

**PROPOSAL WRITER  
TRAINING - DAY 1:  
Proposal Process & Tools**



# Overview of Proposal Process

## STAGES:

- Notification of RFP Received
- Outlook Email Folder
- Skim RFP & Set Up Network Directory
- Full Review of RFP
- Request & Compilation of Information
- Writing of Proposal
- Draft to Salesperson
- Edits & Final Approval
- Fulfillment
- Optional Presentation
- Award/No Award of Account
- Filing

# Notification of RFP Received

The designated proposal writer should begin working with the listed salesperson to begin compiling information. Please see the opportunity in Salesforce for additional information.

Opportunity: [REDACTED]

Proposal #: 23192

Account Name: [REDACTED]

Salesperson: [REDACTED]

Proposal Writer: Jenn Dee

Type: New Client

Business Segment: School Nutrition

State: VT

Current Vendor: [REDACTED]

Priority: Low

Amount: \$500,000.00

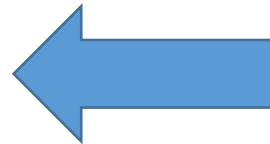
Managed Volume: \$500,000.00

Prebid Meeting: 6/23/2023 8:30 AM

Questions Due:

Bid Due Date: 7/14/2023 12:00 PM

Ship Date: 7/12/2023



**This is all you  
need to know!**

(Plus a few extras we're adding in new this year,  
like # copies and shipping destination)

# Skim RFP & Set Up Directory

**SECTION C: Proposal Format and Contents**  
Proposals must be concise and in outline format. Pertinent supplemental information should be referenced and included as attachments. All proposals must include/address the following:

- C.1. Letter of Transmittal, which includes:
- An introduction of the FSMC.
  - The name, address and telephone number of the person to be contacted, along with others who are authorized to represent the company in dealing with the SFA and this RFP.
  - A description of the FSMC's ability and desire to meet the requirements of the RFP, and a positive assertion of the FSMC's intention to do so.
  - Any other responsive information not otherwise included in the proposal.
- C.2. Executive Summary, which:
- Briefly describes the FSMC's approach to the proposal and clearly indicates any options or alternatives.
  - Indicates any major requirements that cannot be met by the FSMC.
  - Highlights the major features of the proposal and identifies any supporting information considered pertinent and responsive.
- C.3. Price/Cost Information
- List and describe any and all costs to the SFA for any Management Fee (FSMC's profit) to be charged as a flat rate or on a per meal basis.
  - List and describe any and all costs to the SFA for the Administrative Fee (FSMC's overhead and other off-site costs not otherwise paid by the SFA) to be charged as a flat rate or on a per meal basis.
  - If consulting services are not covered in Administrative Fee, list those services along with the extra charges.
  - List payment terms and arrangements.
  - Complete budgeted financial forms provided in Schedule E and provide a summary of the following:
    - Financial Budget Projections;
    - Income Summary;
    - Labor Cost Summary: Management/ Administrative/Clerical;
    - Individual School Labor Cost Summary; and
    - Miscellaneous Expense Summary.

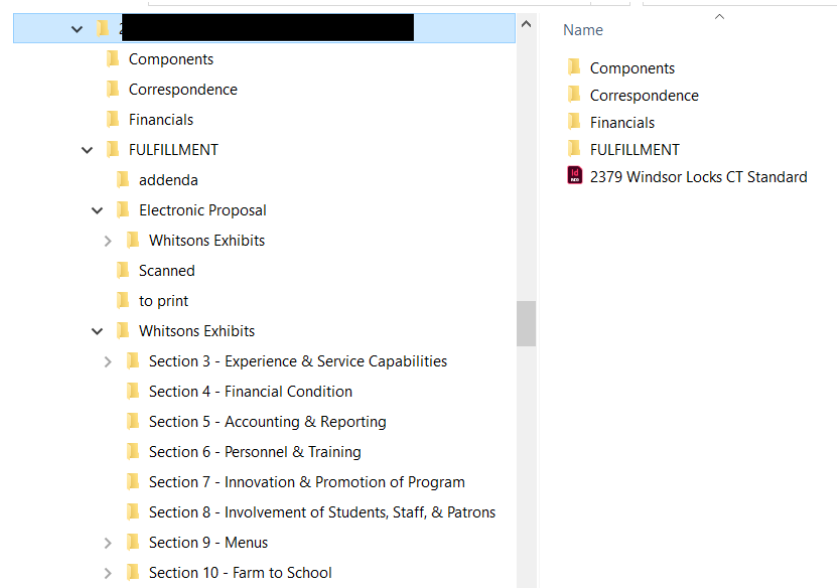


Figure Out What Template to Use.  
Plus, set up your Outlook email folder!

# RFP: Request for Proposal



COMMONWEALTH OF PENNSYLVANIA  
DEPARTMENT OF EDUCATION  
333 MARKET STREET  
HARRISBURG, PA 17126-0333  
[www.education.pa.gov](http://www.education.pa.gov)

Food Service Management Company (FSMC)  
Request for Proposal (RFP) and COST REIMBURSABLE Contract



July 1, 2023 to June 30, 2024

Any School Food Authority (SFA) selecting to use a full-service FSMC must prepare a RFP utilizing this document which may not be re-typed or changed in any way. Addendums to the original or renewal year contract are not permitted. Should the SFA and FSMC enter into any addendum, the Division of Food and Nutrition (DFN) will not review the addendum and the language in this document prevails as binding. The standard form contract has open fields where additions can be made on the contract, itself, in lieu of attaching an addendum.

CONNECTICUT

## REQUEST FOR PROPOSAL/CONTRACT: Food Service Management Company to Manage District's Child Nutrition Programs

**RESPONSE DUE DATE: MAY 22, 2023 at 12:00 PM**

CSDE RFP APPROVAL

*Andrew Paul*

3.30.23

Signature of CSDE Consultant  
Andrew Paul

Date

Printed Name CSDE Consultant  
Revision: Feb. 2023

SFA/FSMC 2023-24 RFP/Contract Document

# Request & Compilation of Information

## Information Outline – PA Standard

### Proposal Details

Proposal Name	
Proposal Writer	
Date Due	
Date Shipped	
Shipping Destination	
Date Info Final Due to Writer	
<b>REMINDER: Financials must be completed &amp; submitted to writer at least ONE DAY PRIOR to shipping.</b>	
# of Copies (inc. Whitsons)	
Electronic PDF Required?	1 electronic USB (unless more are specified) with full proposal will be included with <del>with</del> every proposal.
# of Electronic Copies	
Special Instructions	

### Forms:

Any Exceptions? <i>Please List:</i>	
Any Questions?	<p><b>Financial Write-up - Please provide write-up and all necessary financial forms completed at least 1 day prior to shipping date) *Writer: please email financial write-up template when you submit this form to Salesperson</b></p> <p><b>Staffing Schedule - Salesperson please provide at least 2 days before shipping date</b></p>

## Includes:

- Information Outline
  - Service Plan, References, Resumes, Menus, & More
- Financial Writeup/Price Proposal /Bid Price Sheets
- Special Info Requests (i.e., menus, new info)
- Cover Letter & Ship Label
- Forms & Documentation
- Bid Bond & Insurance
- Electronic/Paper Exhibits

Information Outline –  
Let's Check One Out!

# Proposal Info Request Tools

## STRATEGIC FINANCIAL ANALYSIS

Considerable effort goes into the development of our projections, making certain to conduct a thorough review of your onsite operations, program goals and menu expectations, and then benchmark your program against similar clients. **In fact, for XYZ, we utilized our experience at ABC SCHOOL as the benchmark for your program.** Our projections are then passed through three levels of careful review and analysis to ensure our proposal is both realistic and achievable for the entirety of the contract.

### FINANCIAL PROPOSAL

We propose to manage the XYZ school nutrition program on a **cost reimbursable** basis in accordance with the terms of the Request for Proposal. **We stand behind our financial projections and are confident that they reflect realistic expectations in year one and throughout the extended life of the contract.**

- Guarantee.** The District and **Wuboo** shall work together to ensure a financially sound food service operation. **We guarantee the food service program will operate profitably per the Request for Proposal, OR We guarantee the food service program will operate profitably at a surplus of \$xxxx.** We are willing to put our management fee and/or administrative fee at risk as part of our guarantee.
- Management & Administrative Fee.** Our administrative fee is **XXXXXXXX** per year and our management fee is **XXXXXXXX** per year, invoiced in ten (10) equal monthly installments during the 2023/2024 school year. The administrative fee represents **Wuboo's** corporate support necessary to operate the food service program, and includes the **cost of insurance, bid and performance bonds, OTHER AS NEEDED.** Our fees adjust annually based on the Northeast Region, All Urban Consumer Price Index (CPI) for Food Away from Home.
- Investment.** We will invest up to **\$XXXXXX** in equipment on behalf of XYZ. In Year 1 of the contract, as per the Request for Proposal. All equipment purchases conform to local and state purchasing regulations and guidelines. Our recommendations were developed with your objectives in mind, and believe these enhancements will better serve your students, speed service **xxxx** and improve the variety of meals available to students. Our recommendations include **DETAILS.**
- Labor.** Our projected labor is consistent with the positions, hours and wages contained within the RFP, plus considers a **X%** wage increase for the 2023/24 school year. **OR Wuboo** is recommending minor labor adjustments to enhance the effectiveness and efficiency of your program, as detailed in our enclosed labor schedule.
- Health Insurance and Benefits.** All current employees working **XX** hours per week or more will continue to be eligible for health insurance. All new employees will be eligible for medical benefits based on the company policy in place at the time they are hired.
- Consulting Services.** All services **Wuboo** provides, either on a contractual or consulting basis, are also included in our administrative and management fee.
- Payment Terms.** Payment terms are **10 days** per the RFP.

## Financial Writeup



**Price Proposal**

May 16, 2023

Dear Mr. Hunt:

We believe in cultivating a partnership with our clients, one that gives the CICS Administration control over all aspects of our services while delivering an affordable, high quality program to your students. Our financial projections contained in this section are fiscally responsible, realistic projections that reflect the requirements set forth in the RFP, our assumptions and the program presented in our proposal.

We've developed our Price Proposal based on the information contained in the Request for Proposal, Addendums (as applicable), observations of your current operation and our experience managing food service programs similar to yours.

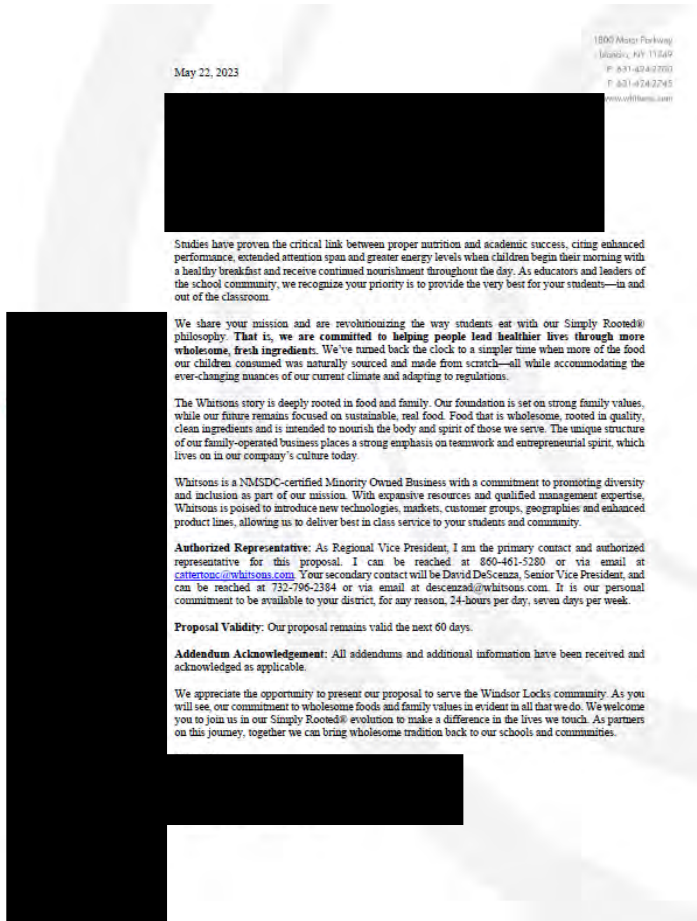
Considerable effort goes into the development of our projections, making certain to conduct a thorough review of your onsite operations, program goals and menu expectations, and then benchmark your program against similar clients. Our projections are then passed through three levels of careful review and analysis—our sales team, operations management and our executive team—to ensure our proposal is both realistic and achievable for the entirety of the contract.

## MA Price Proposal Letter

Cost Reimbursable	PUBLIC	Form #23 CR PUBLIC Revised 01/2023
<b>RESPONSE AND PROJECTED OPERATING STATEMENT</b>		
<p>(By the undersigned, agree)</p> <p>F5MC NAME</p> <p>F5MC ADDRESS</p> <p>PREPARER'S NAME</p> <p>TELEPHONE #</p> <p>PREPARER'S E-MAIL</p> <p>This proposal is subject to</p> <p>COMPANY (if F5MC) CONT</p> <p>F5MC Administrative/Man</p>		
<p>CENTS PER MEAL:</p> <p>FLAT FEE:</p> <p>TOTAL INCOME</p> <p>TOTAL (EXPENSES) COST</p> <p>RETURN / (LOSS)</p> <p>EQUIPMENT INVESTMENT (\$ YR.)</p> <p>W/ WITH EQUIP &amp; MEAL CHARGE DEBT</p>		
<p><input type="checkbox"/></p> <p><input type="checkbox"/></p>		
<p>BOND TYPE &amp; REGULAT</p> <p>*BID BOND 18A-18A</p> <p>BID BOND - SFSP (FEDE CO. ONLY)</p> <p>**PERFORMANCE BOND SURETY CO. ONLY</p>		

## Financial Schedule

# Proposal Info Request Tools



Cover Letter



## Shipping Label

Name	Date modified	Type
SECTION 1 - COST PROPOSAL	5/7/2023 6:53 PM	File folder
SECTION 2 - PROMOTION & WELLBEING	5/8/2023 6:19 PM	File folder
SECTION 3 - PURCHASING & SUPPLIERS	5/8/2023 6:32 PM	File folder
SECTION 4 - STAFF & MANAGEMENT TR...	4/13/2023 4:48 PM	File folder
SECTION 6 -INCREASING PARTICIPATION ...	5/8/2023 11:50 PM	File folder
SECTION 7 - COMMITMENT TO QUALITY	5/7/2023 6:55 PM	File folder

Electronic Exhibits Directory



# Forms & Documentation

## Non-collusive Statement Food Service Program

Whitsons Nutrition, LLC

By submission of this proposal, the food service management company (FSMC) certifies that:

- This proposal has been independently arrived at without collusion with any other proposer, competitor, potential proposer, or potential competitor.
- This proposal has not been knowingly disclosed and will not be knowingly disclosed prior to the opening of the proposals for the work to be performed or the goods to be sold, to any other proposer, competitor, potential proposer or potential competitor.
- No attempt has been made, or will be made, to induce any other person, partnership, or corporation to submit or not to submit a proposal.
- The person signing this proposal certifies that he or she has fully informed himself or herself regarding the accuracy of the statements contained in this certification, and under penalties of perjury, affirms the truth thereof, such penalties being applicable to the bidder, as well as the person signing in his behalf.
- Below is a certified copy of the resolution authorizing the execution of this certificate by the signator of this proposal on behalf of the corporate proposer.

## Forms

## Document A310™ – 2010

Conforms with The American Institute of Architects AIA Document 310

### Bid Bond



This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural unless applicable.

The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof, or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein. Where so furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

Signed and sealed this 9th day of May, 2023.

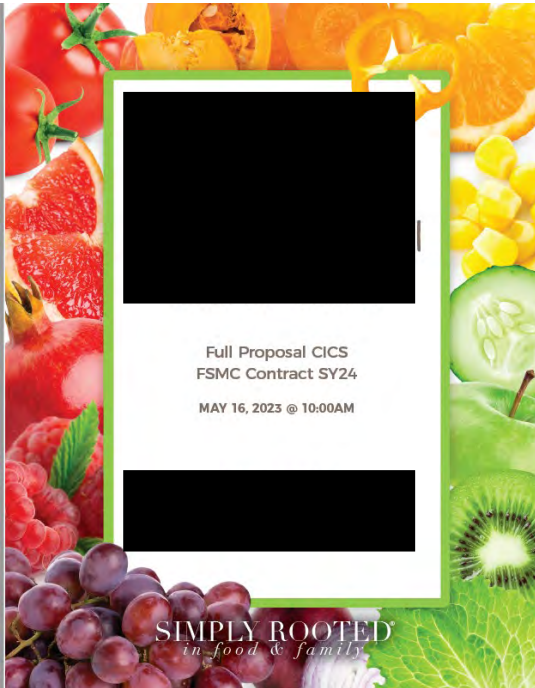


## Bid Bond

ACORD						CERTIFICATE OF LIABILITY INSURANCE		DATE: 06/05/2023
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p><b>IMPORTANT:</b> If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or the endorsement, if SUBSCRIPTION IS WAIVED, subject to the terms and conditions of the policy/certain policies may require an endorsement. A statement on</p>								
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>								
TYPE OF INSURANCE	DATE WHEN	POLICY NUMBER	POLICY TYPE	POLICY PERIOD	LIMITS			
<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR	Y	5200732	12/18/2022	12/15/2023	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 500,000 MEDICAL EXPENSE \$ 100,000 PERSONAL AND AUTO INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS/COMPLETION \$ 4,000,000			
<input type="checkbox"/> AUTOMOBILE LIABILITY ANY AUTO: <input type="checkbox"/> BODILY INJURY <input type="checkbox"/> AUTO THEFT <input type="checkbox"/> MEDICAL <input type="checkbox"/> AUTO ONLY					COMMERCE TRUCKS/BIKE \$ BODILY INJURY \$ BODILY INJURY \$ PROPERTY DAMAGE \$ AUTO THEFT \$			
<input type="checkbox"/> LIABILITY <input type="checkbox"/> EXCESS LIABILITY					EACH OCCURRENCE \$ AGGREGATE \$			
<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY EMPLOYER (NON-EMPLOYER/ORGANIZATION) CONTRACTOR/EMPLOYEE (EMPLOYER IN THIS STATE) OCCUPATIONAL ACCIDENTS/OPERATIONS					SICK \$ SICK \$ ALL ACCIDENT \$ ALL OCCASION - EMPLOYEE \$ ALL OCCASION - POLICY LIMIT \$			
<p>DESCRIPTION OF OPERATIONS (LOCATIONS, VEHICLES, SECOND TO, SUBSIDIARY, REVENUE, SEVERAL, MAY BE EXCLUDED IF MORE THAN 10000000)</p> <p>RE: Food Service Management Company to Manage District's Child Nutrition Program.</p> <p>As respects to General Liability, if required by written contract the following are included as additional insured as per the policy form CG0010. The Modern Local Board of Education and the Town of Windsor Locks.</p> <p>As respects to General Liability, 30 days notice of cancellation will be provided as per the policy form. Insurance of the type indicated by the policy applies to the insured operator at the site of the project or incidental thereto, which are undertaken by the Contractor during the performance of the contract.</p>								
CERTIFICATE HOLDER				CANCELLATION				
				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  THUMBPRINT REPRESENTATIVE 				
ACORD 25 (2016/03)				© 1988-2013 ACORD CORPORATION. All rights reserved. The ACORD name and logo are registered marks of ACORD.				

## Certificate of Insurance

# Writing of Proposal



## Meeting Your Evaluation Criteria

Whitsons has a complete understanding of your program and service requirements, and is able to perform under the terms and conditions of the RFP without conditions or qualifications beyond prescribed limits. All required documentation has been noted and provided within each applicable section in accordance with the RFP requirements.

Criteria	Documentation	Location in Proposal
<b>Cost/Financial Proposal</b>		
Offeror's proposed meal rate for fixed price program, and detailed proposal for this program. The lowest overall cost proposal that meets all food specifications and RFP criteria will receive the highest points value.	Submit completed proposal summary form	Separate Contract and Required Documents Envelope
Current audited financial statements with a reasonable explanation for any deficits.	Provide a copy of your company's most recently audited financial statements. Statements should reflect the bidder is in good financial health.	Exhibits USB; Section 1' Folder
<b>Promotion of Health and Well-being of Students</b>		
FSMC must demonstrate their commitment to creating a healthy environment dedicated to supporting the SFA efforts to provide whole child support and wholesome scratch made food that encourages student participation and wellness. Menus and specialty items should be created to reflect the individual preferences and culture at each campus.	Plan for menu creation, Plan for introducing new menu items. Marketing techniques for the promotion of healthy choices and trying new foods. Serving presentation plans to help promote appealing and enticing food items. Menu item signage to assist in item identification and origin. Techniques for evaluating student satisfaction and participation (metric). Nutrition education events schedule of events.	Section 2, pages 13-45 Section 2, pages 48-66 Section 2, pages 67-72 Section 2, pages 73-74 Section 2, pages 75-87
<b>Local Food Products</b>		
Offerors experience and relationships with local purchasing and local food sources.	Lists of local purchasing vendor relationships including their practices for rinsing, cleaning, packaging and storage.	Section 3, page 89-96 Exhibits USB; Section 3' Folder
	Plan for promotion/identification of local products during service (description to include seasonality and or farm/facility of origin). Reporting of local products to SFA including metrics.	Section 3, page 89-96 Exhibits USB; Section 3' Folder
<b>Hormone and Pest Practices</b>		
Offeror is committed to good stewardship of the land and to serving produce grown safely and without the use of chemicals that are harmful to child health.	Narrative and examples of commitment to good stewardship of the land and to serving produce grown safely and without the use of chemicals that are harmful to child health.	Section 3, page 97-99 Exhibits USB; Section 3' Folder
<b>Animal Welfare</b>		
Offerors commitment to the development of menus and recipes to support animal welfare.	Any certifications or documentation that supports Offeror's Hormone and Pest Practices.	Section 3, page 99 Exhibits USB; Section 3' Folder
<b>Contracting with Small and Minority Businesses, Women's Business Enterprises and Labor Surplus Area Firms</b>		
Points will be given to Offerors who prioritize contracting with small, minority businesses, women's business enterprises & labor surplus area firms.	Documentation of contracts with MBE, WBE and Labor Surplus Area Firm.	Section 3, pages 100-101 Exhibits USB; Section 3' Folder

PROPOSAL FOR CHICAGO INTERNATIONAL CHARTER SCHOOL 3

## Developing a Strategic Plan Specifically for [REDACTED]

Communication is key when it comes to building the right program for your students. That's why it is important to us that we establish a close-knit partnership with your administration, onsite food service team and community in order to have a complete understanding of your short- and long-term goals, objectives, historical performance and student preferences. Your main goals as we understand them include:



Establishing CICS as a premiere showcase account in Illinois, setting the standards for a best in class dining program by bringing an RD-credentialed manager and experienced culinarians on staff to elevate quality and service.



Collaborating with the CICS team to implement the Simply Rooted philosophy by using more scratch-cooked meals featuring wholesome, clean and local ingredients that are less processed, lower in fat and fiber-rich to improve food quality.



Building participation and improving financial performance by increasing student engagement in meals through enhanced local purchasing, scratch cooking, authentic, culturally relevant flavors, sampling events and trendy menu promotions.



Improving the eating habits of students, as well as their knowledge of nutrition, through an interactive relationship with the health education and marketing programs at all levels of the school system.



Incorporating our Guest Chef program and Chefology 101 to allow students to develop lifelong habits and potential employment skills.



Promoting eco-friendly sustainability, Farm-to-School initiatives and a commitment to menu diversity that meets a wide range of palates.

As part of our commitment to CICS, we will maintain ongoing, authentic communication with all school community stakeholders and report monthly on our progress to ensure all facets of the program continue to meet your expectations. Following are some of the ways we believe we can achieve your vision for your school nutrition program.

# Draft, Edits & Final Pieces

- All Custom Narrative Writeups from Salesperson
  - Service Plan, References, Resumes, Menus, Misc.
- Financial Writeups and Schedules Finalized
- Duly Signed, Notarized, Approved Forms, Bonds, Insurance, and Requested Documents
- Electronic/Paper Exhibits

**Create Draft Folder in Client Prospect.**

**Export Narrative to PDF and Save Here.**

**Insert All Other Pieces in the Right Place and Save.**

**Copy Exhibits Folders Over for Review.**

**Notify Salesperson and Wait for Changes/Green Light!**

# Fulfillment

## PROPOSAL FULFILLMENT REQUEST

PROPOSAL:	[REDACTED]		
SHIP DATE:	[REDACTED]		
<b>PRINTING FULFILLMENT</b>			
# BINDERS	2	TABS	1-7
PTOUCH LABELS	2: Original & Chicago Intl Charter School IL		
FILE TO USE	CICS PURE.pdf (complete version in folder for insert references)		
DIRECTORY	Sales/Proposals/2023 Proposals/[REDACTED]		
SPECIAL	There is a technical proposal and a price proposal to be sealed separately		
<b>ELECTRONIC EXHIBITS</b>			
#USBs	1	DIRECTORY:	[REDACTED]
INSTRUCTIONS:	Place in front of binder, including <b>Wikipaps'</b> copy		
<b>TECHNICAL PROPOSAL PAPER INSERTS "FULL PROPOSAL"</b>			
ORIGINAL FORMS	INSERT	WHERE IN PROPOSAL?	
On Letterhead	Cover Letter	Behind Paul Page before TOC - <b>revised</b>	
<b>PRICE PROPOSAL PAPER INSERTS "CONTRACT &amp; REQUIRED DOCUMENTS"</b>			
COPIES	1 original in envelope; 1 for us	DIRECTORY:	Found in Sales/Proposals/2023 Proposals/2367 Chicago International Charter School IL/Fulfillment/PRICE PROPOSAL
ORIGINAL FORMS	INSERT	WHERE IN PROPOSAL?	
	<p><b>Price Proposal COMPLETE letter plus Proposal forms in this order:</b></p> <ul style="list-style-type: none"> <li>• Bid Pricing sheet (no signature required) plus labor page</li> <li>• Exceptions</li> <li>• Independent Price Determination Certificate</li> <li>• Proposal Agreement</li> <li>• Bid Rigging Certification</li> <li>• Certificate of Independent Bid Determination</li> <li>• Certification Regarding Debarment</li> <li>• Certification Regarding Lobbying</li> <li>• Disclosure of Lobbying Activities</li> <li>• MBE Certificate</li> <li>• Addendum #1 and 2 (signed)</li> <li>• Bid Bond and Surety</li> <li>• Certificate of Insurance (2)</li> </ul>	<p>*Already combined in electronic as one single file; just need to replace documents in original</p> <p>Please check originals against this to make sure that all pages match and that originals aren't missing any COIs, full addendums, etc.</p>	



Do You Have Everything?

# Post-Proposal Possibilities

- **Presentation & Handout Request**
- **Follow-up Questions/Clarifications**
- **No Bids**
- **Bid Thrown Out – Will Need to Resubmit**
- **Bid Award – Yay! Onsite Proposal Created**
- **Bid Lost – Boo! File It Away**

# Timelines

- **Read RFP & Send Info Outline; Submit forms for signatures – within 3 days of notification**
- **Info Outline Returned (Except financials) – within 48 hours – will need to keep track of outstanding information**
- **Final Financials, Bonds, Insurance & Forms Finalized – 4 business days before due date**
- **Final Draft Approved & Sent to Fulfillment – 3 business days before due date**
- **Ship date – 2 business days before due date**

# Proposal Development Tools

## Software:

- MS Office Suite – info gathering, communications, exhibits, tracking, and general administration
- MS Teams – shared documents, meetings
- Adobe PDF – RFPS, filling out forms
- Adobe InDesign – proposal template narrative
- Adobe InCopy – linked text for proposal templates
- Adobe Photoshop – proposal graphic formatting
- PandaDoc – filling out electronic forms
- Salesforce – client contact information
- UPS – create labels for shipping
- Upload sites –RFP required electronic upload websites

# Proposal Development Tools

## Physical Resources:

- Printers & Printer Supplies
- Binders
- Tabs (Regular & Mini)
- Shipping Labels
- Letterhead
- USBs, Labels & Holders
- Shipping: Boxes, Envelopes, Foam, Bubble Wrap, etc.
- Corporate Stamps & Seals
- Folders



# Proposal Development Tools

## Network:

- Sales/Client Prospects (RFP & Salespeople info; Save Drafts)
- Sales/Proposals
  - Proposal Templates, Info Forms, & Exhibits
  - Information Library
  - Graphics
  - InCopy Documents

**Let's Take a Tour...**

A close-up photograph of a person's hands holding a large bunch of fresh red radishes with green leaves. The radishes are vibrant red and have small white roots. The person is wearing a dark blue shirt. A purple banner with white text is overlaid on the image.

**Take a Break!**

# Reading an RFP

## What to Look For:

- Account Name, Project Title & Bid Number (if applicable)
- Due Date & Time
- # Paper (Hard) Copies, # Originals, # Electronic
- Contact Person & Shipping/Mailing Address
- Financial Construct
- Checklists, Criteria for Submission, Proposal Format
- Verify All Forms Required Are Included
- Keywords: vendor/bidder must submit, include, attach, etc. with its bid/proposal; documentation required

# Parts of a Proposal

## Within Document:

- Cover Page
- Table of Contents
- Statement of Confidentiality
- Section Header Page & Inside Pages
- Criteria Charts

## Inserted into Final PDF:

- Cover Letter
- Forms & Documentation
- Financial Schedules OR Separate Price Proposal PDF file

## Physically Inserted During Fulfillment:

- Paper or USB Exhibits
- Electronic USBs of Proposal

# Standard Proposal Sections

- Executive Summary
- Documentation (sometimes in another section; sometimes separate)
- Financials/Pricing
- About Company/References
- Full Service Plan
- Menus & Menu Development
- Marketing
- Nutrition/Allergens
- Community & Communication
- Management, Org Charts, & Resumes
- HR Policies & Benefits
- Training
- Quality Assurance
- Purchasing/Local Purchasing
- Accounting & Reporting
- Sustainability

# Let's Take a Look!

## Review of:

- Proposal Narrative
- Complete Proposal
- Exhibits

A wooden crate filled with fresh produce. The crate is made of weathered wood and contains a variety of items: a bunch of green leafy vegetables (possibly spinach or chard) in the top left; a bunch of green beans tied together in the top right; a red tomato, a green cucumber, and a purple eggplant in the middle; a large orange carrot, a green zucchini, a purple onion, a bunch of red tomatoes, a bunch of purple grapes, a large orange squash, a bunch of green leafy vegetables (possibly spinach), and a bunch of green beans in the bottom. The produce is arranged in a rustic, natural way.

**End of Day 1!**

SIMPLY ROOTED™  
*in food & family*

