



REQUEST FOR PROPOSALS

Consultation Services for Food & Nutrition Feasibility Study

THIS IS NOT AN ORDER

VENDOR/PROPOSER NAME & ADDRESS
<p>PROPOSAL NUMBER: 4109</p> <p>ISSUE DATE: November 15, 2023</p> <p>DUE DATE: January 19, 2024 - 2:00 PM (CST)</p> <p>IF NOT PROPOSING, please check here and return this cover page only. <input type="checkbox"/></p>

Unless otherwise noted, names of all organizations submitting proposals will be publicly available after the date and time specified as the deadline for submitting proposals. Proposals will be open to public inspection after award(s).

Revisions to this request for qualifications, including due date, may be made by an official written amendment issued by Purchasing Services. Please check whether any amendments have been issued prior to submitting a proposal and do not submit a proposal before the School District issues its formal response to questions about the RFP.

Correspondence must reference the proposal number.

The original proposal may be submitted via US mail, hand delivery or a delivery service and must be **received** by Administrative Services at the above address. Proposals not date/time stamped by Administrative Services staff by the posted date and time shall be considered late and **shall be rejected**.

Any entity submitting a proposal has no enforceable right to amend its proposal after the submission deadline.

MMSD is exempt from Federal Excise and Wisconsin State Sales tax.

By signing this proposal, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

SIGNATURE: _____

DATE: _____

TYPE or PRINT NAME: _____

TITLE: _____

TELEPHONE NUMBER: _____

FEIN or TAX ID NUMBER: _____

FAX NUMBER: _____

EMAIL ADDRESS: _____

Table of Contents

1. General Information	4
1.1 Introduction and background	4
1.2 Scope	4
1.3 Request for Proposals process	5
1.4 Procuring and contracting department/division	5
1.5 Definitions	6
1.6 Clarification and/or revisions to the specifications and requirements	6
1.7 Debarred, suspended, proposed for debarment or declared ineligible	6
1.8 Accessibility guidelines related to proposed software and hardware	7
1.9 Calendar of events	7
1.10 State of Wisconsin VendorNet registration	8
2. Preparing and Submitting Proposals	8
2.1 General instructions	8
2.2 Proprietary information	8
2.3 Incurring costs	8
2.4 Submitting the proposal	8
2.5 Proposal organization and format	9
2.6 Multiple proposals	9
2.7 Oral Presentations and site visits	9
2.8 Withdrawal of proposals	9
3. Proposal Selection Process	10
3.1 Preliminary evaluation	10
3.2 Right to reject proposals and negotiate contract terms	10
3.3 Evaluation criteria	10
3.4 Invitation to Present	11
4. Vendor/Proposer Qualifications	11
4.1 Introduction	11
4.2 Organizational capabilities	11
4.3 Key staff	11
4.4 Cost proposal	11
4.5 References	12
5. Required Forms	12
5.1 Cover Page (Sign and complete RFP cover page)	N/A

5.2	Attachment A Vendor Information	13
5.3	Attachment B Vendor Reference	14
5.4	Attachment C Designation of Confidential and Proprietary Information	15
5.5	Attachment D Cost Summary Page	16
5.6	Attachment E Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion	17
5.7	Appendix A Affirmative Action Requirements for Contractors and Vendors	18
5.8	Appendix B Equal Employment Opportunity / Affirmative Action Employer Identification Report	19
5.9	Appendix C Affirmative Action & Equal Employment Opportunity Policy Statement	21
5.10	Appendix D Intention to Submit a Proposal and Questions/Inquiries	25

1. General Information

1.1 Introduction and background

The purpose of this document is to provide interested parties with information to enable them to prepare and submit a Proposal for Consultation Services for a Food & Nutrition Feasibility Study. The District as represented by the Board of Education for the Madison Metropolitan School District intends to use the results of this solicitation to request proposals from the most qualified parties and award a contract for consultation services based on the proposals.

Approximately 26,500 students, more than 55% of whom are members of historically excluded groups, are currently enrolled in the Madison Metropolitan School District, making it the second largest school district in the State of Wisconsin. The District employs over 2,600 teachers, 125 administrators and 1,300 support personnel, plus more than 2,500 part time staff (including substitute teachers and summer recreation workers). MMSD includes 52 school buildings in a 74 square mile area that includes the City of Madison and all or parts of several surrounding municipalities, with 32 elementary schools (grades 4K through 5), 12 middle schools (grades 6 through 8) and 6 high schools, two of which are a small alternative high school (grades 9 through 12). Several of the schools at each level have been named National Schools of Excellence by the U.S. Department of Education. The District also operates early childhood programs, which include full-day 4K, and alternative programs for middle and high school students as well as maintaining additional sites such as the Administration Building, the Maintenance/Food Service Building, the Mansfield and Lussier Stadiums, and the Affiliated Alternatives.

MMSD believes every school should be a thriving school that prepares each student to graduate from high school ready for college, career and community. We strive to ensure that students are on-track to graduate, that every student has access to a challenging and well-rounded education, and that students, families and employees experience a positive school and district climate. The District's strategic framework recognizes the following priorities in working toward the realization of our vision: 1) Coherent Instruction – every student should have well-rounded, culturally responsive and coherent instruction; 2) Personalized Pathways – students should be engaged in charting a personalized pathway to college, career and community readiness; 3) Family Engagement and Community Partnerships- we should engage families and community members as partners; 4) Thriving Workforce – we should cultivate a work environment to attract, develop and retain top talent; and 5) Accountability Systems – we need to ensure accountability at all levels. It is important for any vendor or organization working with the District to share in this vision for our students.

MMSD's Strategic Framework can be found at:

<https://www.madison.k12.wi.us/about/strategic-framework>

Because of the District's sound financial management practices, Madison is one of only a few Wisconsin districts to have an "Aa1" bond rating.

1.2 Scope

1.2.1 Project Description

MMSD currently supplies 32 elementary schools with pre-packaged, re-heatable meals from its central food production facility ("FPC"). These meals comprise a combination of manufactured and scratch-made products that are assembled in proprietary plastic containers on a mechanized line that seals the meals with film for delivery to the schools. The racks on which the meals are stored are then shipped to schools the day prior to service when they are re-heated in convection ovens and served to students.

MMSD seeks to change this operating model to move the preparation of ingredients that benefit most from preparation just prior to service to the school sites, to increase the use of scratch-made meal components from both the FPC and the individual school sites, and to an enhanced service model for serving food that emphasizes variety, freshness, and visual appeal. This transition will require a variety of new equipment and physical changes to its kitchens, serving areas, and dining areas. The sites are varied in age, infrastructure, size, and existing suitability for the changes. In addition, Madison Metropolitan School District is looking for consulting services on establishing an industry best practice operational model, staffing and management structure to support the transition to the proposed new operational model, including projections on anticipated “roll out” time and required training for staff to be successful in this change.

1.2.2 Objectives

To achieve this goal, MMSD seeks a consultant with the understanding, experience, resources, and personnel to conduct a feasibility study that outlines the following:

- Understand future menu expectations and how MMSD’s central production capabilities can support school sites;
- Analysis of existing equipment and infrastructural capacity;
- Schematic design proposal by site for equipment and projected staffing needed for new operation and potential expansion;
- Plumbing/HVAC/Electrical infrastructure required for the design and its capital implications;
- Cost estimates for equipment and construction;
- Recommendations for a tiered or structured plan for implementation in yearly intervals;
- Recommendations for enhanced or increased capacity for both production and serving, including dining seating capacity;
- Recommendations for training and implementation.

The feasibility study must be completed and submitted to MMSD no later than April 5, 2024.

1.3 Request for Proposals process

This document is a Request for Proposals. It differs from a Request for Bid in that the District is seeking a solution as described herein, **not a bid** meeting firm specifications for the lowest price. As defined in the American Bar Association Model Procurement Code, Proposals submissions will be evaluated based upon criteria that identify the most important qualifications, references, and availability or capability, may be overriding factors, and price may not be determinative in the issuance of a contract or award.

Interested Vendors will be invited to conduct a site visit to MMSD’s central production facility and sample schools to inform their questions and Proposals to MMSD. Selected Vendors will be invited to conduct a virtual presentation of their Proposals.

1.4 Procuring and contracting department/division

This Request for Proposals (RFP) is issued by Madison Metropolitan School District, **Purchasing Services**, which is **the sole point of contact for the District during the RFP process**. The person responsible for managing this procurement process is **Kenneth Thomas, Assistant Director of Auxiliary Services**.

As it pertains to this RFP, vendors **shall NOT** have contact with anyone other than the Assistant Director of Auxiliary Services (if absent, the designee) through the duration of this RFP process. All

communication pertaining to this RFP must be in writing by email (preferred) or US mail.

Any contract(s) resulting from this RFP will be administered by the **Madison Metropolitan School District Board of Education**.

1.5 Definitions

The following definitions are used throughout this document:

RFP means Request for Proposals

District/MMSD means Madison Metropolitan School District.

the Board means Board of Education for the Madison Metropolitan School District.

Vendor/Proposer means a firm submitting a proposal in response to this RFP.

1.6 Clarification and/or revisions to the specifications and requirements

In order for your organization directly to receive updates to this Request for Proposals, including responses to submitted questions/inquiries, please complete Appendix D: Intentions to Submit a Proposal and Question/Inquiries. This document (Appendix D) can be emailed to krthomas1@madison.k12.wi.us and it will assist in allowing the District to provide timely information to interested parties.

Any questions concerning this RFP must be submitted in writing in the format provided in Appendix D of this document by email (preferred) or US mail on or before November 24, 2023 - 2:00 PM (CST) (Email: krthomas1@madison.k12.wi.us):

Kenneth Thomas
Auxiliary Services – Purchasing Services Madison Metropolitan School District
4711 Pflaum Road
Madison, WI 53718-6765

During the selection process, vendors/proposers are specifically prohibited from contacting the District/schools to “prospect” for new business; introduce the firm’s staff; provide marketing or promotional materials; discuss advantages/benefits of their company, and/or discuss the disadvantages of working with their competitor(s). Vendors/proposers with questions about what constitutes allowable behavior during the selection process for this RFP should submit questions in writing to the above email address. Attempts to contact a District employee (including school personnel), official, or representative in any manner contrary to the requirements set forth in this document may lead to vendors/proposers being disqualified from consideration.

An electronic version of the RFP is available on the District’s web site: <https://www.madison.k12.wi.us/for-vendors-contractors/current-requests-for-proposals>

Vendors/Proposers should raise any questions, exceptions, or additions they have concerning the RFP DOCUMENT as early as possible in the RFP process. If a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the vendor should immediately notify the above-named individual of such error and request modification or clarification of the RFP document.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, revisions/amendments and/or supplements will be provided to all known recipients of this initial RFP or posted to the District’s Website at: [Understanding the Procurement Process](#)

1.7 Debarred, suspended, proposed for debarment or declared ineligible

Contractors doing business with MMSD must provide certification that they are not debarred, suspended, proposed for debarment, declared ineligible, are not in the process of being debarred,

or are not voluntarily excluded from conducting business with a federal department or agency of the federal government.

MMSD may exclude a contractor or its subcontractor from participating in the RFP process and/or contract award if the organization or its principal(s) has(have) been debarred or excluded from doing business with the Federal Government.

1.8 Accessibility guidelines related to proposed software and hardware

Vendor should demonstrate that each software and/or hardware proposed conforms to the accessibility guidelines established by the World Wide Web Consortium's Web Content Accessibility Guidelines 2.0 (WCAG 2.0).

In addition, Vendor should demonstrate that each software and/or hardware conforms to the accessibility guidelines established by Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d), as amended. (Section 508 is the section of the 1973 Rehabilitation Act that states that all electronic and information technology procured, used, or developed by the federal government after June 25, 2001, must be accessible to people with disabilities. Affected technology includes hardware such as copiers, fax machines, telephones, and other electronic devices as well as application software and websites.)

Vendor may demonstrate compliance with such guidelines by submitting a VPAT (Voluntary Product Accessibility Template) or comparable documentation. The District will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request. If you need accommodations at a proposal opening/vendor conference, contact Purchasing Services at (608) 663-5287.

1.9 Calendar of events

Listed below are specific and estimated dates and times of actions related to this Request for Proposal (RFP). The actions with specific dates must be completed as indicated unless otherwise changed by the District. If the District finds it necessary to change any of the specific dates and times in the calendar of events listed below, it will do so by issuing a supplement to this RFP. There may or may not be a formal notification issued for changes in the estimated dates and times.

<u>DATE</u>	<u>EVENT</u>
November 15, 2023	Date of RFP issue
November 24, 2023 - 2:00 PM (CST)	Submission of intention to submit proposal, organizational capabilities, and staff/personnel qualifications
November 28, 2023 (estimate)	Invitation to Vendors for MMSD site visits
December 5-7, 2023	Site visits to central production facility and sample schools
December 15, 2023 - 2:00 PM (CST)	Questions to MMSD due from Vendors
December 22, 2023 - 2:00 PM (CST)	Answers to Vendor questions posted to MMSD website
January 19, 2024- 2:00 PM (CST)	Vendor proposals with cost due
January 23-25, 2024	Live presentations of Vendor proposals
February 2, 2024	Award by MMSD
April 5, 2024	Feasibility Study Completion and Submission to MMSD

1.10 State of Wisconsin VendorNet registration

The District makes use of the State of Wisconsin's purchasing information and vendor notification service. Anyone may access VendorNet on the Internet at <http://vendornet.state.wi.us>.

2. Preparing and Submitting a Proposal

2.1 General instructions

The evaluation and selection of a contractor and the contract will be based on the information submitted in the vendor's proposal plus references and any required on-site visits or oral presentations. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a proposal or submission.

Elaborate proposals (i.e., expensive artwork, binders) beyond a sufficiently presented, complete, effective and securely bound proposal, are not necessary or desired.

2.2 Proprietary information

All restrictions on the use of data contained within a proposal and all confidential information must be clearly stated on the attached "Designation of Confidential and Proprietary Information" form.

Proprietary information submitted in a proposal, or in response to the RFP, will be handled in accordance with applicable law.

To the extent permitted by law, it is the intention of the District to withhold the contents of the proposal from public view until such times as competitive or bargaining reasons no longer require non-disclosure, in the opinion of the District. At that time, all proposals will be available for review in accordance with the Wisconsin Public Records Law.

2.3 Incurring costs

The District is not liable for any cost incurred by proposers in replying to this RFP.

2.4 Submitting the proposal

Proposers must submit **ONE electronic version with all attachments** via email (see paragraph 6.2) required for acceptance of their proposal by January 19, 2024 at **2:00 PM (CST)** to:

Kenneth Thomas
Auxiliary Services – Purchasing Services Madison
Metropolitan School District
4711 Pflaum Road
Madison, WI 53718-6765

At proposal opening, only the names of responding vendors are provided. No further information will be available until contract award.

Proposals must be time/date stamped as received by Administrative Services on or before the specified date and time provided above. Proposals not so stamped will not be accepted. Receipt of a proposal by the District's mail system does not constitute receipt of a proposal by Purchasing Services, for purposes of this RFP.

All proposals **MUST** be packaged, sealed and show the following information on the outside of the package:

Proposer's name and address
Request for proposal number
Proposal due date

2.5 Proposal organization and format

Proposals should be organized and presented in the order and by the number assigned in the RFP. Proposals must be organized with the following headings and subheadings:

2.5.1 Cover Page (Sign and complete associated Request for Proposal cover page)

2.5.2 Response to vendor/proposer qualifications

Introduction
 Organizational capabilities
 Key staff
 Cost proposal
 References

2.5.3 Required forms (See Section 9): Attachment A Vendor Information

Attachment B	Vendor Reference
Attachment C	Designation of Confidential and Proprietary Information
Attachment D	Cost Summary Page
Attachment E	Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion
Appendix A	Affirmative Action Requirements for Contractors and Vendors
Appendix B	Equal Employment Opportunity / Affirmative Action Employer Information Report
Appendix C	Affirmative Action & equal Employment Opportunity Policy Statement
Appendix D	Intention to Submit a Proposal and Questions/Inquiries

2.6 Multiple proposals or submissions

A vendor/proposer may submit multiple submissions/proposals; however, each proposal must conform fully to the requirements for Proposal submission. Each such proposal must be separately submitted and labeled as Proposal #1, Proposal #2, etc. on each page included in the response. Alternate acquisition plans do not constitute multiple proposals.

2.7 Oral Presentations

Selected Vendors, based on their submissions, will be invited to submit a virtual presentation as set forth in Section 3.4 below.

2.8 Withdrawal of proposals

Proposals shall be irrevocable until award unless the proposal is withdrawn. Proposers may withdraw a proposal in writing at any time up to the actual proposal closing date if the proposal has already been received by Purchasing Services. To accomplish this, the written request must be signed by an authorized representative of the proposer and submitted to purchasing services. If a previously

submitted proposal is withdrawn before the proposal due date and time, the proposer may submit another proposal at any time up to the original proposal closing date and time.

3. Proposal Selection Process

3.1 Preliminary evaluation

The proposals will first be reviewed to determine if requirements in Section 2.0 are met and if additional requirements are met (see all requirement sections). Failure to meet mandatory requirements will result in the proposal being rejected. In the event that all vendors do not meet one or more of the mandatory requirements, the District reserves the right to continue the evaluation of the proposals and to select the proposal which most closely meets the requirements specified in this RFP.

Proposal scoring

Accepted qualification submittals/proposals will be reviewed for completeness and submitted to the Food & Nutrition evaluation team for scoring against the stated criteria. The Food & Nutrition evaluation team will review references, schedule interviews, and conduct a live presentation, either in-person or virtual, and use the results in scoring the proposals. Diverse-owned businesses are encouraged to participate in this solicitation. To qualify as a diverse-owned business, vendors must be certified by the Wisconsin Supplier Diversity Program or participate in the Wisconsin Diversity Procurement Network.

3.2 Right to reject qualification submissions, proposals and negotiate contract terms

The District reserves the right to reject any and all submissions, proposals and to waive minor irregularities and technicalities. The judgment of the District on such matters shall be final. The District further retains the right to negotiate the terms of the contract, including the award amount, with the selected proposer prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer, the District may negotiate a contract with the next highest scoring proposer.

3.3 Evaluation criteria

The proposals will be scored using the following:

CRITERIA	Weight (%)
Organizational Capabilities	35%
Organization/Staff/Qualifications/Experience	20%
Vendor References	20%
Cost	20%
MBE/WBE	5%
TOTAL	100%

3.4 Invitation to Present

The F&N evaluation team will consider all submissions and select the top qualifying firms to present a detailed description of the process by which each firm will undertake the feasibility study. Such presentations must include the following:

- A description of the process for initial site surveys, timeline for such surveys, data collection required, and manner of recording and presenting findings;
- A description of the process by which vendor determines proposed layout, equipment needs, staffing requirements, and other related requirements;
- A description of the process by which associated construction costs are estimated;
- Examples of finished similar feasibility studies;
- An approximate cost and cost structure for the final feasibility study.

4. Vendor/Proposer Qualifications

4.1 Introduction

Describe the process by which you will conduct site-specific research and analysis and by which you will prepare the list of equipment and construction/infrastructure needs and the process by which you will analyze MMSD's menu expectations and how it informs the equipment and staffing recommendations. Vendors should also describe the best ways to achieve the project's objectives over time within the fiscal and operational requirements of a public entity.

4.2 Organizational capabilities

Describe your firm's experience and capabilities in providing similar feasibility studies for similarly sized projects and the status or outcomes of those projects. Describe also your firm's ability to provide not only the technical data and analysis, but also the ability to communicate this information to a diverse audience with a wide range of expertise, including Board of Education members and the public at-large. Include your experience in supporting such projects following the submission of the feasibility study through implementation and a description of the technical expertise and services your firm offers.

4.3 Key staff

Provide a list of key personnel who would be associated with this project, resumes or CVs of such personnel, and the areas of expertise and responsibility each person provides.

4.4 Cost proposal

Using Attachment D, provide a proposed cost for preparation and presentation of a feasibility study that covers the objectives set forth in Section 1.2.2. Vendor's cost proposal must include all expenses anticipated for site visits and analysis, review of existing conditions, meetings to discuss progress and concerns with MMSD staff, and all other research and preparation time. Travel and all related costs and expenses must be included in the proposal, and any additional costs and expenses beyond the cost proposal shall be subject to approval by MMSD.

Indicate explicitly any potential costs or expenses not covered by Vendor's cost proposal and outside the scope of Vendor's submission.

4.5 References

Using Attachment B, vendors should provide a list of organizations that are similar in size and demographics to MMSD, including points of contact (name, address, and telephone number), which can be used as references for work performed in the area of service required. Selected organizations may be contacted to determine the quality of work performed and personnel assigned to the project. The results of the references will be provided to the evaluation team and used in scoring the written proposals. As permitted, include examples of your firm's work for these references.

5. Required Forms

The following forms must be completed and submitted with the proposal in accordance with the instructions given in Section 2.0. Blank forms are attached.

- 5.1 Cover Page (Sign and complete RFP cover page)
- 5.2 Attachment A Vendor Information
- 5.3 Attachment B Vendor Reference
- 5.4 Attachment C Designation of Confidential and Proprietary Information
- 5.5 Attachment D Cost Summary Page
- 5.6 Attachment E Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion
- 5.7 Appendix A Affirmative Action Requirements for Contractors and Vendors
- 5.8 Appendix B Equal Employment Opportunity / Affirmative Action Employer Identification Report
- 5.9 Appendix C Affirmative Action & Equal Employment Opportunity Policy Statement
- 5.10 Appendix D Intention to Submit a Proposal and Questions/Inquiries

**Attachment A – Vendor
Identification**

1. Proposing Company Name _____

Telephone _____ Toll Free Telephone _____ Fax _____

Address: _____

City: _____ State: _____ Zip + 4: _____

Federal Employee Identification Number (FEIN): _____

2. Contact Person in the event there are questions about your proposal

Name: _____ Title: _____

Telephone: _____ Toll Free Telephone: _____

Address: _____

City: _____ State: _____ Zip + Four: _____

3. All vendors that have 16 or more employees and that are awarded \$25,000 or more on this contract will be required to submit Affirmative Action information to the District Contract Compliance Office. Please list the Person in your Company we can contact about this plan.

Name: _____ Title: _____

Telephone: _____ Toll Free Telephone: _____

Address: _____

City: _____ State: _____ Zip + Four: _____

4. Mailing address where District purchase orders/contracts are to be mailed and person the Department can contact concerning orders and billing.

Name: _____ Title: _____

Telephone: _____ Toll Free Telephone: _____

Address: _____

City: _____ State: _____ Zip + Four: _____

Attachment B – Vendor References

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for installations/services with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement. Unless specified otherwise within this document, please provide a minimum of three (3) references.

Company Name: _____
 Address: _____
 Telephone: _____ Contact Person: _____
 Product(s) and/or Service(s) Used: _____

Company Name: _____
 Address: _____
 Telephone: _____ Contact Person: _____
 Product(s) and/or Service(s) Used: _____

Company Name: _____
 Address: _____
 Telephone: _____ Contact Person: _____
 Product(s) and/or Service(s) Used: _____

Company Name: _____
 Address: _____
 Telephone: _____ Contact Person: _____
 Product(s) and/or Service(s) Used: _____

Company Name: _____
 Address: _____
 Telephone: _____ Contact Person: _____
 Product(s) and/or Service(s) Used: _____

Attachment C – Designation of Confidential and Proprietary Information

The attached material submitted in response to **Proposal Number [Need new number]** includes proprietary and confidential information which qualifies as a trade secret, as provided in Sect 19.36(5), Wisconsin State Statutes. As such, we ask that certain pages, as indicated below, of this proposal response be treated as confidential material and not be released without our written approval or as required by law. Attach additional sheets if needed.

Prices and this page always become public information when proposals are opened, and therefore cannot be kept confidential.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1) (c) Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

We request that the following pages not be released:

Section	Page Number	Topic

In the event a public records request is made to the District, the parties agree and understand that the District is an "authority" as defined in Wis. Stats. section 19.32 and subject to the Wisconsin Public Records law, Wis. Stats. sections 19.31 et. seq. The District will notify the undersigned of a request made pursuant to the Public Records law which involves records containing information of a type described as confidential and proprietary herein and will notify undersigned of its intent to comply as well as the manner in which compliance will occur. The District shall release records, including records that may contain confidential information, pursuant to the Public Records law. Such release shall not be considered a breach of this agreement.

Failure to include this form in the proposal response may mean that all information provided as part of the proposal response will be open to examination or copying. The District considers other markings of "confidential" in the proposal document to be insufficient. The undersigned agree(s) to hold the District harmless for any damages arising out of the release of any material required to be released pursuant to the public records law or material not specifically identified above.

Signature-Authorized Representative

Company Name

Print Name-Authorized Representative

Date

Attachment D – Cost Summary Sheet

Provide a proposed cost for preparation and presentation of a feasibility study that covers the objectives set forth in Section 1.2.2. Vendor's cost proposal must include all expenses anticipated for site visits and analysis, review of existing conditions, meetings to discuss progress and concerns with MMSD staff, and all other research and preparation time. Travel and all related costs and expenses must be included in the proposal, and any additional costs and expenses beyond the cost proposal shall be subject to approval by MMSD.

Indicate explicitly any potential costs or expenses not covered by Vendor's cost proposal and outside the scope of Vendor's submission.

Attachment E – Certification Regarding Debarment, Suspension, Ineligibility
and
Voluntary Exclusion

MADISON METROPOLITAN SCHOOL DISTRICT

**Certification Regarding Debarment,
Suspension, Ineligibility and Voluntary Exclusion**

Federal Executive Order (E.O.) 12549 “Debarment and Suspension” requires that all contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government.

Your signature certifies that neither you nor your principal is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

Name

City, State, Zip Code

Company Address

PHONE _____ FAX _____

EMAIL _____

Signature

Date

Appendix A – Affirmative Action Requirements for Contractors and Vendors

1. VENDOR NOTIFICATION:

The Board of Education of the Madison Metropolitan School District is committed to fair and equal employment opportunities for all persons. Equal opportunities, policies and procedures govern the hiring of District staff. By this policy, the Board requires contractors and vendors to adopt and implement similar policies as a condition of doing business with the District.

Vendors/contractors, **not exempt**, shall indicate (1) with what agency their Affirmative Action Plan is on file, (2) whether or not the Plan is certified, and (3) whether the employment goal(s) stated in the Plan has/have been achieved. If the vendor/contractor has not met each of the above stated requirements, the vendor/contractor must sign and adopt the District's Affirmative Action & Equal Opportunity Policy Statement (Appendix C); and complete the Employer's Information Report (Appendix B); and submit a copy of vendor/contractor's Affirmative Action Plan. In addition, the completed Affirmative Action Requirements for Contractors and Vendors Form (Appendix A) should be submitted with the bid or proposal.

Vendors/contractors are **exempt** from these requirements if they meet one or more of the following criteria: (1)the vendor employs 15 or fewer employees; (2) the vendor's **aggregate** business with the District in the last fiscal year is \$25,000 or less; (3) the vendor is a taxing authority, municipality, the University of Wisconsin System or the State of Wisconsin; (4) the contractor is an organization which ordinarily provides, and is proposing to provide to the District, financial, legal, insurance, utility, or medical services; and/or (5) the contractor is a non-profit business that can provide the District proof of its IRS designation of tax-exempt status.

If needed, assistance is available through the District including what constitutes a good faith effort. Technical assistance regarding contract compliance issues can be obtained from Jennifer Trendel, Senior Executive Director of Human Resources, at (608) 663-1741 or jtrendel@madison.k12.wi.us.

The complete Board Of Education Policy 6600, Affirmative Action Requirements for Vendors and Contractors, is available [here](#).

2. VENDOR RESPONSE:

_____ I am an exempt vendor by reason of _____;
therefore, the following does not apply.

_____ I am a **non-exempt** vendor and have answered accordingly below:

I have an Affirmative Action Plan on file with _____

My Plan is certified with _____

___ Yes ___ No The employment goals in the plan have been achieved.

Please submit a copy of your Affirmative Action Plan with your bid/proposal.

If a non-exempt vendor has not met each of the above requirements, the vendor must complete the Employer's Information Report (Appendix B); sign and adopt the District's Affirmative Action & Equal Opportunity Policy Statement (Appendix C); and submit a copy of its Affirmative Action Plan.

Number of Employees, by race and gender, employed within the Madison School District geographic area.

**Madison Metropolitan School District
Equal Employment Opportunity/Affirmative Action -- Employer Information Report**

NAME OF COMPANY/ORGANIZATION	ADDRESS	CITY, STATE AND ZIP CODE
CONTACT PERSON/NAME & TITLE	AREA CODE & TELEPHONE NUMBER	AREA CODE & FACSIMILE NUMBER
NAME OF PARENT OR AFFILIATED COMPANY	ADDRESS	CITY, STATE AND ZIP CODE
CONTACT PERSON/NAME & TITLE	AREA CODE & TELEPHONE NUMBER	AREA CODE & FACSIMILE NUMBER

ESTABLISHMENT INFORMATION

HOW WAS THE INFORMATION ON RACE OR ETHNIC GROUP OBTAINED? VISUAL SURVEY EMPLOYMENT RECORDS OTHER –SPECIFY: _____

DATES OR PERIOD USED: _____ DOES THE ESTABLISHMENT EMPLOY APPRENTICES? YES NO

IS THE LOCATION THE SAME AS LAST YEAR? YES NO PREVIOUS REPORT DATE: _____ NO PREVIOUS REPORT _____

BUSINESS TYPE: *(DESCRIPTION OF THE MAJOR ACTIVITY OF THIS ESTABLISHMENT, INCLUDING THE SPECIFIC TYPE OF PRODUCT OR SERVICE PROVIDED.)*

THIS ORGANIZATION HAS A CURRENT AFFIRMATIVE ACTION PLAN ON FILE WITH: _____ STATE OF WISCONSIN _____ DANE COUNTY _____ CITY OF MADISON

_____ U. S. GOVERNMENT (SPECIFY AGENCY: _____) _____ OTHER (SPECIFY: _____)

CERTIFICATION

1. THE CONTRACTOR OR VENDOR CERTIFIES THAT THE INFORMATION CONTAINED IN THIS EMPLOYER INFORMATION REPORT IS ACCURATE.
2. THE CONTRACTOR OR VENDOR HAS AGREED THAT, AS PROVIDED IN THE CONTRACT OR PURCHASE ORDER, IF NOT EXEMPT, WITHIN TEN DAYS AFTER THE EFFECTIVE DATE OF MADISON METROPOLITAN SCHOOL DISTRICT CONTRACTS OR PURCHASE ORDERS, THAT IT WILL COMPLETE AND PROVIDE THE ABOVE INFORMATION AND EITHER AN APPROVED AFFIRMATIVE ACTION PLAN OR AN AFFIRMATIVE ACTION POLICY STATEMENT THAT MEETS THE DISTRICT’S RECOMMENDED FORMAT.
3. THE CONTRACTOR OR VENDOR FURTHER AGREES THAT, AS PROVIDED IN THE CONTRACT OR PURCHASE ORDER, FOR THE DURATION OF THIS OR SUBSEQUENT CONTRACTS WITH THE DISTRICT, ACCURATE AND TIMELY INFORMATION WILL BE FILED ON AN ANNUAL BASIS.

Date Completed: _____

Completed By: _____

Appendix C – Affirmative Action & Equal Employment Opportunity Policy Statement

Statement of Commitment

As an employer, this company welcomes the opportunity to affirm our continuing policy to provide equal employment or advancement opportunity and to dedicate ourselves to establishing a work environment which is free from discrimination.

Equal Employment Opportunity

It is the policy of this company that all employees and applicants for employment are guaranteed equality of employment opportunity. Essentially, this means that, as an employer, we will not discriminate against any worker or job applicant on the basis of race, color, religion, gender, age, national origin, ability status or veteran status.

Recruitment, selection, placement, transfer, promotion, reinstatement, training and education, tuition assistance, compensation, benefits and layoff decisions made by the supervisors or managers of this company will be based upon the job-related qualifications and abilities of candidates. In some cases, seniority may be treated as a factor to be considered in the selection process. Employees who apply for a promotion or transfer will be given equal consideration.

It is our policy that supervisors shall be made aware that they must use only objective, job-related criteria when selecting workers for any employment-related action, including hiring, training, promotions and terminations. They also shall be informed that certain types of pre-employment inquiries may lead to problems when interviewing candidates for positions.

All other personnel policies and practices of this company, including compensation, benefits, discipline, safety and health programs, as well as other activities, will be administered and conducted without regard to an individual's race, color, religion, gender, age, national origin, ability status or veteran status.

To the extent possible, reasonable accommodation shall be made for religious needs and for individuals with ability challenges.

As an employer, we will continually review our personnel practices and procedures to ensure that all supervisors and managers are adhering to our commitment to Equal Employment Opportunity principles.

Affirmative Action

As an employer, it is our policy to utilize Affirmative Action as a tool to ensure Equal Employment Opportunity.

Jennifer Trendel has been designated as the Affirmative Action Officer and shall maintain responsibility for establishing, monitoring and evaluating our Affirmative Action efforts at all company establishments.

Our commitment to Affirmative Action means that we will do more than examine our policies and procedures to ensure against discrimination on the basis of race, color, religion, gender or national origin.

We will make a good faith effort to provide hiring opportunities for minorities and women.

- A. In order to demonstrate that we will make a good faith effort in a timely manner as determined by MMSD, we will properly analyze appropriate job classifications within the organization to determine if women or minorities are being underutilized (i.e., if fewer minorities or women are employed in a particular job classification than would be expected by their availability in the labor market area). (Seek technical assistance from the District's Contract Compliance Officer if you do not know how to properly analyze the job classifications or if you are not sure which job classifications are appropriate).

- B. In order to demonstrate that we will make a good faith effort after such analysis, if there is an under-representation of minorities or women in any job classification we will in a timely manner as determined by MMSD:
1. Develop realistic goals for the employment of women and minorities who are underrepresented in such job classifications.
 2. Develop a timetable for achieving the goals.
 3.
 - a) Develop a written recruitment activity plan which is a detailed strategy that outlines specific steps that will be taken to attract minorities and women in the appropriate job classifications in which minorities and women are underrepresented and
 - b) Implement the written recruitment activity plan at a minimum by:
 - i) Prominently displaying on your bulletin boards or in common areas the fact that you are an equal opportunity employer.
 - ii) Minorities are underrepresented in certain job classifications, for each vacancy in such job classification place an advertisement in a media outlet that caters to minorities. Such advertisement should describe the job and indicate that the vendor is an equal opportunity employer and that minorities are encouraged to apply.
 - iii) If women are underrepresented in certain job classifications, for each vacancy in such job classification place an advertisement in a media outlet that caters to women. Such advertisement should describe the job and indicate that the vendor is an equal opportunity employer and that women are encouraged to apply.
 - iv) If minorities are underrepresented in certain job classifications, correspond in writing to local advocacy agencies such as community-based organizations, minority trade unions, etc., that you have job vacancies in job classifications for which minorities are underrepresented, describe the job and indicate that you are an equal opportunity employer and that minorities are encouraged to apply.
 - v) If women are underrepresented in certain job classifications, correspond in writing to local advocacy agencies such as community-based organizations, local trade unions, etc., that you have job vacancies in job classifications for which women are underrepresented, describe the job, indicate that you are an equal opportunity employer and that women are encouraged to apply.
 - vi) Write a letter encouraging current racial/ethnic minorities and women employees to assist in the recruitment of prospective racial/ethnic minorities and women employees.
 - vii) Ensure that all job descriptions reflect actual job duties and are job related.
 - viii) Have a written discrimination complaint procedure in place that is publicized to all employees.
 - ix) Review all hiring policies and practices to ensure that they are non-discriminatory.
 - x) Hire, where possible, minorities and women in job classifications in which they are underrepresented.

It is our expectation that all employees shall demonstrate respect for and awareness of the diversity of all our employees and model our corporate commitment to diversity.

EEO/AA Communication

This Affirmative Action and Equal Employment Opportunity Policy Statement shall be communicated to all supervisors and managers. It shall also be posted conspicuously (on company bulletin boards or common areas) and in areas where applicants are typically screened, interviewed and tested. The intent of this communication of the Policy Statement is that all of the company's employees are alerted and that job applicants are informed of our commitment. It is also the company's intent to include this Policy Statement in employee handbooks or orientation literature and to keep employees informed of Policy Statement changes or updates.

The terms "Equal Opportunity Employer" shall be utilized in recruitment advertisements and literature.

EEO Complaint Handling Procedures

It is this company's policy to regularly inform employees that the organization's dispute resolution system is available for handling discrimination complaints or problems. Employees who have Equal Employment Opportunity-related questions, problems or complaints should first communicate their concern to their immediate supervisor. If they are dissatisfied with the supervisor's handling of the matter, they may pursue their complaint in the company's formal dispute resolution procedure.

All complaints will be handled fairly and expediently. No employee shall suffer reprisals for seeking resolution of a problem through the procedure.

Disqualification

As a condition of being awarded contracts for goods and services the District needs in the future, it is understood that by signing this Statement, the vendor agrees that the District may disqualify the vendor from being awarded such contracts, if it is determined by the District that no good faith effort was made in that the vendor cannot demonstrate to the District's satisfaction that it has in a timely manner as determined by MMSD:

1. Properly analyzed appropriate job classifications within the organization to determine if women or minorities are being underrepresented.
2. Developed realistic goals for the employment of women and minorities who are underrepresented in such job classifications.
3. Developed a timetable for achieving the goals.
4.
 - a) Developed a written recruitment activity plan which is a detailed strategy that outlines specific steps that will be taken to attract minorities and women in the appropriate job classifications in which minorities and women are underrepresented and
 - b) Implemented the written recruitment activity plan at a minimum by having:
 - i) Prominently displayed on your bulletin boards or in common areas the fact that you are an equal opportunity employer.
 - ii) (If minorities are underrepresented in certain job classifications, for each vacancy in such job classification) placed an advertisement in a media outlet that caters to minorities and that the advertisement described the job and indicated that the vendor is an equal opportunity employer and that minorities are encouraged to apply.

- iii) (If women are underrepresented in certain job classifications for each vacancy in such job classification) placed an advertisement in a media outlet that caters to women and that the advertisement described the job and indicated that the vendor is an equal opportunity employer and that women are encouraged to apply.
- iv) (If minorities are underrepresented in certain job classifications) corresponded in writing with local advocacy agencies such as community-based organizations, minority trade unions, etc., that you have job vacancies in job classifications for which minorities are underrepresented, described the job and indicated that you are an equal opportunity employer and that minorities are encouraged to apply.
- v) (If women are underrepresented in certain job classifications) corresponded in writing with local advocacy agencies such as community-based organizations, local trade unions, etc., that you have job vacancies in job classifications for which women are underrepresented, described the job, indicated that you are an equal opportunity employer and that women are encouraged to apply.
- vi) Written a letter encouraging current racial/ethnic minorities and women employees to assist in the recruitment of prospective racial/ethnic minorities and women employees.
- vii) Reviewed all job descriptions to ensure that they reflect actual job duties and are job related.
- viii) Created a written discrimination complaint procedure that is publicized to all employees.
- ix) Reviewed all hiring policies and practices to ensure that they are non-discriminatory.
- x) Hired, where possible, minorities and women in job classifications in which they are underrepresented.

Vendors shall maintain and submit records at the request of the District for the purposes of the District, among other things, determining if the vendor has made a good faith effort. The District may disqualify a vendor from being awarded a contract if the vendor fails to maintain or provide the information requested by the District.

Date

Company Name

Location Address, Telephone Number

CEO's Typed Name & Title

Signature

Human Resource Officer or Affirmative Action Officer's Typed Name & Title

Signature

Appendix D – Intention to Submit a Proposal and Questions/Inquiries

Submission Deadline: November, 2023 - 2:00PM (CST)

In order to provide timely updates to this Request for Proposal, including the responses to questions submitted, we ask that potential organizations complete the following form and return it by email to Kenneth Thomas at krthomas1@madison.k12.wi.us in accordance with paragraph 1.6 of this document.

Business Name: _____
 RFP Point of Contact: _____
 RFP Contact Email: _____
 Physical Address: _____
 Mailing Address: _____
 Phone: _____

Yes, we plan to submit a proposal to RFP [Need new number] – Consultation Services for Feasibility Study Search. Please continue to provide updates to the individual named above.

No, we do not plan to submit a proposal.

Reason: _____

Business (Printed Name):

Signature of Authorized Individual:

Printed Name of Authorized Individual:

Printed Title of Authorized Individual:

Date:

QUESTIONS/INQUIRIES SUBMISSION

**RFP – Consultation Services for Feasibility Study Search Vendor
Questions/Inquiries and Responses**

1: Vendor add question here if needed...

RESPONSE: [To be completed by the district]

2: Vendor add question here if needed...

RESPONSE: [To be completed by the district]

3: Vendor add question here if needed...

RESPONSE: [To be completed by the district]

4: Vendor add question here if needed...

RESPONSE: [To be completed by the district]

5: Vendor add question here if needed (can continue with additional questions as needed)...

RESPONSE: [To be completed by the district]