

School Food Authority (SFA) Guidance for Procuring a Food Service Management Company (FSMC) Contract or Vended Meals Service Contract

PLEASE READ THIS DOCUMENT THOROUGHLY

Legal Disclaimer

The Illinois State Board of Education (ISBE) does not review or judge the fairness, advisability, or fiscal implications of the contract. ISBE is not a party to any contractual relationship between the SFA and Selected FSMC/Vendor. ISBE is not obligated, liable, or responsible for any action or inaction taken by the SFA or Selected FSMC based on this contract template and changes and/or amendments to the solicitation or subsequent Awarded Contract.

Carefully review the [School Food Authority Responsibilities When Contracting for Meals and/or Services](#) along with the guidance outlined on the following pages. If you have questions regarding the solicitation and contract process, please contact the ISBE Nutrition Department at 217-782-2491 or 800-545-7892 (in Illinois), or via email at NutritionProcurement@isbe.net.

Purpose

This guidance provides School Food Authorities (SFAs) with an overview of the requirements for procuring a Food Service Management Company (FSMC), FSMC-Vended, or Vended Meals contract. Following these requirements helps ensure compliance with federal, state, and local procurement regulations while protecting the integrity of the Child Nutrition Programs.

SFA Responsibilities

The SFA is responsible for the overall operation and administration of all Child Nutrition Programs under its jurisdiction, including, but not limited to:

- National School Lunch Program (NSLP)
- School Breakfast Program (SBP)
- Special Milk Program (SMP)
- Fresh Fruit and Vegetable Program (FFVP)
- Afterschool Snack Program
- Food Distribution Program (FDP)
- Seamless Summer Option (SSO)
- Summer Food Service Program (SFSP)
- Child and Adult Care Food Program (CACFP)

Important: Contracting with an FSMC or Vended Meals Company **does not transfer responsibility** for program compliance. The SFA remains accountable for ensuring all program requirements are met and must maintain active oversight throughout the contract term.

Understanding Contract Types

Before beginning the procurement process, the SFA must evaluate its food service operation to determine which contract type best meets its operational needs. Remember: Regardless of the contract type selected, the SFA

retains ultimate responsibility for the administration, oversight, and compliance of all Child Nutrition Programs. Contracting with an FSMC or meal vendor does not relieve the SFA of its legal and programmatic responsibilities.

FSMC Contract

A Food Service Management Company is a commercial enterprise or nonprofit organization contracted by an SFA to manage one or more aspects of the school food service operation. Depending on the contract, an FSMC may provide services such as menu planning, food purchasing, meal preparation, staffing, training, inventory management, and other operational functions.

An FSMC contract is appropriate when the SFA seeks management services in addition to meal preparation.

Vended Meals Contract

A Vended Meals Company prepares and delivers meals to the SFA for service to students. Meals may be delivered in bulk or as individually pre-packaged meals.

A meal vendor may also develop menus and provide menu production records. However, if the vendor performs additional management responsibilities that are typically the responsibility of the SFA — such as managing daily food service operations, supervising staff, or administering the food service program — the procurement is no longer considered solely a vended meals contract and must instead be solicited as an FSMC contract.

A vended meals contract is appropriate when the SFA is seeking meal production and delivery services without transferring management responsibilities.

FSMC-Vended Meals Contract

An FSMC-Vended contract combines food service management services with off-site meal production.

Under this arrangement, the FSMC provides one or more management functions while preparing meals at an FSMC-owned or leased facility because the SFA does not have adequate on-site kitchen facilities. The FSMC then delivers meals to the SFA in either bulk or individually pre-packaged units for service to students.

This contract type is appropriate when the SFA requires both management expertise and off-site meal preparation.

[Understanding Procurement Methods](#)

There are two procurement methods available: the Invitation for Bid and Contract (IFB) and the Request for Proposal (RFP). When contracting for food service, there are a lot of factors to consider when determining the best procurement method for the SFA. The SFA needs to determine their needs, goals, and priorities prior to determining which procurement method best suits the situation.

Invitation for Bid	Request for Proposal
Uses competitive sealed bids	Uses competitive proposals
Award is based primarily on the lowest responsive and responsible bid	Award is based on best value, considering price and other evaluation factors
Results in a firm fixed-price contract	May result in a fixed-price or cost-reimbursable contract, as appropriate
No negotiations after bids are opened	Negotiations may be conducted with one or more proposers
Appropriate when requirements are clear and can be precisely specified	Appropriate when requirements are more complex or when factors beyond price are important

Both procurement methods require:

- Public advertisement of the solicitation
- Direct solicitation of all known qualified suppliers (defined as, at a minimum, every company on the [ISBE List of Known FSMC-Vended Meals Companies in the SNP](#))
- Sufficient time for vendors to prepare responses
- Public opening of bids or proposals
- Review and approval by the ISBE Nutrition Department at key stages before proceeding

When to use each method

- Use an IFB when the goods or services can be clearly defined, and price is the determining factor
- Use an RFP when the procurement requires evaluation of technical approach, qualifications, experience, service quality, or other factors in addition to price, and negotiations may be beneficial
- Review the [RFP Vs. IFB Comparison Chart](#)  for more information

Plan Your Procurement

Before beginning a solicitation, the SFA must evaluate its current food service operation and determine:

- The type of contract that best meets the district's needs:
 - FSMC
 - Vended Meals
 - FSMC-Vended
- The appropriate procurement method:
 - **Invitation for Bid** – Award based on the lowest responsive and responsible bid according to the criteria outlined in the specifications
 - **Request for Proposal** – Award based on the proposal most advantageous to the program, with price as the primary consideration

Regardless of the method selected, all procurements must be conducted in a manner that promotes full and open competition.

Prepare the Solicitation

Illinois SFAs are required to use the ISBE Nutrition Department prototype solicitation and contract documents.

These prototypes include federally required contract provisions; however, they are not complete until the SFA:

- Completes all required blanks and district-specific information
- Develops a clear scope of work
- Includes detailed specifications for products and services
- Identifies contract terms and conditions
- Establishes a procurement timeline that ensures adequate response time
- Establishes evaluation and scoring criteria
- Includes all required federal, state, and local procurement requirements

Because some required sections must be completed locally, SFAs are strongly encouraged to consult with legal counsel before issuing the solicitation.

Obtain ISBE Approval

Before advertising or issuing an IFB or RFP, the SFA must follow ISBE's three-step competitive solicitation process and submit the complete solicitation package to ISBE for review.

The solicitation may not be released until the SFA receives written approval from ISBE confirming the documents comply with federal procurement regulations.

Remember:

- The solicitation and resulting contract should remain substantially the same.
- Material changes after solicitation may require the procurement to be reissued.

Conduct the Competitive Procurement

After receiving ISBE approval, the SFA may begin the competitive solicitation process.

The SFA is responsible for:

- Advertising the solicitation
- Conducting pre-bid or pre-proposal conferences, if applicable
- Receiving bids or proposals
- Evaluating submissions using only the criteria identified in the solicitation
- Documenting the evaluation and award process
- Awarding the contract in accordance with procurement requirements

Maintain Contract Oversight

Awarding a contract is not the end of the SFA's responsibilities. Throughout the contract period, the SFA must:

- Establish and operate an advisory board composed of parents, teachers, and students to assist in menu planning
- Monitor contractor performance
- Ensure meals and services comply with program requirements
- Verify contract terms are being met
- Maintain documentation supporting contract administration
- Submit the contract and supporting documentation to ISBE for the required annual review

The SFA must remain actively involved in all aspects of program administration and may not delegate its oversight responsibilities to the contractor.

Procurement Checklist

Before issuing your solicitation, confirm that you have:

- ☐ Determined the appropriate contract type (FSMC, FSMC-Vended, or Vended)
- ☐ Selected the appropriate procurement method (IFB or RFP)
- ☐ Used the current ISBE prototype solicitation
- ☐ Completed all required sections

- ☐ Developed evaluation criteria
- ☐ Included all required contract provisions
- ☐ Submitted the solicitation to ISBE for review
- ☐ Received written ISBE approval before issuing the solicitation
- ☐ Planned for ongoing contract monitoring and oversight

Key Takeaways

- The SFA always retains responsibility for Child Nutrition Program compliance.
- Competitive procurement is required for FSMC and Vended Meal contracts.
- The SFA must use and complete ISBE prototype documents.
- ISBE approval is required before issuing a solicitation.
- Active contract oversight is required throughout the life of the contract.

Following these steps will help ensure a fair, competitive procurement process while protecting program integrity and federal funding.

Three-Step Competitive Solicitation Submission Process

The following procurement and three-step competitive solicitation submission process must be implemented to ensure compliance with federal regulations and statutes. These requirements apply to all Food Service Management Company (FSMC) contracts of any value and Vended Meal contracts in value excess of \$350,000. The School Food Authority (SFA) should also seek the advice of their legal counsel regarding local, state, and federal regulations and policies. An SFA failing to follow and complete the following required process may be prohibited from utilizing nonprofit food service account funds to pay for the meal services contract.

Step 1 – Preparing a formal solicitation

Before issuing an Invitation for Bid (IFB) or Request for Proposal (RFP), the SFA must develop a solicitation, using the Illinois State Board of Education (ISBE) prototype, that clearly defines its procurement needs and complies with all applicable federal, state, and local procurement requirements.

When preparing the solicitation, the SFA should:

- **Establish the procurement timeline.** Include key dates such as the solicitation release date, pre-bid/pre-proposal conference (if applicable), deadline for submitting questions, bid/proposal due date, public opening, anticipated award, and contract start date.
 - To ensure a timely completion of the procurement prior to the June Board meeting, and the overall success of the solicitation, the completed final draft of the Step 1 documents must be submitted to the ISBE Nutrition Department by the following deadlines:
 - RFP-Cost Reimbursable: Jan. 15
 - RFP-Fixed Price per Meal: Feb. 16
 - IFB-Fixed Price per Meal with evaluation criteria: March 31
 - IFB-Fixed Price per Meal with no evaluation criteria (price only): April 30
- **Select the appropriate procurement method.** Use an IFB when the award will be based on the lowest responsive and responsible bid. Use an RFP when factors other than price will be evaluated to determine best value.
- **Develop clear and complete specifications.** Describe the goods or services required without unnecessarily restricting competition or favoring a particular vendor, brand, or product. Ensure that the specifications are updated to meet local needs and expectations, especially regarding food quality and minimum menu standards.
- **Include all required contract terms and conditions.** Incorporate all applicable federal, state, local, and USDA-required contract provisions and certifications.
- **Identify the evaluation and award criteria.** Clearly explain how bids or proposals will be evaluated and how the successful contractor will be selected.
- **Ensure adequate response time.** Allow sufficient time for vendors to prepare responsive submissions in accordance with state requirements and USDA guidance.
- **Obtain required state agency approval.** For FSMC procurements, submit the solicitation to the state agency for review and receive written approval before publicly advertising the solicitation, when required.

A well-prepared solicitation promotes full and open competition, ensures all vendors receive the same information, and establishes a fair and transparent procurement process.

Once the solicitation is complete, submit to ISBE via email to NutritionProcurement@isbe.net:

- [Step 1 Submission Form](#)

- Appropriate completed IFB or RFP prototype document. All prototype documents are available upon written request to NutritionProcurement@isbe.net.

ISBE review time: **Minimum 30 calendar days**. Written authorization is required before the solicitation may be publicly released as per federal regulations.

Step 2 – During the competitive solicitation phase, but before contract award

Once the solicitation has been publicly advertised and released, the SFA must ensure the procurement is conducted fairly, transparently, and in accordance with federal and state requirements.

During the solicitation period, the SFA must:

- **Provide equal access to information.** Make the solicitation documents available to all interested vendors and respond consistently to requests for information.
- **Accept questions only through the process identified in the solicitation.** Questions should be submitted in writing by the established deadline.
- **Issue written addenda when necessary.** Any clarification, correction, or change to the solicitation must be provided in writing to all vendors that received or requested the solicitation. Verbal explanations or interpretations are not binding. ISBE review and approval of all written addenda is required prior to public release.
- **Conduct any pre-bid or pre-proposal conference consistently.** If held, provide the same information to all attendees, maintain a sign-in sheet, and, with ISBE approval, issue any resulting clarifications through a written addendum.
- **Avoid discussions that could provide an unfair competitive advantage.** Do not disclose information regarding another vendor's interest, inquiries, pricing, proposed approach, or other proprietary or procurement-sensitive information. Establish and adhere to a local communication policy requiring that all communications regarding the procurement be conducted through the designated procurement official. Ex parte communications with evaluation committee members, decision-makers, or other personnel involved in the evaluation or award of the procurement are prohibited. Any communication outside the authorized procurement process is not permitted.
- **Maintain the integrity of the procurement.** Do not accept late questions after the established deadline unless the solicitation is formally amended, and all vendors are provided the same opportunity to respond.
- **Safeguard bids or proposals.** Responses must remain sealed or otherwise secured and unopened until the date and time specified in the solicitation.
- **Bid/proposal opening.** Open offers received publicly at the date/time specified in the solicitation and maintain a sign-in sheet.

- **Notify all vendors of the award decision.** Provide appropriate notification to the successful contractor and, if applicable, to unsuccessful bidders or proposers. Be sure to include protest procedures that were included in the solicitation and that award is pending ISBE review and approval.
- **Protests.** Report any protests received to ISBE. All protests must be resolved prior to submitted recommendation of award to ISBE.
- **Maintain procurement documentation.** Retain copies of all questions, addenda, correspondence, sign-in sheets (if applicable), and other procurement records as part of the official procurement file.

The SFA should not evaluate, discuss, or negotiate bids or proposals until after the official public opening and in accordance with the procurement method identified in the solicitation.

After opening bids/proposals, submit to ISBE via email to NutritionProcurement@isbe.net:

- [Step 2 Pre-Contract Award Submission Form](#) along with required contract documentation outlined within

ISBE review time: **Minimum 30 calendar days**. Written authorization is required before the official contract award may occur.

Step 3- After Contract Award

Following contract award, the SFA must complete all required post-award activities before contract performance begins and maintain oversight throughout the contract term.

After contract award, the SFA should:

- **Submit required documentation to the state agency.** Complete and submit all required post-award forms and supporting documentation for review and approval, as applicable.
- **Execute the contract.** Ensure the contract is signed by all authorized parties before services begin and that it matches the solicitation, contractor's response, and award decision.
- **Maintain the procurement file.** Retain all procurement records, including the solicitation, advertisements, addenda, bids or proposals, evaluation documents, award documentation, signed contract, and required approvals.
- **Monitor contractor performance.** Verify that the contractor complies with all contract terms, USDA program requirements, and applicable federal, state, and local regulations.
- **Manage contract changes appropriately.** Any contract amendment or renewal must comply with the terms of the original solicitation and applicable procurement requirements. Material changes that alter the scope of work generally require a new procurement.
- **Maintain ongoing contract oversight.** The SFA remains responsible for administering the School Nutrition Programs and ensuring the contractor performs in accordance with the contract throughout the contract period.

Effective post-award administration helps ensure contract compliance, protects program integrity, and supports responsible stewardship of federal funds.

After official award, submit to ISBE via email to NutritionProcurement@isbe.net:

- [Step 3 Post-Contract Award Submission Form](#) along with required contract documentation outlined within

ISBE review time: **Minimum 7 calendar days**. Written authorization is required before federal funds may be utilized to pay for the contracted services.

Public Advertisement Guidance

According to [USDA Policy Memo SP 40-2016: Updated Guidance—Contracting with Food Service Management Companies](#) and the accompanying FSMC Guidance for School Food Authorities, the purpose of the public advertisement is to ensure full and open competition. While the guidance does not prescribe a specific newspaper or publication frequency, it establishes minimum expectations for publicizing formal procurements.

Federal expectations for the public advertisement

For a formal Invitation for Bid (IFB) or Request for Proposal (RFP), the School Food Authority (SFA) must:

- Publicly advertise the solicitation in accordance with Federal, State, and local procurement requirements.
- Advertise in a major newspaper or trade journal normally used by the SFA to publicize procurements. The guidance notes that, at a minimum, the solicitation should be published in a regional news source to maximize competition.
 - The State of Illinois recommends The State Journal-Register or the Chicago Tribune.
- Directly solicit an adequate number of qualified Food Service Management Companies (FSMCs)/Vendors in addition to the public advertisement. Public notice alone is not sufficient.
 - ISBE defines adequate number of qualified FSMCs/ Vendors as every company on the [ISBE List of Known FSMC-Vended Meals Companies in the SNP](#)
- Allow sufficient time for vendors to prepare responses. ISBE requires School Food Authorities (SFAs) to allow a minimum of 45 calendar days between the date the solicitation is publicly advertised and the bid or proposal due date to provide vendors with adequate time to prepare responsive offers. This requirement is consistent with USDA guidance, which recommends allowing at least 45 days for Invitations for Bid (IFBs) and 60 days for Requests for Proposals (RFPs) to promote full and open competition, unless State or local procurement requirements are more restrictive.

What the newspaper advertisement should include

USDA guidance states that the entire solicitation does not need to be published. Instead, the [notice](#) should contain enough information for interested vendors to obtain the complete solicitation. At a minimum, include:

- Solicitation number (if applicable)
- Date of the solicitation
- Name of the School Food Authority
- Brief description of the procurement (e.g., Food Service Management Company services or vended meal services)
- Instructions on how and where to obtain the complete solicitation documents
- Bid/proposal submission deadline
- Time and location of the public opening
- Contact information for questions or requests for the solicitation package

Addendum Guidance

Addendum

An addendum is a supplemental document added to an existing contract or agreement. It is used to add new terms, clarify information, or include additional provisions without replacing or rewriting the original contract. Once signed by all parties, it becomes a legally binding part of the original agreement.

Amendment

Amendment(s) modify, add, or delete specific clauses, terms, conditions, requirements, or attachments contained in the original solicitation. Each amendment must clearly identify the exact provision being changed and use precise language to indicate the action being taken. Changes should be drafted using replacement, addition, deletion, or strikethrough formats, as applicable.

- **Replacement of Existing Language:** Use the following format when replacing an existing clause or provision.
"Section X, Subsection Y is hereby deleted in its entirety and replaced with the following: [Insert New Language]"
- **Addition of New Language:** Use the following format when adding a new clause or provision. "The following is hereby added to Article X as Paragraph Z: [Insert New Language]"
- **Deletion of Existing Language:** Use the following format when deleting a clause or provision. "Section X, Subsection Y is hereby deleted in its entirety."
- **Use of Strikethrough and Revision Markups:** When appropriate, amendments may identify specific changes within a provision using revision markups. Deleted text should be shown in strikethrough format, and new text should be clearly identified as added language.

Attachments

All attachments referenced in an amendment shall be sequentially numbered and labeled. Each attachment shall be identified using the following format:

- Attachment 1 – [Attachment Title]
- Attachment 2 – [Attachment Title]
- Attachment 3 – [Attachment Title]

When an attachment is added, revised, replaced, or deleted, the amendment shall clearly state the action being taken and identify the applicable attachment number and title.

ISBE Approval Required

When issuing any addendum or amendment to a solicitation, federal regulations require review and written approval by the Illinois State Board of Education (ISBE) prior to public release. No addendum or amendment shall be distributed, posted, or otherwise made available to prospective respondents until written ISBE approval has been obtained and documented in the procurement file.

Pre-Bid/Proposal Conference Guidance

A School Food Authority (SFA) may be required by local procurement policies, or may elect, to conduct a pre-bid/proposal conference (also referred to as a pre-bid/proposal meeting). If the SFA is procuring meal services for the first time, a conference can provide valuable information to both the SFA and prospective offerors by clarifying solicitation requirements before bids or proposals are submitted.

Attendance

Attendance requirements are determined by the SFA. USDA guidance recommends that prospective offerors attend the conference; however, attendance generally should **not** be mandatory as a condition for submitting a bid or proposal.

Scheduling

To allow adequate time for prospective offerors to prepare, the conference must be scheduled:

- At least **10 calendar days** after the public advertisement and distribution of the solicitation documents
- At least **35 calendar days** before the public bid opening or proposal due date, allowing sufficient time for the SFA to issue any necessary written addenda or amendments and for offerors to revise their responses accordingly

As a result, the solicitation period should be a minimum of **45 calendar days**.

The conference announcement must be included within both the public advertisement and the solicitation documents.

Purpose

The pre-bid/proposal conference provides an opportunity to:

- Clarify contract specifications and procurement requirements
- Answer questions from prospective offerors. Detailed notes should be taken, and all responses must be provided later in writing.
- Conduct a tour of the facilities, when appropriate
- Identify ambiguities, errors, or omissions in the solicitation that may require correction through a written addendum or amendment

The conference should **not** be used as a substitute for formally revising deficient or ambiguous specifications or for communicating additional performance requirements that are not included in the solicitation.

Addenda/Amendments/Questions and Answers

At the beginning of the conference, the SFA should advise attendees that any information discussed is not official until issued in writing to all prospective offerors who received the solicitation.

Oral explanations or instructions provided before contract award are not binding. Any clarification, interpretation, or additional information provided during the conference must be issued to all prospective offerors in the form of a written addendum or amendment to the solicitation.

Documentation

The SFA should maintain complete documentation of the conference, including:

- A [sign-in sheet](#) for all attendees
- Meeting minutes or a summary of information presented

- A record of all questions asked and the corresponding written responses

This information should be distributed to all prospective offerors as a written addendum to the solicitation. If multiple addenda are issued, each should be sequentially numbered. Offerors should acknowledge receipt of each addendum by signing and returning it with their bid or proposal as evidence that all solicitation requirements have been received and considered.

Solicitation, Receipt, Evaluation, and Award Procedures

Bids and proposals must be directly solicited from all contractors listed on the Illinois State Board of Education (ISBE) List of Known FSMC/Vended Meal Companies participating in the School Nutrition Programs. In addition, the solicitation must be publicly advertised in a newspaper of general circulation. Sufficient time must be provided for prospective contractors to prepare and submit a responsive bid or proposal before the established bid opening or proposal due date.

Invitation for Bids (IFB)

Receipt of Bids/Public Bid Opening

Under the sealed bidding method, each bid must be date- and time-stamped immediately upon receipt. Bids received before the public opening should be secured in a locked box, safe, or other secure location until the designated opening time.

Bids that are unsealed or received after the date and time specified in the IFB are considered late and must not be accepted.

Bid Award

The contract must be awarded to the responsible bidder whose bid is responsive to all material terms and conditions of the solicitation and offers the lowest price, unless there are documented business reasons demonstrating that rejection of the bid is in the best interest of the Child Nutrition Programs.

State Agency Review and Contract Award

USDA requires all School Food Authority (SFA), Food Service Management Company (FSMC), and Vended Meal contracts to be reviewed and approved by ISBE before execution (refer to the ISBE Three-Step Competitive Solicitation Submission Process).

Accordingly, the SFA must not formally award or execute a contract until written approval is received from ISBE.

After identifying the apparent successful bidder, the SFA should:

- Notify the successful bidder of the SFA's intent to award the contract, while clearly stating that the award is contingent upon ISBE approval, local board approval, and the expiration or resolution of any bid protests
- Provide written notification to all unsuccessful bidders
- Allow the established bid protest period to expire or resolve any protests received
- Submit the proposed contract to ISBE for review and approval
- Upon receiving ISBE approval, obtain local board approval, execute the contract, and submit a copy of the fully executed contract to ISBE

Request for Proposals (RFP)

Under the competitive proposal method, offerors submit both:

- A **technical proposal** describing how they will meet the objectives and requirements of the solicitation; and
- A **cost proposal** identifying the costs associated with providing the requested goods and services

Before issuing an RFP, the SFA must clearly define the objectives, desired outcomes, and evaluation criteria for the procurement. The solicitation must specify the information and documentation offerors are required to submit so that all proposals can be evaluated consistently and fairly.

Public Proposal Opening

The sealed proposal opening must occur at the time and place identified in the RFP and must be conducted publicly.

The purpose of the public opening is to publicly identify the offerors that submitted proposals. Unlike an IFB opening, pricing or cost information must **not** be publicly announced.

Evaluation Plan

An evaluation and scoring plan must be developed by the SFA before proposals are received and must be included in the solicitation. Although price is not the sole factor in an RFP, it remains the primary consideration when awarding the contract.

The SFA must evaluate proposals solely using the published evaluation criteria and must not modify, waive, or bypass those criteria in a manner that restricts or circumvents full and open competition.

To further protect the integrity of the procurement process, it is recommended that all evaluation committee members sign both a Conflict-of-Interest Statement and a Confidentiality Statement prior to evaluating proposals.

The evaluation plan should include the following components:

A. Evaluation Team

The SFA should establish an evaluation team or scoring committee that includes individuals with a wide variety of appropriate expertise, such as:

- School nutrition program operations
- School food service management
- Financial management
- Procurement

The SFA should designate an evaluation team leader with procurement expertise. The team leader should train committee members on:

- Procurement objectives
- Evaluation criteria
- Required documentation
- Scoring procedures
- Evaluation forms and rubrics

B. Scoring System

The solicitation must clearly describe the scoring methodology, including:

- Evaluation criteria and performance standards
- Relative weights assigned to each criterion
- Documentation required to support scoring
- Individual evaluator scoring procedures
- Method used to calculate the final score (for example, average or combined evaluator scores)

Price must remain the primary factor in the overall evaluation.

C. Evaluation Materials

The SFA should prepare all evaluation materials before proposals are received, including:

- Individual scoring sheets
- Composite scoring forms
- Evaluation rubrics
- Required correspondence and documentation templates

Scoring forms should include each evaluation criterion, applicable standards, scoring ranges, and space for evaluator comments.

D. Proposal Receipt and Safeguarding

Proposals must remain sealed and confidential until the proposal due date and public opening, in accordance with applicable laws and local procurement procedures.

The individual responsible for receiving proposals shall safeguard all submissions to prevent unauthorized access, disclosure, or premature release of proposal materials. All procurement-related communications must be handled in accordance with the local communication policy. Unauthorized or ex parte communications regarding the procurement with individuals involved in the evaluation or award process are prohibited.

E. Proposal Evaluation

Proposals may not be opened or evaluated until after the established due date.

Each evaluation team member should independently evaluate and score each responsive proposal using only the published evaluation criteria.

If alternative proposals are permitted, they must satisfy the minimum requirements established in the solicitation.

Proposals must not be compared directly to one another. Instead, each proposal should be evaluated solely against the published evaluation criteria.

Proposals that fail to meet all mandatory requirements are considered nonresponsive and must receive no further consideration. Evaluation teams should first determine responsiveness using a pass/fail review before scoring responsive proposals.

F. Oral Presentations

If oral presentations are included as part of the RFP process, they must:

- Be evaluated only on the criteria identified in the solicitation
- Be scored using measurable, predetermined standards
- Clarify the contents of the written proposal without allowing offerors to revise, modify, or supplement their proposals

G. Determination of Responsibility

Following evaluation, the SFA must determine whether each offeror is both responsive to the solicitation and responsible for performing the contract.

Factors that may be considered include:

- Contractor integrity
- Compliance with public policy
- Record of past performance

- Financial capacity
- Technical capability
- Available personnel and resources

State Agency Review and Contract Award

USDA requires all SFA FSMC and Vended Meal contracts to be reviewed and approved by ISBE before award and execution (refer to the ISBE Three-Step Competitive Solicitation Submission Process above).

The SFA must not formally award or execute a contract until written approval has been received from ISBE.

After identifying the apparent successful offeror, the SFA should:

- Notify the successful offeror of the intent to award, clearly stating that the award is contingent upon ISBE approval, local board approval, and the expiration or resolution of any bid protests
- Provide written notification to all unsuccessful offerors
- Allow the bid protest period to expire or resolve any protests received
- Submit the proposed contract to ISBE for review and approval
- Upon receiving ISBE approval, obtain local board approval, execute the contract, and submit a copy of the fully executed contract to ISBE