**GENERAL INFORMATION and DIRECTIONS**

* NCPA School Districts issuing NEW bids must attend the annual Bid Opening Meeting on May 16, 2024 – 10 a.m. at McKimmon Center, Raleigh, NC. All Distributors issuing NEW bids are required to attend bid opening **except** **Distributors with five (5) or less bid responses** may mail documents to Leann Seelman by 5:00 pm on May 14, 2024. Mailed bids will be given to the school district at the opening. **Distributors will deliver their NEW bids to you personally in the auditorium prior to 10:00 a.m.**
* The *gray information boxes* found in the required bid documents can be typed in by *double clicking and typing in the default text line to enter needed information.*
* Yellow highlights on Official document pages indicate the School District is to enter the information required.
* Teal highlights on Official document pages indicate required information to be entered by the Distributor.
* Paragraphs on the IFB/Contract may be manipulated to correct page spacing, but **do not delete or change any of the IFB/Contract language.**
* If the District has additional requirements of Distributors, list them on the **Special Conditions** page, but discuss Special Conditions in advance with all Distributors. If any additions/deletions are made to the Special Conditions by one Distributor, a local addenda must be issued to all bidders with the information a minimum of seven working (7) days prior to bid opening – **May 7, 2024.**

**GETTING STARTED: “MEMBER” NEW BID DOCUMENTS**

(Zip Files #1 & #2, referenced here, were attached to the email containing these instructions.)

**ZIP FILE #1.** Download the attached zip file containing the Official Bid Documents. Review documents 1 – 9 (below) and fill in required School District information on pages with yellow highlights. Save each document as completed. Remove sheets not required by your district. For example, if you don’t have NCDA Storage/Delivery, or Special Conditions, eliminate the sheet.

**Distributor NEW Bid Documents** **Folder will contain the following:**

1. **DISTRIBUTOR CHECKLIST –** Completed by Distributor and placed under Bid Tabulation Sheet.
2. **Official New Bid Invitation to Distributors** – Invitation and general procedures for New Bid Distributors.
3. **Official NEW Distributor Bid Tabulation Sheet** – Completed by Distributor and placed as first page of the bid packet. Provide TOTALS from the bid spreadsheets. This sheet is used to determine the “Preliminary Bid Award” at Bid Opening. Bid review by the school district may show corrections.
4. **Official New Bid Certification Agreement**– Two original forms, each completed and signed by Distributor with **original signature** **in Blue Ink preferred, but a scanned copy of the form with an original signature of an authorized company official will be accepted.** School District Official signs **after** School District approval of award and the completed/signed Agreement copy is mailed to the awarded Distributor. The agreement is effective by the issue to the Distributor of a School District Purchase Order.
5. **Official IFB – Contract for 2024-2025** details procedures in Sections 1 – 36. **Should not be returned by Distributor.**
6. **Official 2024-2025** **Contract Attachments A – J** – Attachments A – I are defined in the IFB – Contract and must be completed, signed, and returned digitally with the bid packet. Attachment J is the “no bid” sheet. Digital signatures are allowed on Attachments A-J.
7. **Official NC Taxable – Non – Taxable Status List – Lot 3 Supplies** – Information only – **Should not be returned by Distributor.**
8. **Official District Profile 2024-2025** – Additional Information: cycle menus, 209 reports, etc. may be provided after the bid award but no later than June 1.
9. **Special Conditions Sheet (**if required) – agreement to Special Conditions must be made prior to bid opening and acknowledged on the New Bid Certification and Agreement. Any change to a Special Condition requires the School District to issue a local addenda to all potential bidders, a minimum of seven (7) working days prior to bid opening, which would be **May 7, 2024.**
10. **Official NCDA Storage Contract** – (if required) Send a signed copy of the Official NCDA Storage Contact to the Distributor. The Distributor will sign and return with the Official Bid Documents, keeping a copy on file. The SN Director will forward a copy of the dual signed Official NCDA Storage Contact to the Director of NCDA & CS Food Distribution.

**ZIP FILE #2.** Download the zip file containing the **Official NCPA Bid Spreadsheets by Lot**.

* Save each Lot you plan to bid. Save as: **“Your School District Name” and the Lot number** so you can work with the worksheets.
* Enter usage estimates on the **Bid Spreadsheets.** Instructions for completing bid spreadsheets are included with the bid documents.

**Distributor** **BidSpreadsheets** **Folder**

LOT 1: GROCERIES (*awarded as a separate bid LOT total and firm fixed price delivery fee this LOT (includes a Tab for Water and Beverages if not issued as separate bid LOT)*

LOT 3: SUPPLIES (*awarded as a separate bid LOT total and firm fixed price delivery fee*)

LOT 4: FRESH PRODUCE (*awarded as a separate bid LOT total and firm fixed price delivery fee*)

LOT 6: WATER & Beverages - (*awarded as a Firm, Fixed Price bid by line item if a separate bid LOT)*

* + All Lots may be bid with large Distributors.
  + LOT 6 Water/Beverage may be bid in LOT 1 Groceries, OR may be bid *separately from LOT 1,* in order to accommodate requests from additional/local bidders.
  + LOT 3 Supplies and Lot 4 Produce are always separate bid LOTS with separate fixed fees.

**MAKING THE ZIP FILES FOR DISTRIBUTORS**

**How to make a Zip File:** Highlight the document files using the Control Key. Right click and select “Send To”- select “Compressed (zipped) folder” and the Zip File will appear below your files.

**Zip File #1** – **Contains required legal documents 1 – 9 as listed above:**

* Review your saved **Official NCPA NEW Bid Documents** **1-9**, to be sure all Member information is completed.
* Make a “DISTRIBUTOR” ZIP FILE #1 containing your School District’s **Official NCPA NEW Bid Documents**. Remember to customize this to the Distributor to whom you are sending an email. Example – don’t include Special Conditions in the Zip File to a produce vendor if you don’t have any - don’t include NCDA Storage to a vendor if you don’t use it - don’t include the Taxable/Non - Taxable Status sheet on Produce or Beverage Bids.
* Rename Zip File 1: **“Your School District Name” 2024-2025 OFFICIAL NCPA NEW BID DOCUMENTS.**

**Zip File #2** – **Contains Bid Spreadsheets with your Usage for the Distributor:**

* + Review your saved Official Bid Spreadsheets to be sure all Member information and usage estimates are complete and totals are calculating to Recap Sheet.
  + Make a “DISTRIBUTOR” ZIP FILE #2 containing your School District’s **2024-2025** **Official NCPA Bid Spreadsheets**.
  + Rename Zip File #2 **“Your School District Name” 2024-2025 OFFICIAL NCPA BID SPREADSHEETS.** Remember to customize this to the Distributor to whom you are sending an email. Example – don’t include Lot 1 spreadsheets in the Zip File to a Produce vendor, etc
  + If bidding Lots 3, 4 and/or 6 separately, send an email invitation to each eligible bidder and attach the bid spreadsheets for each LOT, with legal documents (see Zip File 1) and the usage, (see Zip File 2).
  + Prepare an e-mail for each qualified Distributor requesting your bid, and attach:
  + Zip File #1: **“Your School District Name” 2024-2025 NCPA Official NEW Bid Documents**
  + Zip File# 2: **“Your School District Name” 2024-2025 NCPA Official Bid Spreadsheets**
* **Email to Distributors invited to bid between April 10-19, 202****4.**
* **REQUEST A READ RECEIPT**

SAMPLE email that may be used/customized and sent to Distributors invited to Bid:

* **Subject Line for New Bid E-Mail**: “*School or Co-Op Name” 2024-2025 Request for NEW NCPA Distributor Bid.*

Dear Distributor XXX:

(YOUR SCHOOL DISTRICT NAME) is requesting a NEW bid from your company for the 2024-2025 school year on bid LOT(S) *Include in this sentence the LOT numbers you are requesting from Distributor – it will be LOT(S) 1 and/or LOT 3 Supplies and LOT 4 Produce unless you are bidding LOTS 4 or 6 separately to bidders).* Our district will also require: *(add as needed)* Commodity Storage and Delivery/Farm to School Delivery *(list as required by your Special Conditions)* which you will find detailed in the Special Conditions page of the IFB/Contract.

Attached are the NCPA NEW BID contract documents and bid spreadsheets for 2024-2025. Please note the “2024-2025 Official Distributor Invitation New NCPA IFB/Contract” which contains pertinent information for Distributors.

Please acknowledge the Read Receipt of this invitation to bid to (enter your School District). If you have any questions, contact XXXXX at XXXXX.

Sincerely,

XXX

**Reminders to Members Preparing Bid Documents:**

* **NO CHANGES** (**adding or removing rows, columns, or cells**) **are to be made to any of the lines on the Excel bid spreadsheets when entering usage data as it will destroy the proper cell alignment needed for the Distributor to enter their cost pricing and for allowing correct calculation across the page.**

**Member Bid Preparation**

* Request food and supply usage reports from your distributor from August 2023-January 2024 (or as you determine) for preparation of annual estimated case usage. Plan for the NOI and brown box you ordered in your district cycle menus.
* Usage estimates on bid spreadsheets should be based on facts at the time.
* **PLEASE** **Use Column A** to tell the Distributor the MONTH the item will be on your cycle menu; otherwise, the buyer will order/bring in a product to their warehouse in August/September that you do not plan to use until the spring menu cycle! Particularly do this for Entrée items and items that will be menued seasonally. For instance, note date of first delivery needed for items that will not be used in the first menu cycle or other communication needed for the Distributor. Example: You put 400 cases of FISH on your usage, but you don’t plan to order fish until the November – Feb Menu cycle – if not noted in Column A the Distributor will order your fish in August!!
* Do not insert low usage numbers as **“place holders”** for a rarely used product. The bid allows you to purchase stocked items at the current cost price (not a bid price) from the Distributor, so it’s not necessary.
* Check that usage is entered on the correct specification. **A major error is listing usage on the line above/below the correct line item.**
* Check that usage is entered on the **correct line** so that it will calculate the total!
* **Recheck all lines before you issue your bid spreadsheets.**
* **Send NEW bids by email to distributors between April 10-19, 2024**.
* **AFTER BID OPENING:**
* **Usage estimates must be reviewed and updated with the awarded distributor on a continual basis.** Communication is essential as the food industry is subject to manufacturer production, transportation, minimum shipment requirements, warehouse slotting, weather and many other potential issues affecting deliveries.
* **Communicate Menu Changes** at least 60 days prior to planned change.
* **Non – Domestic Shelf Stable Fruits and Vegetables, Frozen Vegetables and Produce** – After bid opening, make the list of Countries of Origin of all Non – Domestic products and provide to School District cafeteria managers. All updates or changes must be approved in advance and an updated list maintained and provided to cafeteria managers.
* **Districts should provide a list of the Additional Items under 500 cases to the awarded Distributor**, after the bid is awarded, to include estimated usage and the time frame that the products will be ordered. Distributor should provide pricing on the weekly price sheets. The District will communicate with the Distributor Representative to coordinate these orders