



REQUEST FOR PROPOSAL

RFP #2025-100 FOOD AND CHILD NUTRITION MANAGEMENT SOFTWARE

NOTICE TO OFFERORS

The Pittsburgh Public Schools Food Service Department (PPSFS), on behalf of the Pittsburgh Board of Education (PGHBOE), is accepting proposals until 2:00 PM on Monday 31 March 2025, at the designated address, for the design, implementation, and maintenance of a comprehensive Food & Child Nutrition System (FCNS). A public opening of proposals will not occur in order to allow for review of each proposal and scheduled demonstrations. Assessment details will not be disclosed until an award is made. The undersigned bidder agrees to furnish all items within the proposal subject to the contract terms as outlined in the Request for Proposal (RFP) #2025-100. PPSFS reserves the right to reject any or all bids or select items individually based on the needs of the department.

Proposals must be submitted on a flash drive in a sealed, labeled envelope or via a downloadable link emailed to mhamilton1@pghschools.org with the RFP number, title, and company name in the subject line. Submissions must be received by the **Pittsburgh Public Schools Food Service Department** by the deadline. Offerors should provide their best pricing, ensure **PDFs are electronically signed and password-protected**, and **Excel files are protected from editing but allow copying/pasting**. Only **PDF or Excel formats** are accepted. **Proposals sent via fax will not be accepted, and Pittsburgh Public Schools Food Service is not responsible for postal delays. The awarded RFP will result in a professional services contract, requiring the successful bidder to provide all specified items.**

DATE

COMPANY NAME

ADDRESS

TELEPHONE NUMBER

AUTHORIZED AGENT/OFFICER PRINT

TITLE

AUTHORIZED AGENT/OFFICER SIGNATURE

STATEMENT OF PURPOSE

Pittsburgh Public School Food Service Department (PPSFS) is accepting sealed bids for the design, implementation, and maintenance of a comprehensive Food & Child Nutrition System (FCNS), until 2:00 PM on the specified closing date, to be delivered to the Food Service Administrative Office at 8 South 13th Street, Pittsburgh, PA 15203. Bids must be clearly marked with the RFP number, name, and the name of the submitting company, and no late submissions will be accepted. Submissions will be reviewed and scored by the end of business on the proposal due date, and notifications will be sent electronically to successful bidders.

Submission and Labeling: Bidders are responsible for ensuring that sealed bids reach Malik Hamilton, Director, Food Services, by the deadline. PPSFS is not responsible for any delivery issues by employees or mail services, and fax or email submissions are not accepted.

RFP Access: This RFP can may be downloaded from the district website at <https://www.pghschools.org/community/business-opportunities/rfps>

Authorized Signature: Bids must be signed in blue ink by an authorized agent. Unsigned bids will be considered void.

Unit Pricing and Scope: Prices should align with industry standards to ensure proper evaluation across all submissions. Although vendors are not required to bid on all items, the percentage of items bid will factor into the final award. Prices quoted are net and must cover all transport and delivery costs to the specified locations.

Effective Period and Withdrawal: Bids remain effective for 30 calendar days from opening and cannot be withdrawn within that time frame.

For questions or additional information regarding this RFP, bidders should contact the designated Procurement Official - **Malik Hamilton, Director, Food Services**. All questions will be addressed in writing, and any clarifications provided will be distributed to all potential offerors to ensure transparency and equal opportunity.

INSTRUCTIONS TO OFFERORS

The following instructions by the Pittsburgh Public Schools, Department of Food Services are intended to afford offerors an equal opportunity to participate in the proposal process.

Before submitting an offer in response to this solicitation, offerors must review and understand all parts of the solicitation, as these components will form part of the final contract.

Offerors are expected to assess current conditions in the material and labor markets before submitting their offers. By submitting a bid or proposal, the offeror signifies their commitment to fulfill the requirements of the scope of work and all other contract documents, regardless of prevailing market conditions for materials and labor.

Any questions regarding the interpretation or clarification of these instructions or other solicitation documents must be submitted in writing to the Pittsburgh Public Schools Food Services Department, addressed to **Malik Hamilton, Director, at 8 South 13th Street, Pittsburgh, PA 15203**. Questions should be submitted with enough time for a written response to reach all offerors before the submission deadline. Verbal explanations or instructions are not binding. If necessary, clarifications or additional information will be provided to all prospective offerors through an official amendment to the solicitation, ensuring fairness and transparency.

Pittsburgh Public Schools employees, including functional area experts, day-to-day contract administrators or managers, teachers, principals, and other district staff, are not authorized to make substantial amendments to solicitation documents or modifications to contracts. Substantial changes include, but are not limited to, alterations to delivery dates, delivery locations, specifications, or the scope of work.

All amendments to solicitation documents and contract modifications will be handled by Malik Hamilton, Director of Food Service, and/or Amy Daffern, Manager of Food Service Accounts in alignment with Pittsburgh Public Schools Board policies and procedures. In extreme cases, management of all or part of the contract may be handled by the district's legal staff. Offerors acting on unauthorized guidance or obtaining unauthorized modifications do so at their own risk and may face contract termination.

Malik Hamilton serves as the technical and contractual point of contact for this solicitation. He will address all questions related to contractual and procedural matters and coordinate responses to technical inquiries with functional experts. All questions must be directed to Mr. Hamilton for proper handling.

The terms *offeror*, *contractor*, *vendor* and/or *bidder* refer to the person/firm that submits the offer to this

solicitation document. The terms *Pittsburgh Public Schools*, *owner*, *district*, and/or *department* refer to Pittsburgh Public Schools and/or Pittsburgh Public Schools Food Service.

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SCOPE OF WORK.

Overview

The Pittsburgh Public Schools (PPS) Food Service Department seeks proposals for the design, implementation, and maintenance of a comprehensive Food & Child Nutrition System (FCNS). The system must streamline and integrate various food service operations, including but not limited to menu planning and production for – National School Breakfast, National School Lunch, CACFP dinner and Snack and Summer Food Service, allergy management, inventory management, financial and data reporting, vendor purchasing, forecasting, patron management – including Direct Certification, Central Commissary production, and central warehousing management. The district does not currently use a formal point-of-sale (POS) process but the ability to move towards one is a requirement. The goal is to enhance efficiency, compliance, and service quality while supporting the district's vision of a fully integrated, web-enabled solution for all stakeholders.

This project encompasses software, hardware, data migration, training, and ongoing support to ensure a turnkey solution that meets the district's current and future operational needs.

Key Objectives

1.0 General Application Requirements

This specification outlines the General Application Requirements for the Food & Child Nutrition System at Pittsburgh Public Schools, ensuring a scalable, secure, and user-friendly platform that integrates real-time data management, customization, and role-based security.

2.0 Point of Sale (POS) System

The system must provide a secure, efficient, and real-time meal service transaction platform. The system will integrate real-time student eligibility updates, flexible payment options, biometric authentication, and advanced reporting capabilities while ensuring compliance with federal and Pennsylvania meal program regulations.

3.0 Free and Reduced Eligibility

The system must provide real-time eligibility determinations, direct certification processing, automated verification workflows, and secure data management. By integrating household-based eligibility linking, automated notifications, and compliance tracking, the system will streamline application processing while ensuring federal and Pennsylvania state regulatory compliance.

4.0 Online Payment

The system must be a secure, real-time, and user-friendly platform that provides parents with easy access to student meal accounts, automated payments, transaction history, and low-balance alerts. With full PCI-DSS compliance, real-time reporting, and seamless integration with district financial systems, the system will enhance efficiency, security, and convenience for both families and food service administrators.

5.0 Menu Planning & Nutrition Analysis

The system must provide a comprehensive, real-time platform for meal planning, allergen tracking, cost forecasting, and student acceptability analysis. The system must integrate with Cybersoft Technologies PrimeroEdge for Administrative Review support and compliance. The system should have the capability to auto-populate production records, and supporting commodity diversion planning, the system will ensure compliance with USDA and Pennsylvania regulations while enhancing efficiency and meal quality.

6.0 Production

The system must provide automated production record generation, independent inventory tracking, waste tracking, and compliance monitoring. By ensuring warehouse, production, and school site inventories remain separate, and integrating waste tracking reports and meal forecasting tools, the system will improve operational efficiency and reduce food waste while maintaining compliance with USDA and Pennsylvania regulations.

7.0 Ordering & Receiving

The system must provide systematic, data-driven ordering, automated receiving, vendor tracking, and detailed trend analysis reporting. By integrating historical usage data, real-time order tracking, and Year-over-Year and Monthly trend reports, the system will improve procurement efficiency, cost control, and inventory forecasting.

8.0 Inventory Management

The system must provide real-time inventory tracking, independent inventory valuation, flexible sorting and filtering, cost tracking, and advanced reporting capabilities. By integrating user-defined category tags, backdated price changes, valuation tracking, and CSV import functionality, the system will improve accuracy, efficiency, and cost control in food service operations.

9.0 Accountability

The system must ensure full transparency, auditability, and compliance across financial transactions, inventory management, meal counts, and user activity tracking. By integrating real-time audit trails, reconciliation tools, waste tracking, and compliance reporting, the system will enhance efficiency, fraud prevention, and operational oversight.

10.0 Asset Management

The system must provide real-time tracking, automated maintenance scheduling, depreciation tracking, and comprehensive reporting for all food service assets. By integrating barcode/RFID scanning, maintenance tracking, and automated reporting, the system will enhance operational efficiency, cost control, and asset accountability across the district.

11.0 Personnel Management

The system must provide robust employee tracking, attendance management, continuing education compliance, and disciplinary documentation. By allowing for unlimited site transfers, batch CEU uploads, and automated labor cost reporting, the system will ensure accurate workforce management and regulatory compliance.

12.0 Bidding & Procurement

The system must provide an automated, transparent, and data-driven approach to vendor selection, contract management, and procurement tracking. By integrating rubric-based bid evaluation, weighted pricing analysis, and automated contract management, the system will ensure fair vendor selection, cost efficiency, and compliance with procurement regulations.

13.0 Reporting Requirements

The system must provide customizable, data-driven reports with automated scheduling, export capabilities, and interactive visualization tools. By allowing custom branding, drill-down analytics, and automated distribution, the system will enhance data accessibility, compliance tracking, and operational efficiency across the district.

Implementation Plan

The vendor will work collaboratively with Pittsburgh Public Schools Food Services to develop and execute a phased implementation plan. The plan must include:

System Installation

Deployment of hardware and software at all required locations.

Data Migration

Transfer existing data into the new system, ensuring accuracy and consistency.

Training

Comprehensive training for central office staff, cafeteria managers, and site personnel.

A "train-the-trainer" model for sustained knowledge transfer.

Testing and Rollout

Pilot testing at selected sites. District-wide rollout within the agreed timeline.

Ongoing Support and System Maintenance

The vendor must provide the following post-implementation services:

Dedicated support team available during business hours.

On-site support as needed for the first three months post-rollout phases.

Regular updates and patches to ensure system stability and security.

Continuous improvement based on district feedback.

Custom Reporting

Collaborate with Pittsburgh Public Schools Food Services to design and deliver customized reports as needed.

Performance Expectations

The FCNS must meet the following benchmarks:

System uptime of at least 99.5% during operational hours.

Real-time processing of POS transactions.

Error rates below 1% for data migration and integration tasks.

User satisfaction scores exceeding 85% in post-implementation surveys.

Vendor Qualifications

Proven experience in deploying similar systems in K-12 school districts.

Large site count

Central Warehouse

Central Kitchen

Compliance with M/WBE participation goals to contract with Minority or Women Business Enterprises whenever possible by providing existing policy language..

Ability to scale solutions for a large, diverse district.

Strong references and successful project outcomes.

Deliverables

Vendors must provide:

A detailed project plan with timelines, milestones, and deliverables.

A comprehensive cost proposal, including licensing, hardware, implementation, and support.

A risk management plan addressing potential challenges and mitigation strategies.

Documentation for training, maintenance, and system architecture.

Timeline

Contract Award	May 1, 2025.
Initial Planning Meeting	May 7, 2025
PHASED LAUNCH	
Phase 1	August 2025
Central Warehouse and Production	August 11, 2025
Phase 2- School Sites Pilot (9-12 sites)	
Supervisor & Coordinator Training	TBD (December 2025 – January 2026)
Manager Training (Pilot sites)	TBD 2025 -2026 (January 2026)
Phase 3 – All School Sites	August 2026
Manager Training (SK/CC)	August 13 – 14, 2026
Manager Training (CK)	August 17 – 18, 2026
Go Live	August 19, 2026
First Day of School	August 24, 2026

Economic Price Adjustment

If an offeror includes an economic price adjustment, it will only be considered as an alternate proposal. The adjustment must specify the maximum price increase (in % or \$) and the date or event triggering the increase.

Tax Exemption

Pittsburgh Public Schools is exempt from federal excise taxes and state/local sales and use taxes.

Proposal Compliance

Failure to manually sign and complete the M/WBE form will render a proposal non-compliant.

Discussions/Negotiations

Pittsburgh Public Schools may engage in discussions/negotiations with offerors in the final competitive range, however, the district reserves the right to award a contract without negotiations. Offerors may be required to submit a best and final offer (BAFO) within 24 hours of discussions.

Best and Final Offers

If price or delivery terms change after negotiations, a BAFO must be submitted by the deadline given. Otherwise, the original proposal will be used for evaluation and award consideration.

Modification or Withdrawal of Proposals

Proposals may be modified or withdrawn by written notice before the submission deadline. Offerors may also withdraw in person before the deadline with proper identification and a signed receipt.

Proposal Opening

Proposals may be opened upon receipt, no formal public opening will be held, and prices will not be read aloud. While trade secrets and confidential information are generally protected, Pittsburgh Public Schools' records remain public.

SUBMISSION OF PROPOSALS

Proposals must be submitted on a flash drive sealed in an envelope clearly labeled with the offeror's name, address, and the RFP number/title. Proposals must be received by the **Pittsburgh Public Schools Food Service Department (8 South 13th Street, Pittsburgh, PA 15203) to the attention of Malik Hamilton, Director of Food Service**, on or before the published deadline date and time.

Alternatively, offerors may provide a link to the downloadable submission via email to mhamilton1@pghschools.org. The RFP number and title must be in the subject line followed by the offeror's company name (e.g., RFP 2025-100 Food and Child Nutrition Management Software, ABC Acme Software). Offerors should submit their lowest and best price for each item. PDF files must be electronically signed and saved with a password-protected digital signature. Any Excel spreadsheets should be password-protected to prevent editing but must allow copying and pasting of data. All documents must be submitted in PDF or Excel format; no other formats will be accepted.

Proposed pricing should be firm and fixed, as fixed pricing is preferred. If an economic price adjustment is necessary, the offeror must specify the maximum price increase (in percentage or dollar amount) and the event or date that would trigger such an increase. Preference will be given to proposals offering stable and predictable pricing.

Pittsburgh Public Schools is exempt from federal excise taxes, as well as state and local sales and use taxes. Failure to manually sign and complete the M/WBE forms will result in the proposal being considered non-compliant.

Timeline	
Release RFP	March 03, 2025
Pre-Proposal Conference	March 14, 2025 – 2:00 PM EST
Deadlines for Questions	March 18, 2025 – 2:00 PM EST
Responses to Questions Rec'd.	March 19, 2025 - 5:00 PM EST
RFP Due Date	March 31, 2025 – 2:00 PM EST
Finalists Demonstrations	April 1, 2025 – April 7, 2025
Vendor Selection	April 8, 2025
Board Meeting Approval	April 30, 2025
Awardee Contacted (if approved)	May 1, 2025

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1. Scope of Proposal

- 1.1. Pittsburgh Public Schools Food Service is seeking proposals from qualified offerors to provide a Food & Child Nutrition System.
- 1.2. This Request for Proposal (RFP) is divided into six (6) sections:
 - 1.2.1. Notice to Offerors
 - 1.2.2. Instructions to Offerors
 - 1.2.3. General Conditions
 - 1.2.4. Responsibilities of Offerors
 - 1.2.5. Specifications
 - 1.2.6. Offer Forms
- 1.3. These sections form part of all contract documents and apply to the terms and conditions of all purchase orders related to the specified products and services.
- 1.4. This is a fixed-quantity contract for the specified products and services
- 1.5. Product and service quantities listed in this RFP are estimates and do not guarantee purchases under this contract. Specific orders will be issued as needed.
- 1.6. The district is not obligated to purchase beyond the estimated contract value.
- 1.7. If an urgent need arises before the scheduled delivery date and the awarded vendor cannot accommodate the request, the district reserves the right to procure the required items/services from
- 1.8. Pittsburgh Public Schools Food Service may negotiate price and delivery terms with the awarded vendor(s) for similar products during the contract period.
- 1.9. The district may increase the quantity of any item by up to 100% of the estimated amount at the same proposal price during the contract term.
- 1.10. The contract is subject to Board approval and is contingent on factors such as pricing, service quality, compliance with contract terms, and district needs. The district reserves the right to terminate the contract for convenience without penalty due to non-appropriation or lack of available funds. A written Notice of Termination will specify the extent and effective date of termination.

2. Proposal Submittal

- 2.1. A signed proposal constitutes an offer to provide the specified products/services in accordance with the solicitation. Upon board approval, a formal contract agreement will be executed with the awarded offeror(s).

3. General Evaluation

- 3.1. Pittsburgh Public Schools Food Service will award contracts based on the lowest responsive and responsible offer, considering price and other relevant factors. The district does not award contracts based solely on the lowest price. Awards may be made on a lump sum or unit price basis, with compensation determined by actual quantities supplied.

3.2. When evaluating the lowest responsible offer, the district may consider:

3.2.1. Compliance with RFP requirements

3.2.2. Delivery timelines

3.2.3. Product suitability

3.2.4. Maintenance and operational costs

3.2.5. Training requirements

3.2.6. Warranties and service availability

3.2.7. Vendor performance history

3.2.8. Direct and indirect costs

3.2.9. Compliance with the district's Affirmative Action policies

3.3. **Contract Award**

3.3.1. The district may award the contract to the lowest aggregate offeror. If unable to award as a package, the district will evaluate and may issue multiple awards.

3.4. **Unit Price Verification**

3.4.1. The district will verify all unit price extensions. If a discrepancy arises between the unit price and the total extension, the unit price shall prevail.

3.5. **Identical Offers**

3.5.1. If multiple identical offers are determined to be the lowest responsible bids, the district will make the final selection based on the overall best value to the district. No preference will be given to district residents, and no random drawing will be conducted.

3.6. **Selection Process**

3.6.1. **Evaluation Committee** The Evaluation Committee will consist of 4 to 6 voting members from Pittsburgh Public Schools Food Services. The right is reserved to include 1 to 2 non-voting members to the committee. The district reserves the right to modify the committee as necessary.

3.6.2. **Pricing Considerations** All fees and charges must be included in the pricing section. Any extraordinary or additional charges must be clearly detailed in the proposal.

3.6.3. **Comprehensive Solution** Proposals should offer a complete, compatible solution that best meets the Food Service department's operational and technological needs.

3.6.4. **Evaluation & Ranking** Each Evaluation Committee member will independently score the proposals. The scores will be combined to generate a total ranking from highest to lowest. The proposal with the highest combined score will be ranked first, followed by subsequent rankings in descending order.

3.6.5. **Final Selection & Board Approval** The Evaluation Committee will select the proposal that best meets the RFP requirements and district needs. This proposal will be presented to the Pittsburgh Public Schools Board of Directors for review, authorization, and potential contract negotiation.

3.7. **Evaluation Criteria**

3.7.1. The Evaluation Committee will conduct a fair, impartial, and thorough review of all proposals. Each submission will be assessed for completeness and compliance with the Scope of Work and

submission requirements. Proposals that are incomplete or non-compliant may be disqualified at the committee's discretion

- 3.7.2. Proposals will be evaluated based on weighted criteria to determine the best overall value for Pittsburgh Public Schools Food Service. The scoring reflects district priorities, including adherence to fair labor standards, commitment to diversity through M/WBE and/or Veteran Owned Business participation, and long-term cost efficiency. Maximum points that can be earned is 100.

Written RFP Scope Response – 20 Points

Evaluates the overall quality, completeness, and responsiveness to the RFP requirements.

Firm Qualification Requirements & Experience – 5 Point

Demonstrated expertise and relevant experience in Food & Child Nutrition Systems.

References from comparable school districts or institutions.

Project Management & Implementation Approach – 5 Points

Clear project timelines, milestones, and risk management strategies. Defined roles and responsibilities for implementation.

Technical & Security Strategy – 5 Points

System compatibility with district infrastructure. Data privacy, cybersecurity measures, and compliance with regulations.

Support, Maintenance & Training Approach – 5 Points

Availability of customer support, maintenance, and training programs. Plan for knowledge transfer to district personnel.

Functional Specifications & Demonstration – 25 Points

Assesses the extent to which the proposed solution meets district needs.

Solution Approach, Customization, and Enhancements – 10 Points

Alignment with district workflows and operational needs. Scalability and adaptability for future requirements.

Testing, Data Migration, & System Integration – 10 Points

Plan for system testing, data conversion, and seamless migration. Integration capabilities with existing district platforms.

Demonstration of Functional Capabilities – 5 Points

Live demonstration showcasing key features, usability, and efficiency.

Five-Year Life Cycle Cost – 35 Points

Evaluates the total cost of ownership, including implementation, support, and long-term expenses.

Initial Acquisition & Implementation Costs – 10 Points

Pricing transparency for software, hardware, licensing, and setup.

Ongoing Maintenance, Support, and Training Costs – 10 Points

Recurring costs for system updates, troubleshooting, and staff training.

Long-Term Value & Cost Efficiency – 15 Points

Overall affordability considering operational efficiency, durability, and potential cost savings.

Supplier Diversity & Compliance – 10 Points

Evaluates the firm's commitment to diversity, equity, and inclusion, aligning with district policies and goals.

Diversity Plan & Workforce Composition – 4 Points

Documentation of an established diversity plan, workforce representation, and commitment to equitable employment practices.

M/WBE & Veteran-Owned Business Certification and Utilization – 5 Points

Proven track record of meaningful engagement with Minority/Women-Owned Business Enterprises (M/WBEs) and Veteran-Owned Businesses (VOBs) on prior contracts.

Valued Labor Force & Ethical Employment Practices – 5 Points

Support workers' rights to unionize and bargain collectively for fair pay and safe conditions.

Wages & Benefits – 3 Points

Policies ensuring fair wages, benefits, and worker protections.

Demonstrated Commitment to Worker Well-Being – 2 Point

Efforts to improve employee training, career growth, and retention.

5.0 Reservation of Rights

Pittsburgh Public Schools Food Service reserves the right to reject or cancel proposals, waive irregularities, accept minor deviations, reissue the RFP, consider alternate proposals, cancel contracts with 30-day notice for various reasons, and procure goods or services through other means as needed.

6.0. Invoices and Payments

Invoices must be itemized and include the purchase order number, RFP number, and any applicable documentation, such as a bill of lading.

Payments will be made according to the district's payment procedures, with Electronic Funds Transfer (EFT) being the preferred method. Payment will be processed within 30 days of acceptance of the completed order or project.

7.0 Warranty of Price

The price offered must be consistent with the offeror's current prices for similar products, services and quantities under similar conditions. If the price is found to be higher than that of others, Pittsburgh Public Schools Food Service may cancel the RFP without liability.

8.0 Termination

Pittsburgh Public Schools Food Service reserves the right to terminate the contract for default if the offeror breaches the contract or becomes insolvent.

The district may terminate the contract for convenience if funds are not appropriated or are unavailable, with notice provided to the offeror specifying the extent of termination and the effective date.

Pittsburgh Public Schools Food Service may terminate the contract and debar the offeror from future bidding for violations of federal requirements, including but not limited to the "Contract Work Hours and Safety Standards Act," "Equal Employment Opportunity Act," and the "Energy Policy and Conservation Act."

9.0 Interpretation

This document represents the final expression of the agreement between the parties and is intended as a complete and exclusive statement of the terms. Prior dealings or trade usage shall not supplement or explain any term used herein. Acceptance of performance under this RFP shall not impact the meaning of this RFP, even if the accepting party has knowledge of the performance or had the opportunity to object.

10.0 Applicable law

This RFP, and its resulting contract, shall be governed first by the laws of the State of Pennsylvania, and the venue for any disputes arising thereunder shall be in Allegheny County, Pennsylvania, and secondarily by the Uniform Commercial Code as adopted in the State of Pennsylvania and in force on the date of this RFP.

11.0 District on-site requirements

All Pittsburgh Public Schools Food Service property and facilities are a “drug-free zone.” No one may use, consume, carry, transport, or exchange tobacco, cigarettes, or illegal drugs while in a school district building or on school district property. The Offeror, its company, and its employees shall adhere to this policy. For the safety of students, all Offerors working on a campus must sign the visitor log in the campus office.

12.0 Indemnification and hold harmless

Except as otherwise expressly provided, the Offeror shall defend, indemnify, and hold Pittsburgh Public Schools Food Service harmless from and against all claims, liability, loss, and expenses, including reasonable costs, collection expenses, and attorneys’ fees incurred, which arise by reason of the acts or omissions of the Offeror, its agents, or employees in the performance of its obligations under a resulting contract. This clause shall survive termination of a resulting contract.

13.0 Assignment of overcharge claims

The successful Offeror shall assign to Pittsburgh Public Schools Food Service any and all claims for overcharges associated with a resulting contract, which arise under the antitrust laws of the United States, 15 USCA, Section 1 et seq., and under the antitrust laws of the State of Pennsylvania, Pennsylvania Statutes, Title 73, Section 201 et seq.

14.0 Reproduction

Copies of this Request for Proposal document may be reproduced for convenience in collaborating or working with other individuals in the company submitting the proposal. However, the Offeror registered as the plan holder must submit their proposal on the original Request for Proposal document. Offerors may not collaborate with any other Offeror in preparing their proposal.

15.0 Assignment-delegation

No right or interest in a contract resulting from this Request for Proposal process shall be assigned, nor any obligation delegated by the Offeror, without the written permission of Pittsburgh Public Schools Food Service.

16.0 Distribution

Pittsburgh Public Schools Food Service owns the exclusive right to distribute this and any procurement document to Offerors requesting to be included in the procurement process or to Offerors that have been identified as qualified to provide the goods and/or services required in this document.

17.0 Conflict of interest compliance form

This form is required in conjunction with House Bill 914, which went into law on September 1, 2005, and became effective on January 1, 2006. This is a two-page form: the first page is a Notice to Offerors, and the second page is the Conflict of Interest Questionnaire. Completing this form fulfills requirements under Chapter 176, Section 176.006 (a) of the Pennsylvania Local Government Code. Offerors are required to complete and include this form if applicable. If no conflict exists, Offerors must complete and submit the NOTICE OF NO CONFLICT OF INTEREST STATEMENT.

18.0 Insurance

The successful Offeror, at their own expense, shall provide and maintain insurance with fiscally sound firms (at least an AM Best rating of A-) authorized to do business in Pennsylvania. The Offeror may be required to provide a copy of insurance coverage to Pittsburgh Public Schools Food Service. Insurance certificates should include a provision stating that coverage afforded under the policies will not be canceled until at least thirty (30) days prior written notice has been given to Pittsburgh Public Schools Food Service. The district may also require to be named as an additional insured on the Offeror's insurance coverage. If so, the certificate indicating this should be provided within ten (10) calendar days from the award date. If a certificate of insurance is required, the bid/proposal number and title should be noted in the "Description of Operations/Locations/Vehicles/Special Items" block of the certificate, and the "Certificate Holder" block should read, "Pittsburgh Public Schools Food Service."

21.6 Veteran, minority, and women-owned enterprise (V/M/WBE) guidelines

All responses must include the completed V/M/WBE Compliance Guidelines and Forms, which are due at the time of the bid/proposal submission. Bidders/Offerors intending to subcontract any portion of the work must attach a signed Letter of Intent to Subcontract.

All Offerors are required to demonstrate positive and reasonable good faith efforts to subcontract with and/or procure supplies and services from veteran-owned, minority-owned, and women-owned businesses.

If the V/M/WBE Compliance Guidelines and Forms are not included, the bid/proposal will be considered nonresponsive.

IV. RESPONSIBILITIES OF OFFERORS

1.0 Compliance Responsibility

The responsibility for compliance with this solicitation and the subsequent contract rests solely with the bidder/offeror.

2.0 Performance Expectations

Offerors are expected to provide prompt service as required under the resulting contract, including warranties and specified deliverables. Past performance may be considered in awarding future contracts.

3.0 Product and Service Delivery

Offerors must deliver services and products as specified in the solicitation.

4.0 Contract Execution

The successful offeror will be required to execute a **Services Contract** as part of this process.

5.0 Submission Requirements

Proposals must be submitted on a flash drive sealed in an envelope clearly labeled with the offeror's name, address, and the RFP number/title. Proposals must be received by the **Pittsburgh Public Schools Food Service Department (8 South 13th Street, Pittsburgh, PA 15203) to the attention of Malik Hamilton, Director of Food Service**, on or before the published deadline date and time.

Alternatively, offerors may provide a link to the downloadable submission via email to mhamilton1@pghschools.org. The RFP number and title must be in the subject line followed by the offeror's company name (e.g., RFP 2025-100 Food and Child Nutrition Management Software, ABC Acme Software). Offerors should submit their lowest and best price for each item. PDF files must be electronically signed and saved with a password-protected digital signature. Any Excel spreadsheets should be password-protected to prevent editing but must allow copying and pasting of data. All documents must be submitted in PDF or Excel format; no other formats will be accepted.

6.0 Independent Contractor Status

The offeror acknowledges that it is operating as an **independent contractor** and that Pittsburgh Public Schools is not responsible for providing transportation, insurance, or other benefits typically associated with employment status.

The offeror shall **not** represent itself as an employee, officer, partner, or agent of Pittsburgh Public Schools.

The offeror is responsible for any applicable taxes and benefits as required by law.

7.0 Legal and Policy Compliance

The offeror must comply with all **federal, state, and local laws** affecting the services covered by this solicitation, including but not limited to:

- Family Educational Rights and Privacy Act (FERPA)
- Protection of Pupil Rights Amendment (PPRA)
- Health Insurance Portability and Accountability Act (HIPAA)

Pittsburgh Public Schools policies may be obtained from the district's official website.

7.1 Prohibited Contact with Board Members

Board policies prohibit offerors from directly contacting **Pittsburgh Public Schools** board members at any time during the procurement process or contract performance.

8.0 Public Information Act Compliance

Pittsburgh Public Schools is subject to **public records laws**, which require the district to disclose certain information upon request. Offerors must cooperate fully, including providing requested documentation.

If an offeror marks documents as **confidential or proprietary**, Pittsburgh Public Schools will notify the offeror as required by law. However, it is the **offeror's responsibility** to defend its claim of confidentiality before the Attorney General's Office.

9.0 Equal Opportunity Statement

Pittsburgh Public Schools Food Service is an **equal opportunity educational provider and employer** and does not discriminate based on race, color, religion, sex, national origin, disability, sexual orientation, or age in its programs or employment decisions.

The district complies with:

- Title VI & Title VII of the Civil Rights Act of 1964
- Title IX of the Education Amendments of 1972
- Section 504 of the Rehabilitation Act of 1973
- The Americans with Disabilities Act
- The Age Discrimination Act of 1975

Reports of discrimination may result in contract termination.

10.0 Sexual Harassment Policy

Sexual harassment of **students or employees** by the offeror's personnel is strictly prohibited. Any such behavior will result in **disciplinary action, including potential dismissal**, by the offeror.

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Pittsburgh Public School Food Service
Food & Child Nutrition Software System
RFP # 2025-100

Appendix A:

Specifications

All questions about this RFP must be directed in writing to:

Malik Hamilton
Director, Food Services
Pittsburgh Public Schools Food Services
8 South 13th Street
Pittsburgh, PA 15226

Email address: mhamilton1@pghschools.org

Phone: 412.529.3324

1. Priority Requirements

1.1. System Implementation & Scalability

- 1.1.1. The proposed solution must be successfully implemented in a school district with at least 10,000 students and be scalable to a minimum of 25,000 students.
- 1.1.2. The system should allow for customization by adding data elements, applying business rules, and maintaining data through the user interface.

1.2. Web-Based Accessibility & Database Support

- 1.2.1. The system must be accessible online 24/7/365 via a standard web browser.
- 1.2.2. It should support a recognized Enterprise Database System, such as MS SQL Server 2008 or later.
- 1.2.3. Must be ODBC compliant for data access and integration.

1.3. Data Integrity & Security

- 1.3.1. The system should provide an audit trail for tracking critical data changes, including who changed the data and when.
- 1.3.2. It must support role-based permissions, allowing the district to configure and override roles as needed.
- 1.3.3. Authentication should be compatible with the district's Active Directory and allow single sign-on access for all system modules.

1.4. Parent & User Accessibility

- 1.4.1. The system must provide parents with real-time access to menus and lunch account balances via a web-based parent portal or integrate with an existing parent portal.
- 1.4.2. Users at all levels should have access to real-time data reporting available 24/7/365.

1.5. Reporting & Real-Time Data Management

- 1.5.1. The system should support scalable reporting, allowing simultaneous campus and administrative reporting without impacting system performance.
- 1.5.2. It must allow real-time updates from site/cafeteria level to the district's central office with proper security protocols.
- 1.5.3. The reporting framework should allow template-based reports maintained by Pittsburgh Public Schools, ad-hoc reporting accessible by authorized system users, and individually stored reports customizable by each user.

1.6. System Integration & Interoperability

- 1.6.1. The system should integrate with Cybersoft Technologies PrimeroEdge
- 1.6.2. It must allow for custom user interfaces and policy-driven menu shortcuts at the district, school, or site level without requiring vendor programming.

1.7. System Administration & User Controls

- 1.7.1. System maintenance and administration should be remotely accessible from any workstation.
- 1.7.2. Built-in performance monitors should track system and user resources, including CPU/memory usage and logged-in users.

1.8. The system should allow for automated backups while in use, transaction rollback capabilities to prevent data loss, role-based notifications for system shutdown warnings, and a centralized system calendar that integrates across all modules.

1.9. Software Maintenance & Vendor Support

1.9.1. Vendors must provide online support services, including status updates on service calls, live chat for troubleshooting, access to new software releases and patches with installation from the district level, and software updates applied according to the district's timeline rather than the vendor's.

1.10. User Interface & Customization

1.10.1. The system should provide a consistent look and feel across all modules.

1.10.2. It must support:

1.10.3. User-defined shortcuts for frequent queries and reports.

1.10.4. Mass data updates through an intuitive interface.

1.10.5. Hover-over tooltips and contextual error messages for usability.

1.10.6. Field-level security to mask/hide data for specific users.

1.11. Mobile & Multi-Device Compatibility

1.11.1. The web client must be compatible with PC and Mac browsers, including Internet Explorer, Chrome, Firefox, and Safari, as well as mobile devices running Android, Windows Mobile, and iOS, with a mobile application available to support all Food & Child Nutrition System functionalities.

1.12. Data Integrity & Security Measures

1.12.1. The system must allow customizable data validation rules at the district level, field-level tracking for all edits with an audit log, and automated alerts when critical data reaches predefined thresholds.

1.12.2. It should encrypt all data transmissions with 256-bit encryption and allow multi-tiered role-based access for different user groups.

2. System Administration & Performance Monitoring

2.1. The system must allow remote administration of all maintenance functions from any authorized workstation.

2.2. Built-in performance monitoring tools should track system and user resources, including the number of active users logged in, CPU and memory usage, and overall system availability in real-time.

2.3. The system must support data backup functionality, allowing backups of specific modules or the entire system while in use, independently of network backup procedures.

2.4. Must provide commitment control and rollback functionality at the transaction level to prevent data loss in case of a system crash.

- 2.5. Ability to send system-wide notifications to users with a countdown warning before system shutdowns or other key deadlines (e.g., survey processing).
- 2.6. The system must feature a fully integrated calendar that syncs across all modules, including Menu Planning, School Site Ordering & Receiving, Personnel Management, Warehouse Distribution, and Vendor Online Software & Support Services.
- 2.7. The system should allow web-based access to vendor support services, including the ability to monitor the status of current service and support requests and receive statistical data about software quality assurance.
- 2.8. Access and install new software releases, documentation, and updates centrally from Pittsburgh Public Schools.
- 2.9. Engage in live chat with vendor support for real-time troubleshooting.
- 2.10. Contact the vendor's call center for software issue resolution and updates.
- 2.11. Software updates, patches, and fixes must be applied based on the district's schedule, rather than the vendor's.
- 2.12. Release notes must document all software changes and enhancements and be available for review before deployment.
- 2.13. System updates and fixes must not result in data loss, customization removal, or productivity disruption.
- 2.14. **Customization & Role-Based Access**
 - 2.14.1. The system must allow district-level customization of menus, shortcuts, and links on system screens.
 - 2.14.2. Authorized district staff must be able to centrally create and modify user interfaces without vendor programming, including district-specific screens and data fields, school- and site-specific layouts, and program- and role-based interfaces.
 - 2.14.3. The system should provide role-based portals, ensuring access is aligned with user permissions.
 - 2.14.4. User-defined required fields should be configurable at the district level.
 - 2.14.5. Designated personnel should have the ability to create and manage user accounts, such as parent accounts for the parent portal and student accounts for the student portal.
- 2.15. The system must allow administrators to enable or disable functionality based on district-wide settings, school-specific needs, site-specific operations, and program/module-specific settings while ensuring audit logging and data integrity.
- 2.16. The system must provide full audit tracking for all modified data, including previous entries before modification, the date and time of changes, and the user ID of the person making the change.
- 2.17. Historical logs must be maintained permanently, rather than only tracking the most recent change.
- 2.18. The audit log should be customizable, allowing reporting by school, job function or role, and specific data fields such as student ID or user ID.
- 2.19. The system should allow real-time tracking of active users and their actions within the system.

2.20. District IT personnel should have full control over database access permissions.

2.21. **Software Platform & Environment**

2.21.1. The system must employ a district-wide architecture, ensuring all data is stored in a single enterprise database with real-time communication across all school sites.

2.21.2. Real-time point-of-sale (POS) and site-level transactions must be directly updated to the central database.

2.21.3. The system must support offline transaction capabilities, ensuring sites and POS terminals continue functioning even if network connectivity is lost.

2.21.4. Transactions should be stored locally and synchronized once connectivity is restored.

2.21.5. The system should include built-in redundancy and resiliency to minimize downtime.

2.21.6. The database should be accessible using standard tools such as SQL Server 2008R2 or later.

2.22. **User Interface & Usability**

2.22.1. The system should provide consistent navigation and functionality across all modules.

2.22.2. Users should be able to create customized shortcuts for frequently used queries and reports.

2.22.3. The system should allow for mass data entry and updates, improving efficiency for tasks such as inventory management and report creation.

2.22.4. The interface should provide pop-up explanations for validated fields, hover-over tooltips for additional guidance, user-friendly error messages with links to troubleshooting resources, and hyperlinked drill-down screens for quick access to related data.

2.22.5. The system should display student names and IDs on all student-related screens.

2.23. **Cross-System Communication & Data Sharing**

2.23.1. The system must support multi-channel communication for school-level menu changes, district-wide updates, and the publishing of new information to all relevant stakeholders.

2.23.2. Must allow data integration and information flow between **the Food & Child Nutrition System** and other district applications.

2.23.3. Should provide mobile compatibility for remote access across Windows, Android, and iOS devices.

2.24. **Security & Access Control**

2.24.1. The system must ensure secure user authentication with encrypted login credentials.

2.24.2. Users should be required to reset passwords periodically based on a district-configured timeframe.

2.24.3. Failed login attempts should be limited, triggering a temporary account lockout after multiple failed attempts.

2.24.4. Users should be automatically logged out after a defined period of inactivity to prevent unauthorized access.

2.24.5. The system must allow multiple roles per user, enabling employees to access different school sites or programs without unnecessary permissions expansion.

2.24.6. Single login access should be available for authorized users overseeing multiple schools.

2.25. Security Administration & Data Protection

- 2.25.1. System security settings should be adjustable without requiring system downtime.
- 2.25.2. The system must allow for centralized security administration and distributed security administration at the school or site level.
- 2.25.3. Must provide transaction audit capabilities, tracking all modifications with a timestamp and source identifier.

3. System Design and Architecture

3.1. Integrated & Seamless System Structure

- 3.1.1. The Food & Child Nutrition System must be an integrated, seamless, and comprehensive solution, built around workstreams for child nutrition with predefined business processes that can be customized for Pittsburgh Public Schools.
- 3.1.2. The system components/modules must be built around a common data model to ensure consistency and interoperability across all functional areas.
- 3.1.3. All system components/modules must support internal and external data sharing, adhering to Master Data Management (MDM) best practices.

3.2. Single Sign-On & Authentication

- 3.2.1. The system must support single sign-on (SSO) functionality across all modules and applications.
- 3.2.2. Authentication must be compatible with Pittsburgh Public Schools' Active Directory system, ensuring a secure, pass-through authentication mechanism.
- 3.2.3. The system must complement and facilitate role-based security settings down to the field level, ensuring appropriate data access controls for different user roles.

3.3. User Experience & Interface Consistency

- 3.3.1. The system must provide a consistent look and feel across all modules and functional areas.
- 3.3.2. Controls for similar functions across different components must be located, accessed, and operated in a uniform manner.
- 3.3.3. User views and workflows should follow existing conventions where they make sense to optimize user familiarity and ease of use.

3.4. Data Movement & Processing Schedules

- 3.4.1. The system must accommodate various data movement periodicities, including monthly data processing, weekly updates, daily transactions, on-demand access to updated data, and real-time data synchronization across modules.

3.5. Workflow Automation & Customization

- 3.5.1. The system must allow for customizable workflow processes, configurable by the vendor and embedded within the system's core design.
- 3.5.2. Workflow process documentation must follow industry standards such as Business Process Modeling Notation (BPMN) or XML Process Definition Language (XPDL).
- 3.5.3. The system should provide a visual process framework outlining:

- 3.5.4. Major processes within the Food & Child Nutrition System.
- 3.5.5. Sub-processes and dependencies within the system.
- 3.5.6. Linkages between processes to maintain visibility and control.
- 3.5.7. Workflow documentation should be leveraged for user training and ongoing system optimization.

3.6. Common Data Architecture & Referential Integrity

- 3.6.1. The system must be built around a logical and physical data model, defining the relationships between data elements within and across components.
- 3.6.2. Referential integrity must be strictly enforced, ensuring that data remains accurate, consistent, and reliable across all programs and databases.

3.7. Master Data Management (MDM) Compliance

- 3.7.1. The system must comply with Master Data Management (MDM) best practices, ensuring that data integrity is maintained by controlling additions, modifications, and deletions at the data element level, and that data imported from authoritative source systems, such as student information systems, cannot be overwritten, deleted, or modified outside of established permissions.
- 3.7.2. The system can be designated as the authoritative data source for specific data types and support a publish/subscribe, event-driven data movement architecture with near real-time synchronization.
- 3.7.3. The system provides database location transparency, allowing users to access relevant data without requiring knowledge of database structures.
- 3.7.4. Role-based personnel must be able to extract and upload data to and from remote workstations as necessary.
- 3.7.5. The system should be normalized to minimize redundant data entry and optimize system performance.

3.8. Real-Time Data Processing & System Integration

- 3.8.1. The system must support real-time data updates, ensuring that changes to a record in one module are immediately reflected across all integrated components, users receive real-time notifications for updates affecting their respective functional areas, and system users are alerted to simultaneous record modifications to prevent conflicts in data entry.
- 3.8.2. The system should include an **auto-retry mechanism for locked records**, allowing users to attempt modifications after a brief delay.

3.9. Open Database Connectivity & Extensibility

- 3.9.1. The system must support Open Database Connectivity (ODBC) standards to facilitate seamless data integration with external applications.
- 3.9.2. The system must include a dynamic, searchable data dictionary, available to district system administrators, to enable easy reference and system customization.

3.9.3. The data dictionary must provide a crosswalk of data elements linking user interface locations (screens) to database locations (table columns) and documentation of interactions between data elements, including references to Pennsylvania state reporting requirements.

3.10. **System Updates & Testing Environment**

3.10.1. The system must allow Pittsburgh Public Schools to maintain a development and test environment, enabling system administrators to test new software updates, patches, and integrations before deployment, ensure updates do not disrupt existing functionality or data integrity, and validate that district-specific customizations remain intact after software upgrades.

4. **Point of Sale Configuration Features**

4.1. The Point of Sale (POS) system must support a variety of input devices for accessing student accounts, including USB 2.0 compliant peripheral devices such as cash drawers, PIN pads, and barcode scanners with Plug-n-Play functionality; commercially available keypad-input devices for manual student account access; barcode scanning of student ID cards for quick identification; and biometric authentication, including fingerprint and palm scan devices for meal access.

4.2. The system should allow cashiers to manually enter ID numbers if necessary.

4.3. Must support on-screen student account lookups by name, PIN, or ID number.

4.4. A touchscreen interface should be available at the point of service for faster transaction processing.

4.5. The system should allow for the annual upload of student pictures from the Student Information System (SIS) or a third-party photo solution for enhanced visual identification.

4.6. The system should provide the ability to print student ID cards with barcode compatibility for POS scanners.

4.7. **Menu & Sales Functionality**

4.7.1. The system must allow for the graphical definition of unlimited menu categories and buttons for ease of selection.

4.7.2. Display of unlimited menu items, allowing lookup by category.

4.7.3. Allergy information alerts for menu items to ensure student safety.

4.7.4. Management of student-specific dietary restrictions.

4.7.5. Bulk transaction entry, enabling multiple sales entries at once for efficiency in large meal service settings.

4.7.6. Auto-detection of second reimbursable meals, ensuring proper charge application or categorization as à la carte purchases.

4.7.7. The POS system must be able to track Offer vs. Serve components for compliance with federal meal regulations.

4.7.8. The system must prevent multiple reimbursable meal claims per student per meal period across multiple school locations.

4.8. **Financial & Payment Management**

4.8.1. The POS system should support **multiple payment options**, including:

- 4.8.1.1. Cash, check, or charge transactions.
- 4.8.1.2. Prepayment options at the POS terminal.
- 4.8.1.3. Ability to allocate change to a student's account without leaving the transaction screen.
- 4.8.1.4. Check processing with check number entry without disrupting sales transactions.
- 4.8.1.5. Ability to assign prepay funds for use on meal purchases only or general account spending.
- 4.8.1.6. Parent-set spending limits on à la carte purchases, with override options for specific students.

4.9. The system should allow schools to define charge limits based on eligibility category and adjust them per student if needed.

4.10. The system must support pre-payment at locations other than the cafeteria, such as the main office, homeroom, or central office; pre-payment via an integrated web-based portal for parents; and prepay documents listing all students and account balances for administrative tracking.

4.11. The system must allow real-time updates of payments to be reflected in the student's meal account within 15 minutes of deposit.

4.12. **Student Account & POS Display Features**

4.12.1. The POS system should provide real-time student eligibility status updates from the central office database to school sites.

4.12.2. The system should support blind balance till configurations for users or groups, ensuring secure cashier transactions.

4.12.3. The POS sales display must include a student picture ID for verification, dietary or allergy alerts, student name and ID number, parent-set spending limit notifications, and meal account balance.

4.12.4. The system should support **audible electronic voice responses and warnings** to assist cashiers in high-volume settings.

4.13. **POS Reporting & Analytics**

4.13.1. The system must generate comprehensive reports, including:

4.13.2. User-defined queries and reports for student database records at the school or district level.

4.13.3. Customer count reports categorized by:

4.13.4. Free, reduced, paid, and adult meal counts for specified date ranges.

4.13.5. Demographic analysis reports, including meal participation breakdowns by ethnic group.

4.13.6. Edit-check reports identifying potential overclaims.

4.13.7. Detailed student transaction reports for individual purchase history.

4.13.8. Audit trail reports showing cash handling discrepancies.

4.13.9. Daily, weekly, and monthly summary reports integrating with Pennsylvania state reimbursement claims.

4.13.10. Live student participation reports, accessible by food service administrators at any district location.

- 4.13.11. Real-time reports on transactions for any school location or cashier.
- 4.13.12. Letter templates can be developed and altered with Microsoft Suite applications for customized parent communication.
- 4.13.13. Detailed report on different profit centers within the same school site such as; NSLP, Catering, Outside Contracts, CACFP, etc..
- 4.13.14. Real-time reporting of combined sales figures for different school levels (elementary, middle, high school) and individual schools.

4.14. Security & Compliance

- 4.14.1. The system must comply with federal and Pennsylvania state meal program regulations.
- 4.14.2. All meal transaction data must be encrypted and stored securely.
- 4.14.3. Users should have role-based access permissions, preventing unauthorized data modifications.
- 4.14.4. The system must support audit tracking for all modifications to student records and financial transactions.

4.15. Centralized Point of Sale Management

- 4.15.1. The Point of Sale (POS) system must support centralized menu creation, item management, and maintenance at the Pittsburgh Public Schools Food Service central office.
- 4.15.2. The system must allow for unlimited cycle menus, supporting a minimum of six-week menu cycles for flexible meal planning.
- 4.15.3. Must provide a drag-and-drop interface for designing menu grids to streamline meal planning.
- 4.15.4. The system should allow for grouping schools by type (e.g., elementary, middle, high school, satellite sites) to simplify menu communication.
- 4.15.5. Central office staff must be able to restrict or allow menu editing at the school level based on user roles.
- 4.15.6. The POS system must facilitate prepayments at the central office, allowing funds to be deposited directly into individual student accounts at their respective schools.
- 4.15.7. The system must support fund transfers between student accounts within the same household.
- 4.15.8. The POS system should ensure that student meal account balances follow the student when transferring between schools.
- 4.15.9. The system must prevent duplicate meal claims, ensuring that a student cannot receive more than one first meal per day at different schools.

4.16. POS Transaction Processing & School Integration

- 4.16.1. The system must allow for grouping of schools for POS data downloads, ensuring each site or POS terminal recognizes students within the assigned group.
- 4.16.2. The system must enable central office-controlled year-end rollovers for account balances, menu configurations, and student eligibility.

4.16.3. The POS system should allow centralized recipe creation and management, with the ability to restrict editing permissions at the school level.

4.16.4. Remote electronic upgrades and patching must be supported for individual school computers, groups of multiple school computers, and entire district-wide POS systems in a staggered or scheduled deployment.

4.17. Student Data Management & POS Integration

4.17.1. The system must be SIF-compliant and support real-time student information synchronization.

4.17.2. Student records should be set to inactive within the district without deleting historical transaction data.

4.17.3. The system must allow for district-wide student searches using alphanumeric searches (name-based), student ID numbers, and PIN numbers.

4.17.4. Meal application records must sync in real-time with the POS system, ensuring immediate updates to student eligibility at all terminals.

4.17.5. The system should allow POS terminals at different school sites to communicate transactions in real-time, ensuring accurate tracking of meal purchases.

4.17.6. The POS system must allow locking and restricting access to patron records based on user permissions and authentication protocols.

4.18. Transaction History & Accountability

4.18.1. The system must maintain a **detailed transaction history** for each student, including:

4.18.1.1. Type of transaction (meal purchase, fund deposit, etc.).

4.18.1.2. Date and time of transaction.

4.18.1.3. User ID of the staff member who processed the change.

4.18.1.4. Comprehensive student transaction reports, sorted by:

4.18.1.5. ID number.

4.18.1.6. Alphabetically.

4.18.1.7. Homeroom assignments.

4.18.1.8. Student status.

4.18.2. The system must support prepayment discount levels by grade level, applicable to both paid and reduced-price students.

4.19. District-Wide POS Communication & Reporting

4.19.1. The POS system must support real-time two-way electronic data exchange between the central server and all POS terminals via a wide-area network (WAN).

4.19.2. The system should allow students visiting from other schools within the district to use their PIN number to purchase meals.

4.19.3. The system should allow authorized users to access detailed transaction histories for a student from any school location.

4.19.4. The system must include security alerts to notify cashiers when a student from another school is attempting to use a different PIN number at their POS terminal.

4.20. POS Hardware & Accessibility Features

- 4.20.1. The system must support biometric authentication options, such as fingerprint scanning and palm recognition technology.
- 4.20.2. The POS system should allow for secure wireless network operation to facilitate transactions at mobile or temporary school sites.
- 4.20.3. The system must allow controlled access to financial data, ensuring over/short transaction data is only visible to authorized personnel.
- 4.20.4. The system should support data import/export functionality using CSV (comma-separated value) format for enhanced interoperability.

4.21. POS Security & Compliance

- 4.21.1. The system must require password authentication for access to student meal accounts and financial data.
- 4.21.2. Software updates, program patches, and upgrades must be automatically propagated from the central office to all site computers and POS terminals via a wired or wireless WAN connection.
- 4.21.3. The POS system should support reimbursement rate tables, including designations for severe need schools.
- 4.21.4. The system must support specialized programs such as snack and milk programs, Breakfast-in-the-Classroom initiatives, After-School Supper Programs, and Summer School meal programs.
- 4.21.5. Enrollment figures should be trackable at the site level and by specific profit centers (e.g., National School Lunch Program (NSLP), charter schools, Head Start, and satellite sites).
- 4.21.6. The system must support tracking of non-sufficient funds (NSF) checks to ensure proper accounting and prevent unauthorized meal charges.
- 4.21.7. The system must integrate with Pittsburgh Public Schools' financial systems, supporting at least 20-character Chart of Accounts numbers for accurate accounting and reporting.

4.22. POS Reporting & Analytics

- 4.22.1. The system must support comprehensive reporting functionalities, including:
 - 4.22.1.1. Customizable queries and reports for student meal transaction records at the school or district level.
 - 4.22.1.2. Customer count reports, categorized by free, reduced, paid, and adult meal counts, available for daily, weekly, or custom date ranges.
 - 4.22.1.3. Demographic analysis reports, including meal participation breakdowns by ethnic group.
 - 4.22.1.4. Automated edit-check reports to identify potential overclaims.
 - 4.22.1.5. Audit trail reports for meal transactions, ensuring full transparency in cash handling and digital transactions.
 - 4.22.1.6. Reimbursement claims reports required for state and federal meal program compliance.
 - 4.22.1.7. Live student participation reports, accessible by food service administrators from any district location.

- 4.22.1.8. Automated end-of-day reports, configurable for automatic printing at the school site with a single button click.

5. Free and Reduced Eligibility

- 5.1. The Free and Reduced Eligibility System must be fully integrated within the Pittsburgh Public Schools' Food & Child Nutrition platform.
- 5.2. The system must support online and paper application processing for meal benefits, ensuring real-time updates to student eligibility records.
- 5.3. The system should be able to process individual and household applications, verifying eligibility based on federal and Pennsylvania state guidelines.
- 5.4. Must allow for batch processing of applications for faster data entry and approval.
- 5.5. The system should provide secure, role-based access to protect student information and limit visibility based on user permissions.
- 5.6. All eligibility determinations must comply with United States Department of Agriculture (USDA) and Pennsylvania Department of Education regulations.

5.7. Application Processing & Management

- 5.7.1. The system must allow for real-time eligibility determination upon submission of an application.
- 5.7.2. Must support both direct certification and categorical eligibility processing.
- 5.7.3. The system should include built-in verification tools to identify duplicate applications and incorrect data entries.
- 5.7.4. The system must allow for mass updates to student records, such as rolling over eligibility status from the previous year and updating all students in a household when a new eligibility determination is made.
- 5.7.5. The system must provide a customizable workflow for application approvals, including the automatic assignment of applications to appropriate reviewers, tracking and logging of approval steps, and notifications to parents/guardians upon application approval, denial, or pending status.
- 5.7.6. The system must automatically flag incomplete applications and prevent submission until all required fields are completed.
- 5.7.7. It should allow for electronic signatures on online applications, ensuring compliance with federal and Pennsylvania regulations.

5.8. Direct Certification Integration

- 5.8.1. The system must be able to import and process direct certification files from the Pennsylvania Department of Education.
- 5.8.2. Must automatically match students against state-provided direct certification lists and update eligibility status accordingly.
- 5.8.3. The system should allow for manual verification of direct certification status when needed.

5.8.4. It must generate reports on direct certification matches and indicate which students were certified through Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), or Medicaid eligibility.

5.9. Household & Sibling Linking

5.9.1. The system must be able to link students within the same household, ensuring that:

5.9.1.1. All students in the household receive the same eligibility determination.

5.9.1.2. Changes to one student's eligibility automatically update all household members.

5.9.1.3. Household income calculations consider all members on the application.

5.9.2. The system should allow for household income-based eligibility calculations, including the ability to prorate income based on pay frequency (e.g., weekly, bi-weekly, monthly).

5.10. Notification & Communication

5.10.1. The system must support automated notification letters to families regarding:

5.10.1.1. Approval or denial of free/reduced-price meal benefits.

5.10.1.2. Application status updates.

5.10.1.3. Requests for additional verification documentation.

5.10.1.4. Letter templates can be developed and altered with Microsoft Suite applications to allow for customized communication with households.

5.10.2. The system must be able to generate and send email and printed letters in English, Spanish, and other district-defined languages.

5.10.3. The system must allow for mass communication to households in cases of changes in eligibility guidelines, upcoming application deadlines, and verification audit requests, ensuring compliance with verification requirements.

5.10.4. The system must include built-in tools to conduct the federally required verification process, including:

5.10.4.1. Automated selection of applications for verification based on USDA guidelines.

5.10.4.2. Random and focused selection methodologies.

5.10.4.3. Tracking responses and follow-ups for verification requests.

5.10.4.4. Generation of required federal and state verification reports.

5.11. The system should allow for electronic submission of verification documentation from parents/guardians.

5.12. Must track verification completion rates and generate reports to ensure compliance with USDA and Pennsylvania Department of Education audit requirements.

5.13. The system should automatically update student eligibility status based on verification results.

5.14. Eligibility Rollovers & Grace Periods

5.14.1. The system must allow for automatic carryover of prior year eligibility into the new school year for the federally mandated 30-day grace period.

5.14.2. Must be able to generate a list of students who have not submitted a new application and are at risk of losing benefits after the grace period expires.

5.14.3. The system should allow for batch processing of carryover eligibility removals when the grace period ends.

5.15. Data Security & Audit Logging

5.15.1. The system must include full audit tracking for all modifications to eligibility records, including previous eligibility status before changes, the date, time, and user ID of modifications, and details of application processing steps.

5.15.2. The system must store historical eligibility data for a minimum of five years for audit purposes.

5.15.3. Must comply with Family Educational Rights and Privacy Act (FERPA) regulations to protect student data.

5.16. Reporting & Analytics

5.16.1. The system must support real-time reporting on eligibility data, including total number of students in each eligibility category (free, reduced, paid), breakdown of eligibility by school, grade level, and demographic group, tracking of application processing times and approval rates, verification audit reports required for state and federal compliance, reports must be exportable in multiple formats, including excel, pdf, and csv and the system must support automatic report scheduling and distribution to authorized personnel.

6. Online Payment System

6.1. The Online Payment System must be fully integrated with the Pittsburgh Public Schools' Food & Child Nutrition platform, allowing parents/guardians to make electronic meal payments securely and conveniently.

6.2. The system must support 24/7 online access via a web-based parent portal, accessible through standard internet browsers on desktops, tablets, and mobile devices.

6.3. Must provide real-time synchronization with student meal accounts to ensure immediate fund availability upon successful transaction processing.

6.4. The system should be capable of handling multiple payment methods, including credit and debit cards (Visa, MasterCard, Discover, and American Express), Automated Clearing House (ACH) bank transfers, and mobile payment integrations such as Apple Pay and Google Pay.

6.5. Must allow parents/guardians to view account balances, meal transactions, and deposit history in real-time.

6.6. Account Management & Family Linking

6.6.1. The system must enable parents/guardians to link multiple students within the same household under a single online payment account.

6.6.2. Parents must be able to allocate deposited funds to individual student accounts or a shared family meal account.

6.6.3. The system should allow parents to set spending limits for à la carte purchases per student.

6.6.4. It must provide an option to enable recurring payments, allowing parents to:

6.6.4.1. Schedule automatic deposits at specified intervals (weekly, bi-weekly, monthly).

6.6.4.2. Trigger auto-payments when the account balance falls below a parent-defined threshold.

6.6.5. The system should generate low-balance alerts via email, SMS, or app notifications to notify parents when funds are running low.

6.7. Security & Compliance

6.7.1. The system must comply with Payment Card Industry Data Security Standard (PCI-DSS) Level 1 for secure payment processing.

6.7.2. All personal and financial data must be encrypted using 256-bit SSL encryption.

6.7.3. The system must require multi-factor authentication (MFA) for parents and district administrators accessing financial records.

6.7.4. User activity logs must track successful and failed login attempts, payment transactions and modifications and refund requests and approvals.

6.7.5. It must comply with Family Educational Rights and Privacy Act (FERPA) to ensure student financial data security.

6.8. Transaction Processing & Reporting

6.8.1. The system must support real-time payment processing, ensuring funds are immediately credited to student accounts.

6.8.2. Must allow for partial payments, enabling parents to deposit any desired amount rather than requiring full balances to be paid at once.

6.8.3. The system should generate automated receipts via email and downloadable PDF after each payment.

6.8.4. Must provide district administrators and food service staff with access to real-time transaction reports, including daily payment summaries, deposits by student, school, or district-wide totals and transaction status reports (successful, pending, failed, or refunded payments).

6.8.5. The system should support automated reconciliation, ensuring payment records sync accurately with the district's financial accounting system.

6.8.6. A refund management module must be included, allowing authorized personnel to process refunds to original payment methods or apply refunds as credit to student accounts.

6.9. Parent & User Accessibility

6.9.1. The parent portal must be mobile-friendly, allowing payments from smartphones and tablets.

6.9.2. The system should offer multi-language support, including English, Spanish, and additional district-preferred languages.

6.9.3. Must include an intuitive dashboard for parents to view detailed transaction history, filter payments by date range, set and manage alerts, and download statements and reports.

6.9.4. The system must integrate with the district's Student Information System (SIS) to pull real-time student enrollment data.

6.9.5. Must sync with the Point of Sale (POS) system, ensuring that payments reflect instantly in cafeteria cash registers.

6.9.6. The system should allow authorized school and district staff to manually adjust meal balances with proper security controls.

7. Menu Planning & Nutrition Analysis Requirements

- 7.1. The system must provide a fully integrated menu planning and nutrition analysis platform that aligns with the USDA and Pennsylvania Department of Education regulations.
- 7.2. Supports the complete integration of menu planning/nutrition analysis with Cybersoft Technologies PrimeroEdge for Administrative Review purposes.
- 7.3. Must allow for district-wide, school-specific, and site-specific menu planning, ensuring flexibility across all food service locations.
- 7.4. The system must auto-populate production records based on the site type menu, reducing manual data entry and improving efficiency.
- 7.5. Must include meal pattern compliance checks to ensure all planned menus meet National School Lunch Program (NSLP), School Breakfast Program (SBP), Child and Adult Care Food Program (CACFP), and Summer Food Service Program (SFSP) regulations.
- 7.6. The system must support the ability to add non-food items to a recipe without the cost of that item being calculated into the food cost, ensuring accurate cost control.
- 7.7. Provides real-time tracking of menu modifications, with district-controlled restrictions on edits at the school level.
- 7.8. The system must allow for detailed nutrient tracking, including calories, fat, protein, carbohydrates, sodium, vitamins, and minerals, saturated fat and trans-fat monitoring and fiber and sugar intake tracking.

7.9. Allergen Tracking & Special Diet Management

- 7.9.1. The system must allow for an unlimited number of allergens to be created and tracked across all modules of the system.
- 7.9.2. All allergens must be linked to individual ingredients and recipes, ensuring accurate tracking and automated alerts for meals containing allergens.
- 7.9.3. The system must allow for student-specific dietary restrictions to be flagged within the POS system to prevent improper meal selections.
- 7.9.4. Must support special diet planning, including the ability to designate gluten-free, vegetarian, and medically necessary substitutions.
- 7.9.5. The system should generate allergen-aware menu reports, accessible by parents, school nurses, and food service personnel.

7.10. Menu Costing & Forecasting

- 7.10.1. The system must allow for detailed meal cost analysis, tracking both food costs and labor costs associated with each recipe.
- 7.10.2. Must include the ability to forecast product needs based on a site's Average Daily Participation (ADP) for Breakfast, Lunch, Snack, and Dinner.
- 7.10.3. The system should predict inventory needs based on historical usage, site ADP trends, and projected meal service numbers.

- 7.10.4. Must support the ability to plan and track commodity diversions, ensuring efficient use of USDA foods.
- 7.10.5. The system must track commodity balances and total diversions for each diverted product and manufacturer
- 7.10.6. The forecasting tool should provide automated alerts when anticipated demand exceeds available inventory.
- 7.10.7. The system must allow users to generate advanced reports for ordering trends, including Year-over-Year reports to analyze annual changes in ordering patterns. Monthly trends reports to assess ordering consistency. Monthly trends Year-over-Year reports, comparing the same months across multiple years to identify seasonal patterns.
- 7.10.8. Must allow for exportable reports in formats such as Excel, PDF, and CSV.

7.11. Student Acceptability & Participation Analysis

- 7.11.1. The system must include a student acceptability report with the ability to compare acceptability by site to identify meal trends and menu performance.
- 7.11.2. The system should track menu item popularity, allowing food service administrators to adjust menus based on student preferences and participation rates.
- 7.11.3. Reports should include meal participation by site, grade level, and student demographics.
- 7.11.4. Waste tracking to determine which meals are discarded most frequently.
- 7.11.5. Survey integration for student meal satisfaction feedback.

7.12. Menu Customization & Standardization

- 7.12.1. The system must allow for centralized district menu management, while permitting site-level adjustments based on local availability and student preferences.
- 7.12.2. Must support menu duplication to streamline meal planning across multiple schools, cycle menu planning for up to 12 weeks, ensuring variety and efficiency, and automated substitution recommendations based on available inventory.
- 7.12.3. The system must include customizable portion sizes based on age group, grade level, and program type (NSLP, SBP, CACFP, SFSP, etc.).
- 7.12.4. Menus must be exportable in multiple formats, including Excel, PDF, and web-based display for parents and stakeholders.

7.13. Recipe & Production Management

- 7.13.1. The system must allow for district-wide recipe standardization, ensuring consistency across all sites.
- 7.13.2. Must include a built-in ingredient database with the ability to add custom ingredients, vendor-supplied items, and USDA commodities.
- 7.13.3. The system should allow for scaling recipes up or down based on expected meal participation, automated adjustments for recipe yields based on ingredient availability and tracking of ingredient substitutions to maintain nutritional compliance.

- 7.13.4. Production records should auto-populate based on the site type menu, ensuring accurate forecasting and reducing manual entry errors.
- 7.13.5. The system must allow for batch cooking scheduling, ensuring food is prepared fresh while minimizing waste.

7.14. Integration & Reporting

- 7.14.1. The system must be integrated with the Point of Sale (POS) system to ensure real-time nutrient and allergen tracking.
- 7.14.2. Must generate comprehensive reports for menu cost analysis and per-meal expense tracking and inventory usage based on planned vs. actual meal production.
- 7.14.3. Production records, with automated calculations of planned servings, actual servings, and waste.
- 7.14.4. Meal pattern compliance checks for federal and state reporting.
- 7.14.5. Student meal preferences and participation trends.
- 7.14.6. Reports must be exportable in Excel, PDF, and CSV formats for analysis and compliance auditing.

8. Production Management

- 8.1. The Production Management System must be fully integrated with Pittsburgh Public Schools' Food & Child Nutrition platform, ensuring efficient meal production, inventory tracking, and waste management.
- 8.2. The system must allow for automated production planning, ensuring food preparation aligns with meal participation trends and USDA guidelines.
- 8.3. All inventories should be independent of each other. Warehouse inventory should not be dependent on production withdrawals, school site withdrawals, or any other inventory movement, ensuring accurate tracking at each operational level.
- 8.4. The system must support real-time production record management, allowing for tracking of planned meals, actual meals produced, and adjustments based on site needs.
- 8.5. Must allow for batch cooking schedules to optimize food quality and minimize waste.

8.6. Production Record Automation & Forecasting

- 8.6.1. The system must allow for auto-populated production records based on site type menus, ensuring that planned meals align with expected participation.
- 8.6.2. Must provide forecasting tools to predict product needs based on a site's Average Daily Participation (ADP) for Breakfast, Lunch, Snack, and Dinner. Ingredients and menu item demand using historical data trends. Inventory depletion based on menu cycles and site-specific needs.
- 8.6.3. The system should allow for real-time adjustments to production schedules, accommodating changes in participation, weather, special events, or emergency closures.

8.7. Inventory Management & Tracking

- 8.7.1. The system must maintain separate, independent inventory tracking for warehouse inventory, production kitchen inventory and school site inventory, as well as commodity diversion tracking and balances.
- 8.7.2. Withdrawals from production kitchens or school sites should not affect warehouse inventory levels, ensuring each inventory location remains accurately accounted for.
- 8.7.3. The system must track inventory down to the ingredient level, ensuring accurate forecasting for future production.
- 8.7.4. It must allow for automated inventory replenishment requests based on forecasted production needs.

8.8. Waste Tracking & Reporting

- 8.8.1. The system must include a Waste Tracking Report, allowing food service administrators to record and categorize wasted food (overproduction, spoilage, returned trays, etc.). Reports must be exportable in Excel, PDF, and CSV formats.
- 8.8.2. Analyze trends in meal participation vs. waste to optimize production planning and identify problem areas contributing to excess food waste.
- 8.8.3. Generate USDA-compliant waste tracking logs for reporting and compliance.
- 8.8.4. Waste tracking should be integrated with production records, ensuring that overproduction trends can be identified and adjusted.

8.9. Compliance & Meal Pattern Tracking

- 8.9.1. The system must ensure that all produced meals meet USDA meal pattern requirements.
- 8.9.2. Must generate real-time compliance reports, ensuring that each meal meets federal and Pennsylvania nutritional guidelines.
- 8.9.3. The system should alert users if menu items do not align with required nutritional standards before finalizing production plans.

8.10. Production Reporting & Analytics

- 8.10.1. The system must provide real-time reporting dashboards for meal production vs. actual participation, ingredient usage and forecasted needs. Waste tracking and reduction efforts. Site-specific production efficiency analysis.
- 8.10.2. Reports must be customizable and exportable, ensuring detailed insights into meal production efficiency across the district.

9. Ordering & Receiving

- 9.1. The Ordering & Receiving System must be fully integrated within the Pittsburgh Public Schools' Food & Child Nutrition platform to support efficient, data-driven procurement and inventory management.
- 9.2. The system must provide real-time updates to inventory levels upon receiving deliveries and placing orders.
- 9.3. It must allow for district-wide, school-specific, and program-specific ordering, ensuring flexibility for different locations and meal programs.

9.4. Must include automated order tracking, with real-time updates on pending, received, and in-transit orders.

9.5. Must allow for automated alerts when stock levels reach reorder points, ensuring proactive ordering.

9.6. Systematic Ordering & Usage History

9.6.1. The system allows for systematic ordering, which displays a user-defined range up to the previous six months' usage history and upcoming six months' history from the previous year by item.

9.6.2. Must provide an automated order recommendation feature, factoring in historical usage data, forecasted meal participation, on-hand inventory levels, minimum and maximum order thresholds.

9.6.3. The system must allow users to manually adjust orders while maintaining visibility into recommended quantities.

9.6.4. Must allow for order adjustments at the district level before final submission.

9.7. Receiving & Delivery Management

9.7.1. The system must allow for electronic receiving with the ability to mark items as received, partially received, or rejected.

9.7.2. Record discrepancies between ordered and received quantities.

9.7.3. Automatically update inventory upon receipt.

9.7.4. Track expiration dates and automatically flag soon-to-expire products.

9.7.5. Must include barcode scanning for item verification at the time of receiving.

9.7.6. The system must generate receiving reports summarizing the total items received per vendor, price discrepancies between purchase orders and invoices, and delivery delays and vendor performance metrics.

9.8. Vendor & Bid Management

9.8.1. The system must allow for multiple vendor price comparisons before order placement.

9.8.2. Must track contracted pricing agreements and bid pricing for bulk purchases.

9.8.3. The system must generate vendor performance reports, tracking on-time deliveries, product quality issues and fulfillment accuracy rates.

10. Inventory Management Requirements

10.1. The Inventory Management System must be fully integrated within the Pittsburgh Public Schools' Food & Child Nutrition platform to provide real-time tracking, valuation, and reporting for all inventory items.

10.2. The system must allow for multi-location inventory tracking, ensuring independent inventories for, Central Warehouse, Central Production, and school sites.

10.3. Must support real-time inventory updates when items are received, transferred, or used in production.

10.4. The system should allow for importing inventory data from a CSV file for easy data entry and system integration.

10.5. Inventory Sorting & Filtering

- 10.5.1. The system must allow users to sort inventory items by storage type (dry, refrigerated, frozen, etc.), combination filters such as alphabetically by storage type, etc.
- 10.5.2. Must support custom user-defined tags for quick look up and reporting.
- 10.5.3. Provide for the site-specific storage categories (Cooler, Dry, Frozen, Cooler A, Downstairs Freezer, etc)

10.6. Inventory Receiving & Tracking

- 10.6.1. The system must allow for detailed receiving records, tracking date of receipt, supplier/vendor, item quantity received, storage location and unit cost at purchase.
- 10.6.2. Must allow inventory reconciliation to verify received quantities against purchase orders.
- 10.6.3. The system must allow users to backdate a price change and update inventory valuations accordingly, ensuring cost accuracy.

10.7. Inventory Valuation & Cost Tracking

- 10.7.1. The system must generate Inventory Valuation Reports, showing cost per unit based on the whole unit price stored in the system, identification of items with incorrect pricing and total inventory value across all locations.
- 10.7.2. Must allow tracking of inventory value based on the price at purchase, ensuring accurate cost tracking over time.

10.8. User-Defined Category Tags

- 10.8.1. The system must allow user-defined category tags for inventory items, including Chicken, Beef, Breaded, Local, Clean Label, Gluten-Free, Organic, and Allergen-Free.
- 10.8.2. These tags should be searchable and reportable for inventory planning, menu planning and purchasing decisions.

10.9. Inventory Usage & Transfers

- 10.9.1. The system must allow for inventory transfers between locations with proper approval workflows.
- 10.9.2. The system must support usage tracking by site, enabling real-time reporting of inventory depletion based on production usage, stock movement from the Central Warehouse to school sites, and expiration date tracking with alerts.
- 10.9.3. The system must allow users to allocate inventory to specific programs, including CACFP items, catering items, after-school meal programs, and special dietary needs programs, while also supporting inventory forecasting and reporting.
- 10.9.4. The system must provide detailed reporting capabilities, including stock status reports by location, projected depletion rates based on historical usage, and inventory shortage alerts based on forecasted needs.
- 10.9.5. Inventory reports must be exportable in multiple formats, including Excel, PDF, and CSV.

10.10. Central Warehouse Management

- 10.10.1. The system must ensure that inventory management at the Central Warehouse is independent of production withdrawals or school site usage, preventing inventory discrepancies.
- 10.10.2. The system should allow for separate inventory tracking for bulk orders, USDA commodities, and school site allocations.

11. General Accountability Requirements

- 11.1. The system must ensure full transparency and auditability across all food service operations within Pittsburgh Public Schools.
- 11.2. Must provide real-time monitoring of all transactions, inventory movements, and financial records.
- 11.3. The system must track and log all user activity, including modifications to student accounts, inventory records, meal transactions, and financial data.

11.4. Audit Trails & Data Integrity

- 11.4.1. The system must include a comprehensive audit trail for all transactions, tracking the user ID of the individual making changes, the timestamp of modifications, before and after values of modified data, and details of all approvals and overrides.
- 11.4.2. Must provide role-based access controls, ensuring users only have permissions aligned with their responsibilities.
- 11.4.3. The system should allow automated audit log exports for internal and external compliance reviews.

11.5. Financial Accountability & Reconciliation

- 11.5.1. The system must ensure accurate financial reconciliation by tracking all cash, check, and electronic transactions, providing automated end-of-day reconciliation reports for each site, and integrating with the district's financial accounting system for streamlined reporting.
- 11.5.2. Must support automated flagging of discrepancies, such as duplicate transactions, voided payments, and refund requests.
- 11.5.3. The system should generate detailed over/short reports to track cash handling accuracy at each point of sale (POS) location.

11.6. Meal Count & Claim Validation

- 11.6.1. The system must ensure that meal counts and claims are accurate and compliant with USDA and Pennsylvania state regulations.
- 11.6.2. Must prevent duplicate meal claims across multiple sites.
- 11.6.3. The system should provide automated edit-check reports to identify overclaims, underclaims, and anomalies.
- 11.6.4. Must generate daily, weekly, and monthly claim reports for state and federal reimbursement submission.

11.7. Inventory & Waste Accountability

- 11.7.1. The system must track inventory transactions from ordering and receiving to usage and depletion.
- 11.7.2. Must provide real-time alerts for missing, miscounted, or expired inventory items.

11.7.3. The system should generate waste tracking reports documenting the reasons for food waste, including overproduction, spoilage, and returned trays, as well as trends in waste reduction efforts and the impact of waste on inventory costs and meal planning.

11.8. Staff Performance & Security Controls

11.8.1. The system must support user accountability tracking, including login history and duration of activity, completed transactions and data modifications, and approval and override actions taken by staff.

11.8.2. The system must include automated alerts for suspicious activity, such as excessive meal adjustments or refunds, unusual transaction volumes at specific locations, and unauthorized changes to inventory records.

11.8.3. The system must allow administrators to review and approve overrides, ensuring compliance with district policies.

11.9. Reporting & Compliance

11.9.1. The system must generate detailed accountability reports, including meal participation reports by school, grade level, and eligibility category; financial reports detailing revenue, expenses, and reimbursement claims; inventory movement reports tracking stock levels, transfers, and usage trends; and POS transaction reports summarizing daily sales, voids, and refunds.

11.9.2. Reports must be exportable in multiple formats, including Excel, PDF, and CSV, and should be available for scheduled automated distribution to designated stakeholders.

12. Asset Management

12.1. The system must provide comprehensive tracking and management of all food service assets across Pittsburgh Public Schools, ensuring accurate inventory, maintenance scheduling, and lifecycle tracking.

12.2. Must allow for real-time updates to asset records, including purchases, transfers, maintenance, and retirements.

12.3. The system must integrate with inventory, procurement, and financial systems to ensure seamless asset tracking and cost allocation.

12.4. Asset Inventory & Tracking

12.4.1. The system must maintain a centralized database for tracking all food service-related assets, including kitchen equipment such as ovens, refrigerators, freezers, and dishwashers; POS terminals and peripherals; furniture and fixtures; smallwares and utensils; and vehicles used for food distribution.

12.4.2. Must support barcode scanning and RFID tracking for efficient asset identification and management.

12.4.3. The system must allow for real-time asset status updates, including active (in use), in repair, retired or disposed, and transferred to another site.

12.5. Maintenance & Repair Tracking

- 12.5.1. The system must provide automated maintenance scheduling, allowing for preventative maintenance tracking based on time-based intervals or usage thresholds.
- 12.5.2. The system must allow users to log repair requests and track the date of the request, assigned technician or service provider, estimated and actual completion dates, parts used and repair costs, and warranty status and coverage, while also generating maintenance history reports to analyze recurring issues and replacement needs.

12.6. Asset Transfers & Disposal

- 12.6.1. The system must support asset transfers between locations, ensuring accurate tracking of equipment moves and reassignments.
- 12.6.2. The system must allow users to log asset disposal by tracking the reason for disposal, such as obsolete, damaged, or sold items; the approval process for asset retirement; and the disposal method, including auction, recycling, or discarding.
- 12.6.3. The system must generate disposal reports, documenting asset retirement trends and financial impacts.

12.7. Depreciation & Cost Tracking

- 12.7.1. The system must track asset purchase costs, depreciation schedules, and remaining value.
- 12.7.2. Must support multiple depreciation methods, including straight-line and accelerated depreciation.
- 12.7.3. The system should provide real-time reporting on asset valuation, ensuring accurate financial reporting for budgeting and audits.

12.8. Reporting & Compliance

- 12.8.1. The system must generate detailed asset management reports, including asset inventory by location and category, maintenance history and repair costs, asset lifecycle tracking for purchases, transfers, and retirement, and depreciation and financial impact reports, with export options in Excel, PDF, and CSV formats and the ability for scheduled automated distribution.

13. Personnel Management Requirements

- 13.1. The system must provide comprehensive tracking and management of food service personnel across Pittsburgh Public Schools, ensuring accurate labor cost allocation, continuing education tracking, and payroll integration.
- 13.2. Must allow for real-time personnel record updates, reflecting job assignments, training progress, and site transfers.
- 13.3. The system must ensure role-based access control, allowing authorized personnel to view and manage employee records while maintaining confidentiality.

13.4. Employee Tracking & Site Transfers

- 13.4.1. The system must support the unlimited transfer of staff between buildings, allowing for more accurate labor cost tracking by site.
- 13.4.2. Must enable tracking of primary and secondary job assignments, ensuring proper classification of multi-site employees.

13.4.3. Should provide historical tracking of past site assignments for auditing and reporting purposes.

13.5. Timekeeping & Attendance Management

13.5.1. The system must provide a clock-in/clock-out feature that allows employees to log their work hours by entering their employee number or using a badge swipe.

13.5.2. Must integrate with payroll processing systems, ensuring accurate timekeeping and labor cost management.

13.5.3. The system should generate time and attendance reports tracking scheduled versus actual work hours, overtime tracking and approval, and absenteeism and tardiness trends.

13.6. Continuing Education & Certification Tracking

13.6.1. The system must allow for tracking of continuing education (CE) courses completed by employees.

13.6.2. Must enable the batch recording of Continuing Education Units (CEUs) and certificate uploads from a single screen, regardless of the date taken or course completed.

13.6.3. The system should generate training compliance reports, ensuring all employees meet required training standards.

13.7. Disciplinary Documentation & Employee Records

13.7.1. The system must allow for the upload and storage of disciplinary reports, ensuring proper documentation of employee performance issues.

13.7.2. The system must support electronic employee records, including job titles and employment history, certifications and training records, performance evaluations, and disciplinary actions and resolutions, while also ensuring comprehensive reporting and compliance.

13.7.3. The system must generate customizable personnel reports, including labor cost distribution by site and program, employee certification compliance reports, time and attendance trend reports, and CEU tracking reports for regulatory compliance.

13.7.4. Reports must be exportable in multiple formats, including Excel, PDF, and CSV, for easy integration with HR and payroll systems.

14. Bidding & Procurement

14.1. The system must provide a centralized and automated procurement process for managing vendor bids, contracts, and pricing analysis for Pittsburgh Public Schools.

14.2. Must support electronic bid submission, review, and awarding while ensuring compliance with state and federal procurement regulations.

14.3. The system must allow for customizable bid categories, enabling users to create and track food, equipment, and service bids separately.

14.4. Must allow for secure role-based access, ensuring that only authorized personnel can view, edit, and approve bids.

14.5. Vendor Management & Bid Submission

- 14.5.1. The system must allow vendors to electronically submit bids, with support for uploading required documentation such as pricing sheets, specifications, and certifications.
- 14.5.2. Vendors should be able to update bids before submission deadlines, ensuring accuracy in pricing and terms.
- 14.5.3. Must support bulk bid uploads for vendors who submit multiple itemized pricing sheets.
- 14.5.4. The system should allow for vendor profile management, tracking contact information and business details, compliance certifications, and previous bid history and contract performance.

14.6. Bid Evaluation & Awarding

- 14.6.1. The system must allow automated bid evaluation and scoring, using rubrics and weighted scoring methods to ensure fair and transparent decision-making.
- 14.6.2. The system must support weighted pricing analysis using the formula $s = (1 - (VP - LP) / LP) * MP$, where s is the final score, VP is the vendor price, LP is the lowest price, and MP is the maximum points.
- 14.6.3. The system should also support alternative scoring methods for evaluating non-price factors such as quality, vendor reputation, and delivery timelines.
- 14.6.4. Must allow for customizable rubrics that enable district staff to define criteria for bid evaluation beyond price alone.
- 14.6.5. The system should automatically generate a bid summary report outlining the total number of bids received, vendor rankings based on weighted evaluation, pricing comparisons across multiple vendors, and historical performance metrics for returning vendors.

14.7. Contract Management & Compliance

- 14.7.1. The system must allow for contract generation based on awarded bids, ensuring all terms and pricing are accurately reflected.
- 14.7.2. Must track contract expiration dates and renewal options, providing automated alerts for expiring agreements.
- 14.7.3. The system must integrate with financial accounting and inventory systems, ensuring awarded contracts align with budget allocations and inventory needs.
- 14.7.4. Must allow for real-time tracking of contract performance, ensuring vendors meet agreed-upon service levels.

14.8. Reporting & Analytics

- 14.8.1. The system must generate detailed procurement reports, including bid comparison analysis with pricing trends, spending reports by category, vendor, and contract term, and historical bid data for multi-year procurement planning.
- 14.8.2. Reports must be exportable in multiple formats, including Excel, PDF, and CSV, and support scheduled automated distribution.

15. General Reporting Capabilities

- 15.1. The system must provide comprehensive, real-time reporting capabilities across all modules within Pittsburgh Public Schools' Food & Child Nutrition System.

- 15.2. Reports must be customizable, exportable, and schedulable, ensuring stakeholders receive relevant data for decision-making.
- 15.3. The system should support role-based access, allowing users to generate and view only the reports they are authorized to access.
- 15.4. Must allow for batch report generation, enabling the automatic creation of multiple reports at scheduled intervals.
- 15.5. **Custom Branding & Formatting**
 - 15.5.1. The system must allow reports and recipes to incorporate department logos, watermarks, and custom branding to maintain consistency in official documents.
 - 15.5.2. Reports must support customizable headers, footers, and district-wide formatting standards.
- 15.6. **Standard & Custom Report Generation**
 - 15.6.1. The system must provide a library of pre-built standard reports, including meal participation reports by site, grade level, and eligibility category; financial reports detailing revenue, expenses, and reimbursement claims; inventory tracking and valuation reports; procurement and bid comparison reports; and production planning and waste tracking reports.
 - 15.6.2. Users must be able to create custom reports by selecting specific data fields, date ranges, and filtering criteria.
- 15.7. **Data Visualization & Export Options**
 - 15.7.1. Reports must include interactive data visualization tools, such as charts, graphs, and heat maps, to enhance data analysis.
 - 15.7.2. The system should allow for real-time drill-down functionality, enabling users to explore underlying data.
 - 15.7.3. Reports must be exportable in multiple formats, including Excel, PDF, and CSV, to ensure compatibility with external systems.
- 15.8. **Automated Report Scheduling & Notifications**
 - 15.8.1. The system must allow for automated report scheduling, ensuring key reports are generated and distributed on a recurring basis.
 - 15.8.2. Reports should be automatically emailed to designated recipients, with access restrictions based on user roles and permissions.
- 15.9. **Compliance & Audit Reporting**
 - 15.9.1. The system must generate state and federal compliance reports, ensuring adherence to USDA and Pennsylvania Department of Education requirements.
 - 15.9.2. Must include detailed audit trails, tracking all report modifications and data changes for transparency.

Appendix B - Conflict of Interest Disclosure Form Note

A potential or actual conflict of interest exists when commitments and obligations are likely to be compromised by the nominator(s)' other material interests, or relationships (especially economic), particularly if those interests or commitments are not disclosed.

This Conflict of Interest Form should indicate whether the nominator(s) has an economic interest in, or acts as an officer or a director of, any outside entity whose financial interests would reasonably appear to be affected by the addition of the nominated condition to the newborn screening panel. The nominator(s) should also disclose any personal, business, or volunteer affiliations that may give rise to a real or apparent conflict of interest. Relevant Federally and organizationally established regulations and guidelines in financial conflicts must be abided by. Individuals with a conflict of interest should refrain from nominating a condition for screening.

Date:

Name:

Position:

Please describe below any relationships, transactions, positions you hold (volunteer or otherwise), or circumstances that you believe could contribute to a conflict of interest:

_____ I have no conflict of interest to report.

_____ I have the following conflict of interest to report (please specify other nonprofit and for-profit boards you (and your spouse) sit on, any for-profit businesses for which you or an immediate family member are an officer or director, or a majority shareholder, and the name of your employer and any businesses you or a family member own:

1. _____

2. _____

3. _____

I hereby certify that the information set forth above is true and complete to the best of my knowledge.

Signature: _____

Date: _____

Appendix C - Notice of Protest and Protest Procedures

DATE: _____ RFP NAME/ NUMBER: _____

PROTESTING PARTY: _____

_____ A party who did not submit a bid or proposal;

_____ A party who has responded to an invitation for bids (IFB), a request for proposal RFP) or a request for qualification (RFQ);

_____ A prospective contractor who is aggrieved in connection with the solicitation or award of a contract

REASON FOR PROTEST:

RELEVANT INFORMATION (attach documents as needed):

Do not write below. For PPSFSD use only.

Date Notice of Protest Received: _____ Eligible for Review: Yes No

Date Forwarded to PPSFSD BOD: _____

Date Forwarded to Awarded Contractor or Eligible Respondents: _____

Date of Review and Consideration: _____ Extension Date: _____

Date of Determination: _____ Determination Made _____

Signature of PPSFSD Food Service Director _____

Signature Date _____

CONTRACT SOLICITATION AND AWARD PROTEST PROCEDURE POLICY

Offerors who disagree or are otherwise aggrieved by the competitive procurement process for contract solicitation and award have the right by federal regulation to enter into a formal protest with Pittsburgh Public Schools Food Services Department (PPSFSD).

PROCEDURE:

Federal regulations are the primary authority for rules related to competitive procurement. Those regulations that MAY be applicable to competitive procurements of PPSFSD are found in OMB Circular A-87, A-122, 2 CFR 200 and 7 CFR 210, 220, 3016, 3019. Applicability of the federal regulation depends upon the product or services being procured and the federal program in which it will be used. In addition, Pennsylvania School Code contains additional state regulations related to competitive procurement that may also be applicable.

Protests may be by any of the following:

- 1) By a party who did not submit a bid or proposal.
- 2) By a party who has responded to an invitation for bids (IFB), a request for proposal (RFP) or a request for qualification (RFQ).
- 3) By a prospective contractor who is aggrieved in connection with the solicitation or award of a contract

Those parties who did not submit a bid, or proposal must file for protest prior to the advertised opening date of the IFB, RFP, or RFQ. Protests received after that time will not be reviewed and considered. Such protests will be dismissed as untimely.

Those parties who responded to an IFB, RFP, or RFQ or who are aggrieved in connection with the solicitation or award of a contract must file for protest within seven (7) days of the protesting party knowing of the facts giving rise to the protest. No protest filed after that protest window or more than seven (7) days after the date of notice of contract award will be reviewed and considered. Untimely protests will be dismissed.

The date of the filing will be the date the protest is received by PPSFSD. Protests to contract solicitations and awards must be in writing and submitted to the contact person listed on the RFP for which a protest is filed.

Protests must be filed utilizing the form titled, "Notice of Protest." Appropriate documentation or relevant information may be included as attachments to the form when completed and returned. Issues not raised in the original written protest are deemed to be waived and may not be raised on appeal. All documentation is forwarded to the Legal Department for the Pittsburgh Board of Education for review and consideration within five (5) days of receipt.

If the contract has been awarded, the successful contractor will be made aware of the protest within five (5) days of receipt. If the protest is received before the contract is awarded and substantial issues are raised by the protest, all bidders and offerors who appear to have a substantial and reasonable prospect of winning the award shall be notified of the protest and the reasons for the protest. They may, in turn, file their own position to the protest within five (5) days after the receipt of the Notice of Protest.

Action on the contract solicitation or award shall be stayed until the protest is resolved except in cases where state or federal deadlines prevail. In those cases, the contract award will be issued, but performance by the awarded contractor will be suspended until the protest is resolved. If there is a continued delay in resolving the protest, PPSFSD reserves the right to resume its activities related to the procurement under protest if such action is found to be in the best interest of the membership affected by the protest.

The Board of Education and PPSFSD have up to fifteen (15) days to review the protest and any documentation or relevant information. This period will also be used for additional research as needed. Additional documents or information deemed necessary to resolve the protest may be requested during this period. The Board of Education and PPSFSD reserves the right to schedule a hearing to review the protest with the protesting party and other affected parties. If additional time is required to resolve the protest, The Board of Education and PPSFSD will notify the protesting party of such action. At no time will any protest remain without determination in excess of sixty (60) days from the receipt of the original Notice of Protest.

If the contract solicitation or award is found to be contrary to law, The Board of Education and PPSFSD reserves the right to cancel the solicitation, change the solicitation to comply with law, reject all bids or proposal or those parts of the bids or proposals which were affected by the violation, or change/cancel the contract award to comply with the law.

If such determination is made after execution of the contract and the contractor has not acted fraudulently or in bad faith, 1) the contract may be ratified and affirmed if doing so is in the best interest of The Board of Education and PPSFSD, 2) the contract may be modified to comply with the law with the consent of all parties, or 3) the contract may be cancelled in accordance with the termination, default, and settlement clause in the contract.

If such determination is made after execution of the contract and the contractor has acted fraudulently or in bad faith, the contract may be 1) declared void; 2) modified to comply with the law and with the consent of all parties; or 3) ratified and affirmed if doing so is in the best interest of The Board of Education and PPSFSD.

A copy of the protest determination will be sent to the protesting party and any other person determined to be affected by the decision within five (5) days of the determination being made.