

## **REQUEST FOR PROPOSALS (RFP)**

RFP No. SMT2016

### **TO DEVELOP AN SFUSD-OWNED SMART MEAL TECHNOLOGY PLATFORM FOR SFUSD's STUDENT NUTRITION SERVICES**

**Proposal Release Date:** January 19, 2016  
**Due Date:** February 16, 2016 – 2:00 PM PST

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#### PRE-PROPOSAL VENDOR CONFERENCE

**February 9, 2016 – 10:00 AM PST**

SFUSD will host a Pre-Proposal Vendor Conference at SFUSD, 841 Ellis Street, San Francisco, CA 94109, on **February 9, 2016 – 10:00 AM PST**. Vendors will have an opportunity to meet with SFUSD staff to discuss the content of this RFP. A written question and answer document addressing questions from Vendors will be posted on the web following the conference. Attendance at this conference is encouraged but is not mandatory.

PROPOSAL DUE DATE AND TIME

**February 16, 2016 – 2:00 PM PST**

Proposals must be delivered in writing, either via hard copy or electronically to the attention of:

Angela McKee  
Project Manager, SFUSD's Future Dining Experience  
c/o Student Nutrition Services Department  
San Francisco Unified School District  
841 Ellis Street, San Francisco, CA 94109

at any time prior to **February 16, 2016 – 2:00 PM PST**.

Proposals delivered after **February 16, 2016 – 2:00 PM PST** will not be considered. SFUSD reserves the right to reject any and all proposals.

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## Background

### San Francisco Unified School District

The San Francisco Unified School District (hereinafter also “SFUSD” or “District”), founded in 1851, is the seventh largest school district in California, educating over 57,000 preK-12 students every year. During school year 2014-15, SFUSD had 72 elementary and K-8 schools; 12 middle schools; 18 high schools (including two continuation schools and an independent study school); 15 early education schools; and 13 active charter schools authorized by the District.

SFUSD’s mission is to provide each student with an equal opportunity to succeed by promoting intellectual growth, creativity, self-discipline, cultural and linguistic sensitivity, democratic responsibility, economic competence, and physical and mental health so that each student can achieve his or her maximum potential. Given the clear connections between health, learning, and attendance, student nutrition is a priority for the Board of Education and Superintendent Richard A. Carranza.

SFUSD’s Student Nutrition Services (SNS) department operates the largest public food service program in San Francisco, providing 21,000 lunches, 6,000 breakfasts, 2,500 suppers and 5,500 after-school snacks (48,000 pounds of food) on a daily basis. SNS is committed to ensuring students are properly nourished throughout the school day so they are prepared to learn and achieve academically.

SNS has been working over the past 10 years to improve the school meal program. Despite the many improvements made over the past decade, SFUSD continues to face challenges, such as : limited kitchen facilities; outdated cooking equipment; lack of a central warehouse for food distribution; low student participation; limited cafeteria space and long lunch lines; as well as a financial deficit. SFUSD’s Future Dining Experience initiative was established to address these challenges, and in so doing, the larger community and societal problems of childhood hunger, food insecurity and childhood obesity.

### SFUSD’s Future Dining Experience

SFUSD’s Future Dining Experience (FDE), an initiative of SFUSD’s Student Nutrition Services division and a fiscally-sponsored project of Community Initiatives, a 501C3 nonprofit organization that serves as the fiscal agent to SFUSD’s FDE project, is dedicated to comprehensively redesigning the school food experience through the implementation of a student-centered, equitable, financially-stable system that provides access to and engages all students in eating fresh, healthy meals. School meals are key in our community’s efforts to prevent both childhood hunger and obesity. Experiences that meet the needs and desires of students will increase participation in school meals, which in turn will increase consumption of healthy foods especially among San Francisco’s low-income and hungry students.

The comprehensive plan for SFUSD’s FDE was developed through a student-centered design process led by award-winning international design firm IDEO. Over the course of five months, a tremendous amount of information was gathered from more than 1,300 students, families, staff, and community members. The findings from the research was compiled, analyzed, and

synthesized into an innovative, student-centered redesign plan that consists of ten interconnected design recommendations. To learn more about SFUSD's FDE and the Ten Design Recommendations, visit: [www.SFUSDFutureDining.org](http://www.SFUSDFutureDining.org)

### Smart Meal Technology Project Purpose and Expectations

The Smart Meal Technology platform will link the students of SFUSD and Student Nutrition Services (SNS) staff in a conversation by capitalizing on the appeal and ubiquity of smartphones among today's youth. The integrated technology platform will include:

1. **A mobile application (App)** that students with smartphones will be able to access at no charge from their phones; students without smartphones will be able to access the App from iPads in convenient locations.
2. **A content management system (CMS)** that will allow SNS to send and receive information from students via the App.
3. **A database and application program interfaces** that integrate the various components with each other and with SFUSD's current software.

The App will make it possible for students to pre-order meals, provide feedback, set dietary preferences and learn about their food through curriculum modules. Student use of the App will enable SNS staff to become 'smarter' in terms of operations by responding to student's needs in an informed way. The CMS will make it possible for SNS staff to share information with students, and analyze students' dietary preferences and consumption patterns.

SFUSD's FDE partnered with IDEO to map the conceptual development of the Smart Meal Technology platform, and it currently possesses wireframes, system maps (including feeds and data sources) and detailed use cases for the development of the platform. These resources can serve as a point of reference; however, they are not specific enough to serve as the business requirements for the design process.

SFUSD seeks to make the Smart Meal Technology concept a reality, starting with a pilot prototype in the spring or summer of 2016 and a limited release to schools participating in a U.C. Berkeley study during the 2016-17 school year. The App will be developed with Middle School and High School age students as the target audience.

Currently, San Francisco Unified School District (SFUSD) and University of California, Berkeley are partnering to study innovative student-centered strategies that promote student participation in the school lunch program and that could improve students' dietary intake and reduce plate waste in schools. With a grant from the USDA, the SFUSD/UC partnership will support and study SFUSD's efforts to improve students' dining experience. UC Berkeley and SFUSD will partner together to write the content that will be shared with students via the App.

SFUSD's FDE seeks a vendor that is able to develop an integrated App and CMS for SFUSD that builds on the design recommendations created through the collaboration with IDEO. The project is open to discussing design alterations to functionality if thoughtful suggestions are presented. SFUSD's FDE views the development of the Smart Meal Technology platform as an iterative process that will be dynamic in all phases.

## Scope of Work

### Overview

Pursuant to this RFP, SFUSD's Student Nutrition Services (SNS) department is seeking proposals from vendors to develop a Smart Meal Technology platform that includes a fully functional mobile application, content management system, and database as detailed herein (also referred to herein as the "Project"). The Smart Meal Technology platform being sought will be a visionary platform that will, amongst other functionalities and features, link the students of SFUSD and SFUSD's SNS staff in a conversation to better inform the meal services of the SFUSD.

### Deliverables

1. Fully functioning and quality assurance tested **Application (App)** for iOS and Android smartphones that will be available at no charge to specific SFUSD students that have been preapproved to use the mobile application by SFUSD. Students without smartphone access will be able to access the App from iPads in convenient school locations. The App will be available in English, Chinese, and Spanish. Login capabilities that are specific to students and staff will be determined by SFUSD and will comply with applicable state and federal laws and regulations.
2. **Content management system (CMS)** that will allow SNS staff to manage content on the App, generate reports that synthesize feedback from students, and manage a loyalty rewards program.
  - Note 1: The users of the content management system will be SNS administrators, not individual students.
  - Note 2: SNS will provide all the content and photographs. The initial content and photos will be loaded by the Vendor via a batch process. Edits and new content will be loaded on an ongoing basis by SNS staff via the content management system website.
3. **Data storage and management** services for all data produced by the App or CMS, and any data needed to help execute efficient queries of the database. SFUSD will own the data, and the vendor will configure and maintain the database and any associated hosting services.
4. **Application program interfaces (APIs)** for abstraction layer and ID services and communication with other systems as detailed in the RFP. Services should bridge between SFUSD's Student Information System, Student Nutrition Services Food Management software, Online Prepayment System, and Web based Free & Reduced Meal Application software.
5. **Source code and design assets** for the App, CMS, APIs and other elements associated with the integrated technology platform.
6. **Documentation** of the development processes.
7. **Training and manuals** for product use.
8. Vendor will provide App, CMS, database, and API **maintenance and support** once launched, during the term of the Agreement, if awarded.



**1. Application (App)**

- Advise and consult with the District on the different ways in which the App may be developed, prior to designing and developing the chosen approach from among options such as, mobile web, native, hybrid.
- Develop design specifications, code, and complete acceptance testing for a student-facing mobile/tablet software application with a data channel to connect to SFUSD’s data systems based on the functions set forth below.

| Functionality                        | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Integration                       | <ul style="list-style-type: none"> <li>• Notification management and application program interface (API) integration with current SFUSD software. Automate connections between abstraction layer and SFUSD software. Automate data channels to other SFUSD software systems and application.</li> <li>• Built with flexibility to integrate with upgrades to SFUSD’s software.</li> <li>• Built to allow for expansion of the platform.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                 |
| 2. Tutorial                          | <ul style="list-style-type: none"> <li>• User tutorial for the system that will provide clear guidance on how the App functions as well as any legal language provided by SFUSD.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 3. Login dashboard, passwords, & PIN | <ul style="list-style-type: none"> <li>• App will provide log-in capabilities that are specific to students and staff and will be determined by SFUSD. Log-in access and security will comply with applicable state and federal laws and regulations.</li> <li>• App will provide the ability for eligible students to sign-up for the App based on school and grade level. SFUSD will have the ability to determine which students have access to the App. SFUSD staff will be able to access the App via predetermined log-ins.</li> <li>• App will provide forgotten password flows that will enable students to access their account and view their SFUSD provided meal PIN number.</li> <li>• Login dashboard on the mobile application will support complex displays of account information and food preferences.</li> </ul> |
| 4. Food preferences                  | <ul style="list-style-type: none"> <li>• Students will be able to share their dietary preferences (e.g., vegetarian, gluten-free, etc.) via the App. SNS will alter its purchasing of vegetarian, diabetic, and gluten-free options quickly in response to students dietary needs.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 5. Money                             | <ul style="list-style-type: none"> <li>• The App will provide the student and/or parent with the ability to load money to the account. Ideally, this function will connect directly to SNS’s current payment system: MyPaymentsPlus.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 6. Menus                             | <ul style="list-style-type: none"> <li>• The mobile App will provide listing and browsing of food menus by date. Students will be able to view the current month’s menu.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 7. Pre-order                         | <ul style="list-style-type: none"> <li>• The mobile App will provide ordering food through the meal planner. Students will be able to pre-order up to 2 weeks in advance.</li> <li>• Below is an illustration of what the preorder process might look like.</li> <li>• Students who pre order meals will be able to pick up their meal orders through an express line, allowing them to avoid normal meal lines.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                        |



| Functionality                                                                     | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
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|                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 8. Order history                                                                  | <ul style="list-style-type: none"> <li>The App will allow students to view their order history.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 9. Rating system for menu items (student feedback)                                | <p>The App will allow students to provide SNS with feedback about meals consumed, allowing the department to become ‘smarter’ about ordering school meals. Over time, SNS will work to better align food procurement with student preferences.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 10. Learning layer templates and content for easy creation and hosting of content | <p>Develop Learning Layer infrastructure within the mobile application to include content management system and templates for content</p> <p>The App will provide a hard coded learning module with gamification to house basic nutritional information. With student input, UC Berkeley’s Cooperative Extension (CE) will develop health messages that convey the benefits and risks of specific nutrients in a format that is accessible and relevant to youth, allowing students to make informed meal decisions. For instance, this sample screen relates proteins and saturated fat to exercise and complexion.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 11. Loyalty platform                                                              | <ul style="list-style-type: none"> <li>Provide a loyalty platform (or identify a provider) for creating and managing challenges and rewards and embedding into the user experience (“UX”).</li> <li>A loyalty rewards program will be built into the system to reward students for healthy choices. Loyalty services will enable students to earn points based on POS transactions. Points will be redeemable off-line and managed by SFUSD.</li> <li>If loyalty platform is not developed in-house, connect loyalty platform to 3rd-party loyalty platform with configuration of provider’s admin portal.</li> <li>The App will display loyalty points and point redemption options, and will include a flow for a user to redeem their points.</li> <li>SNS/UC Berkeley will develop weekly nutrition challenges and accompanying explanations in ways that appeal to students. Weekly nutrition challenges will help students adopt more healthful eating behaviors inside and outside of school.</li> <li>Students who successfully complete nutrition challenges will receive points that are redeemable for a variety of school paraphernalia.</li> </ul> |



## 2. Content Management System (CMS)

- Development of an online-hosted operations portal for SFUSD that will serve as a content management system (CMS) and back-end operations portal to serve as an abstraction layer on top of current third-party POS meal services tracking software utilized by SFUSD.
- The CMS and back-end operations portal will interface with and/or augment student nutrition software currently used by SFUSD.
- The CMS and back-end must be dynamic, allowing for new functionalities to be built without depending on existing third-party POS meal services tracking software currently utilized by SFUSD.
- CMS and back-end operations portal will consist of the following functionality.

| Functionality                          | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Integration                         | <ul style="list-style-type: none"> <li>• CMS website will be built in such a way to allow for expansion of the platform.</li> <li>• APIs will be developed for App integration, POS integration, ID management, analytics, report generation and payment integration.</li> <li>• Payment integration with District selected software will be provided so parents or students can purchase meals and refill meal accounts.</li> <li>• Meals pre ordered by students via the App will be pushed out to schools via the POS so school staff can set up express lines for students who pre ordered meals.</li> </ul> |
| 2. Administration                      | <ul style="list-style-type: none"> <li>• Authorized users of the CMS website will be able to: <ul style="list-style-type: none"> <li>○ Add and remove users to manage the CMS;</li> <li>○ Check students details and determine which students are eligible to access the App;</li> <li>○ Authenticate new students.</li> <li>○ Remove students.</li> </ul> </li> </ul>                                                                                                                                                                                                                                           |
| 3. School menus                        | <ul style="list-style-type: none"> <li>• Authorized users of the CMS website will be able to build menus, upload photos, and manage content describing a month's worth of RevFoods and SFUSD prepared meals.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                          |
| 4. Educational messages & challenges   | <ul style="list-style-type: none"> <li>• Authorized users of the CMS website will be able manage (upload/delete/revise) educational messages.</li> <li>• The learning module that is viewed in the App will be configured with a URL so the student can be shown the learning module through a webview.</li> </ul>                                                                                                                                                                                                                                                                                               |
| 5. Loyalty Points                      | <ul style="list-style-type: none"> <li>• A loyalty point redemption flow management system will be developed.</li> <li>• The points and rewards rules of the App will be configured as a URL in order for students to be able to redeem the rewards via the website.</li> </ul>                                                                                                                                                                                                                                                                                                                                  |
| 6. Data analysis and report generation | <ul style="list-style-type: none"> <li>• SNS staff will be able to generate automated reports that draw data from SFUSD's data systems and the App.</li> <li>• Vendor will work with SNS staff to design the automated reports. Below is a description of the types of automated reports that will be required to leverage the App. <ul style="list-style-type: none"> <li>○ <i>Student Activity</i>. At a district-wide level; at the school and grade level; and at the student level. These reports will highlight App</li> </ul> </li> </ul>                                                                 |



| Functionality | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|               | <p>usage trends, and will be used by SNS management to monitor activity and identify patterns.</p> <ul style="list-style-type: none"><li>○ <i>Dietary Preferences</i>: At a district-wide level; at the school and grade level; and at the student level. These reports will be used by SNS management to alter purchasing of vegetarian, diabetic, and gluten-free options quickly in response to student dietary needs.</li><li>○ <i>Pre Ordered Meals</i>: At a district-wide level; at the school and grade level; and at the student level. These reports will be used by SNS management and School Lunchroom Staff to ensure sufficient meals at each school, to set up an express line for students who pre order meals so they can avoid time waiting in line, and to analyze order histories. Student level reports will be pushed out to schools via the POS.</li><li>○ <i>Student Feedback</i>. At a district-wide level; at the school and grade level; and at the student level. SNS staff will use this information to align food procurement and menu development with student preferences.</li><li>○ <i>Loyalty Rewards</i>. At a district-wide level; at the school and grade level; and at the student level. SNS staff will use this information to track points and order and distribute rewards (e.g., school paraphernalia) to students.</li></ul> <ul style="list-style-type: none"><li>● Data will not live on CMS website, and data generated for reports produced via the CMS website will be securely discarded once a report is generated.</li></ul> |

### 3. Data Storage and Management

- Development of an online-hosted database, which will securely store student data from the mobile application for use in the mobile application and the CMS Website and back-end, and which will securely interface and share data with those systems and other SFUSD data systems as detailed herein.
- The District will have access to all data twenty four hours a day, seven days a week and will be the owners of the data generated by the App and CMS website.
- Data will be available and purged from the database as determined by the District. The District will be able to determine how often data is synced and which databases are synced.

### 4. Application Interfaces

Vendor will collaborate with the server team in SFUSD’s Information Technology Department for a short period of time to determine the best way to integrate the App with SFUSD’s child nutrition software and student identification management systems. Through this collaboration, the Vendor and SFUSD will determine whether it’s best to use Active Directory, Google Single Sign On, or some other process that will ensure the login process links to the student’s SFUSD profile, including their school and grade.

### 5. Student Access

- Students with smartphones will be able to access the App at no charge from their phones; students without smartphones will access the App from iPads in convenient school locations.
- The App will be available in English, Spanish, and Chinese. SFUSD’s Translation Services can provide translation services.
- Login capabilities that are specific to students and staff will be determined by SFUSD in compliance with applicable state and federal laws and regulations.

### 6. Data Confidentiality and Security

- The disclosure and handling of student data—which will form a significant part of the data that will be stored upon, and/or utilized by, the Smart Meal Technology to be developed under this RFP—is subject to California and federal laws and regulations such as, and without limitation, the Family Educational Rights and Privacy Act (“FERPA”) and its implementing regulations, and California Education Code sections 49071 et seq. The Smart Meal Technology sought hereunder must maintain the security and confidentiality of such data consistent with applicable laws and regulations. Proposals must address how security and confidentiality of data shall be maintained in each component of the Smart Meal Technology, and detail the Vendor’s experience in maintaining the security and confidentiality of data in other similar projects that the Vendor has completed.

## **7. Project Schedule**

Proposals must include a detailed proposed Project Schedule for the implementation of the Scope of Work. It is anticipated that Smart Meal Technology development, including without limitation Application and Platform development will take place on a schedule that will enable piloting to take place during the summer of 2016, and for, at a minimum, a limited release to take place during the 2016-2017 school year. The Proposal's Project Schedule must take this into account.

## **8. Location of Work to Be Performed**

Meetings will occur in San Francisco or remotely via conference call, Skype, etc. Presentation of each phase of development will be done in San Francisco or remotely via conference call, Skype, etc. If an award is made, the Vendor will make itself and its relevant staff available. Any costs of travel must be specified and broken out separately in the Proposal's Project Budget (see Section 10, Project Budget, below).

## **9. Designated Project Manager**

Proposals must include the designation of a staff person to serve as the Vendor's Project Manager who will be made available to work with SFUSD's FDE and the District in the implementation of the Project. If a specific person is able to be designated at the time the Proposal is submitted, the Proposal will include a resume/curriculum vitae for that individual or a detailed statement of that person's relevant qualifications and experience in serving in a project management capacity. If a specific person has not yet been hired or otherwise identified by the time the Proposal is submitted, the Proposal must state that the Vendor will designate a qualified and experienced Project Manager prior to the commencement of the engagement, and provide a proposed job description for this position with the Proposal.

If an award is made, the designated Project Manager for SFUSD's Future Dining Experience (Angela McKee) will be available to work with the Vendor on the Project, answering questions and providing documents, and so forth, during the engagement. Access to SFUSD Student Nutrition Services Business Analysts and IT department will also be facilitated.

## **10. Project Budget**

Proposals must include a detailed Project Budget proposed by the Vendor, which correlates directly to the Vendor's Proposal for providing the Smart Meal Technology sought under this RFP, including without limitation a detailed breakdown of charges. As in Section 8 above, any costs of travel must be specified and broken out separately in the Project Budget.

## Proposal Instructions

### Complete with Regard to all RFP Requirements

Proposals must be complete in all respects as to the requirements of this RFP. A Proposal may be rejected if it is conditional or incomplete, or if it contains any alterations of form or other irregularities of any kind. A Proposal may be rejected if any defect or irregularity changes the prices or material substance of the proposed products or services submitted.

### Minimum Proposal Requirements

Responses to this Request for Proposals must provide a straightforward, concise description of how the proposer proposes to satisfy the requirements of this RFP. Each Proposal must, at a minimum, include the following:

1. Written Proposal responsive to all of the requirements of this RFP, including all of the requirements of Appendix A (Scope of Work) and elsewhere in this RFP, and which contains:
  - a. A detailed description of how the Vendor proposes to structure and operate the Smart Meal Technology platform's various components, functionalities and specifications as detailed in Appendix A (Scope of Work) and elsewhere in this RFP.
  - b. A description of the project team and staffing resources that will support the engagement, including resumes for all principals (including without limitation the Project Manager) and description of support staff.
  - c. The Vendor's project management approach and the software development methodology they will use to manage the development process.
  - d. Detailed description of the types of accounts and services needed to support the project e.g., web services, database services, etc. and any associated one-time and ongoing costs (to be reflected in the Project Budget).
  - e. Detailed project workplan and Project Schedule that outlines the major phases, workstreams, deliverables. Vendors shall include with their Proposals a tentative deliverable schedule based on the Project Schedule in conformity with the expectations detailed in Appendix A (Scope of Work) above. Proposals must include the Vendor's reasons for the proposed tentative deliverable schedule.
  - f. Total Project Budget presented in as an itemized list and breakdown of charges based on services and deliverables provided, in conformity with the Project Budget section provided in Appendix A (Scope of Work). Any expenses and travel must be separately detailed in and included with the Proposer's Project Budget.
  - g. The Proposal must address how security and confidentiality of data shall be maintained in each component of the Smart Meal Technology, and reference as appropriate the Vendor's experience in maintaining the security and confidentiality of data in other similar projects that the Vendor has completed (as required under Section 2(c) of this Minimum Proposal Requirements section).

2. SFUSD's FDE is seeking a Vendor with documented experience and capabilities in successfully implementing projects similar to the Project sought under this RFP, including the following areas of experience and capability:
  - a. Documented software development experience and capabilities including the development, support and maintenance of web, database and cross-platform (Android and iOS) mobile software application systems.
  - b. Documented experience in developing software applications capable of analyzing and processing large sets of data.
  - c. Documented experience in handling confidential data in a manner that maintains the data's security and confidentiality in compliance with applicable state and federal laws and regulations.
  - d. Documented experience and capacity in providing updates, maintenance and support to an online-hosted software system over the longer-term.

In order to provide documentation of the requisite Vendor experience and capabilities in each of the areas listed immediately above in this Section 2 of this Minimum Proposal Requirements section, Vendors' Proposals shall provide the following:

- a. References from at least three (3) organizations for which the Vendor has completed similar projects as the Project sought under this RFP, including contact information for a person or persons from the reference-providing organization who have direct knowledge of the project(s) the Vendor performed for that organization.
  - b. Examples of similarly completed projects, or projects in progress, that demonstrate the responding firm's expertise and capabilities in each of the above-listed areas. Examples might include, for example, detailed descriptions supported by printed screen shots, references to websites or apps that the SFUSD FDE will be able to review online (even with limited access), etc.
  - c. In addition, the SFUSD FDE will review the resumes and project team staffing descriptions submitted under Section 1(b) of this Minimum Proposal Requirements section, for the experience and capabilities of Vendor's project team staff members in implementing projects similar to that which is sought under this RFP. For any project team positions not currently filled, Vendor will provide the job description for such position and a description of the process and timeline by which Vendor shall ensure that such position will be filled by a qualified individual, given the competition for qualified staff in the technology sector.
3. A written statement by the Vendor that it will agree to the attached contract (Appendix B) if award an award is made, or the Vendor shall provide with its Proposal its specific proposed language modifications, if any, for consideration in contract negotiations.

### **Required Proposal Presentation**

Responsive Proposers are required to make a presentation of their proposal either in-person or live via Skype in any one of these dates - February 19/22/23, 2016. Proposals from Vendors that do not make themselves available as required may be deemed non-responsive.

*Any Proposal that does not meet all of the requirements of this RFP may be deemed non-responsive and as such, will not be considered.*

### **Proposal Evaluation/Selection**

Proposals will be evaluated based on the written proposal to provide a Smart Meal Technology platform as detailed under this RFP, the documented experience and capabilities of the proposer and project team, the Project Presentation, and price. Emphasis shall be on completeness and clarity of content.

## RFP Terms and Conditions

### Contract Provisions

Vendors are instructed to review the attached contract provided in Appendix B. If an award is made, the Vendor selected will execute a contract between the Vendor and Community Initiatives (the fiscal sponsor of the SFUSD Future Dining Experience Project as detailed in this RFP) with SFUSD as the intended third party beneficiary. Vendor-proposed alterations, if any, to any of the terms and conditions of the attached contract are required to be submitted with the Vendor's Proposal by the Submission Deadline, for consideration in negotiating the final contract with the selected Vendor, if an award is made.

If an award is made, the contract with the selected Vendor shall be executed as soon as possible after the award is made. Any such award and contract require approval by the San Francisco Board of Education in order to become effective. Vendors understand and agree that in the event an appeal is submitted as specified in this RFP, such appeal may delay execution of the contract, if awarded. Execution of any such contract may be deferred until after resolution of such appeal.

In the event that the District determines that the contract negotiations with the selected Vendor have failed to result in an executed contract within a reasonable timeframe, as determined in the District's sole and absolute discretion, the District reserves the right to terminate any further contract negotiations with such Vendor, and take such next steps as the District may deem appropriate including without limitation: award the contract to the next most qualified Vendor under the RFP evaluation process and enter into contract negotiations with such Vendor; reject all Proposals; re-issue an RFP; acquire the services through an alternative means; take other action; and/or take no further action.

### Reservation of Rights by the District

The issuance of this RFP does not constitute an agreement by the District that any contract will be awarded and/or entered into by the District. The District expressly reserves the right at any time to:

1. Waive any minor defect or informality in any proposal;
2. Prior to the submission deadline for proposals, modify the proposal requirements or procedures, modify the selection procedures including without limitation deadlines for accepting proposals, the specifications or requirements for any materials, products, equipment or services to be provided under this RFP. Any such modification shall be made in writing by addendum to this RFP or by other writing posted to the District website to which this RFP was posted. Vendors are responsible for checking that website regularly for any updates and postings that may be provided;
3. Reject all proposals;
4. Reissue a Request for Proposals;
5. Procure any materials, products, equipment or services specified in this RFP by any other means;



6. Determine that no project will be pursued.
7. Nothing in this reservation of rights section shall limit or restrict any other rights or remedies available to the District.

### **Vendor's Costs**

All costs incurred in the preparation or submission of a Proposal shall be entirely the responsibility of the Vendor and shall not be chargeable either directly or indirectly to SFUSD or Community Initiatives.

### **False and Misleading Statements**

A Proposal that contains false or misleading statements, or which provides references that do not support an attribute or condition contended by the proposer, may be rejected. If, in the opinion of SFUSD such information was intended to mislead the Project in its evaluation of the Proposal or of a Vendor attribute that is a condition or capability required under this RFP, the Proposal may be rejected.

### **Errors and Omissions in RFP**

Proposers are responsible for reviewing all portions of this RFP. Proposers are to promptly notify the District, in writing, if the proposer discovers any ambiguity, discrepancy, omission, or other error in the RFP. Any such notification should be directed to the District promptly after discovery, but in no event later than five working days prior to the date for receipt of proposals. Modifications or clarifications will be made as needed, at the discretion of the District, by addenda as provided in this RFP.

### **Errors and Omissions in Proposal**

Failure by the District to object to any error, omission, or deviation in a Proposal will in no way modify the RFP or excuse the Vendor from full compliance with the specifications of the RFP or any contract awarded pursuant to the RFP as attached or as negotiated as provided for in this RFP.

### **Change Notices**

The District may modify the RFP, prior to the Submission Deadline, by issuing an addendum, change notice or other notification which will be posted on the District website to which this RFP was posted. The Proposer shall be responsible for ensuring that its Proposal reflects any and all such addenda, change notices or other notifications issued by the District prior to the Submission Deadline regardless of when the Proposal is submitted. Therefore, the District recommends that all Proposers consult the website frequently, including shortly before the Submission Deadline, to determine if the proposer has seen and addressed any and all such addenda, change notices or other notifications.

### **Term of Proposals**

Submission of a Proposal signifies that the proposed services, deliverables and prices shall be binding on the Proposer and valid for a minimum of 120 calendar days from the submission

deadline detailed in this RFP, and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

### **No Waiver**

No waiver by the District of any provision of this RFP shall be implied from any failure or delay by the District to recognize and take action with regard to any failure by a proposer to observe any provision of this RFP.

### **Appeal Procedures**

#### **Protest of a Determination Not to Select a Vendor for Award of Contract**

Any Vendor that has submitted a Proposal and believes that the District has incorrectly determined that its Proposal is not qualified may submit a written notice of appeal to the District. Such notice of appeal must be received by the District on or before 2:00 P.M. on March 2, 2016 or the fifth (5th) business day following the District's issuance of an intent to award notice, whichever is later.

The notice of appeal must include a written statement specifying in detail each and every one of the grounds asserted for the appeal and must include a detailed description of the appealing party's objection and all supporting documentation that the appellant wishes to have considered in relation to its appeal. The appeal must be signed by an individual authorized to represent the Proposer, and must cite the specific RFP provision or provisions on which the appeal is based. In addition, the appellant must specify facts and evidence sufficient for the District to determine the validity of the appeal. Appeals that are based on a disagreement with the professional judgment of the reviewer will not be considered.

#### **Delivery of Appeal**

All appeals must be received by the specified due date. If an appeal is mailed or otherwise delivered via any means, the appellant bears the risk of non-delivery within the deadlines specified herein. Appeals must be provided by a means that will objectively establish the date the District received the protest (such as certified U.S. mail, UPS or FedEx delivery with signature receipt, courier service with signature receipt, or email). Appeals or notice of appeals made orally (e.g., by telephone or in-person) will not be considered.

Appeals must be in writing, addressed and delivered to:

SFUSD Purchasing Department  
ATTN: Rod Sarmiento  
RE: Appeal Regarding Smart Meal Technology RFP  
San Francisco Unified School District  
135 Van Ness Avenue, Room 123  
San Francisco, California 94102-5207

Email: [SarmientoR@sfusd.edu](mailto:SarmientoR@sfusd.edu)

## RFP Submission Procedures

### General Information

In addition to identifying the District's needs, this RFP includes requirements and instructions prescribing the content of all Proposals to be submitted and provides a copy of the contract between the Vendor and Community Initiatives (the fiscal sponsor of the SFUSD Future Dining Experience Project as detailed in this RFP) with SFUSD as the intended third party beneficiary, to be executed, if an award is made, as provided for in this RFP.

### Submission Requirements

Vendors submitting a Proposal under this RFP shall do so in writing, either via hard copy or electronic copy, to:

Angela McKee  
Project Manager, SFUSD's Future Dining Experience  
c/o SFUSD Student Nutrition Services  
841 Ellis Street, San Francisco, CA 94109  
Via E-mail: [McKeeA@sfusd.edu](mailto:McKeeA@sfusd.edu)

All Proposals must be clearly marked "Smart Meal Technology RFP No. SMT2016".

The Submission Deadline for all Proposals is 2:00 PM Pacific Standard Time on February 16, 2016. Proposals must be received by or before the specified due date and time. Proposals received after the specified due date and time will not be considered. The District reserves the right to reject all proposals and other rights as detailed in the "Reservation of Rights by the District" section of this RFP. It is the respondent's responsibility to confirm timely receipt by the District of the Vendor's Proposal. Late Proposals will not be considered.

### Vendor Questions Regarding RFP

A Pre-Proposal Vendor Conference will be held at 10:00 AM Pacific Standard Time on February 9, 2016. Vendors will have an opportunity to meet with SFUSD staff to discuss the content of this RFP during the Pre-Proposal Vendor Conference at SFUSD, 841 Ellis Street, San Francisco, CA 94109.

SFUSD will respond to questions regarding this RFP, via a written question-and-answer document posted to the website on which this RFP is posted. Questions must be sent in writing via electronic mail (email) to Angela McKee at [McKeeA@sfusd.edu](mailto:McKeeA@sfusd.edu) on or before the start of the Pre-Proposal Vendor Conference. Questions submitted after this deadline will not be answered. Questions asked during the Pre-Proposal Vendor Conference will be answered during the conference, and a written question-and-answer document will provide all such questions and answers in writing afterwards, posted to the website on which this RFP is posted. Any question that cannot be answered during the conference will be addressed in the post-conference question-and-answer document.

In no event shall any oral statement made by SFUSD staff in relation to this RFP be binding upon SFUSD. SFUSD shall only be bound by statements and information provided in writing in this

RFP, via written addendum to this RFP, or via other written posting by SFUSD to the same SFUSD website to which this RFP is posted. Vendors are responsible to check that website regularly for any updates and postings that may be provided.

Attendance at the Pre-Proposal Vendor Conference is encouraged but is not mandatory.

### Timeline

- **January 19 – 26:** Issue RFP and advertise
- **February 2:** Vendors submit questions concerning RFP. All questions must be submitted in writing by February 2<sup>nd</sup> at 5pm PST to Angela McKee at [McKeeA@sfusd.edu](mailto:McKeeA@sfusd.edu). It is up to the vendor to confirm that SFUSD has received the questions.
- **February 9:** SFUSD will host pre-proposal vendor conference on February 9, 2016 at 10:00 am. Conference will be held at 555 Franklin Street, San Francisco, CA.
- **February 12:** Final response document to all questions will be published on the SFUSD Student Nutrition Services webpage by 5pm PST.
- **February 16:** All proposals must be received by **2:00 pm PST**. Documents must be submitted via mail or e-mail. It is the proposer's responsibility to confirm receipt in conformity with the requirements of this RFP.
- **February 19, 22, 23:** All Vendors who submit a responsive proposal will be invited to participate in a presentation of their proposal. Presentations may be in-person or via Skype.
- **February 24:** Vendor will be selected and SFUSD will declare intent to award
- **March 8:** Proposal will be submitted to Board of Education for award of contract
- **TBD:** Contract finalization

### Withdrawal, Resubmission or Modification

A proposer may withdraw a submitted Proposal at any time prior to the Submission Deadline by submitting a written request for withdrawal signed by the proposer: [McKeeA@sfusd.edu](mailto:McKeeA@sfusd.edu).

If withdrawn prior to the Proposal Submission Deadline, a new Proposal may be submitted prior to the Submission Deadline. Any modification to a submitted Proposal offered in any other manner, oral or written, will not be considered. A Proposal cannot be changed, corrected, or withdrawn after the Proposal Submission Deadline.

### SFUSD FDE Contact Person

All communications regarding this RFP must be directed in writing to:

Angela McKee  
Project Manager, SFUSD's Future Dining Experience  
c/o SFUSD Student Nutrition Services  
841 Ellis Street, San Francisco, CA 94109  
Via E-mail: [McKeeA@sfusd.edu](mailto:McKeeA@sfusd.edu)

All communications must be in writing and must reference the RFP title and the specific section(s) of the RFP being referred to. The Vendor will also include all contact information for the requestor and its company.