

School District Five of Lexington and Richland Counties  
Request for Proposal (RFP) #2018-12  
Food Service Management System



November 28, 2017

Education Management Systems, Inc.  
2528 Independence Blvd.  
Wilmington, NC 28412

Jeff Flynn  
800 541 8999  
[jeff@mealsplus.com](mailto:jeff@mealsplus.com)



November 28, 2017

Ms. Lynda Robinson  
School District Five of Lexington and Richland Counties  
1020 Dutch Fork Rd.  
Irmo, SC 29063  
RFP # 2018-12 Food Service Management System

Dear Ms. Robinson:

This letter will serve as our transmittal letter for the above referenced proposal.

The signature below acknowledges that we have read and understand the specifications and terms & conditions of this RFP and resulting contract if awarded.

We warrant that Education Management Systems, Inc. is duly qualified to perform the work and will perform such in accordance with the contract if awarded.

Education Management Systems, Inc. believes that it is the best qualified vendor to perform the engagement for the following reasons:

- The technical superiority of the Meals Plus system
- Ease of use
- The breadth and depth of the Meals Plus product line
- Commitment to K12
- Company capabilities, approach and experience
- South Carolina experience and market leadership
- Customer service commitment and track record

We appreciate your consideration.

Respectfully,

A handwritten signature in black ink, appearing to read "Jeff Flynn", is written over a horizontal line.

Jeff Flynn, Vice President



School District Five Of  
Lexington and Richland  
Counties

**District Five of Lexington  
and Richland Counties**

**Request for Proposals**

Solicitation #	2018-012
Date Issued	October 24, 2017
Procurement Official	Lynda Robinson
Phone	(803) 476-8140
E-Mail Address	ljrobins@lexrich5.org

DESCRIPTION	Food Service Management System
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*The Term "Offer" Means Your "Bid" or "Proposal"*

SUBMIT OFFER BY	November 28, 2017 11:00 am
QUESTIONS MUST BE RECEIVED BY	November 7, 2017 4:00 pm
NUMBER OF COPIES TO BE SUBMITTED	1 original and 4 copies

Offers must be submitted in a sealed package. Solicitation number & Opening Date must appear on package.

SUBMIT YOUR SEALED OFFER TO:

**District Five of Lexington and Richland Counties  
Purchasing Office  
1020 Dutch Fork Road  
Irmo, SC 29063**



CONFERENCE TYPE: Pre-bid Conference DATE & TIME (EST) As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions	LOCATION: Not Applicable
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<b>AWARD &amp; AMENDMENTS</b>	The award, this solicitation, and any amendments will be posted at the following web address: <a href="http://www.lexrich5.org/Page/16458">www.lexrich5.org/Page/16458</a>
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You **must** submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of sixty (60) calendar days after the Opening Date.

NAME OF OFFEROR (Full legal name of business submitting the offer) Education Management Systems, Inc.	OFFEROR'S TYPE OF ENTITY: (Check one) <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (tax-exempt) <input checked="" type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) <input type="checkbox"/> Other _____ (See "Signing Your Offer" provision.)
AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.) 	
TITLE (Business title of person signing above) Vice President	
PRINTED NAME (Printed name of person signing above) Jeff Flynn	DATE SIGNED 11-28-17

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror above. The entity named as the Offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.

STATE OF INCORPORATION North Carolina (If Offeror is a corporation, identify the state of Incorporation.)	TAXPAYER IDENTIFICATION NO. 56-1661968
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COVER PAGE

PAGE TWO  
(Return Page Two with Your Offer)

<b>HOME OFFICE ADDRESS</b> (Address for Offeror's home office / principal place of business)  2528 Independence Blvd. Suite 200 Wilmington, NC 28412	<b>NOTICE ADDRESS</b> (Address to which all procurement and contract related notices should be sent.)  2528 Independence Blvd. Suite 200 Wilmington, NC 28412				
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Area Code: 800</td> <td style="width: 25%;">Number: 541-8999</td> <td style="width: 15%;">Extension: 4</td> <td style="width: 45%;">Facsimile: 910 799 5427</td> </tr> </table>		Area Code: 800	Number: 541-8999	Extension: 4	Facsimile: 910 799 5427
Area Code: 800	Number: 541-8999	Extension: 4	Facsimile: 910 799 5427		
E-Mail Address: <p style="text-align: center;">jeff@mealsplus.com</p>					

<b>PAYMENT ADDRESS</b> (Address to which payments will be sent.)  2528 Independence Blvd. Suite 200 Wilmington, NC 28412  <input checked="" type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address (check only one)	<b>ORDER ADDRESS</b> (Address to which purchase orders will be sent)  2528 Independence Blvd. Suite 200 Wilmington, NC 28412  Order E-Mail Address: <p style="text-align: center;">jeff@mealsplus.com</p> <input checked="" type="checkbox"/> Order Address same as Home Office Address <input type="checkbox"/> Order Address same as Notice Address (check only one)
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**ACKNOWLEDGMENT OF AMENDMENTS:** Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue.

Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date

<b>DISCOUNT FOR PROMPT PAYMENT</b>	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	Calendar Days (%)
	—	—	—	

**MINORITY PARTICIPATION**

Please answer the following question:

1. Are you certified as a MOB/WOB (minority-owned business/woman-owned business) by the State of South Carolina?  
 Yes  No  
 If yes, provide certification number: \_\_\_\_\_

**ATTACHMENT B**

**MINORITY PARTICIPATION AFFIDAVIT**

Is the bidder a South Carolina Certified Minority Business? [ ] Yes  No

Is the bidder a Minority Business certified by another governmental entity? [ ] Yes  No

If so, please list the certifying governmental entity: \_\_\_\_\_

Will any of the work under this contract be performed by a SC certified Minority Business as a subcontractor? [ ] Yes  No

If so, what percentage of the total value of the contract will be performed by a SC certified Minority Business as a subcontractor? \_\_\_\_\_

Will any of the work under this contract be performed by a minority business certified by another governmental entity as a subcontractor? [ ] Yes  No

If so, what percentage of the total value of the contract will be performed by a minority business certified by another governmental entity as a subcontractor? \_\_\_\_\_

If a certified Minority Business is participating in this contract, please indicate all categories for which the Business is certified:

- Traditional minority
- Traditional minority, but female
- Women (Caucasian females)
- Hispanic minorities
- DOT referral (Traditional minority)
- DOT referral (Caucasian female)
- Temporary certification
- SBA 8 (a) certification referral
- Other minorities (Native American, Asian, etc.)

(If more than one minority contractor will be utilized in the performance of this contract, please provide the information above for each minority business.)

The Department of Administration, Division of Small and Minority Business Contracting and Certification, publishes a list of certified minority firms. The Minority Business Directory is available at the following URL: <http://osmba.sc.gov/directory.html>  
[04-4015-3]

## Request for Taxpayer Identification Number and Certification

Give Form to the  
 requester. Do not  
 send to the IRS.

**1** Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**EDUCATION MANAGEMENT SYSTEMS, INC.**

**2** Business name/disregarded entity name, if different from above

**3** Check appropriate box for federal tax classification; check only one of the following seven boxes:  
 Individual/sole proprietor or single-member LLC  
 Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ \_\_\_\_\_  
 Note: For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.  
 Other (see instructions) ▶ \_\_\_\_\_

C Corporation     S Corporation     Partnership     Trust/estate

**4** Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  
 Exempt payee code (if any) \_\_\_\_\_  
 Exemption from FATCA reporting code (if any) \_\_\_\_\_  
*(Applies to accounts maintained outside the U.S.)*

**5** Address (number, street, and apt. or suite no.)  
**2528 INDEPENDENCE BLVD**

**6** City, state, and ZIP code  
**WILMINGTON, NC 28412**

**7** List account number(s) here (optional)

Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

**Note.** If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

<b>Social security number</b>											
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or											
<b>Employer identification number</b>											
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5	6	-	1	6	6	1	9	6	8		

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

**Sign Here**      Signature of U.S. person ▶ *[Signature]*      Date ▶ *4/10/17*

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at [www.irs.gov/fw9](http://www.irs.gov/fw9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.



WELLS  
FARGO

Wilmington Business Banking

Business Banking  
Triangle East South Region  
MAC D1614-021  
300 N Third Street, 2nd Floor  
Wilmington, NC 28401

11/17/2017

Mr. Ben Hooks, President  
Education Management Systems, Inc.  
2528 Independence Blvd Ste 200  
Wilmington, NC 28412

Re: Bank Reference

Dear Mr. Hooks:

I am writing to acknowledge Education Management Systems, Inc., as a well-known and valued customer of Wells Fargo Bank.

Education Management System, Inc. has banked with our organization for more than 25 years. All of their accounts are in good standing and have been managed in a satisfactory manner. The company has demonstrated growth and stability and we continue to have an outstanding banking relationship with them.

If you have any questions or need additional information, please call me at 910-342-2083.

Sincerely,



Paul Blalock  
Vice President  
Senior Relationship Manger  
300 N 3<sup>rd</sup> Street 2<sup>nd</sup> Floor  
Wilmington, NC 28401



**School District Five of Lexington and Richland Counties  
Request for Proposal (RFP) #2018-12 Food Service Management System**

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### **Company Profile**

Education Management Systems, Inc. (national K12 business software corporation)  
2528 Independence Blvd.  
Wilmington, NC 28412

51 of 53 company employees at this location- owner, corporate VP's, managers, supervisors, development staff, quality assurance, technical support and administrative

2 offsite employees:

Western US Sales- Costa Mesa, CA

Corporate SNS Consultant- Winston Salem, NC

Performance and contract issue contact:

Jeff Flynn, VP

910 398 6066

jeff@mealsplus.com

**(a) Background and Organizational Information Schedules**

**1) Briefly furnish your organization's history, legal form (sole proprietorship, partnership, corporation and State of incorporation), number and location of offices, number of employees, days/hours of operation and other pertinent data.**

Education Management Systems, Inc. is a U.S. based national corporation headquartered in Wilmington, North Carolina, which develops, markets and supports K-12 administrative software. Our company has been exclusively servicing K-12 schools since it was founded in 1989. The privately-held corporation has two distinct product lines: LINQ Financial Systems (School Accounting Software) and Meals Plus (School Food Service Software).

- 99% + customer retention rate
- Servicing 5,200+ cafeteria sites for over 600 district customers in 41 states, including all US Department of Defense schools
- Company Founder & CEO is former school district finance administrator
- 28+ years supporting the K-12 marketplace
- All Meals Plus support staff has on-site training experience
- All Meals Plus support staff hold at least Bachelor's Degree
- Microsoft and Cisco trained staff members
- 2X HDI Elite 50 Customer Service Award recipient
- 3X District Administration Magazine Top 100
- **Among the highest staff to customer ratio in the industry**

Our family-owned business is a financially stable corporation that is committed to growing in the state of South Carolina. Our business plans consistently show our commitment to being a premiere partner in K-12 business technology. We believe in a strong customer support and have proven success in our customer retention track record. Our comprehensive solutions are designed to help in your school district's productivity with a minimum level of upkeep and a maximum level of satisfaction resulting in being named a District Administration Magazine Top 100 Product 4 of the last 5 years. Additionally, Meals Plus has attained Elite 50 status for customer satisfaction ratings in 2015 and 2016 as measured by HDI, the world's leading tech support industry association.

Our school nutrition customers range in size from single location private schools up to a major metropolitan school district with 130 cafeterias. This segment tends to have a greater need for a robust product but one that is easy to learn and use with minimal technical upkeep.

Education Management Systems, Inc. has 51 full-time employees; 29 dedicated to Meals Plus. Our company has been involved in the child nutrition industry since 1989- 28 years.

**Meals Plus Organization Chart:**

- Program Development/Quality Assurance: 10 employees
- Customer Service/Tech Support/Training: 14
- Administrative/Management (shared): 5
- Sales: 5

**Our Vision**

“To be recognized as a premier solutions provider to the K12 education market for financial management”

**Our Mission**

“Provide efficient integrated tools for K12 administration & business management”

**Our Philosophy**

“Seek ambitious creative team players who delight in building lifelong customers”

**2) Disclose any conditions (e.g. bankruptcy or other financial problems, pending litigation, planned office closures, impending merger) that may affect your organization’s ability to perform contractually.**

There are no conditions that would affect our organization’s ability to perform contractually.

**3) Describe your professional liability insurance, including the type and level of coverage. Confirm you will notify the District at least thirty (30) days in advance of any material changes to this coverage.**

A certificate of insurance is included in this response following the signature page. Education Management Systems confirms that we will notify the District at least thirty (30) days in advance of any material changes to this coverage.

**4) Describe how your organization is properly licensed, bonded, and/or insured (both fidelity insurance and errors and omissions insurance).**

EMS is registered with the secretary of State for NC, registration number 0251461

EMS is registered with the North Carolina Bank of Commissioners, Money Transmitter License # 150130.

EMS has a general insurance policy with Hanover American Insurance. policy number OZ6-A654896-02

EMS has fidelity bond with Travelers Insurance. policy number 106189492

EMS has Professional/Error & Omissions policy with Beasley Insurance, policy number V12AFA170601


**Documentation available at the district's request**

5) **Certify that your organization and any principal of the organization is not prohibited, suspended or otherwise declared ineligible to contract or provide any services required hereunder by any federal, state, or local public agency.**

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**  
(Executive Order 12549, Debarment and Suspension, 34 CFR Part 85)

Education Management Systems certifies to the best of its knowledge and belief, that it and its principals:

- (a)  Are  are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
- (b)  Have  have not within a three-year period preceding award of this consulting agreement been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or Local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c)  Are  are not presently indicted for or otherwise criminally charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in Paragraph (b) above; and
- (d)  Have  have not within a three-year period preceding award of this consulting agreement had one or more public transactions (Federal, State or Local) terminated for cause or default.

  
\_\_\_\_\_  
Education Management Systems Signature

\_\_\_\_\_  
November 28, 2017  
Date

\_\_\_\_\_  
Jeff Flynn VP  
Typed or Printed Name

\_\_\_\_\_  
RFP #2018-12  
Contractual Agreement No.

**(b) Qualifications**

**1) Provide the length of time/experience in providing school food service management software systems.**

Education Management Systems has provided software solutions to K12 food service since 1989. The original systems were designed specifically for financial management of nutrition operations. Today Meals Plus software is running in over 5,500 schools in 41 states in districts ranging from 1 to 130 school sites.

**2) Provide a brief resume of the offeror's representatives to be assigned to this project.**

**Key Personnel Profile**

**Ben Hooks - President/CEO Education Management Systems, Inc.**

The company founder is a former K-12 school district Finance Officer, teacher and school software marketing representative. Ben oversees product development, marketing, financial management and overall strategic planning for the company. He spends approximately 10% of his time at customer school district sites.

**Jeff Flynn - VP Meals Plus Division**

Jeff has been with the company since February 2003 and oversees Meals Plus operations. He spends approximately 20% of his time at customer school district sites.

**Ellen Bashore - Director, Customer Service**

Ellen has over 20 years of technical support experience, working with companies such as McKesson, Inc. and Accenture. Since joining Meals Plus in February 2008, she has also served as a Technical Account Specialist and Assistant Manager of Support. She oversees Meals Plus product support, training and implementation, and spends approximately 10% of her time at customer school district sites.

**Dolly Whittington - Implementation & Training Specialist**

Dolly is the single point of contact lead for new customer implementations. She coordinates onsite trainers and supervises development of customer training materials. Dolly has served on the Technical Support Team for Meals Plus since June 2003. She is also involved in developing training videos for Meals Plus software.

**Cynthia Sevier, SNS – School Nutrition Operations Consultant**

Cynthia is a former major district director (Guilford County NC- 70,000 students) and Meals Plus customer who has over 30 years experience in all facets of school nutrition management.

**Judd Stohl - Development Manager**

Judd has been with Education Management Systems since March 2005. His sole experience is in development and implementation of Windows-based software and he is Microsoft Certified.

**Trish Williams – Quality Assurance Supervisor**

A former district Free & Reduced administrator, Trish has been with the company since June 1992. Her sole experience is in K-12 administration. She leads the Meals Plus product testing team and completed the CompTIA A+ certification.

**Julia Barnette – Business Analyst**

Julia has been with Meals Plus since March 2005 and is responsible for working with Management, Sales, Support, QA and Product Development teams to facilitate the enhancement of current products and development of new products and modules.

**3) Provide the number of personnel specifically available to the District and dedicated both routinely and in the event of an emergency.**

During implementation phase the project manager is the primary point of contact. Additionally the following staff are routinely available:

- Tech support supervisor
- Level 2 (2)
- Tech support staff (13)
- Customer service manager

For emergencies during and after implementation the following are available during normal business hours

- Implementation coordinator
- Tech support supervisor
- Tech support staff (10)
- Customer service manager

For emergencies during and after implementation the following are available outside normal business hours: (typically via cellphone, text or email)

- Tech support supervisor
- division VP

**4) Provide the name, location, and experience/background of the primary trainer(s) who will be providing training to the District.**

**Dolly Whittington - Implementation & Training Specialist**

Dolly is the single point of contact lead for new customer implementations. She coordinates onsite trainers and supervises development of customer training materials. Dolly is a former classroom teacher and has served on the Technical Support Team for Meals Plus since June 2003. She is also involved in developing training videos for Meals Plus software.

**5) Provide the name, location, and experience/background of representative(s) who will be providing service and assistance to the District staff in installing and maintaining the system.**

Profiles of the Meals Plus technical support team follow this page

## Meet the Meals Plus Support Staff

### Ellen

Ellen currently serves as the Director of Customer Service. She was previously Assistant Manager of the department and has served as a Technical Account Specialist. Prior to coming to Meals Plus in February 2008, Ellen had over 10 years of technical support experience, working with companies such as McKesson, Inc. and Accenture. She holds a Bachelor of Arts from the University of Mary Washington.

She enjoys working with her team and customers to make the Meals Plus help desk experience the best in the industry. In her spare time, Ellen spends time with her family, and is an active supporter of her daughter's school and gymnastics team. She is also an avid reader.



### Dolly

Dolly is the single point-of-contact for ALL new customer implementations. She coordinates onsite trainers and supervises development of customer training materials. Dolly has served on the Technical Support Team for Meals Plus since June 2003. She is also involved in developing training videos for Meals Plus software. Prior to Meals Plus, Dolly had over 15 years of experience teaching with New Hanover County Schools and Cape Fear Community College. She holds a Bachelor of Science in Special/Elementary Education from Old Dominion University.



### Debra

Debra serves as a Training & Implementation Specialist for the Meals Plus Support Team. Prior to joining Meals Plus in November 2014, she spent five years working for a major U.S. mobile carrier. There she provided outstanding customer service. She has a Bachelor in Business Administration, with a concentration in Information Systems from the University of North Carolina at Wilmington. In her spare time, she enjoys spending time with friends and family and going to the beach.



### Julia

Julia is an integral part of the Meals Plus Team as our Product Analyst; she works with the Development, and Support Team to ensure our cafeteria software meets your district's needs. Julia has been a member of the Meals Plus team since March 2005. Prior to employment with Meals Plus, Julia worked in IT and customer support with other local companies. She holds a Bachelor of Science in Computer Science and a Project Management certification from The University of North Carolina at Wilmington.



**Jared – Level 2 Technical Account Specialist**

Jared has been working with technical support and implementation teams since 2004 and enjoys solving client issues. Prior to joining Meals Plus in March 2012, Jared was a Professional Services Analyst at VisionAIR, a software company that catered to the Public Safety sector throughout the US. He has a Bachelor of Business degree with an emphasis on Computer Information Systems from Delta State University.

When not fulfilling his duties as the Level 2 Technical Account Specialist, he enjoys playing basketball and golf, and being outside as much as possible.



**Tony**

Tony serves as a Technical Account Specialist, and has been a part of Meals Plus since October 2012. He has many years of customer support dealing with various technological systems. As a part of the Meals Plus Team, he enjoys meeting new people and resolving their issues. In his spare time, Tony likes to volunteer, travel, and spend time with family and friends.



**Ira**

Ira has been a Technical Account Specialist for the Meals Plus Support Team since February 2013. Prior to joining Meals Plus, Ira worked for a nationwide criminal background screening company for five years. He has years of experience in technology, training, and providing top-notch support to clients. While at work, Ira enjoys training clients and troubleshooting technical issues. In his spare time he enjoys watching movies, traveling and spending time with his friends and family.



**Gordon**

Gordon joined the Meals Plus Team as a Technical Account Specialist in January 2015. He loves solving all types of puzzles and problems. His favorite part of working for Meals Plus is getting to visit new school districts and meet the people working in them. Gordon has ten years of Technical Support experience. He has a Bachelor of Arts from Appalachian State University. He exists primarily on a diet of coffee and ice cream. His motto is: "I'll go!"



### Tye

Tye joined the Meals Plus Team as a Technical Account Specialist in 2015. Prior to joining Meals Plus, she attended North Carolina A&T State University and accumulated nearly ten years of technical support experience. She enjoys writing poetry, painting, anything artistic and listening to music.



**Tye**  
TECHNICAL ACCOUNT SPECIALIST

### David

David serves as a Technical Account Specialist for the Meals Plus Support Team. David is a US Navy Veteran, and prior to joining the Meals Plus Support Team in January 2016, he spent seven years as an Information Technology Specialist for Novant Health, supporting hospital IT equipment and the transition to electronic medical records. At Meals Plus, David enjoys meeting new customers and assisting them with their technical issues. In his spare time, he enjoys traveling with his wife, playing video games, and living at the beach.



**David**  
TECHNICAL ACCOUNT SPECIALIST

### Bobbie

Bobbie joined the Meals Plus Team in January 2016. She has over 27 years of IT technical support and training experience in the K-12 education area. Her favorite part of being a Meals Plus Technical Account Specialist is helping customers solve their problems. In her spare time, she likes traveling, spending time with friends and family, watching movies, and enjoying as much beach time and outdoor activities as she can.



**Bobbie**  
TECHNICAL ACCOUNT SPECIALIST

### Chris

Chris is a Technical Account Specialist that has been with Meals Plus since April of 2016. He has over 14 years of customer support experience from various roles, including: account management, hotel management and customer service. He enjoys working with customers to make sure that our software is making their jobs easier every day. When Chris is not at work, he is spending time with his wife and two daughters. You will either find him at the beach, taking on home improvement projects or having fun with his kids!



**Chris F.**  
TECHNICAL ACCOUNT SPECIALIST

### Gideon

Gideon is a Technical Account Specialist that joined the Meals Plus Team In November 2016. He attended Johnson and Wales University and was a cook for the US Navy before switching careers to technology. He attended East Carolina University and worked full time while earning his degrees. Through his experiences in the restaurant and retail industries, he gained experience providing top notch customer support and always working hard to complete his goals. His motto: "Be Fearless."



### Nolin

Nolin joined the Meals Plus Team as a Technical Account Specialist in November of 2016. Nolin enjoys working at Meals Plus because he understands that being a part of this support team means assisting cafeteria staff that fuel our country's youth. Nolin graduated from the University of North Carolina at Wilmington with a Bachelor in Management Information Systems. In his free time, Nolin enjoys exploring historical places and scuba diving.



### Cynthia Sevier, SNS

Cynthia joined Meals Plus as a School Nutrition Operations Consultant in March 2012 after serving as a Child Nutrition Director for nearly thirty years. She retired from Guilford County Schools, NC, a district with 122 schools and student enrollment of 73,000. Cynthia cherishes the years of serving nutritious meals to thousands of children. She understands the greatest needs in today's school food service industry, as she has seen it develop greatly over the years.

Throughout her years in K-12 school cafeterias, her greatest satisfaction has always been seeing children enjoy the meals that her staff carefully planned and prepared. She has thrived on the challenge of being an advocate for her school food service program. In her spare time she enjoys family, Appalachian State football and flower gardening.

Cynthia's consulting services include: personnel training, pre-CRE reviews, menu preparation assistance, pre-Validation review, financial management consulting and KPI evaluation.



(c) Response to Checklist (See Attachment A for Checklist of Features Offered)

	<u>GENERAL SYSTEM FEATURES</u>	<u>YES</u>	<u>NO</u>
	Designed exclusively for K-12 food service	✓	
	Easy to learn & use	✓	
	Single, centralized database- MS SQL	✓	
	Microsoft .NET Framework	✓	
	System functions are integrated	✓	
	Data updates are real-time. No 'batch' updating requiring user intervention.	✓	
	Microsoft Windows Based- Point & Click	✓	
	Runs on standard PC's , no proprietary hardware	✓	
	Automatic Program Updates via Internet Connection for all food service programs	✓	
	Compatible with PowerSchool	✓	
	Automatic update of enrolled students from PowerSchool into student information field in real time	✓	
	Real time updates of student eligibility to school sites	✓	

	Posting of negative balance on student accounts in real time to the student info field in PowerSchool		✓
	From PowerSchool, post food allergies or special dietary concerns into fields of students in food service software	✓	
	An automated process to load student photos to the food service software from picture CD.	✓	
	Currently Interfaced with iVisions Financials	✓	
	Custom Interface for Promag DT105U/DT105R Cash Drawer Triggers	✓	
	Utilize Crystal Reports for customization	✓	
	User-controlled security by module and function	✓	
	Allows setting scheduled password expirations	✓	
	Automatic Program Updates via internet connection to include end of year functions and beginning of new school year functions	✓	
	Available as individual components or as part of an Enterprise Suite	✓	
	Compatible with other Infinite Visions software		✓
	Reports can be converted to Excel, PDF files	✓	
	User -friendly on screen and printed user's manuals	✓	
	SIF Certified	✓	
	No databases required at cafeteria site	✓	
	No backups required at school site	✓	
	Automated backup	✓	
	No data transfers or communications routines	✓	
	Does not require monitoring of communications logs	✓	
	Works with School Messenger or other district notification systems	✓	

**\*student balance and status can be communicated to PowerSchool once daily**

	Software: Scalable Architecture "add-on" and "upgrades"	✓	
	Ability to remote access from central office to school sites	✓	
	<b><u>POINT OF SALE</u></b>	<b><u>YES</u></b>	<b><u>NO</u></b>
	Identify students via pictures	✓	
	Eligibility status is updated immediately when processed by integrated Free & Reduced module	✓	
	Ability to import pictures by server access	✓	
	Single database. Serve visiting students with regular meal account	✓	
	Offline mode allows POS cashiers to continue serving even if connection to server is lost	✓	
	Handles prepayments and/or charges at anytime	✓	
	Multiple input options (PIN Pad, Barcode, Fingerprint)	✓	
	Able to store input of up to 5 transactions of students at POS through selected means of input	✓	
	Prohibit items based on dietary restriction	✓	
	Customize item screens by cashier	✓	
	Prevents over claims; the same student cannot be claimed twice	✓	
	Re-process' function corrects transactions where student was served with incorrect status	✓	
	Accurately converts a la carte items into reimbursable meal	✓	
	Built-in charge controls	✓	
	Ability to change Serving number to ID	✓	
	Set ala carte limits	✓	
	Tracks after school snack programs	✓	

	Provides an alpha look-up for all accounts	✓	
	User-defined security and access restriction by identification of system operator	✓	
	Handles teacher, SFS employee, miscellaneous, and catered accounts	✓	
	Automatically & discretely identifies student status	✓	
	Tracks up to 999 different menu items for breakfast & 999 items for lunch	✓	
	Item price is driven by student status	✓	
	Allows for item pricing by grade	✓	
	Tracks all cashier transactions by name, date and time	✓	
	Master/Family accounts to group students or siblings to a single balance by school	✓	
	Maintains multi year history via transaction archive	✓	
	Accurately tracks multiple schools through a single cafeteria	✓	
	Allows students to be served by membership in multiple groups (i.e. homeroom, bus route, afterschool program)	✓	
	Generates low balance and charge letters	✓	
	Touch screen or standard keyboard	✓	
	Ability to set up multiple Ala Carte purchases	✓	
	Utility allows 'reclassification' of meals served with the incorrect eligibility status	✓	
	Charge Limits by Status	✓	
	Import/Export Ability of all POS reports	✓	
	Includes SC SLP Report format	✓	
	Includes fraud monitoring functions	✓	
	Software Support/Training – hosted on vendor's website	✓	

	<u>INTERNET MEAL PAYMENTS</u>	<u>YES</u>	<u>NO</u>
	Allows parents/guardians to prepay from Internet with credit cards in Real Time	✓	
	Allows parents to see account balances and what students are buying	✓	
	Low balance notification via email	✓	
	Integrated with POS to accurately update balance and activity	✓	
	Utilizes SSL security protocol	✓	
	Administrative portal enables districts to generate management reports	✓	
	Handles all types of school fees	✓	
	Completely turnkey. Hosted and supported by vendor	✓	
	Links to district menus	✓	

\*PCI certified

\*standard convenience fee is \$1.95 charged to users. No charge to district

	<u>FREE &amp; REDUCED</u>	<u>YES</u>	<u>NO</u>
	Family/household applications	✓	
	Scan Household Applications	✓	
	Handles import of direct certification data	✓	
	Utilizes pre-loaded data from PowerSchool to minimize data input	✓	
	Accommodates all USDA designated categorical qualifications	✓	
	Letters in multiple languages	✓	
	Upon 'save', status is immediately updated at Point of Sale in real time	✓	
	Automated cross checking eliminates duplicate applications	✓	
	Handles variety of pay periods	✓	
	Accommodates start of year temporary status grace period and an automatic expiration utility	✓	
	User-defined 'no income' temporary period	✓	
	User defined verification: Basic, Alternate Random, Alternate Focused	✓	
	Complete audit trail of all activity	✓	
	Keeps 'archived' applications per USDA guidelines and allows easy access	✓	
	Maintains list of withdrawn, deleted and students not applying	✓	
	Marks students who elect to have information shared with other agencies	✓	
	'As of' date tracking allows user to re-create historic information	✓	
	Expandable to accommodate scanning and internet applications	✓	

	Compliant with NSLP Reauthorization guidelines	✓	
	Import/Export Ability	✓	
	Online Free & Reduced Applications & Scanning	✓	
	Scanning capability is built in to component		✓
	History screen shows when data was modified and by whom	✓	

\*supports custom interface with RocketScan application scanning

\*system 'Document Cabinet' allows scanning and storing documents. Does not support handwriting recognition.

	<b><u>MENU PLANNING/NUTRITION ANALYSIS/PRODUCTION</u></b>	<b><u>YES</u></b>	<b><u>NO</u></b>
	Is built upon USDA Approved CN Database and updated annually	✓	
	Offers NSMP and Food based planning and tracking	✓	
	Includes complete analysis of all nutrients and/or items	✓	
	Pre-built USDA nutrient database including 10,000 ingredients, hundreds of recipes, and commodities	✓	
	User controlled ingredients table, with analysis of fat, calories, sodium, etc.	✓	
	Includes state approved SC production record	✓	
	Build and add custom recipes	✓	
	Facilitates menu costing	✓	
	Flexible recipe sizing	✓	
	Nutrient analysis by menu or daily	✓	
	Accommodates HACCP guidelines	✓	
	Offers integration with inventory management module for automated usage tracking	✓	
	User defined cycle menus	✓	
	Menu calendars can automatically skip holidays and teacher work days	✓	
	Programmed format to display menu by the month for elementary, middle, and high school	✓	
	Offers USDA formatted site based production record	✓	

\*includes SC purchasing alliance food items

\*support cloud based recipe sharing with other Meals Plus customers (Community Cookbook)

	<b><u>ACCOUNTABILITY REPORTING</u></b>	<b><u>YES</u></b>	<b><u>NO</u></b>
	Allows for manual adjustment of data, as appropriate	✓	
	Tracks meals per labor hour	✓	
	Includes customized export for SCAPS claim reporting	✓	
	Provides export for participation and revenue data	✓	
	Generates monthly claim form	✓	
	Calculates state and federal reimbursement	✓	
	School site and District wide participation tracking	✓	
	School site and District wide receipts and collections	✓	
	School site and District wide participation analysis	✓	
	Calculates ROA for the end of the month reporting	✓	

	<b><u>FINANCIAL MANAGEMENT</u></b>	<b><u>YES</u></b>	<b><u>NO</u></b>
	Able to exchange data (import/export) with iVisions	✓	
	Tracks statistical data by; school, by month, by year	✓	
	Allows for comparison of statistical data across schools, months & years	✓	
	Provides for automatic "pro-ration" of central office expenses & revenues	✓	
	Allows profit/loss for school sites on a daily or monthly basis	✓	
	Determination if fund balance exceeds 3 months operating balance outlined by the USDA	✓	
	<b>REPORTING TO INCLUDE:</b>		
	Operating Statement	✓	
	Trial Balance	✓	
	Balance Sheet	✓	
	Plate Costs	✓	
	Indirect Costs	✓	
	MTD/YTD Summary	✓	
	Profitability	✓	

	Breakfast & Lunch Counts	✓	
	Meals per Labor Hour	✓	
	Plate Costs	✓	
	Sales By Category	✓	
	Inventory Management (i.e. ordering, usage, transfers, delivers, perpetual inventory; and coordinated with production record usage	✓	

**\*some functions/reports require import from iVisions Financial System**

	<u>TRAINING &amp; SUPPORT</u>	<u>YES</u>	<u>NO</u>
	800# - always a live voice. Closely monitored response times.	✓	
	Remote PC log in capability	✓	
	Service level metrics monitored continually	✓	
	Onsite and remote training including POS "go live"	✓	
	Thorough user's manuals	✓	
	On screen help guides	✓	
	Quick-start tutorial documentation	✓	
	Custom Work	✓	
	Always thorough pre-training planning	✓	
	Support call logging	✓	
	Convenient help desk hours M-F 7:00am-5:00 pm ET.	✓	
	Emergency support	✓	

**d) Technical Support - Offeror shall address the following:**

**1) The level of support that will be provided to the District as part of the contract.**

- Always a live agent
- 90% first call resolution
- 95% of cases within 24 hours

**2) Type of Support: telephone, email, remote**

- 800# telephone is primary for immediate contact
- email offered with 24 hour turnaround
- remote access via Citrix GoToAssist
- customer support website (24/7, requires login)

**3) Response time**

- live voice within 60 seconds (95% average)
- live voice within 90 seconds (99%)
- first call resolution (90% average)
- Level 2 callback if required (within 24 hours)

**4) Hours available (Eastern Standard Time)**

- M-F 730a-7p (phone)
- customer support website (24/7, requires login)

**5) Toll free support number.**

800 541 8999




"This is the ONLY software vendor that I work with where you can call and EVERYONE knows how to help you. There is never any wait time — someone is there to assist you immediately. I am totally satisfied with Meals Plus and the EXCELLENT customer service!"



## Tech Support Call Follow-Up Survey 2016

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On a scale of 1-5, 5 being "Very Satisfied," how satisfied were you with:

The courtesy of the analyst?  4.93

The technical skills/knowledge of the analyst?  4.86

The timeliness of the service provided?  4.89

The quality of the service provided?  4.88

The overall service experience?  4.87

[www.mealsplus.com](http://www.mealsplus.com)

1-800-541-8999



## Technical Support Statistics 2016

	Average Time to Answer (min)	Average Call Time (min)	Timeliness Satisfaction
January	0:31	10:59	98.5%
February	0:19	09:31	98.0%
March	0:15	10:02	96.9%
April	0:13	10:20	96.6%
May	0:21	10:54	97.8%
June	0:10	09:48	98.2%
July	0:15	09:00	97.8%
August	1:50	10:55	98.8%
September	0:50	10:18	96.2%
October	3:36	09:02	98.8%
November	0:19	09:51	98.6%
December	0:12	10:37	96.4%
<b>YTD:</b>	<b>0:44</b>	<b>09:14</b>	<b>97.7%</b>

[www.mealsplus.com](http://www.mealsplus.com)

1-800-541-8999



*"Your support team is the first thing I mention when someone asks me about Meals Plus. It is very important to me that I reach a live person without having to go through an extensive maze of pushing buttons. Thank you for the great support!"*

**(e) References and Performance Capability**

**1) Describe offeror's experience in providing similar systems.**

Education Management Systems has provided software solutions to K12 food service since 1989. The original systems were designed specifically for financial management of nutrition operations. Today Meals Plus software is running in over 5,500 schools in 41 states in districts ranging from 1 to 130 school sites. Meals Plus currently serves 41 customers in South Carolina.

**2) References: Provide a minimum of three (3) references, preferably from school districts, from employers with similar contracts. References to include the company name, address, contact person, telephone number, email address, and how long the company has utilized the system.**

**Reference One:** Company Name: CharlestonCountySchools  
Address: 3999 Bridge View Dr Bldg 1005 North Charleston, SC 29405  
Contact Person: Walter Campbell  
Phone Number: 843-745-5917  
E-Mail Address: walter\_campbell@charleston.k12.sc.us  
How long company has utilized system: 10 Years

**Reference Two:** Company Name: Aiken County School District  
Address: 1000 Brookhaven Drive Aiken, SC 29803  
Contact Person: Karen Johnson  
Phone Number: 803-641-2406  
E-Mail Address: kjohnson2@acpsd.net  
How long company has utilized system: 9 Years

**Reference Three:** Company Name: Lexington District 1 Schools  
Address: 420 Hendrix St. Lexington, SC 29072  
Contact Person: Sally Nicholson  
Phone Number: 803-951-8353  
E-Mail Address: snicholson@lexington1.net  
How long company has utilized system: 15 Years

**Reference Four:** Company Name: Darlington County Schools  
Address: 102 Park St. Darlington, SC 29532  
Contact Person: Pam Vaughn  
Phone Number: 843-398-2315  
E-Mail Address: pamv@darlington.k12.sc.us  
How long company has utilized system: 12 Years

**Reference Five:**

Company Name: Anderson School District 1  
Address: PO Box 99 Williamston, SC 29697  
Contact Person: Jeff Dopkins  
Phone Number: 864-847-7344  
E-Mail Address: dopkinsj@apps.anderson1.org  
How long company has utilized system: 7 Years

South Carolina Meals Plus Customers	Main Phone	Primary Contact	Email	No Of Schools
Academy of Hope	843.995.4861	Tara Utley	tutley@theacademyofhope.org	1
Aiken County School System	803-663-5128	Karen Johnson	kjohnson2@acpsd.net	38
Allendale County Schools	803-584-4603 x 1113	Tuesday Johnson	johnsont@acs.k12.sc.us	5
Anderson School District 1	864-847-7344	Jeff Dopkins	dopkinsj@apps.anderson1.org	14
Anderson School District 4	864-403-2035	Kathy Kilgore	kkilgore@anderson.org	6
Anderson School District 5	864-260-5030	Sharon Hunt	sharonhunt@anderson5.net	15
Bamberg Schools #1	803-245-3055	Karen Jackson	kjackson@bamberg1.net	4
Bamberg County School District #2	803-793-3346	Rodney Anderson	Randerson@bamberg2.org	3
Barnwell County 19 Schools (Blackville-Hilda)	803-284-5605	Jack Johnson	john.johnson@barnwell19.net	2
Barnwell School District 45	803-541-1300	Jack Johnson	jjohnson@barnwell45.k12.sc.us	4
Bridgewater Academy	843-236-3689	Jason Stocks	foodservice@bridgewateracademy.org	1
Calhoun County Schools	803-655-7310	Whittaker Williams	wwilliams@ccpsonline.net	3
Charleston County School District	843-745-5917	Walter Campbell	Walter_Campbell@charleston.k12.sc.us	83
Chester County Schools	803-581-9515	Shana Catoe	SCatoe@chester.k12.sc.us	9
Clarendon 3	843-659-2188	Gwen Phillips	gphillips@clarendon3.org	2
Clarendon County 1 Schools	803-574-2114	Brenda Gist	bgist@clar1.k12.sc.us	3
Darlington County Schools	843-398-2315	Pam Vaughn	pamela.vaughan@darlington.k12.sc.us	23
DDESS - Fort Jackson		Reginald Clement	reginald.clement@am.dodea.edu	2
DDESS - Laurel Bay	843-846-4933	Reginald Clement	reginald.clement@am.dodea.edu	3
Dillon County 3 Schools	843-752-7101	Theresa Rogers	Theresa@mail.dillon3.k12.sc.us	4
Edgefield County Schools-SC	803-275-5788 X22	Melissa Jackson	mkjackson@edgefield.k12.sc.us	8
Fairfield County Schools	803-635-4607 x10338	Wanda Robinson	wrobinson@fairfield.k12.sc.us	9
Felton Laboratory School	803-536-7034	Mike Coaxum	mcoaxum1@scsu.edu	1
Florence SC SD #1	843-669-4141	Donnie Chavis	donnie.chavis@fsd1.org	19
Florence SC SD #2	843-493-2502	Johnnis Tanner	jtanner@flo2.k12.sc.us	2
Florence SC SD #3	843-374-8652 x1121	Michelle Gaskins	mgaskins@fsd3.org	9
Florence SC SD #4	843-346-3956	Casandra Garner	cgarner@florence4.k12.sc.us	1
Florence SC SD #5	843-386-2358	Jeannie Carmichael	ljcarmich@flo5.k12.sc.us	3
Fort Mill Schools District #4	803-802-1968	Roland Cabading	CabadingR@fortmillschools.org	13
Georgetown School District	843-436-7078	Brent Streett	bstreett@gcsd.k12.sc.us	18
Greenwood School District 52	864- 970-7113	Joan Walker	jwalker@greenwood52.org	4
Hampton #1 Schools	803-943-4011	Mozelle Murdaugh	mwmurdaugh@hampton1.k12.sc.us	7
Hampton #2 Schools	803-625-5000	Cheryl Grant	GranChe@hampton2.k12.sc.us	3

South Carolina Meals Plus Customers	Main Phone	Primary Contact	Email	No Of Schools
Lancaster County Schools-SC	803-286-6972	Angela Mccrorey	Angela.Mccrorey@lcsdmail.net	20
Lee County Schools-SC	803-484-5327	Shirley Joe	Joes@lee.k12.sc.us	5
Lexington District # 1 Schools	803-951-8353	Sally Nicholson	snicholson@lexington1.net	26
Low Country Leadership Charter School	843-532-7872	Brian Lemons	blemons@lowcountryleadership.org	1
Marion County School District	843-423-1811	Brenda Cross	bcross@marion.k12.sc.us	4
McCormick County Schools	864-852-2435 x233	Geraldine Morris	morrisg@mccormick.k12.sc.us	2
Orangeburg 4 County Schools	803-534-8081	Angela Robinson	angela.robinson@ocsd4sc.net	8
Orangeburg Consolidated District #3	803-496-3288	Moreen Joseph	Josephm@obg3.k12.sc.us	7
Orangeburg Consolidated District #5	803-533-7921	Donnie Boland	wdb16@orangeburg5.k12.sc.us	14
Royal Live Oaks Academy	888-288-9667	Wanda Davis	wanda.davis@rloacs.org	1
Saluda Schools	864-445-8441	Aileen Connelly	AConnelly@saludaschools.org	4
Spartanburg County School District 3	864-253-9567	Audra Terry	aterry@spartanburg3.org	7
Spartanburg County School District 4	864-476-3186	Cindy Craig	ccraig@spartanburg4.org	4
Spartanburg County School District 5	864-253-9567	Brandon Lewis	brandon.lewis@compass-usa.com	17
Spartanburg County School District 6	864-576-4212	Travis Fisher	tfisher@spart6.org	15
Williston #29 School District	803-266-7878	Eugenia Johnson	ejohnson@williston.k12.sc.us	3

**(f) Delivery/Training (On-Site):** Timeline for each step in the process that is required in order to provide an operational-ready system and a proposed delivery/completion date. The District's intent is to have a turnkey system that is fully functional by July 1, 2018. Describe the training, the proposed schedule, number of trainers, the number and duration of training sessions. Indicate whether or not instruction/user manuals for District personnel are included/provided.

One printed copy of the complete system user manual is provided to the district. Training manuals and materials for district personnel are also provided as are 'shortcut' guides for cafeteria personnel. Help guides and user manuals are available within the software

After the contract award there will be a planning meeting to coordinate implementation and training activities with your district. System functional ready date is July 1 2018

- Training calendars for both remote and onsite training will be developed and progress monitored as part of the total project management. Training agendas and staff assignments for each phase of implementation are listed for your review.
- A successful and manageable project plan will include our flexible deployment and training schedule for your district which will ensure a smooth transition and startup. Meals Plus will emphasize regular communication with all stakeholders as part of the plan to stay on schedule and will create alternate plans as "safety nets" if schedules must change.
- Central to a timely and successful implementation are an experienced project manager and implementation team with a large-scale technology deployment track record. We envision creating a great project plan so that technical deployment and training can occur simultaneously and successfully!

**Meals Plus Recommended Implementation/Training Schedule (dates listed are 'no later than' based on estimated contract award date)**

Summary-

- Infrastructure setup/testing- January 2018
- Admin setup (Financial, Reporting, Free & Reduced (including online apps)- January 2018
- POS pilot at 3 schools – February 2018
- Rollout POS all schools March-April 2018
- Inventory and Menus Implementation (if purchased) – summer 2018
- Inventory and Menus live August 2018

Implementation Timeline- Front of House and Reporting					
Item	Date	Time	Location	Responsible	Notes
Contract Award	12/10/2018				
Implementation Planning Meeting	1/9/2018	1 hour	Remote	MP, D5LR	MP Proj Mgr, D5LR PM & Tech lead on conference call
System Setup	1/15-1/31/2018				
Hardware Procurement (if necessary)		TBD	D5LR	D5LR	Server, POS client machines
POS Hardware Setup		1 day	D5LR	TBD	POS cashier machines & peripherals
Server OS, SQL install		1 hour	D5LR	D5LR	
Database config		1 hour	Remote	MP	via Citrix GoToAssist
System Management Training- District office staff		2 hours	Remote	MP	via Citrix GoToTraining
System security setup		2 hours	D5LR	D5LR	
POS item setup		2 hours	D5LR	D5LR	
Data Import- students, statuses, balances		1 hour	Remote	MP, D5LR	via Citrix GoToAssist
Free & Reduced Training		2 hours	Remote	MP	via Citrix GoToTraining
Training database setup		1 hour	Remote	MP, D5LR	via Citrix GoToAssist
MP Client software install		5 min per	Remote	TBD	Based on customer preference
Online Payment system forms completed		.25 hour	Remote	D5LR	Bank routing information for ACH
Software ready test		1 hour	Remote	MP, D5LR	via Citrix GoToAssist
System Functional	2/1/2018				Ready to train
POS Pilot manager-cashier computer lab training	2/6/2018	3 hours	D5LR	MP (1 trainer)	Optimum class is 12-15 participants
POS Go Live 3 pilot sites (Breakfast & Lunch)	2/7/2018	1 day	D5LR	MP (1 trainer)	
POS Go Live Day 2 Assist (Breakfast & Lunch)	2/8/2018	1 day	D5LR	MP (1 trainer)	
Go Live Review	2/12/2018	1 hour	Remote	MP	Identify any issues
System Reporting Review	3/5/2018	2 hours	Remote	MP	In depth review with Q&A
POS manager-cashier computer lab training 10 schools	3/20/2018	3 hours	D5LR	MP (2 trainers)	Optimum class is 12-15 participants
POS Go Live 10 sites (Breakfast & Lunch)	3/21/2018	1 day	D5LR	MP (2 trainers)	
POS Go Live Day 2 Assist (Breakfast & Lunch)	3/22/2018	1 day	D5LR	MP (2 trainers)	
POS manager-cashier computer lab training remaining schools	4/3/2018	3 hours	D5LR	MP (2 trainers)	Optimum class is 12-15 participants

Item	Date	Time	Location	Responsible	Notes
POS Go Live remaining sites (Breakfast & Lunch)	4/4/2018	1 day	DSLr	MP (2 trainers)	
POS Go Live Day 2 Assist (Breakfast & Lunch)	4/5/2018	1 day	DSLr	MP (2 trainers)	
Go Live Review	4/11/2018	1 hour	Remote	MP	Identify any issues
System Reporting Review	5/7/2018	2 hours	Remote	MP	In depth review with Q&A
<b>Training Totals</b>					
Onsite 'person' days	15				
Remote hours	20				
*timeline will be confirmed/adjusted as needed as part of Implementation Planning Meeting					
*schedule assumes server and all required workstations are in place by 1/31/2018					

**(g) Additional Data**

**1) Provide additional information considered essential to the proposal which has not been specifically requested.** Listed in 'Proposal Summary' tab

**2) Describe any other benefits the District will realize through a contract with your firm.** Listed in 'Proposal Summary' tab

## Proposal Summary

In response to the request by School District Five of Lexington and Richland Counties (hereinafter SD5LRC) for an Integrated Management Software system and high caliber implementation and training for Foodservices, Education Management Systems, Inc. proposes Meals Plus – Superior Cafeteria Technology.

Specific to SD5LRC' stated requirements detailed in Attachment A FOOD SERVICE MANAGEMENT SYSTEM QUESTIONNAIRE, the Meals Plus system, at minimum, will accommodate SD5LRC schools:

### **Overall System Features**

**Point of Sale**

**Internet Meal Payments**

**Free & Reduced Module**

**Online Free & Reduced Applications**

**Accountability Reporting**

**Financial Management**

**Training & Support**

**Inventory Control**

**Food and Supply Order Processing**

**Bid Analysis/ Procurement**

**Menu Planner/ Nutrition Analysis per USDA guidelines**

**Production Module**

**USDA Commodity Management**

**End of the month and yearly reporting**

**End of the school year procedures and beginning of the school year procedures**

**Currently interfaced with iVisions Financials**

**Currently interfaced with Level data and Power School**

**Custom interface for Promag DT105U/DT105R Cash Drawer Trigger**

### **Company**

Education Management Systems is a financially sound company capable of implementing and supporting an installation of this scope and duration. Meals Plus offers significant experience working with similar K-12 educational users, public sector users, and users of the ERP financial system, iVisions along with a demonstrated knowledge of best practices in the field of nutrition and foodservices. Meals Plus has 28 years of proven success providing complete system implementations, software integration, staff and technical training, and excellent ongoing software and customer support.

Throughout the duration of the project the Meals Plus team will deliver the highest level of quality, professionalism, and results from the product and the development and implementation of services.

## Meals Plus Software

Meals Plus is a complete, integrated school foodservice management software system. It operates in a Microsoft Windows environment and runs on standard PC's; there is no proprietary hardware required. The Microsoft SQL database is the cornerstone for the product line.

The system is client-server built on .NET Framework and includes web components for online payments and meal applications. The SD5LRC database will be cloud hosted with full SQL admin access to designated SD5LRC staff.

The Meals Plus system employs a variety of programming methods including VB.net, asp.net. Meals Plus also utilizes SQL triggers and stored procedures within the database to provide some of the program's functionality. The overall goal is to provide maximum functionality and performance within the confines of a variety of school district infrastructures.

Crystal Reports is the engine for all system reporting. Communications are TCP/IP based and encrypted wherever appropriate. Reports can be exported as MS Excel, Word and PDF files.

Meals Plus is an integrated management software system featuring a *single, centralized* database with offline capabilities for Point of Sale. Unlike many systems, it does NOT require a 'manager' workstation to host a local version of the database. Data is updated REAL TIME. It communicates with the district student information system via automated file import or API. Data is hosted on a Windows server on the district network (or by Meals Plus) and is available real time to all clients based on security settings. Program updates are automatic via the internet but are user controlled with regard to scheduling.

Pre-built and customizable data exports provide simplified interface capabilities with disparate district software systems.

Above all Meals Plus software is easy to learn and use but fully featured; a perfect combination for the demands of K12 school nutrition operations.

The proposed components of the system that fulfill the district's functional requirements are as follows:  
(details on each in product brochure)

- Point of Sale**
- Free & Reduced (including online applications)**
- Accountability**
- Inventory (including bid analysis)**
- Menus (planning & nutrient analysis)**
- Production Records**
- Financial & Statistical**
- PowerSchool Connector**
- K12PaymentCenter.com**

### **Meals Plus Philosophy**

We believe that delivering the highest level of customer service is the key to success in the K12 administrative software world. Reliable software backed by timely, compassionate assistance has been our focus since 1989 and has resulted in many customer service awards and recognitions along the way as well as a 99% customer retention record. Our goal is to be a valued partner to our customers.

### **Implementation Strategy**

A mildly aggressive but manageable rollout utilizing 'pilot' starts to smooth the assimilation of operational processes. The primary goals of an implementation are as follows:

- minimize disruption to SD5LRC operations
- meet SD5LRC needs (operational, financial, time line, staff capacity)
- optimize customer satisfaction

The implementation will feature:

- Cloud-hosted database
- Detailed project schedule (tasks & timing) to be developed with SD5LRC
- Meals Plus will deliver the required software functionality as specified
- Software installation & configuration assistance as desired
- Hardware consultation
  - System server
  - Client workstations
  - POS ID input devices
- Central office staff to be trained on all facets of system.
- Site level staff trained on appropriate parts of system. Extent of direct Meals Plus training and "Train the trainer" (if any) to be determined
- Onsite go live assistance with POS as desired
- Implementation 'wrap up' and end-of-month guidance delivered
- Ongoing monitoring of project progress and quality

### **Training Approach**

With staff comfort with the new system as the primary goal, Meals Plus will provide an education/learning plan for all planned modules that is satisfactory to the district. Training will include onsite and remote training classes. Pilot implementations will help identify training priorities and help control training expenses. Training will be provided by Meals Plus certified, experienced training personnel.

Just-in-time training will be used where appropriate.

### **Staffing**

Meals Plus will utilize a single point of contact project manager with 14 years experience in school nutrition to oversee the entire implementation. The Meals Plus operations consultant (SNS certified) will also be involved with planning and training. Additional Meals Plus trainers and tech support staff will be involved with the SD5LRC implementation.

### **Integration**

Meals Plus has experience with other SD5LRC systems that interface with foodservices:

- iVisions- support financial export interface for Fort Mill SC School District (and others), 4 years
- PowerSchool- ISV partner. Supports API integration
- SCAPS- custom export for state claims processing system
- Direct certification- experience importing state electronic files

### **Ongoing support**

The heart of the Meals Plus system is the technical support/customer service which is comprised of system implementation, product training, and help desk. SD5LRC will experience what some Meals Plus customers' IT departments have described as "the best support of any school software vendor."

Once the implementation is complete to the satisfaction of SD5LRC our award-winning help desk will be available M-F 7:30a-7p ET to answer the phone with a live voice in less than 60 seconds and resolve any issues on the first call 95% of the time.

Ongoing development of the Meals Plus application is another way we support our customers as we keep pace with federal & state regulations and industry operational and technology trends.

**Technical Requirements**

**(follow this page)**



*Keeping the lunchline moving.<sup>SM</sup>*

## **Meals Plus System Requirements**

Meals Plus requires 1 (ONE) central server and any number of client machines, depending on the number of schools, serving lines and central office staff.

### **Minimum Requirements for ALL SERVERS (Physical or Virtual)**

- Minimum of Two Data Partitions; one for operating system, one for data\logs
  - Recommended to use three partitions, one for OS, one for Data, one for Log files
- Remote Storage Device for Backups
- 100/1000 NIC (network card)
- Windows 2008 R2 or higher (All editions Standard and 64 bit)
  - Including all the latest Service Packs and Patches
- Microsoft SQL Server 2012 or higher
  - Including all the latest Service Packs and Patches
- .net Framework 4.5.1
- Minimum Monitor Resolution of 1024 X 768
- Processor Type: Pentium Xeon Quad Core Server Grade processor or higher
- Suitable WAN connections to schools

### **Additional Requirements for SERVERS - based upon district size**

- 1 – 10 Schools
  - Hard Drive: RAID 1 w/two 10K RPM drives or faster
    - 300 GB Size Drives Recommended
  - Processor speed: minimum 2.0 GHz, 1066 MHz FSB or higher
  - Memory:
    - minimum: 4 GB RAM or more at 1066 MHz
    - Recommended: 8 GB RAM or more at 1333 MHz or higher
- 11– 25 Schools
  - Hard Drive: RAID 5 w/minimum of four 15K RPM drives or faster
    - 4x 300 GB Size Drives Recommended
  - Processor speed:
    - Minimum: 2.0 GHz, 1333 MHz FSB or higher
    - Recommended: 2 GHz or higher with 1600 MHz FSB or higher

- Memory:
  - Minimum: 8 GB RAM or more at 1333MHz
  - Recommended: 16 GB RAM or more at 1600 MHz or higher
- 26-60 Schools
  - Hard Drive:
    - Minimum: RAID 5 w/minimum of four 15K RPM drives or faster
    - Recommended: Raid 1 for OS, Raid 10 for Data and Logs (6 - 15k Drives)
      - 146 GB Drives or larger for OS, 300 GB Drives x4 for Data and Log Files
  - Processor speed:
    - Minimum: 2.0 GHz, 1600 MHz FSB or higher
    - Recommended: 2.0 GHz or higher with 1600 MHz FSB or higher
  - Memory:
    - Minimum: 16 GB RAM or more at 1600 MHz
    - Recommended: 24 GB RAM or more at 1600 MHz
  - Log and Data file need their own subsystem (RAID configuration recommended)
  - 512MB Raid Controller or higher
- 61+ Schools
  - Hard Drive:
    - Minimum: Raid 1 for OS, Raid 10 for Data and Logs (6 - 15k Drives)
    - Recommended: Raid 1 for OS, Raid 10 for Logs, Raid 10 for Data (10 - 15k Drives)
      - 146 GB Drives for OS, 300 – 600 GB Drives for Data and Logs
  - Processor speed:
    - Minimum: 2.0 GHz, 1600 MHz FSB or higher
  - Memory:
    - Minimum: 24 GB RAM or more at 1600 MHz
    - Recommended: 32 GB RAM or more at 1600 MHz or higher
  - Log and Data file need their own subsystem (RAID configuration recommended)
  - 1 GB Raid Controller or Higher

## Requirements for CLIENTS

- Pentium IV processor or higher
- 2 GB memory or higher
- 100/1000 NIC (network card)
- Minimum Monitor Resolution of 1024 X 768
- Network connectivity with a transfer rate of at least 56KBS
- Windows 7 or higher (32 or 64 bit)
  - Includes all Service Packs and patches
- .net 4.5.1 (might have to include .net 3.5 if it asks for it)

## Requirements for Auto-Updates

For Meals Plus Automatic Updates to function and access the downloads, the following IP and Web Addresses must be accessible through the customer's firewall, proxy, filters, etc.

<http://autoupdate.ems-isis.com/> resolves to 98.129.120.106

<http://downloader.mealsplus.com> resolves to 98.129.120.106

It is also recommended that the windows or domain account that will be running Meals Plus have Full Control to the *C:\Program Files\Meals Plus* folder or *C:\Program Files (x86)\Meals Plus* for 64bit installations. When updates are downloaded and installed, the files in these folders will be overwritten and the user will need the rights to perform that action.

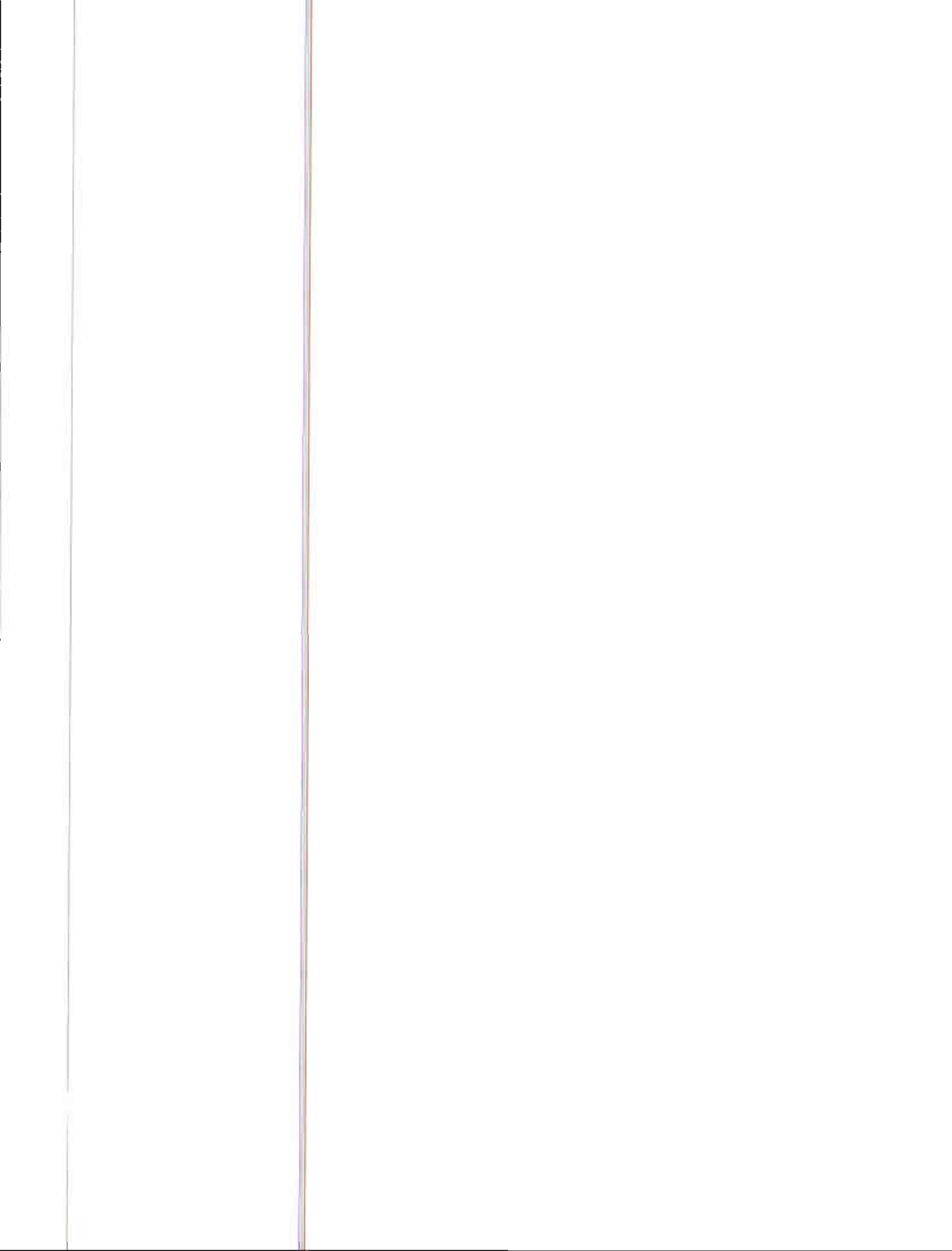
## Requirements for Hosted Customers

For customer whose data is hosted by Meals Plus, we will need the public IP(s) for the machines that will be used to access the Meals Plus database. Our servers are setup to only allow access from known IP addresses and no others. A static address or address pool configured through a NAT translation will be required.

In conclusion...

### Why Meals Plus

-  Experience & Focus- 28 years in K-12 school administrative software exclusively
-  28 years in K-12 cafeterias
-  Over 5,000 cafeterias
-  Over 600 school districts (large & small)
-  41 states, 41 South Carolina Customers
-  99% + customer retention rate
-  Staff expertise and experience
-  Company CEO/Owner is former school district finance administrator
-  All Meals Plus support staff has on-site training experience
-  All Meals Plus support staff hold at least Bachelor's Degree
-  Microsoft and Cisco trained staff members
-  Among the highest staff to customer ratio in the industry
-  Member Help Desk Institute International (**2015, 2016 CSAT Elite 50 winner**)
-  District Administration Magazine Top 100 Product 2011, 2012, 2013, 2016
-  Microsoft Gold Certified Partner
-  Compatibility with iVisions
-  Compatibility with PowerSchool (ISV Partner)
-  The "whole package"- features, K12 focus, technology, service commitment



## Smoothing the way to a trouble-free lunch. (And breakfast.)

At Meals Plus, we've been working in lunchrooms and central offices long enough to know what's really important in a cafeteria technology system: simply put, a provider who knows what to do, and a system that delivers everything that's promised.

- > Point of Sale
- > Free & Reduced
- > Menu Planning
- > USDA Nutrient Analysis
- > Inventory Management
- > Time Clock
- > Financial & Statistical
- > Accountability
- > Online Services
- > Training & Support



### General features:

- Designed exclusively for K-12 food service
- Complete "toolbox" for school nutrition management
- Easy to learn & use
- Single, centralized database – Microsoft SQL
- System functions are integrated
- Microsoft Windows based – point & click
- Runs on standard PCs with minimal technical requirements
- Compatible with most student information systems
- Automatic program updates via internet connection
- Available as individual components or as part of an Enterprise Suite
- Compatible with other district business software
- Reports can be converted to Excel & PDF files
- Qualified training
- User-friendly on screen and printed user's manuals
- Knowledgeable, friendly help desk

## POINT OF SALE

**Fast, simple and easy to use.**

Our POS system was designed by software engineers with direct experience in school settings. We've used that know-how to create technology with benefits for everyone working in the cafeteria.

- 
- An illustration of a Point of Sale (POS) system. It shows a computer monitor on a stand, a keyboard, a mouse, and a receipt printer. The entire setup is enclosed in a cloud-like shape with radiating lines, suggesting connectivity or a networked environment.
- *Easy for cashiers to learn and use*
  - *Built for speed*
  - *Customizable cashier serving screens*
  - *Offline Serving Mode when network connection is lost*
  - *Single database that allows visiting students to use meal account at any school*
  - *Real-time updates from Free & Reduced*
  - *Multiple student input options: PIN pad, barcode and fingerprint*
  - *Two ways to enter data: touch screen or standard keyboard*
  - *A dietary restriction feature for fewer mistakes*
  - *A la carte controls*
  - *Reprocess transactions served with incorrect eligibility status*
  - *A "serve by teacher/group" function that makes it easy to group students*
  - *Mobile compatible*
  - *Detailed audit tracking*

Reports include:

- Monthly participation
- Accuclaim edit check
- Daily cashier activity summary
- Daily cafeteria close-out
- Select state reports (daily deposit)
- Item sales summary
- Checks report

"This is the **ONLY** software vendor that I work with where you can call and **EVERYONE** knows how to help you. There is never any wait time – someone is there to assist you immediately. I am totally satisfied with Meals Plus and the **EXCELLENT** customer service!"

*Tammy Struder  
Technology Coordinator  
Buckeye Central Local School District  
New Washington, OH*

## FREE & REDUCED

### Accurate, compliant and flexible.

Tracking student eligibility for NSLP and SBP — and accurately processing reports — can be a major concern. That's why our Free & Reduced component lets you identify and track students easily and accurately.

- *Adheres to USDA guidelines*
- *Minimizes manual data entry*
- *Centralized database provides real-time update to Point of Sale; click 'save' and you're ready to serve*
- *Imports direct certification data*
- *Generates letters in multiple languages*
- *Automatically crosschecks to eliminate duplicate applications*
- *Accommodates any verification protocol: Basic, Alternate Random or Alternate Focused*
- *Expands your capabilities to accommodate scanning and Internet applications*

#### Reports include:

- Date-driven rosters
- Notification letters
- Verification letters
- Temporary list
- Demographic report



"Meals Plus has proved to be a reliable and accurate system for tracking, reporting and storing data. They tailored our system to fit our school size and individual district needs; in just 45 serving days, our reimbursable meal sales increased 31% over the previous year. Our free and reduced participation has also increased significantly. I honestly have to say that Meals Plus ranks as one of the very best vendors we do business with."

*Patrick Gibson  
Director of Business Operations  
Upper Valley JVS  
Piqua, OH*

## MENU PLANNING

**Standardized, streamlined and expandable.**

The Meals Plus system helps standardize and streamline your district menu planning, while maintaining compliance with USDA nutrition guidelines.

- *USDA-approved for nutrient analyses required in the school meal programs*
- *Approved by USDA for use in certification of compliance with lunch meal requirements*
- *Uses USDA Child Nutrition Database*
- *Food-based planning and tracking*
- *Accommodates cycle menus*
- *Includes 10,000 USDA ingredients*
- *Ability to build and add custom ingredients and recipes*
- *Easy to navigate in and out of recipes and ingredients*
- *Accommodation for HACCP guidelines*
- *Post-production record keeping*
- *Fully integrated with inventory management component to automate usage tracking*



Reports include:

- Production forecasting
- Print menus daily, weekly or monthly
- Menu costing
- Recipes by ingredients or step-by-step
- Nutrient analysis by item & menu
- User-defined custom reports

“Meals Plus is a great partner. They care about their customers being satisfied and that has earned my complete trust. Their consistent product improvements and friendly people make for a system that my staff and I have come to rely on as an invaluable tool that’s very easy to use. I’m very careful about recommending products to people I know, but I recommend Meals Plus every chance I get. They have never let me down.”

*Susan Whitaker  
Director of Food Services  
Huron City Schools  
Huron, OH*

## NUTRIENT ANALYSIS

**Straightforward, feature-full and adaptable.**

You'll find that our Nutrient Analysis component is easier to work with than manual systems or other software programs. And that's not all.

- *Uses USDA Child Nutrition Database*
- *Meals Plus Menus is USDA-approved for nutrient analyses required in the school meal programs*
- *Food-based analysis*
- *Ability to build and add local ingredients*
- *Easy to navigate in and out of recipes and ingredients*
- *Includes the nutrient standards from the final rule*
- *Accessible from central office or school site*

Reports include:

- Nutrient analysis by item & menu
- Ingredient profile
- Recipe profile

"Without exception, Meals Plus meets all of our food service management needs. I have worked with all facets of the system, including training new employees on the software, and it is solid — top to bottom. They have earned my confidence by living up to their promises of quality products and dedicated support. I'm able to focus on other responsibilities and not just putting out computer system fires. Meals Plus has really developed a low-maintenance system. It is an all-around exceptional approach to cafeteria technology."

*René Sturgeon*

*Food Services Computer Systems Manager*

*Darlington County School District*

*Darlington, SC*



## INVENTORY MANAGEMENT

**Organized, efficient and complete.**

With Meals Plus, you get a centralized ordering and management system that helps you keep track of commodities, purchased foods, supplies and more — and maximize the efficiency of your inventory operations.



- Fully integrated with menu planning and production component to automate usage tracking
- Capable of tracking a true perpetual or summary inventory system
- Includes Bid Analysis component
- Enables electronic ordering
- "FIFO" valuation method includes all items for an unlimited number of sites
- Tracks an unlimited number of user-defined categories (USDA, supplies, processed, etc.)
- Allows for limited item access by site

Reports include:

- Item listing
- Open Items/Orders
- Physical 'worksheet'
- Transaction history
- Inventory on-hand
- Ending inventory count
- Summary/Close
- Bid analysis (bottom line & cost per serving)

"It is the most user friendly system I have seen. In purchasing this, I looked at many different systems and Meals Plus looked like it was everything we wanted and it has turned out to be just that. Meals Plus team members respond quickly to my questions and if they don't know the answer, they find it for me. [My favorite part of Meals Plus is its] ease of use. I can train a cashier in about two minutes tops."

*Dianne Storr*

*Clerk*

*Bay School District*

*Bay, AR*

## TIME CLOCK

**Neat, orderly and on top of everything.**

Take the hassle and paperwork out of tracking employee time, leave and professional certification.

- *Integrated into system and accessible from the enterprise portal*
- *Tracks multiple job assignments*
- *Tracks leave balances*
- *Tracks employee certification hours*
- *Tracks comp time*
- *Automates vacation/leave request and approval process*
- *Enables employees to view and print time sheets*
- *Allows employees to clock in and out at any location where Meals Plus is running*
- *Fully secure, with unique user IDs and passwords*
- *Exports data to payroll software system*
- *Built-in management tools*
- *Comprehensive report options*

Reports include:

- Time sheets
- Leave tracking
- Comp time
- Discrepancies



"Very simply, it works. Tech issues at the cafeteria level have dropped by 95%. The system is comprehensive, easy to use, requires very little maintenance and puts minimal demand on the district technology staff. Meals Plus has truly designed a system that works for our cafeteria staff. And as good as the software is, their support is even better!"

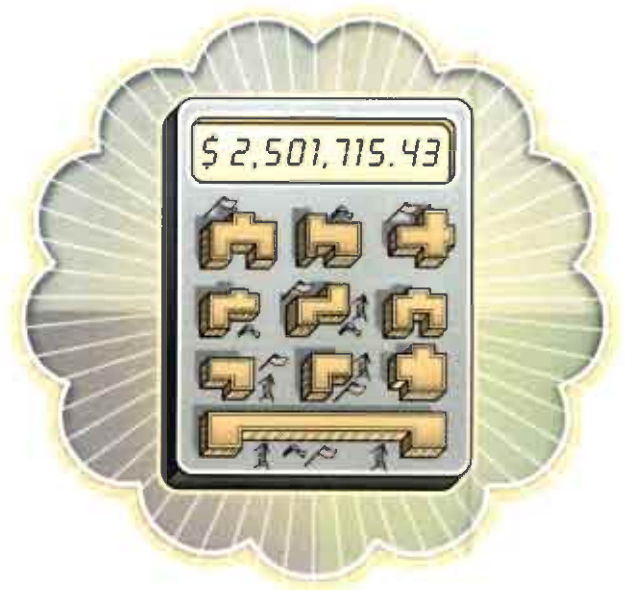
*Walter Campbell  
Food Services Director  
Charleston County School District  
Charleston, SC*

## FINANCIAL & STATISTICAL

### Integrated, inclusive and automatic.

Meals Plus delivers a powerful systems integration and financial management tool that enables automated sharing of information between schools and the district office — and facilitates data-based decision making. Our reporting system provides up-to-date revenue / expense information to better analyze the financial health of individual schools or the entire district.

- Provides overview of the money side of your operation
- Exchanges data (import/export) with your district accounting system
- Accommodates district-specific account codes
- Handles performance calculations using industry norms and NFSMI recommendations
- Uses up-to-date expense information to help analyze the financial health of your district
- Offers multi-year historical comparisons



#### Reports include:

- Operating statement
- Trial balance
- Balance sheet
- Plate costs
- Indirect costs
- MTD/YTD summary
- Profitability
- Breakfast & lunch counts
- Meals per labor hour
- Sales by category

"I constantly get calls to switch POS systems and there is no way I would do it. The software is outstanding and the customer support is extremely dependable. I count on them and they come through for me. When I call, I get help, and I don't have to wait. The whole Meals Plus package — software and people — gets the job done."

*Patrick Barnes*

*Food Services Supervisor*

*Hopewell City Public Schools*

*Hopewell, VA*

## ACCOUNTABILITY

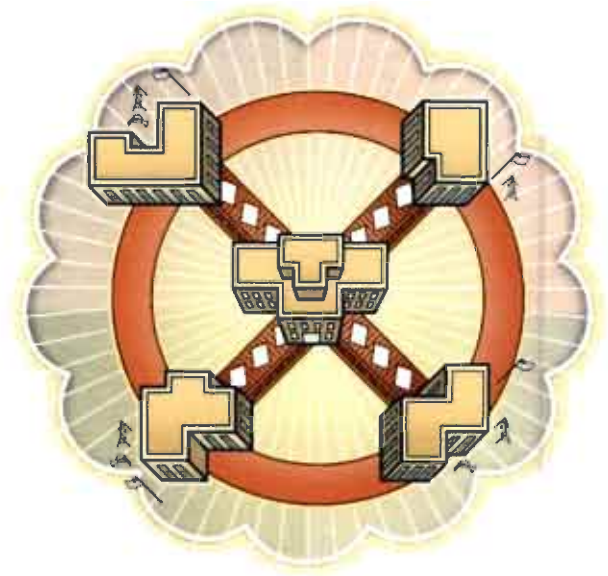
### Centralized, connected and timely.

One of the tastiest features of the Meals Plus system is the way it centralizes all of your district's data. You get real-time access to accurate data on a school-by-school or district-wide basis — and eliminate inconsistencies between schools and the central office.

- *Enables true centralized data management*
  - > *Update student data*
  - > *Setup and edit user profiles*
  - > *Modify Daily Deposit data*
  - > *Exchange data with the district student information system via automated or manual import*
  - > *Export data in a range of formats, to share with other district software systems*
- *Provides real-time access to school-by-school Point of Sale data*
- *Allows Point of Sale pricing updates from the central office*

Reports include:

- Daily sales/collection
- Accuclaim edit
- Monthly claim form
- Reimbursement
- Participation: daily by attendance, by status
- Daily participation listing
- Revenue summary
- Unclosed dates



"[My favorite part of Meals Plus is its] ease of use and the lack of time needed to maintain the server side of the product. The reliability is second to none."

*Jeffrey Bachman*  
*Technology Coordinator*  
*Northern Lehigh School District*  
*Slatington, PA*

## ONLINE SERVICES

**Wide-ranging, web-enabled and worry-free.**

We're the one-stop shop for automated school meal account management. From free & reduced meal accounts to credit card transactions, our online meal payment and application options offer up benefits for the whole student body.

### **K12PaymentCenter.com**

*Online meal payment/school fees option*

- *Simplifies the process by allowing parents/guardians to prepay*
- *Allows parents to see account balances and what students are buying*
- *Provides online meal payment/school fees option*
- *Sends balance notification via email*
- *Integrates with POS to accurately update balance and activity*
- *PCI Certified*
- *Enables generation of management reports through an Administrative portal*



### **LunchApplication.com**

*Online free & reduced applications*

- *Allows parents and guardians to apply for meal benefits online*
- *Speeds application processing*
- *Makes it easy to administer – no more dealing with messy handwriting*
- *Eliminates the need for paper files*
- *Utilizes SSL security protocol*
- *Integrates with Free & Reduced program to accurately update eligibility*



"For over 17 years I have relied on the Meals Plus product suite to coordinate my routine. Having seen the evolution of the software firsthand, I appreciate how much time the Meals Plus products save me."

*Guy Garner*

*Child Nutrition Director  
Caldwell County Schools, NC*

## TRAINING & SUPPORT

**Experienced, hands-on and accessible.**

Implementing a cafeteria management system shouldn't require a leap of faith on your part. When you have a question, need to train new staff or find yourself facing an unexpected problem, you deserve a living, breathing person who's ready, willing and very able to keep everything from crashing down on your head.

- *Experienced training and support personnel who actually spend time in school cafeterias*
- *An 800 number that's always answered by a human being (and closely monitored for response times)*
- *Service level metrics that are continually monitored*
- *Onsite and remote training including POS "go live"*
- *Support-call logging to save you time and hassles*
- *HDI-certified staff (HDI CSAT Elite 50 Winner)*
- *Easy-to-access, comprehensive self-training tools*
- *Highest staff-to-customer ratio in K-12 cafeteria systems*



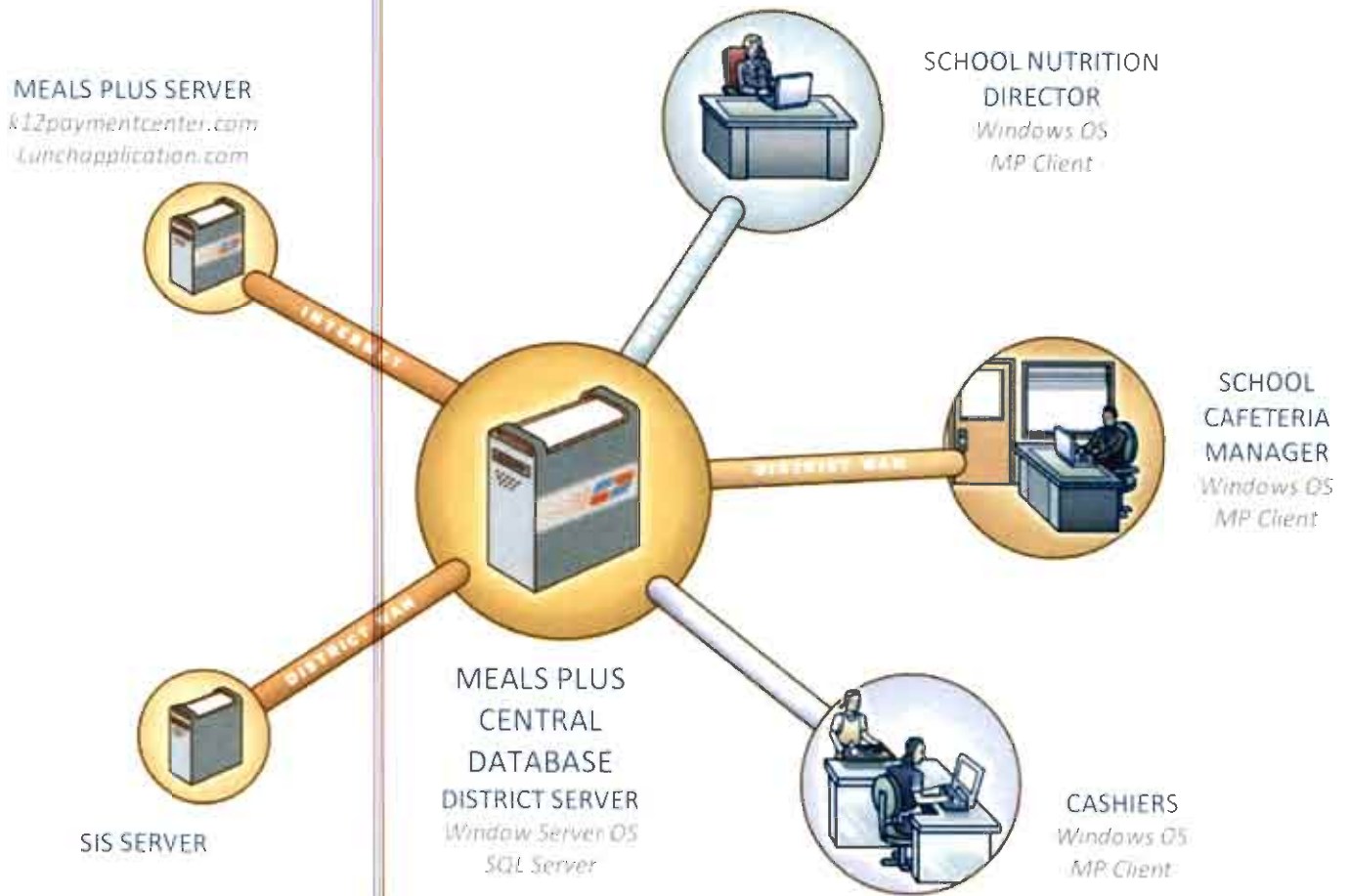
"I have experienced major disasters with other software companies in the past. Meals Plus is different. When I call Meals Plus I always receive fast, **patient support**. I am always able to talk to one person on the support team for any issue, I don't have to go through 6 or 8 different people just to get one answer. The support team is great at helping any level of user... they are able to explain things in your terms so that there is complete understanding.

Compared to other software companies I deal with, Meals Plus is a 'real gem' of a partner."

*Toby Boedeker  
Computer Specialist  
Kettering City Schools  
Kettering, OH*

## TECHNICAL SPECIFICATIONS

**Intuitive, centralized and robust.**



Meals Plus provides a robust integrated system that includes everything from intuitive lunchline software to easy bottom-line reporting — making it a cinch for you to stay on top of all your key areas, from the back office to the district office. Designed exclusively for K-12 food service, the Windows®-based technology (available as individual components or as part of an Enterprise system) runs on standard PCs with minimal technical requirements.

- *Easy to learn and use*
- *Provides a single, centralized database (hosted by customer or Meals Plus)*
- *Minimum bandwidth requirements*
- *Serves as a comprehensive system for managing your entire school nutrition operation*
- *Backed by an uncompromising commitment to customer service*
- *Microsoft .net framework*
- *Microsoft SQL database* • *TCP/IP 'web enabled' client-server system*