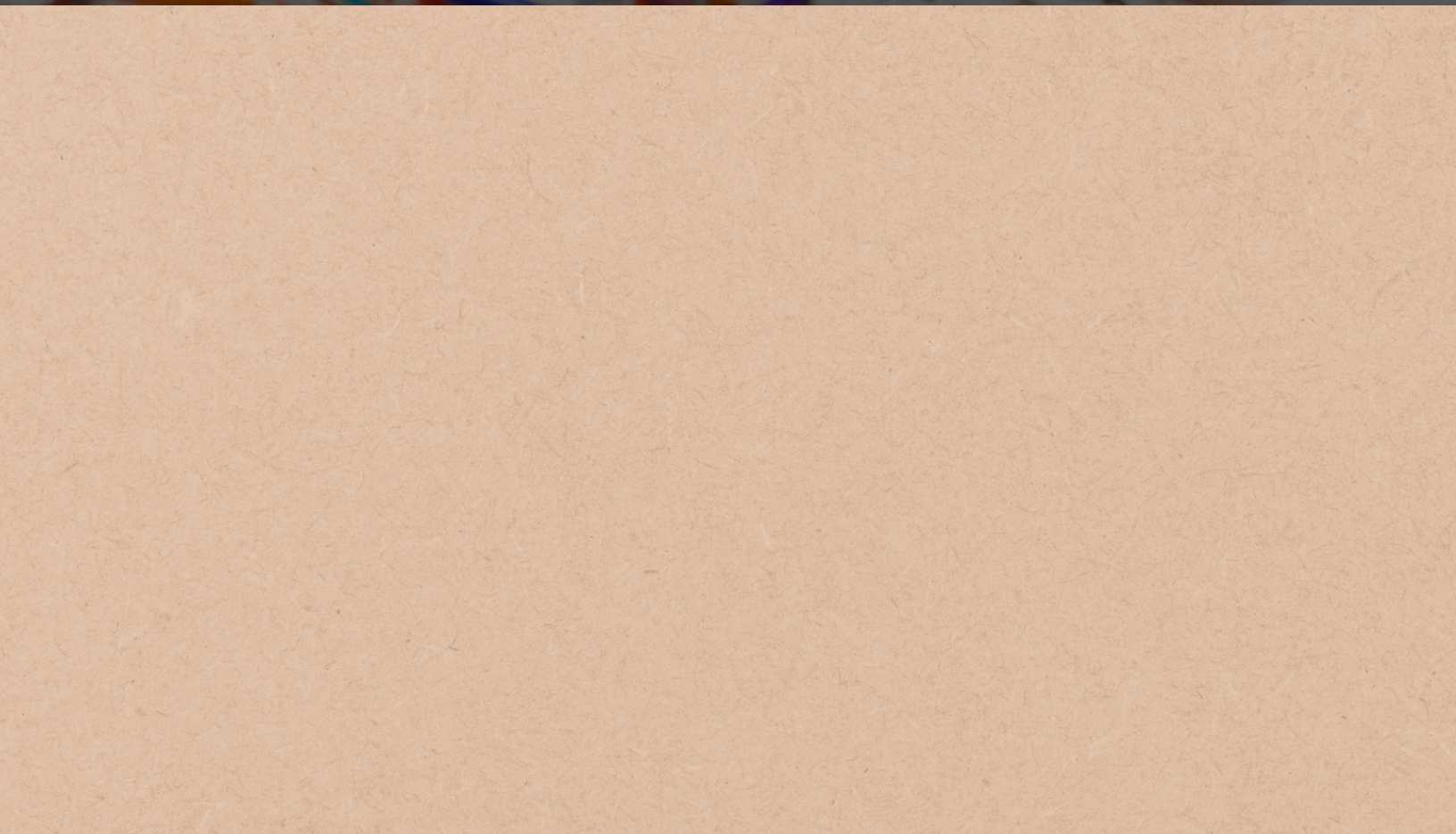
Request for Proposal (RFP)

The RFP is an instrument of competitive sealed bids. The RFP identifies the goods or services needed and all significant evaluation factors, including the importance of each factor, with price as the primary consideration, per the 2016 USDA [Contracting with Food Service Management Companies: Guidance for School Food Authorities](#).

- Defined Scope of Services
- Negotiated Price
- Most Advantageous
- Greater Flexibility
- Technical Requirements



Step 1: Completing the Request for Proposal (RFP) Checklist and Template



The Request for Proposal (RFP) Checklist

Completing the [Checklist \(Page 1\)](#)



Complete each numbered section of the checklist as it pertains to the SFA.

1. SFA Information

2. Cost/Price Analysis (2 CFR 200.324)

3. RFP Information:

Solicitation and RFP Number (Use Your Numbering System)

4. Pre-Offer Conference

5. Request for Proposal Options

Pricing and Purchasing Option (A)

- Choose between Fixed-Price and Cost-Reimbursable (see following pages for comparison).
- May not change once RFP is issued.

The Child Nutrition Programs Option (B)

- Make sure to include programs you may want to participate in within the 5-year time period.
- If a program is added later, it could create a material change and cause you to have to re-bid early.
- Give Program details in RFP template Exhibit F.

Menu Option (C): Choose operating days

Geographical Preference Option (D): See following page for additional information

Food Service Management Company
Request for Proposal (RFP) Checklist 2026 - 2027

1. School Food Authority (SFA) Information
SFA Name: _____ SFA CTD#: _____
Contact Name: _____ Contact Title: _____
Contact E-mail Address: _____
Contact Phone Number: _____

2. Was a cost/price analysis conducted to estimate the cost of goods before soliciting? Yes No

3. Request for Proposal (RFP) Information
Solicitation/RFP Number: _____ Solicitation released for 30 days 45 days ___ days
Solicitation Release Date: _____ Solicitation/Offer Opening Due Date: _____
Solicitation Due Time: _____ Offer Opening Due Time: _____
Advertisement Method: Newspaper Website AZ Purchasing

4. Pre-Offer Conference Information
Pre-Offer Conference: Yes No Method: Virtual In-Person
Pre-Offer Conference Date: _____ Pre-Offer Conference Time: _____

5. Request for Proposal (RFP) Options
A. Pricing and Food Purchasing Option
 Fixed Price
 Cost Reimbursable
 SFA purchases food OR FSMC purchases food
 Fees - flat monthly rate OR Fees - per meal/lunch equivalent

B. The Child Nutrition Programs Option
 National School Lunch Program (NSLP) (Lunch) Special Milk Program (SMP)
 Afterschool Care Snack Program (ASCSP) (Snack) Fresh Fruit and Vegetable Program (FFVP) (Grant)
 Seamless Summer Food Program (SSFP) Child Care Centers/Head Start Programs (CACFP)
 Simplified Summer Food Program (SFSP) (IAAs)/Vending/catering to other schools
 At-Risk Afterschool Meal Component Concession stands
 School Breakfast Program (SBP) (Breakfast) Vending machines

C. Menu Option - Meal Pattern: 4 Day 5 Day 7 Day

D. Geographical Preference Option: Yes No

December 2025 | Health and Nutrition Services | Arizona Department of Education | This institution is an equal opportunity provider. Page 1 of 3

Pricing and Food Purchasing Options

Fixed-Price

PROS

1. Covers all operating and administrative costs with no additional charges to the SFA.
2. The FSMC is now responsible for controlling costs to achieve their own financial objectives of the contract.
3. Tends to lead the contractor toward increasing participation as a means of reaching financial objectives.
4. Easier to compare proposals.

CONS

1. In periods of declining costs, the SFA will not immediately benefit.
2. The FSMC may be perceived as, or may be, cutting food quality to control costs. The SFA should require and monitor clear food quality specifications.

Cost-Reimbursable

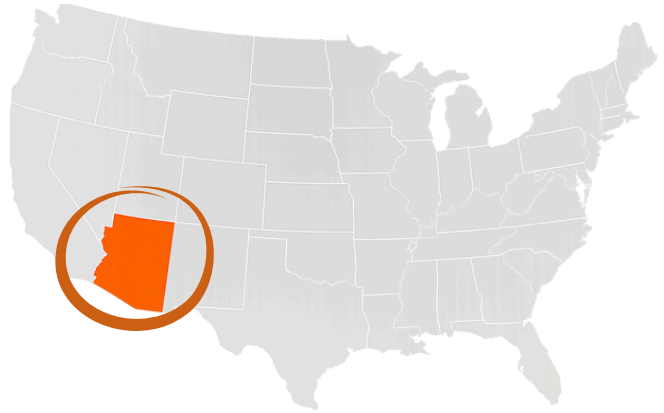
| PRICING OPTION | PROS | CONS |
|---|--|--|
| <p>Cost – Reimbursable where the FSMC Purchases the Food</p> | <ol style="list-style-type: none"> 1. In periods of falling prices, the SFA may benefit financially. 2. The SFA may have more proposals submitted by FSMCs. 3. The break-even guarantee may be higher. 4. The FSMC food costs may be lower. | <ol style="list-style-type: none"> 1. There is no incentive for the contractor to control costs. 2. The SFA could have a difficult time determining if true costs are being reflected. 3. SFA would incur complex monitoring or revenue and expenses for conformity to costing principles. This may mean additional staffing, or greater workload on the existing staff. 4. The contractor may be negotiating and receiving substantial discounts from manufacturers and distributors that are not passed on to the SFA and are almost impossible to detect when they occur. 5. Unbudgeted costs to the district or charter school during periods of rising prices. |
| <p>Cost – Reimbursable where the SFA Purchases the Food</p> | <ol style="list-style-type: none"> 1. In periods of falling prices, the SFA may benefit financially. 2. The SFA may have more proposals submitted by FSMCs. 3. The break-even guarantee may be higher. 4. The SFA knows exactly what the food costs are for the SFA. | <ol style="list-style-type: none"> 1. There is no incentive for the contractor to control costs. 2. The SFA could have a difficult time determining if true costs are being reflected. 3. SFA would incur complex monitoring or revenue and expenses for conformity to costing principles. This may mean additional staffing, or greater workload on the existing staff. 4. Unbudgeted costs to the district or charter school during periods of rising prices |

Geographical Preference

Use of Geographical Preference to increase local purchasing.
The SFA defines “local”.

Common Definitions of “Local”

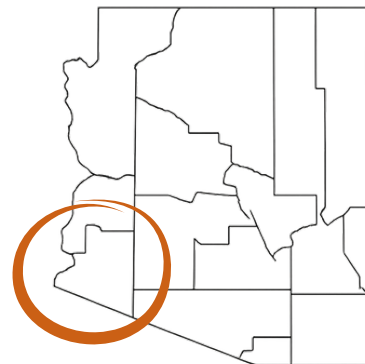
Geographic Radius: Commonly defined as “x” miles from a given District warehouse or school site. This may span outside of Arizona’s borders and into states that fit the geographic range preferred by the SFA.



State of Arizona: Commonly referred to as “Arizona grown” which encompasses anything produced and/or processed within the state of Arizona.



County specific: Commonly referred to as “X” county grown, showing support for the agriculture industries unique to specific counties within the state of Arizona.



The Request for Proposal (RFP) Checklist cont.

Complete the Checklist (Page 2)

Software Options (E): Choose the entity that will house the option

Labor Options (F): Choose the entity that will maintain the employees (FSMC, SFA, or Both)

USDA Foods Option (G): Strongly Recommended

FSMC Oral Presentation Option (H): Choice to include an evaluation committee presentation.

- May not change after RFP is issued.
- Questions must be filled out on evaluation.

E. Software Options
Meal Planning: SFA FSMC Point of Sale: SFA FSMC
Nutrition: SFA FSMC Counting and Claiming: SFA FSMC

F. Labor Options
 All non-management food service employees will remain employees of the SFA
 All non-management food service employees will remain employees of the FSMC
 Some non-management food service employees will be FSMC employees, and some will be SFA employees

G. USDA Foods/DoD Fresh Option: Yes No

H. FSMC Oral Presentation Option
 Presentations by the FSMCs for the Evaluation Committee *will* be an option
 Presentations by the FSMCs for the Evaluation Committee *will not* be an option

6. Modifications
A. No Modifications Modification(s) Requested
B. RFP Modifications (add additional lines if needed) N/A
Modification 1 location: _____
Modification 1 language: _____
Modification 1 reason for change: _____
Modification 2 location: _____
Modification 2 language: _____
Modification 2 reason for change: _____

7. Items to turn in for approval
 Signed RFP Checklist
 RFP Template and Attachments (in Word)
 RFP Evaluation Rubric Template (in Word)

8. Certification
I certify the RFP submitted and the information provided herein is true and correct to the best of my knowledge and that I am the person authorized to conduct procurement.

_____ SFA Representative Signature _____ Date

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6. Modifications

Modifications are changes or additions other than the choices or directions given in red. If modifying, complete this section.

7. Checklist of Items to turn in: ensure all documents are completed.

8. Certification: Must be signed and dated by an authorized signer of the SFA.

- RFP must be approved before release.

The final page of the RFP Checklist is for State Agency Use Only.

The Request for Proposal (RFP) Template

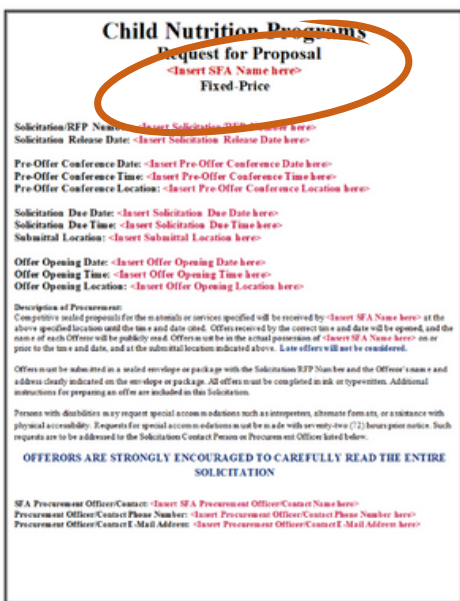
Choose the Correct Template

RFP Template Fixed-Price

RFP Template Cost-Reimbursable (FSMC Purchases Food)

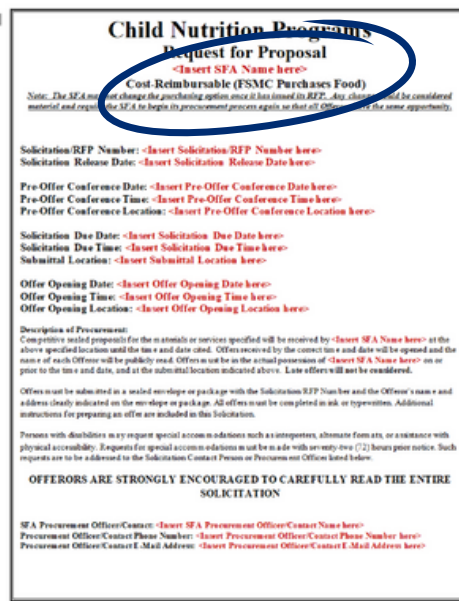
RFP Template Cost-Reimbursable (SFA Purchases Food)

- The RFP must clearly communicate the purpose and goals of the food operations program.
- The quality of the proposals received is directly related to the quality of the RFP issued.
- You must use the ADE template.
- Template follows State & Federal regulations.
- No changes to purchasing option allowed once issued.



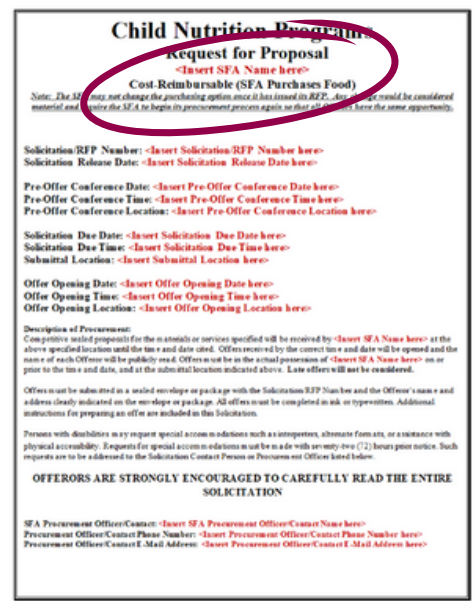
Arizona Department of Education FSMC RFP Template 11.2025 - Page 1 of 16

[Link](#)



Arizona Department of Education FSMC RFP Template 11.2025 - Page 1 of 6

[Link](#)



Arizona Department of Education FSMC RFP Template 11.2025 - Page 1 of 11

[Link](#)



Completing the RFP Template

- 1** Insert Information where applicable: e.g. <Insert SFA Name here>
- 2** Follow directions and/or delete inapplicable information and notes.
- 3** Review formatting and check page numbers on the table of contents.
 - Make sure attachments and exhibits are on their own page.

Note: If the RFP is altered in any manner other than where indicated, the SFA will need to complete the RFP Modification portion of the Checklist and describe the changes.



Draft the RFP to meet the SFA needs.

Do not change any clause with a CFR reference.

Submit the RFP to ADE for approval **before releasing** the solicitation and **before awarding** the contract.

ADE will send notification by email of any changes needed and when the solicitation is approved.

Completing the RFP Template cont.

RFP Sections

| | |
|------------------------------------|--|
| 1. Scope of Work | Outlines the Objectives |
| 2. Special Terms and Conditions | Program and Operational Terms |
| 3. Uniform Terms and Conditions | Legal section |
| 4. Special Instructions to Offeror | Directions |
| 5. Uniform Instructions to Offeror | Additional Directions |
| 6. Pricing | |
| 7. Attachments | Documents that the FSMC will fill out |
| 8. Exhibits | <p>SFA detailed information and meal pattern requirement</p> <ul style="list-style-type: none"> • The more detailed information the better • If detail is not provided, the FSMC will ask for it • Attachments (calendars, claims, etc.) may be added to the end of the document or sent separately as one PDF • Three sections <ul style="list-style-type: none"> ◦ Student Population and School Information ◦ Financial Information ◦ Program Information |



Step 2: RFP Release and Pre-Offer Conference



Solicitation Release

Please ensure the following when soliciting for FSMCs

Adequate notice – allow 30-45 days

- [Guidance manual](#) recommends 60 days.

Advertisement – newspaper, website, procurement site

- At a minimum, the advertisement should include the RFP number and date, a brief description of what is being proposed for procurement, and instructions for obtaining a copy of the RFP.
- Should run for a minimum of 14 days prior to the due date.

Prospective Vendors List – send to all (following page)

- Include the option of a read receipt to ensure the FSMC has received the solicitation.

Make sure to release the RFP on the date listed in the document.

If the SFA receives a request from the FSMC for a meeting prior to the release, the SFA may respond and inform them that they are not able to meet. This is to ensure fair competition, transparency, and integrity of the procurement process

Sample Release Email and Advertisement

SAMPLE RFP RELEASE EMAIL *Copy and paste as the body of an e-mail*

<Insert Date>

RE: FSMC Request for Proposal

<Insert SFA name> desires to contract with a Food Service Management Company (FSMC) to operate our SFA's food service program. Attached is a copy of the Request for Proposal (RFP), Solicitation/RFP Number <Insert RFP number>. There will be a pre-offer conference for this solicitation on <Insert date for pre-offer conference> at <Insert time for pre-offer conference>. The pre-offer conference will take place at <Insert location of pre-offer conference>. Proposals will be accepted until <Insert due date & time> at <Insert SFA name and address>. For more information contact:

<Insert Procurement Officer name>
<Insert SFA address, city, zip code>
<Insert Procurement Officer telephone number>
<Insert Procurement Officer email address >

If your company is not interested in submitting an offer, please submit the Statement of No Bid form (Attachment 7.23 of the RFP).

Sincerely,

<Insert SFA Procurement Officer Name>
<Insert SFA Name>

SAMPLE RFP RELEASE ADVERTISEMENT

Child Nutrition Programs Request for Proposal

<Select one: Fixed-Price/Cost-Reimbursable where the FSMC Purchases Food/ Cost-Reimbursable where the SFA Purchases Food >
Solicitation/RFP Number <Insert Solicitation/RFP Number>

Description:

<Insert SFA name> desires to contract with a Food Service Management Company (FSMC) to operate our SFA's food service program. Offers received by the correct time and date will be **opened** and the name of each Offeror will be publicly read. Offers must be in the actual possession of <Insert SFA Name> on or prior to the time and date, and at the submittal location indicated. Late offers will not be considered. Offers must be submitted in a sealed envelope or package with the Solicitation Number and the Offeror's name and address clearly indicated on the envelope or package. Proposals will be accepted until <Insert due date and time> at <Insert submittal location>.

For more information contact:

<Insert Procurement Officer name>
<Insert SFA address, city, zip code>
<Insert Procurement Officer telephone number>
<Insert Procurement Officer email address >

Pre-Offer Conference

Highly recommended, but may not be mandatory for the vendor.

Document the meeting and provide a sign-in sheet.

Date and time of the meeting must be noted on the cover page.

- Approximately halfway between release and due date, but no less than 7 days after release and 14 days prior to closing date.

Purpose: Q&A, provide information, and inspect facilities

Information given will not be official until it is written.

- A summary of all information shared, questions asked, and answers provided should be sent as a written addendum/amendment to the original solicitation.

If additional information is requested, consider giving the vendors more time to develop a “Responsive” proposal.

If a school is closed, consider a virtual meeting and taking pictures for a virtual “tour.”

[Sample Schedule](#)



SAMPLE PRE-OFFER CONFERENCE SCHEDULE

1. Sign-in and introductions
2. Companies ask questions; questions and answers are documented
3. Tour of kitchens
4. Wrap-up/closing
5. Within 2 days, email questions and answers (amendment/addendum) to all FSMCs on list

Amendments/Addendums

Use if changes or clarifications need to be made to any clause or data in the RFP.

Format:

- Complete on SFA letterhead;
- Include the Solicitation/RFP Number;
- List both questions and answers; and,
- Include signature of Procurement Officer.

Email to all vendors and post in the same place you posted/advertised the RFP.

When completed, submit documents to ADE.



Step 3: Opening and Evaluating the Proposals

Bid/Proposal Opening

- Open publicly on due date and time.
- Read and record names of offerors.
- Do not read prices.
- Offers are not subject to public inspection until after award is made.
- Use [Offer Opening Template](#),



OFFER OPENING TEMPLATE

SFA Name: _____

Solicitation/RFP Number: _____

Date: _____ Time: _____

Attendees:

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Proposals Received:



If only one proposal/offer is received:

- Committee members must evaluate proposal as if there were more than 1
- Turn in [One Response Received letter](#).

Pre-Evaluation References

Before the evaluation process begins, the procurement officer, or designated individual, will need to call the references listed on Attachments 7.10 (Offeror's References) and 7.11 (Offeror's Discontinued or Terminated Services) in the RFP. Copies of the results should be given to all evaluation committee members so they may complete the evaluation section of the rubric.

| | |
|---|-------|
| <u>Attachment 7.10 - Offeror's References</u> Include in Section 4: Experience, Expertise, and Reliability | |
| At least three (3) verifiable professional references must be provided regarding services provided by the Offeror, similar to those required under this Solicitation. | |
| 1. SFA Name | _____ |
| Address | _____ |
| Point of Contact Name and Phone # | _____ |
| Participating Programs | _____ |
| <u>Attachment 7.11 - Offeror's Discontinued or Terminated Services</u> Include in Section 4: Experience, Expertise, and Reliability | |
| List the SFAs where your services have been discontinued, terminated, or lost to re-bid in the past five (5) years. | |
| 1. SFA Name | _____ |
| Address | _____ |
| Point of Contact Name and Phone # | _____ |
| Participating Programs | _____ |

| | |
|--|--|
| SAMPLE REFERENCE QUESTIONS | |
| Prior to evaluating the proposals, the SFA Procurement Officer should contact the FSMC's references. Below are some sample questions an SFA can ask about the FSMC's performance. | |
| <ul style="list-style-type: none">• How would you overall rate the performance of the FSMC at your SFA? Excellent Average Poor• Were there any start-up issues with this FSMC? Yes No• Did the FSMC provide results in a timely manner? Yes No• How would you rate the FSMC staff morale? Excellent Average Poor• Have there been any billing issues? Yes No Please describe:• Did the FSMC give the SFA a guarantee amount? <u>Yes</u> No Not Applicable Please describe: | |

Four Steps to Evaluation

- 1 Review:** The SFA will conduct an initial review of the offer to determine basic responsiveness to the Solicitation and ensure the offer includes the required information.
- 2 Evaluation:** The SFA will evaluate the offer to assess the Offeror's capability to deliver the required services in accordance with the terms and conditions set forth in the Solicitation and requirements of the Scope of Work using the RFP Evaluation Rubric.
 - Oral Presentation Option (Delete if not applicable).



Oral Presentation Questions must be included and approved in the Evaluation Rubric.

- Schedule date, time, and location with the FSMC
- Notification in writing of questions and other requirements of presentation
- Sample questions will be emailed to the SFA

- 3 Discussions:** The SFA reserves the option to conduct discussions with Offerors concerning their offers. This step includes requests for Final Proposal Revisions and Best and Final Offers from Offerors still considered to be reasonably susceptible of winning the contract award.
 - In the event the Procurement Officer determines discussions are required, discussions on the areas, items, and factors specified in this Solicitation will be held with all Offerors determined to be in the competitive range.
 - The Offeror is permitted to make revisions during negotiations. Offerors should be aware that a complete understanding as to pricing, technical, and all other terms and conditions of the proposed contract must exist between the Offeror and the SFA at the conclusion of negotiations.

Four Steps to Evaluation cont.

- Discussions will be concluded when a mutual understanding has been reached with each Offeror remaining in the competitive range. This mutual understanding will become the basis for the Offeror's Final Proposal Revision ([Best and Final Offer](#)).
- The Final Proposal Revision (Best and Final Offer) must be returned, signed, and dated by the Offeror within the time and date specified to be eligible for award.

[Sample Best and Final Offer Letter](#) 

4

Award: The Contract award will be made to the responsible Offeror whose offer is determined to be the most advantageous to the SFA, based on the following criteria (in bold print below), which are listed in order of importance.

- **(1) Pricing:** Demonstrated capability to meet the needs of the SFA food operations using the best cost-effective method. Also, the Offeror must meet the pricing information as described in the Pricing Section. Note: The FSMC Guarantee is not evaluated in this section. (Weight - 37%)
- **(2) Method of Approach and Implementation Plan:** Demonstrated capability to meet the needs of the SFA food operation service as described in the Method of Approach and Implementation Plan section of the Scope of Work. This shall include information on how Offeror plans on conducting business in the SFA. (Weight - 35%)
- **(3) Experience, Expertise, and Reliability:** Demonstrated experience in operating a food service operation in schools. This can be Arizona experience, or another food service program, and will include evaluation of references submitted. (Weight - 28%)



The award will be made after ADE approval.

Evaluation Committee

Three member minimum:

Can be principals, teachers, parents, administrators, board members, nurses, SFA employees involved in food service, business managers.

Beware of conflicts of interest – committee members must sign a confidentiality statement.

[Conflict of Interest and Confidentiality Statement](#)



| | |
|--|-------------|
| <p><Insert SFA Name> Solicitation/RFP Number: <Insert Solicitation/RFP Number></p> <p>EVALUATOR CONFLICT OF INTEREST AND CONFIDENTIALITY STATEMENT</p> <p><u>Conflict of Interest Statement</u></p> <p>To ensure a fair procurement process and to guard against protest by unsuccessful proposers, I have carefully evaluated my position with regard to possible conflict of interest. I certify that I am not aware of any issue which would reduce my ability to participate on the evaluation team in an unbiased and objective matter, or which would place me in a position of real or apparent conflict of interest between my responsibilities as a member of the evaluation team and other interests. In making this certification, I have considered all financial interests and employment arrangements (past, present, or under consideration).</p> <p><u>Confidentiality Statement</u></p> <p>In anticipation of my participation in the evaluation process used to evaluate proposals, I certify that I will not disclose any information about the evaluation of this RFP during the proceedings of the evaluation process or at any subsequent time, to anyone who is not also authorized access to the information by law or regulation.</p> | |
| Signature of Evaluator | Date |
| Printed Name | |

Evaluation Process

PHASE 1

The evaluation process consists of two phases. In the first phase, the **INDEPENDENT EVALUATION PHASE**, Evaluation Committee members prepare for the group evaluation review meeting individually. At this point, evaluators determine initial ratings and make notes about each offer to prepare for discussion with the committee as a whole. The rubrics, containing the committee members' comments and rankings, will become a part of the file, which is public record. Evaluation Committee members should use the following guidelines as they complete their assessment of each offer:

1. Review the Request for Proposal (RFP) to ensure a clear understanding of the solicitation and its requirements.
2. Be familiar with each offer and how they address the solicitation requirements.
3. Using independent judgment, evaluate each offer individually against the evaluation criteria found in this document.
4. For each evaluation criterion:
 - a. Determine how well the offer satisfies the stated requirements.
 - b. Enter notes about locations within the offer that address the requirements.
 - c. Enter comments about strengths and weaknesses of the offer in relation to the stated requirements.
 - d. Select the rating that most accurately reflects the quality of the offer.
 - e. Give a score to the section based on the rating you selected.
5. Remember, only the information found in the offer and the evaluation criteria specifically identified in this document can be used in determining ratings.

Evaluation Process

PHASE 2

In the second phase, the **GROUP EVALUATION REVIEW PHASE**, Evaluation Committee members meet as a group to confer, discuss, and come to an agreement on which offer is most responsive, responsible, and advantageous to the SFA. If the committee feels it is necessary, discussions with the Offerors may be held. After the final decision is made, the procurement officer will create a summary scoring document that will be sent in with all the evaluation rubrics and will be retained in the procurement file as justification for the resulting award decision. The award shall go to the Offeror with the most points.

Use the following definitions as a basis for determining the score assigned to each criterion in Sections I and II. The range of points allotted to each definition will assist with determining the individual score.

[Evaluation Committee Instructions](#)



EVALUATION COMMITTEE INSTRUCTIONS

This is the first meeting of the evaluation committee for RFP ED _____. At this meeting, I shall distribute the original solicitation, the Offeror's proposals, team member briefings and reference questions. After review and individual evaluation scoring of each proposal, we will discuss questions and/or comments.

The evaluation committee will come to a consensus regarding which proposal(s) is the most advantageous to the state.

After reading the solicitation, please thoroughly review each proposal; the "Scope of Work" and "the Special Instructions to Offerors" for the information requested by ADE. All comments should address the Offeror's response to our specific requirements of the solicitation.

Worksheets containing your comments and ranking will become a part of the file which is a public record. Each committee member shall individually write their comments, both negative and positive on the forms provided. If possible, make all comments brief and to the point. List any questions and comments you may have regarding any area of the proposal that may need clarification. Also list any area of concern or areas that you feel need to be enhanced, discussed or negotiated.

If the committee feels that it is necessary, discussions with the Offeror(s) shall be held. The committee shall decide if the discussion will be by telephone, by letter, or in person with the Offeror(s).

Evaluation Rubric



One form for each FSMC per Evaluator



Fill in the name of the Evaluator, name of FSMC, and date in header on each page.



Must use the ADE Rubric to score proposals.



Evaluator must sign off on final score.



Fill in the RFP Information in the document header.



SFA must submit a copy of each evaluation form to ADE for review. Evaluations become public record.

Sections

| Rubric Sections | |
|---|----------------------|
| Method of Approach and Implementation Plan | Subjective (35%) |
| Experience, Expertise, and Reliability | Subjective (28%) |
| Pricing | Objective (37%) |
| Optional Presentation for the Evaluation Committee | Subjective (100 pts) |

Evaluation Rubric

Definitions

Scoring Definitions

| | |
|---|-----------------------|
| Non: Shall mean the information was not provided. | 0% of the Points |
| Poor: Shall mean the information stated in the offer does not meet the RFP requirements. | 1-19% of the Points |
| Fair: Shall mean the information on the offer meet most, but not all of the requirements. | 20-39% of the Points |
| Good: Shall mean the information in the offer meets the RFP requirements. | 40-59% of the Points |
| Very Good: Shall mean the information stated in the offer exceeds most, but not all of the RFP requirements. | 60-79% of the Points |
| Exceptional: Shall mean the information stated in the offer far exceeds all of the RFP Requirements. | 80-100% of the Points |

Scoring the Evaluation Rubric

RFP EVALUATION RUBRIC TEMPLATE:

- Cost-Reimbursable Evaluation Rubric ([Link](#))
- Fixed-Price Evaluation Rubric ([Link](#))



Decide how many points will be given based on the points chart.

Enter total points: Transfer total points to section summary chart.

| | | |
|----------------------|---|------------------|
| Non-Response | = | 0 Points |
| Poor Response | = | 1 – 29 Points |
| Fair Response | = | 30 – 59 Points |
| Good Response | = | 60 – 89 Points |
| Very Good Response | = | 90 – 119 Points |
| Exceptional Response | = | 120 – 150 Points |



Add applicable comments: General, Strengths, Weaknesses.

Add up the points scored.

Multiply that number by the section percentage.

****Document the total points given to the FSMC's Experience, Expertise, and Reliability Section from A – G on the previous pages in the table below:**

| Letter | Name Evaluated | Points Allowed | Points Scored |
|---------------------|---|----------------|---------------|
| A | Attachment 7.9, Offeror's Food Services Program List/Qualifications | 150 | |
| B | Attachment 7.10, Offeror's References | 100 | |
| C | Attachment 7.11, Offeror's Discontinued or Terminated Services | 100 | |
| D | Attachment 7.12, Offeror's Organization Chart | 50 | |
| E | Attachment 7.13, Offeror's Personnel Information | 250 | |
| F | Attachment 7.15, Offeror's Staffing Schedule | 200 | |
| G | Attachment 7.16, Offeror's Training Program | 150 | |
| Total Points | | 1,000 | |

Final Weighted Score for Experience, Expertise, and Reliability section:
 Total Points _____ x 28% = (Maximum 280 points)

Transfer the final weighted score to the Final Scoring Sheet.

Scoring the Evaluation Rubric cont.

PRICING

When evaluating **pricing**:

- Write down the prices for each meal type - Find the lowest price.
- Complete the Formula.
- Transfer the points to the section summary chart.

Add up the final points scored.

FSMC Final Scoring Sheet

| Section Name | Maximum Points Allowed | Final Points Scored |
|---|------------------------|---------------------|
| I. <i>Method of Approach and Implementation Plan</i> Section (Weight 35%) | 350 | |
| II. <i>Experience, Expertise, and Reliability</i> Section (Weight 28%) | 280 | |
| III. <i>Pricing</i> Section (Weight 37%) | 370 | |
| ***Total Final Points for Proposal | 1,000 | |

***Transfer score to the Excel Evaluation Score Summary Chart

Additional Comments: _____

Transfer that number to the Evaluation Score Summary Chart Excel Template.

Complete and submit the Evaluation Score Summary Chart.

- The FSMC with the highest total score should be awarded the contract.

| Evaluation Score Summary | | | | | |
|--|----------|----------|----------|----------|----------|
| Enter the total scores from the Evaluation Committee Rubrics. Turn in <u>all</u> rubrics, with this score summary, to ADE. | | | | | |
| The award shall go to the FSMC with the highest total score. | | | | | |
| | FSMC #1 | FSMC #2 | FSMC #3 | FSMC #4 | FSMC #5 |
| Evaluator #1 | | | | | |
| Evaluator #2 | | | | | |
| Evaluator #3 | | | | | |
| Total Score: | 0 | 0 | 0 | 0 | 0 |



Step 4: Completing the Solicitation Award Process



The Selected FSMC Proposal Checklist



Completing the Checklist

Complete each numbered section of the checklist as it pertains to the SFA.

1. SFA Information

2. The selected FSMC: Input the FSCM that won the contract award.

3. Evaluation and Award:

Complete details about the evaluation and award.

4. Proposal Attachment Review:

Review any deviations and exceptions included in the proposal.

5. Items to turn in for approval:

Turn in these documents and the signed checklist **BEFORE** awarding.

6. Certification: The authorized signer must sign and date.

After approval, take it to the governing board if necessary.

Notify the FSMC of the award.

Sign the Offer and Award form, the Certificate of Independent Price Determination form, and the Deviations and Exceptions form. Submit forms to ADE.

Once forms are signed, the forms, RFP, and proposal documents become the contract.

Selected FSMC Proposal Checklist
2026-2027

Please answer the questions and check each box for which information and/or documents have been provided.

- School Food Authority (SFA) Information**
 SFA Name: _____ SFA CTD#: _____
 Liaison Name: _____ Liaison Title: _____
 Liaison E-mail Address: _____
 Liaison Phone Number: _____
- The selected Food Service Management Company (FSMC): _____
- Evaluation and Award**
 How many offers were received? ____ Were any offers rejected and not evaluated? Yes No
 Were the reasons for rejection sound and documented? Yes No N/A
 Were any overly responsive bids/offers received? Yes No
 If an overly responsive bid/offer was received, did you eliminate the bid/offer, or the overly responsive portion, when awarding the contract? Yes No
 Were any unallowable cost items included in the contract award (scholarships, gift/gift cards, event tickets, catering accounts, etc.) Yes No
- Proposal Attachment Review**
 Attachment 7.18 - Deviations and Exceptions Reviewed: Yes No N/A
 Attachment 7.19 - Confidential Proprietary Form Reviewed: Yes No N/A
- Items to submit to ADE**
 Signed Selected FSMC Proposal Checklist List of FSMCs contacted.
 Selected proposal (1) Proof of advertising
 Evaluation rubrics (for each proposal submitted) Offer opening documentation.
 FSMC Evaluation Score Summary One Response Received Letter (if applicable)
 Signed Evaluator Statements Additional contract (if applicable)
- Certification**
 I certify that the information and documentation provided herein are true and correct to the best of my knowledge and that I am the person authorized to conduct procurement.

 SFA Representative Signature _____
 Date

Procurement Protests

Any action that diminishes open and free competition seriously undermines the integrity of the procurement process and may subject the SFA to bid protests. Pursuant to 7 CFR 3016.36(b)(12), SFAs must have Protest procedures in place to handle and resolve disputes relating to their procurements and must, in all instances, disclose information regarding a protest to ADE.

In the event that a vendor believes a violation has occurred during the procurement process, the vendor has the right to file a Procurement Protest.

If an SFA receives a Procurement Protest, ADE requires the SFA to do the following:

- Notify ADE of the Procurement Protest;
- Provide ADE with a copy of the SFA's Procurement procedures; and,
- Provide ADE with copies of all the Procurement Protest documentation.

ADE will ensure that the SFA followed their Procurement Protest Procedures and expects SFAs to resolve disputes relating to procurements.

See Number 7 of Section 5, Uniform Instructions to Offeror.



Monitoring the Contract



Monitoring the Contract



SFA Oversight: ADE's legal relationship is with the SFA – not the FSMC via the Food Program Permanent Service Agreement with ADE.

- SFA is responsible for program compliance.
- SFA is responsible for use of public monies.



Monitoring: Periodic onsite visits, document review, and auditing with the [On-Site Monitoring Forms](#).

- Ensure compliance with regulations and financial expectations.
- Ensure quality and nutritional value of food service.
- If using USDA Foods or DoD Fresh, review invoices for credit before payments.



Advisory Board: Establish and maintain an advisory board composed of parents, teachers, and students to assist in menu planning. Required by 7 CFR 210.16(a)(8).

- Maybe formed in conjunction with the Local Wellness Committee.
- Keep copies of agendas, sign-in sheets, and minutes.



Buy American: Check periodically and approve exception forms. For additional information, review the [Buy American Accommodation Quick Guide](#).



Invoices: Check to make sure you are being charged the price or fee as it is written in the contract.

- Cost-Reimbursable Contracts: check for credits, rebates, and discounts.



USDA Foods/DoD Fresh: Check for correct credits.

- Amounts should be listed on invoice as separate line items with a monthly and a year-to-date amount.

Renewals and Amendments

- Not required, but allowed up to four renewals.
- Contract may not contain automatic procedures.
- ADE templates required.
- Material changes could cause the SFA to have to re-solicit.

Possible examples:

- The addition of a program
- Major changes to the formula for determining meal equivalency
- Major shifts in responsibilities
- Significant changes in the basis for determining the guarantee

ADE reserves the right to review the material change for compliance, including consulting with USDA.

Getting Started

To begin this process, please click on the survey link below to certify that the information in this guide has been reviewed.

SURVEY LINK:

<https://azed.surveymonkey.com/r/MJPR3HR>

Once ADE has record that this guide has been reviewed, please begin the process of contracting with an FSMC by accessing the following documents:

- **RFP Checklist:**

- [Link](#)

- **RFP Template**

- RFP Template Fixed-Price - [Link](#)
- RFP Template Cost-Reimbursable (FSMC Purchases Food) - [Link](#)
- RFP Template Cost-Reimbursable (SFA Purchases Food) - [Link](#)

- **RFP Evaluation Rubric Template**

- Cost-Reimbursable Evaluation Rubric ([Link](#))
- Fixed-Price Evaluation Rubric ([Link](#))



It is a requirement that this guide is reviewed prior to beginning the RFP process. ADE will not begin RFP approvals until the SFA certifies, via the survey link above, that this guide has been reviewed in its entirety.

Questions

Operators are encouraged to contact ADE HNS' Contracts Specialist with questions related to contracting with an FSMC at the email or phone number listed below.

HNSContracts@azed.gov

(602) 364-2205

Thank you!

In accordance with federal civil rights law and USDA civil rights regulations and policies, the USDA, its agencies, offices, employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotope, American Sign Language, etc.) should contact the state or local agency that administers the program or contact USDA through the Telecommunications Relay Service at 711 (voice and TTY). Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, [AD-3027](#), found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

1. **Mail:** U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Mail Stop 9410, Washington, D.C. 20250-9410;
2. **Fax:** (202) 690-7442; or
3. **Email:** program.intake@usda.gov.

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