

## RFP 19-0034

### EXHIBIT 2

#### Equivalent Product Request Process and Deadlines

If the item specifications indicate "or equal" proposers may offer products equivalent to those identified on the Attachment – Price Proposal/Product Specifications Form (See SECTION V - ATTACHMENTS). The District will review equivalent products for approval via the Equivalent Product Request Process. **Products submitted that do not follow this process will NOT be evaluated.**

In making a request the Proposer represents they have personally investigated the substitute/equivalent product and determined that it is equal or superior in all respects to that specified.

**IMPORTANT:** Only one (1) equivalent item per proposal item may be submitted for evaluation. Submitting more than one (1) equivalent item per proposal item may result in the rejection of all the equivalent items submitted for the proposal item.

**The determination of equivalency shall be based solely on the opinion of the District.**

#### DEADLINES FOR SUBMITTING EQUIVALENT PRODUCT REQUESTS

**Equivalent product requests required documents and samples submitted after the dates below will NOT be accepted and the equivalent product request will not be approved.**

1. Equivalent product request documents due – Tuesday, December 10<sup>th</sup>, 2019
2. Equivalent product request samples due – Tuesday, December 10<sup>th</sup>, 2019

#### EQUIVALENT PRODUCT APPROVAL REQUEST PROCESS

1. Complete and submit required documents.
  - a. **ALL** required equivalent product request documents **MUST** be provided in an electronic format on a USB flash drive or a cd. **NO HARD COPIES WILL BE ACCEPTED.**
    - i. Acceptable formats are:
      - A. PDF
      - B. Microsoft Word
      - C. Microsoft Excel
    - ii. Files **MUST** be named using the following naming convention, failure to use this convention may result in the Equivalent Product Request not being evaluated.
      - A. RFP Item # - document type code(s) (multiple codes to be used if more than one document type is in the file) – Manufacturer Name – Manufacturer Product Code – Product Name
        - (i) Example 1: C1 – ER – Widget Co. – 9876 – Spicy Widgets
        - (ii) Example 2: C1 – NF-IL-PF – Widget Co. – 9876 – Spicy Widgets
      - B. Document type codes:
        - (i) Equivalent Product Request form – ER
        - (ii) Nutrition Facts – NF
        - (iii) Ingredients List – IL
        - (iv) CN Label – CN
        - (v) Product Formulation Statement – PF
        - (vi) Preparation Instructions – PI

- b. Equivalent Product Request form (See SECTION V ATTACHMENTS).
  - i. Proposals for equivalent products will only be considered when provided on this completed and **signed** form for **EACH** item submitted as an equivalent product.
  - ii. Equivalent products offered without this form will be rejected.
  - iii. Combined requests will be rejected. One (1) form is required per equivalent product submitted.
- c. Required product information.
  - A. Nutrition Facts Label
  - B. Ingredient List
  - C. CN Label OR the appropriate Product Formulation Statements
  - D. Preparation Instructions
  - ii. The required documents must be **current within the last three (3) years or;**
  - iii. they must be accompanied by a signed statement from the manufacturer guaranteeing that the information is still current and accurate.

2. Samples

- a. A minimum quantity 25 CN servings is required as a sample. Samples must be furnished to the District at no charge for each equivalent product being proposed.
  - i. **Proposers are ENCOURAGED to provide the minimum number of CN servings or one broken unit (example: one bag from a 6-bag case containing 50 servings) instead of an entire case.**
- b. All samples MUST have a copy of the Attachment Equivalent Product Request (see SECTION V ATTACHMENTS) for the item attached to the sample's bag, box, or container.
- c. Multiple samples are allowed in one shipping container.
- d. All sample shipping containers MUST be clearly marked with the following information:
  - i. RFP number
  - ii. Number of samples in shipping container.
  - iii. Name of manufacturer submitting Equivalent Product Request
  - iv. Manufacturer or manufacturer representative contact information
    - A. Company Name
    - B. Contact Name
    - C. Phone Number
    - D. Email address
  - v. Attachment Equivalent Product Request Sample Label (see SECTION V ATTACHMENTS) may be used.
- e. If not destroyed or mutilated in testing, samples will be either disposed of by the District or retained to determine that the quality of items delivered are comparable to the sample.

3. Samples, Equivalent Product Request forms and supporting documents must be submitted to:

a. **Samples**

- i. Nutrition Services Attn: Dan Kolp  
10740 NE Walker Rd  
Entrance D1  
Beaverton, OR 97006

**b. Forms and Documents**

- i. Purchasing Manager – RFP # 19-0032  
Beaverton School District  
16550 Merlo Rd  
Beaverton, OR 97003

**EVALUATION OF PRODUCTS.** The determination of equivalency shall be based solely on the opinion of the District. The following process detailed below will be used to evaluate the offered equivalent products.

## **Equivalent Product Evaluation Procedure**

### **Purpose**

- The purpose of this procedure is to document the procedure for the evaluation of products submitted as equals to a specified product in a solicitation for food products.

### **Evaluation**

- The evaluation process is a blind process, evaluators are to have no knowledge of who the respondents to the solicitation are.
- All products submitted as equivalents will be compared to the specified product for nutritional equivalency and undergo a taste test comparison with the specified item.
- If the submitted product's taste test score is greater than or equal to the specified product AND the nutritional evaluation has determined the submitted product is equal nutritionally then the submitted product will be considered equal.

### **Nutrition Evaluation**

- A registered dietitian will compare the calories per serving, fat (g) per serving, sodium and the nutrition facts panel for equivalency to the specified item. This is a subjective evaluation dependent on the education, expertise and experience of the registered dietitian.

### **Taste Test**

- The testing panel will consist of at least 3 members of BSD Nutrition Services Staff. At the districts discretion the panel may include additional individuals such as staff from other departments or students.
- Products will be evaluated on:
  - Overall appearance
  - Flavor profile
  - Texture
- Individual criteria will be given a score of 1 to 10. 1 the lowest score, 10 the highest.
  - Scores for all criteria will be totaled.
  - Total scores will be compared to the score of the specified product.