



Food Service Management Company (FSMC) Webinar

Evaluation Criteria: Expectations and Best Practices

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TEXAS DEPARTMENT OF AGRICULTURE
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Food and Nutrition Division
National School Lunch Program



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www.SquareMeals.org

Reminders on Federal Guidance:

Per §210.16

The SFA is responsible for ensuring the FSMC operates the program according to the contract and in compliance with all regulations and guidance; contracting with an FSMC does not release the SFA from any responsibilities for the CN programs

Per §200.318

All standards of conduct must be followed by officers, employees or agents of the SFA that are engaged in the selection, award and administration of contracts

Per §200.319(b)

SFA must not allow the FSMC or their affiliated companies or contractors to participate in the preparation of the FSMC RFP. Any FSMC participation would prohibit the FSMC from being selected



Reminders on State Guidance:

Per Texas Education Code §44.0351 (c)

SFA shall award a competitively bid contract at the bid amount to the bidder offering the best value for the district.

Per Texas Education Code §44.0352 (d)

The SFA shall select the offeror that offers the best value for the district based on the published selection criteria and on its ranking evaluation.

Per Texas Local Government Code §271.032

SFA's purchasing objective is to purchase the best products, materials, and services at the lowest practical prices within relevant statutes and policies. Procurement policies must accommodate the school district's unique operating environment and needs.



You understand and acknowledge that you are responsible for knowing and understanding all handbooks, manuals, alerts, notices, and guidance as well as any other forms of communication that provide further guidance, clarification or instruction on operating the program.

This discussion is designed for CEs with a Food Service Management Company (FSMC) to ask guidance related questions and to share best practices when managing the FSMC contract. This intended for CEs and not FSMC representatives.



Objectives

- Evaluation Committee Instructions and Responsibilities
- Responsive, Non-responsive and Overly Responsive Proposals
- FSMC Score Card Instructions
- Scoring Criteria
- Score Card
- Reference Check
- TDA Review Process

Evaluation Committee Instructions and Responsibilities

- Must have a minimum of 3 but no more than 5 members on the committee
 - Include subject matter experts and stakeholders
 - Understand time commitment
 - Selection of committee should be prior to the receipt of responses
 - Designate a Committee Chair (usually the contract developer)
- Must independently assess the content of each response using only the evaluation criteria and weights published in the RFP
- Must critically read and evaluate the responses, and document decisions in a clear and concise manner
- Sign a non-disclosure agreement
- No conflicts of interest



Responsive, Non-responsive and Overly Responsive Proposals

RESPONSIVE

- ✓ All documents and responses to RFP are submitted
- ✓ On time
- ✓ Straight forward and concise information
- ✓ Vendor signatures included

NON-RESPONSIVE

- Incomplete forms
- Submitted after deadline
- Inclusion of false or misleading information
- Conditional responses
- Added terms and conditions

OVERLY RESPONSIVE

- Value-added responses (using general terms instead of what is specifically defined)
- Offer of goods/services not solicited in the RFP (adding equipment or services)
- High guarantee



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FSMC Score Card Instructions

- Must score each response on how it meets, exceeds or fails to meet the standards established in the RFP
 - Must document specific reasons (justification) when scoring is less than maximum points
- Scoring is based on the proposal criteria approved by TDA (RFP Evaluation Criteria, Page 9)
 - Maximum points may require justifications, as necessary
- Scoring for price/cost, years of experience and guarantee are objective and must be scored uniformly
 - All scores should be the same for each committee member



Scoring Criteria

- Price/Cost
- Experience
- Guarantee
- Service Capability Plan
- Financial Conditions/Stability, Business Plan
- Accounting and Reporting Systems
- Promotion of CNP
- Personnel Management/Staffing considerations
- Student Engagement
- Other



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Price/Cost Score Methodology

- Must be maximum points on criteria
- Based on the formula:

PRICE SCORE = (lowest price/price of response being evaluated) X maximum number of available points

Example: CE received three proposal responses with the following price totals:

Proposal 1: \$1,000

Proposal 2: \$1,500

Proposal 3: \$2,000

Price Score on Proposal 1 = $(1,000/1,000) \times 25 = 25$

Price Score on Proposal 2 = $(1,000/1,500) \times 25 = 16.67$

Price Score on Proposal 3 = $(1,000/2,000) \times 25 = 12.5$



Experience

- Based on years of experience working with various programs
- Experience level of FSMC
- Reference letters
- Experience in operating school districts of similar Child Nutrition Programs
- Requirements of excessive experience is not allowed
- Criteria outlined in score card
 - Maximum 10 points
 - 10+ years = 10 points
 - 9 years = 9 points
 - 8 years = 8 points, etc.



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Guarantee

- FSMC guarantees to meet fiscal goals set by the SFA
- If contract contains guarantees, the contract should also contain language that ensures that the FSMC bears responsibility for failure to meet the goal
- Max is 5 points
- No points awarded for offering a guarantee less than or more than
- No score is provided if not included in RFP
- Scoring is objective and must be uniform across all committee members



Service Capability Plan

- Include information necessary to substantiate that FSMC can meet a product or service requirement
- Response of “will comply” or merely repeating the requirement is not sufficient
- Examples of implementing various strategies, processes and systems to maximize school resources
- Narratives describing continuous process improvement leading to better, faster services at schools with examples and how they are applicable to your schools and school environment
- Document specific differences to determine different scores
- If there are no differences between FSMC proposals, scores shall be the same



Financial Conditions/Stability, Business Plan

- Demonstrate financial stability
- Demonstrate profitability for the last three years
- Documents to review include:
 - Most recent independent financial or single audit
 - FSMC annual financial report or certified financial statement from the most current year of operation, prepared by a CPA
 - Assurance with food safety requirements



Accounting and Reporting Systems

- Review each FSMC accounting and reporting system
- If one is better than another and given a better score, the specific system must be noted in justification
- If systems are similar, then scores should be the same
- If there are issues with invoicing, billing or providing credits properly for USDA Foods, the FSMC cannot receive the maximum points **EVEN IF** they have an excellent software system in place



Promotion of Child Nutrition Programs

- Demonstrate how it adds new food items and incorporates USDA Foods items into menu cycle
- Demonstrate increase participation including expected trends and strategies to increase breakfast and lunch participation in secondary schools
- Strategies to review:
 - New foods or recipes that might be implemented
 - Flexibility in the promotion of the school food service program depending on relevant desired outcomes or goals
 - Provide evidence of partnership with your client on desired initiatives
 - Share unique ideas for our breakfast, lunch, and ala carte programs
 - Provide evidence that involves employees to use their expertise and experience for innovation
 - Demonstrate performance in promotion of the school food service program and results of past promotions



Personnel Management/Staffing Considerations

- Must meet Professional Standards and any requirements listed in RFP (additional education, bilingual skills, certifications)
- Review organizational chart and a detailed plan for the administration, supervision, and staffing proposed under the specifications of your RFP
- Ensure you have the actual resume and background of the person who will supervise staff and work with your Contract Manager
- Description of how FSMC will ensure the best performance
- Description of training opportunities and agendas for the year
- Narrative with examples of partnership to meet CE desired initiatives
- Cannot receive maximum points if not ALL conditions are met



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Student Engagement

- Provide examples from different clients of involvement of students, staff and patrons
- Examples of efforts and results regarding involvement of students, teachers, building administrators and parents in program evaluation and selection of menus, discussion of nutritional issues, etc.
- Examples of surveys and how results/requests were responded to and what actions were taken
- Involvement cooperative education programs
- Expertise and involvement in evening events and/or community events or community engagement
- Experience of proven customer service excellence to all patrons including references to support the level of involvement



Other

- Must be outlined in RFP
- Some examples include:
 - Nutrition education
 - Reference checks
 - History with like school systems
 - Utilization of USDA Foods entitlement
 - Or other criteria not included in other sections



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Score Card – FORM A

Individual Review

FSMC Proposal Score Card Form A
(One form required per vendor and per committee member)

School Food Authority (SFA) _____ SFA Employee _____

Vendor/Offeror Name _____

Criteria	Possible Points	Points Granted	Justification for Scoring *
Cost – The FSMC with the lowest price receives the maximum points. The other vendors receive points equal to the lowest price divided by their meal price multiplied by 25 (or maximum points) - Do not round. - 25 points or more			
Guarantee in RFP Included in Proposal. (No points for increased guarantee or not meeting guarantee) Maximum of 5 points			
Years of Experience in working with Child Nutrition Programs – Maximum of 10 points 10+ years = 10 points 5 years = 5 points 9 years = 9 points 4 years = 4 points 8 years = 8 points 3 years = 3 points 7 years = 7 points 2 years = 2 points 6 years = 6 points 1 year = 1 point			
Determined by CE			
Determined by CE			
Determined by CE			
Determined by CE			
Determined by CE			
Determined by CE			
Determined by CE			
Determined by CE			
Total Points	100		

*Scorecards must include detailed justifications.

Attestation: Under the penalty of perjury, I attest that no one discussed scoring or evaluation preferences with me that would alter my score in one direction or another. My evaluation was done alone and solely based on my evaluation of the material presented. I have read the evaluation committee responsibilities and affirm I have no conflicts of interest with any vendors who have submitted proposals.

Printed Name of Committee Member _____

Signature of Committee Member _____ Date _____

Score Card – FORM B

Committee Member Signatures

SMC Vendor Committee Scoring Summary Form B

Committees should be composed of a minimum of 3 and a maximum of 5 evaluators.

Committee Member	Name of Vendor 1	Name of Vendor 2	Name of Vendor 3	Name of Vendor 4	Name of Vendor 5
Totals					

Record each committee member's name in the 1st column. Record each member's total score for each vendor. Total all responses. The vendor with the highest score is the most responsive and responsible offeror.

Signatures –
 A signature below affirms that the scores provided were independently derived, without influence, bias, or edit, for the purpose of evaluating the proposals submitted for FSMC vendors. Further, by signing below, each evaluation committee member affirms that a conflict of interest does not exist regarding the responsive vendors for this FSMC RFP and ontract.

Signed: _____
 Committee Member 1

Signed: _____
 Committee Member 2

Signed: _____
 Committee Member 3

Signed: _____
 Committee Member 4

Signed: _____
 Committee Member 5

Signed: _____
 Committee Member Head/Observer/Other

Reference Checks

1. Contract developer conducts reference checks
2. All information must be documented in writing
3. Same script or format of questions must be used when conducting reference checks
4. Questions must be prepared prior to the solicitation closing date
5. Keep in mind the types of questions to which its agency would respond; information should be objective as possible
 - Avoid endorsements or lengthy questionnaires
6. For a reference of a current FSMC partner, the CE cannot be its own reference
7. Sample questions:
 - Why did you select this vendor over others?
 - Did the vendor stay within approved timelines of projects and/or budget?
 - What is your relationship like with the vendor?
 - Do they maintain good communications and engagement?
 - How are they through the AR/PR process?



TDA Process

1. Evaluation criteria information and proposed selection due on April 1, 2024
2. Review documentation and check all score cards
3. Discuss any variances or concerns regarding scoring and validate committee responses
4. Provide final approval via email and document
5. Complete process with documentation back to you before May 1st, 2024



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Best Practices

1. Submit information on time to allot for review and feedback and meet your internal deadlines
2. Read the TDA instructions guide thoroughly
3. Follow through on all your procurement processes and ask questions
4. Document justifications
5. Committee member signatures
6. Committee chair signature on standards of conduct statements



Resources

[TDA Food Service Management Company Request for Proposal/Contract SY 2024-2025](#)

[Texas Procurement and Contract Management Guide Version 3.0](#)

[TDA Procurement and Contract Management Policy Handbook Version 1.0 – March 21, 2022](#)

[Texas Education Code](#)

[Texas Education Agency Contract Management Handbook](#)



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mail:

U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;

fax: (202) 690-7442; or email: program.intake@usda.gov.

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QUESTIONS?



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