

**LANCASTER-LEBANON INTERMEDIATE UNIT 13
COLLABORATIVE PURCHASING PROGRAM**

REQUEST FOR BIDS #156-151

for

CAFCO BAKERY REQUIREMENTS

for the period commencing July 1, 2016 through and including June 30, 2017

Issued on July 5, 2016

Pre-Bid Conference:

There will be no pre-bid conference for this bid.

Bid Submittal Deadline

Monday, July 25, 2016 at 12:00 PM (noon) EST

Bid Opening Date, time and location:

Monday, July 25, 2016 at 2:00 PM EST
Lancaster-Lebanon Intermediate Unit 13
1020 New Holland Avenue
Lancaster, PA 17601

SECTION I. INVITATION

The Lancaster-Lebanon Intermediate Unit 13 ("IU13") invites qualified vendors to submit bids for CAFCO School District Bakery Requirements for a 12-month period, according to the specifications contained in this Bid #156-151.

Bid documents can be obtained from Diane Bates, Collaborative Services Program Assistant. See the Bid Table of Contents for further contact information.

Modifications, additions, or changes to the terms and conditions of this Request for Bids may be a cause for rejection of a bid. Vendors are requested to submit all bids on IU13's official forms. Bids submitted on company forms may be rejected.

[END OF SECTION]

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- ATTACHMENTS:
- A. Form of Proposal
 - B. Non-Collusion Affidavit (***NOTE: NOTARY SEAL MUST BE VISIBLE IN THE ELECTRONIC DOCUMENT ON THE NON-COLLUSION AFFIDAVIT***)
 - C. Addendum Acknowledgement Form
 - D. Piggybacking Acceptance Agreement
 - E. Bid Region Acceptance Agreement

If missing any of the above sections or attachments, contact:

Diane Bates
Collaborative Services Program Assistant
Lancaster-Lebanon Intermediate Unit 13
1020 New Holland Avenue,
Lancaster, PA 17601
(717) 606-1994-phone
diane_bates@iu13.org

[END OF SECTION]

SECTION III: BACKGROUND AND PURPOSE

IU13 is an educational service agency that provides products and services to both educational and public entities across Pennsylvania. CAFCO is a collaborative food procurement effort of schools from various counties in central Pennsylvania. CAFCO participant schools are listed in Section VII. IU13 facilitates and awards annual bids for the CAFCO participant’s food requirements. CAFCO and IU13 intend to award a bakery requirements bid for the 2016-17 school year. One vendor per geographical bid region (county) will be awarded. This bid will commence on July 1, 2016 and end on June 30, 2017. IU13 is interested in obtaining bids for the requirements contained within these specifications.

[END OF SECTION]

SECTION IV: BID CONTACTS AND RESPONSE INFORMATION

Bid Questions and Registration:

Diane Bates, Collaborative Services Program Assistant
Lancaster-Lebanon Intermediate Unit 13
1020 New Holland Avenue
Lancaster, PA 17601
(717) 606-1994-phone
diane_bates@iu13.org

Submission of Bids:

Bids, including all required proposal and response documentation, shall be submitted electronically in PDF format by email transmission to: diane_bates@iu13.org. The subject line of the email should read as follows: "CAFCO Bid #156-151". All bids will be accepted electronically on, or before, 12:00 PM EST, Monday, July 25, 2016. All bids will be opened at 2:00 PM EST on Monday, July 25, 2016. Only bids submitted electronically will be considered.

Bidders, by their submission of a bid, agree to conduct legally binding transactions by electronic means, within the meaning of the "Electronic Transactions Act," 73 P.S. 2260.101 et seq. ("ETA"). Electronic documents and records and electronic signatures shall be the equivalent of written documents and records and written signatures, pursuant to ETA. Neither IU13 nor any of the participants make any representation or warranty concerning the reliability or security of any communication links, networks, or any data or information transmitted electronically, and neither IU13 nor any of the participants shall be liable or responsible, in any manner, for any failure, interruption or breach of any communication link, network, or security measure. If necessary, addenda to this Bid will be issued via email. Bidders who have registered to receive this Bid will receive all addenda. Addenda receipt(s) will be confirmed by the return of the Addendum Acknowledgement Form, which is attached as Attachment C.

Bid Response Documentation:

Bidders are required to submit the following documentation as part of their bid:

- Form of Proposal
- Non-Collusion Affidavit
- Addendum Acknowledgement Form (if applicable)
- CAFCO Bakery Requirements Pricing Sheet for SY 2016-17
- Bid Region Acceptance Agreement
- Piggyback Acceptance Agreement

Bid Timeline:

Bid Submittal Deadline

Monday, July 25, 2016 at 12:00 PM (noon) EST

Bid Opening Date, time and location:

Monday, July 25, 2016 at 2:00 PM EST

Lancaster-Lebanon Intermediate Unit 13

1020 New Holland Avenue, Lancaster, PA 17601

SECTION V: GENERAL BID NOTES

1. Ensure that your bid complies with all requirements specified in this Request for Bids. Attention to all clauses of these requirements is advised.
2. Complete bid documents by printing neatly and legibly in pen or typing. Electronic documents must also be completed by typing into the appropriate spaces. Do not alter, delete or change any bid specifications or clauses in the bid documents.
3. Indicate prices for every item you are bidding on.
4. Any variation in your bid from the conditions and specifications as outlined in this Request for Bids must be clearly stated, with the variation from specifications noted. If requested, bidders shall supply samples for all alternates. Note that submission of a sample does not by itself demonstrate compliance with these requirements.

SECTION VI: BID AND CONTRACT REQUIREMENTS

1. Submission of Bids

Bids, including all required proposal and response documentation, shall be submitted electronically in PDF format by email transmission to: diane_bates@iu13.org. The subject line of the email should read as follows: "CAFCO Bid #156-151". All bids will be accepted electronically on, or before, 12:00 PM EST, **Monday, July 25, 2016**. All bids will be publicly opened at 2:00 PM EST on **Monday, July 25, 2016**. ***Only bids submitted electronically will be considered.***

2. Preparation of Bids

Any bid response that alters the documented specification must be indicated on a separate piece of paper and attached to the bid response packet. Bidders must provide their stock code number.

3. Quantities

Quantities will be determined at time of order by each participating district.

4. Selection or Rejection of Bids

Each category or line item will be awarded to the lowest responsive and responsible bidder in each geographical bid region as specified on the Bid Region Acceptance Agreement. IU13 reserves the right to reject any or all bids, in whole or in part, to waive technicalities whenever it is deemed to be in the best interest of IU13, and to select single items from any bid. Failure to comply with bid requirements in previous awards is grounds for bid rejection.

5. Purchase of Items Not Specified on the Bid

All bids shall contain a discount percentage for items not specified on the bid, and which may be purchased on an as needed basis by CAFCO participants. This discount percentage shall be documented on the bottom of the bid pricing spreadsheet.

6. Award - Contract

If any bid is accepted, the contract(s) shall consist of this Request for Bids, including all sections and attachments, the awarded vendor's completed proposal and response documentation, and all other completed attachments, along with any revisions, clarifications, error correction notices, and explanatory notes issued via addendum prior to bid opening. In the case of differing or contradictory contract language, the language providing the greatest benefit to IU13 and its participants shall take precedence. IU13 reserves the right to accept or reject any bid in whole or in part and/or to select one or more items from any bid. The contract shall be interpreted, construed and given effect in all respects according to the laws of the Commonwealth of Pennsylvania, without regard to conflicts of law principles.

7. Reports

The awarded vendor(s) may be required to submit a total product utilization report (sales velocity report) for all items purchased under this bid during the contract term to IU13 by no later than August 1, 2017. This report should be supplied in electronic format. Information on the total product utilization report shall be organized by participant and, at the minimum, include item number, brand, item description, pack size, and sold quantity. Monthly product utilization reports are desired, but not required, to be submitted to IU13.

8. Delivery Time and Location

- a. The prices quoted shall be for deliveries to schools designated by CAFCO participants.
- b. Delivery Points: See Section VIII for a full listing of CAFCO participants billing addresses, phone numbers and contacts. Delivery points will be established by CAFCO participants.
- c. Deliveries shall be made on a regular basis to each CAFCO participant, except school holidays and closing days (due to inclement weather) at which time alternative delivery days shall be mutually agreed upon.
- d. Deliveries schedules, days and times shall be mutually agreed upon by each district and vendor.
- e. Drivers and helpers may be requested to deliver merchandise into designated storage areas at each school.
- f. Drivers and helpers may be requested to receive an authorized school receiver's signature. The authorized school receiver will verify the accuracy of items, quantities of each item, total quantities, and condition of merchandise. Variations from the norm, i.e. shortages, damages, etc. shall be noted on each ticket by the authorized school receiver and initialed by both the truck driver and authorized school receiver.

9. Items Substitutions/Shortages

If the awarded vendor is temporarily out of stock of a particular item, the individual CAFCO participant may, but shall not be obligated to, approve the delivery of an equal or superior product at an equal or lower price. Substitutions should exist only in "emergency" situations. Substitutions can be made only upon prior approval of the individual CAFCO participant. In the case of shortages by the awarded vendor, IU13 or CAFCO participant, after notice (oral or written), may procure the necessary products from other sources and hold the awarded vendor responsible for any excess cost incurred. Repeated instances of default may result in the removal of the awarded vendor from future bidding.

10. Statements

If requested by the individual CAFCO participants, the awarded vendor shall submit statements for individual CAFCO participant. Each statement shall include a summary of invoices and credits for the specified period for the requesting CAFCO participant. Statements may be submitted more often than monthly, but only upon the mutual agreement of both parties. An established procedure shall be designated for any necessary credits.

11. Material Safety Data Sheets

Material Safety Data Sheets required by the U.S. Department of Labor, Occupational Safety & Health Administration shall be supplied in the bid packet for all items bid, **where applicable**, and shall also be provided with each individual shipment of goods, **when applicable**.

12. Termination

The awarded contract(s) may be terminated at any time, in whole or in part, on 30 days' notice, upon the mutual agreement of both parties or upon the discretion of IU13, in a shorter period of time, if the terms of the contract are violated.

13. Buy American

The Warren F. Goodling Child Nutrition Reauthorization Act of 1998, as may be amended, requires sponsors of the National School Lunch Program to buy domestic commodities or products for use in meals to the maximum extent possible. Specification of product origin, based on the Nutrition Labeling and Education Act of 1990, as may be amended, mandates that the country of origin for both domestic and imported food products be identified on the product label. Products bid MUST comply with the foregoing regulations and all applicable federal, state and local laws and regulations.

14. Vendor Qualifications

Before any bid can be accepted, a bidder must be deemed qualified, in the judgment of IU13, to perform as required herein. A bid may be rejected if a bidder fails to meet any one of the following qualifications:

➤ **Product Line**

It must be clearly evident to IU13 that a bidder is capable of prompt delivery of all items on the list to be awarded to the bidder.

➤ **Bidders Evidence of Responsibility**

A bidder may be required to furnish evidence in writing that the bidder (a) maintains a permanent place of business, (b) has adequate equipment, finances and personnel to furnish satisfactory and expeditiously the items bid, and (c) is an authorized dealer which is authorized to provide all necessary services and warranties for the items bid.

➤ **Facilities and Equipment**

Bidders must have adequate warehouses for supplying contract products. Conditions for storing chilled and frozen products must be applied, as recommended and as may be

amended by the Refrigeration Research Foundation. Delivery temperatures of frozen and chilled food shall be in accordance with the Association of Food and Drug Officials (AFDOS) Code as recommended by the United States Food and Drug Administration. CAFCO participants and the IU13 shall have the right, but not the obligation, to monitor all processes and controls in accordance with, and as required by, current Hazard Analysis and Critical Control Points (HACCP) regulations.

➤ Sanitation Requirements

CAFCO participants and IU13 may, but shall not be obligated to, inspect bidder facilities prior to bid award, and the awarded vendor's facilities on a routine basis. Facilities and operating practices must be in compliance with the United States Food, Drug, and Cosmetic Act, as may be amended, and all applicable federal, state and local laws and regulations.

15. Standard Contract Conditions

- a. The contract shall be governed in all respects as to validity, the construction, capacity, performance, or otherwise by the laws of the Commonwealth of Pennsylvania. Exclusive venue and jurisdiction for resolution of any disputes shall be by non-jury trial in the Lancaster County, Pennsylvania, Court of Common Pleas.
- b. Awarded Vendors providing services under a contract herewith assure IU13 and CAFCO participants that they conform to the provisions of the Civil Rights Act of 1964, as amended.
- c. State Sales and Use Tax Certificate of Exemption form will be issued upon request.
- d. Deliveries under the contract must be free of excise or transportation taxes, except when such a tax is part of the bid price and participants are not exempt from such levies.
- e. The awarded vendor shall comply with all applicable federal, state and local laws and regulations pertaining to wages, hours and conditions of employment. In connection with awarded vendor's performance of work under the contract, awarded vendor agrees not to discriminate against any employee(s) or applicant(s) for employment because of age, race, religious creed, sex, national origin, or handicap. Additionally, all applicable federal, state and local laws and regulations shall be deemed to be part of the contract and specifications, and the awarded vendor shall be responsible for compliance therewith.
- f. The awarded vendor agrees to retain all books, records and other documents relative to the contract for three (3) years after final payment. IU13, their authorized agents, and/or State auditors, and CAFCO participants, their authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- g. Product Protection Guarantees. School districts have "automatic" product protection recourse against suppliers for product safety. According to federal regulations, the supplier whose name and address appear on the package is the responsible party. Awarded vendors are expected to take immediate action to correct any situation in which product integrity is violated.

- h. Coupons. The awarded vendor(s) shall ensure all applicable coupons and rebate opportunities are made available to the CAFCO participants during the course of the contract term.

16. Price Change Reviews

Prices are to remain firm for the specified period for each product category or item as noted on the bid specifications.

17. Assignment

The awarded vendor shall not assign the performance of the contract nor any portion thereof to any other person without written consent from IU13.

18. Piggyback Clause:

Pursuant to Section 1902 of Act 57 of 1998, as amended, 62 Pa. C.S. § 1902, known as the "Commonwealth Procurement Code," school districts (and other public procurement units) are permitted to purchase services, supplies, materials, equipment, and other personal property under the terms of a contract entered into by another awarding or sponsoring public procurement unit. This process is commonly known as "piggybacking". IU13, which is the awarding entity under this contract, is willing to make this option available to other public procurement units in addition to the participants listed below for the items and services that are the subject of this bid, provided the bidder indicates its agreement at the time it submits its bid to IU13. Included in this bid is a "Piggyback Clause Acceptance Agreement," a copy of which is attached. All bidders providing a response to this bid shall complete and return this agreement with their proposal, indicating acceptance or rejection of this option.

[END OF SECTION]

SECTION VI: PRODUCT SPECIFICATIONS-BAKERY

SPECIFICATION:

1. All bread and bread products must contain 50% or more whole grains by weight or have whole grains as the first ingredient.
2. All bread must be manufactured and handled in compliance with the U.S. Department of Agriculture under an approved processing agreement utilizing Government Donated Commodities if such are available and in compliance with the Pennsylvania State Department of Agriculture.
3. The yield by unit of each type of finished product must be given.
4. Prices must include the lowest wholesale price using Government Donated Commodities if applicable And the lowest wholesale price without using Government Donated Commodities.

ITEM DESCRIPTIONS:

1. 100% WW, WG or WGR Sandwich Loaf Bread
 - a. .75 OEG
 - b. 1.0 OEG
 - c. Any additional school compliant items
2. 100% WW, WG or WGR Hot Dog Rolls
 - a. 1.75 OEG
 - b. 2.0 OEG
 - c. Any additional school compliant items
3. 100% WW, WG or WGR Hamburger Rolls
 - a. 1.75 OEG
 - b. 2.0 OEG
 - c. Any additional school compliant items
4. 100% WW, WG or WGR Kaiser Rolls
5. 100% WW, WG, or WGR Dinner Rolls, 1 OEG
6. 100% WW, WG or WGR Club Roll, 2 OEG
7. 100% WW, WG or WGR Bread Stick (at least 1 OEG)
 - a. Any additional school compliant items

CATEGORY SPECIFIC DELIVERY REQUIREMENTS:

1. Delivey schedules, days and times shall be mutaully agreed upon between the district and vendor.
2. Products must be delivered fresh and in clean, well-wrapped packages.
3. Processors must have sanitation certificate from the local board of health.
4. Delivery receipts must be left in each school with each delivery.
5. No products are to be left outside of buildings on delivery days.

SECTION VIII: CAFCO AGENCY ADDRESSES

The following are the CAFCO participants as referred to in this Request for Bids. Participation in CAFCO does not guarantee participation in this bid. The addresses below are administrative offices only. Delivery addresses are as per instructions on each individual CAFCO participant's purchase orders.

1. Columbia Borough School District, 200 North Fifth Street, Columbia, PA 17512, (717) 684-2283
2. Conestoga Valley School District, 2110 Horseshoe Road, Lancaster, PA 17601, (717) 399-1542
3. Cornwall-Lebanon School District, 115 E Evergreen Road, Lebanon, PA 17042, (717) 272-2031
4. Donegal School District, 1051 Koser Road, Mount Joy, PA 17552, (717) 653-1447
5. Eastern Lancaster County School District, 669 East Main Street, New Holland, PA 17557, (717) 354-1500
6. Eastern Lebanon County School District, 180 Elco Drive, Myerstown, PA 17067, (717) 866-7117
7. Elizabethtown Area School District, 600 East High St., Elizabethtown, PA 17022, (717) 367-1521
8. Ephrata Area School District, 803 Oak Boulevard, Ephrata, PA 17522-1998, (717) 721-1513
9. Lampeter-Strasburg School District, 1600 Book Road, PO Box 428, Lampeter, PA 17537, (717) 464-3311
10. Lancaster Career & Technical School (Mt Joy) 432 Old Market St, Mt Joy, PA 17552, (717) 653-0901
11. Lancaster Career & Technical School (Willow Street) 1730 Hans Herr Drive, Willow Street, 17584, (717) 464-7050
12. Lancaster Career & Technical School (Brownstown) P.O. Box 519, Metzler/Snyder Rd, Brownstown, PA 17508, (717) 859-5100
13. School District of Lancaster, 251 South Prince Street, Lancaster, PA 17603, (717)299-2700
14. Manheim Township School District, PO Box 5134, Lancaster, PA 17606-5134, (717) 569-8231
15. Penn Manor School District, PO Box 1001, Millersville, PA 17551, (717) 872-9500
16. Pequea Valley School District, PO Box 130, Kinzers, PA 17535, (717) 768-5530
17. Solanco School District, 585 Solanco Rd, Quarryville, PA 17566 (717) 786-8401
18. Warwick School District, 301 West Orange Street, Lititz, PA 17543, (717) 626-3734
19. Bermudian Springs School District, 7335 Carlisle Pike, York Springs, PA 17372, (717) 528-4113
20. Central York School District, 775 Marion Rd, York, PA 17406, (717) 846-6789
21. Eastern York School District, PO Box 150, Cool Creek Rd, York, PA 17368, (717) 252-1555
22. Fairfield Area School District, 4840 Fairfield Rd, Fairfield, PA 17320, (717) 642-8228
23. Gettysburg Area School District, 900 Biglerville Rd, Gettysburg, PA 17325, (717) 334-6254
24. Littlestown Area School District, 162 Newark St, Littlestown, PA 17340, (717) 359-4146
25. Northeastern School District, 41 Harding St, Manchester, PA 17345, (717) 266-3667 x225
26. Northern York County School District, 149 S Baltimore St, Dillsburg, PA 17019, (717) 432-8691
27. Red Lion Area School District, 696 Delta Road, Red Lion, PA 17356, (717) 244-4518
28. Upper Adams School District, 161 North Main St, Biglerville, PA 17307, (717) 677-7191
29. West York Area School District, 1800 Bannister St, York, PA 17403, (717) 843-4653
30. Lancaster Mennonite School District, 2176 Lincoln Highway East, Lancaster, PA 17602, (717) 299-0436
31. Dauphin County Technical School, 6001 Locust Lane, Harrisburg, PA 17109, (717) 652-3170

[END OF SECTION]

ATTACHMENT A: FORM OF PROPOSAL

To: Lancaster-Lebanon Intermediate Unit 13 (IU13)
1020 New Holland Avenue
Lancaster, PA 17601

We, the undersigned, herewith propose and agree to furnish to the participants any item or items at the net prices set opposite each item on the attached sheets.

This proposal is subject to all the terms of the Request for Bids, including all sections and attachments, and any revisions, clarifications, error correction notices, and explanatory notes issued via addendum prior to bid opening, and we hereby agree to enter into a written contract to furnish such item(s), as may be awarded to us.

We understand that IU13 reserves the right to reject any or all proposals or any portion thereof not deemed satisfactory, or to select single items from any bids.

The form of proposal is being returned to you electronically containing our proposal. A copy was retained for our files.

The undersigned certifies to having read the Request for Bids, including all sections and attachments, and any revisions, clarifications, error correction notices, and explanatory notes issued via addendum prior to bid opening and offers to furnish supplies and/or materials as specified to IU13 in exact accordance with these specifications and conditions at the prices stated on the attached forms.

Date: _____

Name of Company: _____

Name / Title of authorized Bidder (Printed):

Address: _____

Telephone: () _____ Fax: () _____

Email address: _____

Authorized Signature: _____

Bid Period: July 1, 2016 through June 30, 2017

Bid electronic response to: *diane_bates@iu13.org*

Conditions: In strict accord with Sections I through VII and all attachments

[END OF ATTACHMENT]

ATTACHMENT B: NON-COLLUSION AFFIDAVIT

Contract / Bid Number: _____

State of: _____

County of _____

I state that I am _____ (title) of _____ (Name of firm) and that I am authorized to make this affidavit on behalf of my firm, and its owners, directors, and officers. I am the person responsible in my firm for the price (s) and the amount of this bid.

I state that:

- (1) The price(s) and amount of this bid have been arrived at independently and without consultation, communication or agreement with any other contractor, bidder or potential bidder.
- (2) Neither the prices(s) nor the amount of this bid, and neither the approximate price (s) nor approximate amount of this bid, have been disclosed to any other firm or person who is a bidder or potential bidder, and they will not be disclosed before bid opening.
- (3) No attempt has been made or will be made to induce any firm or person to refrain from bidding on this contract, or to submit a bid higher than this bid, or to submit any intentionally high or noncompetitive bid or other form of complementary bid.
- (4) The bid of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive bid.
- (5) _____ (Name of my firm), its affiliates, subsidiaries, officers, directors, and employees are not currently under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to bidding on any public contract, except as follows:

I state that _____ (Name of firm) understands and acknowledges that the above representations are material and important, and will be relied on by the LANCASTER-LEBANON INTERMEDIATE UNIT 13 AND CAFCO PARTICIPANTS in awarding the contract(s) for which this bid is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from LANCASTER-LEBANON INTERMEDIATE UNIT 13 AND CAFCO PARTICIPANTS of the true facts relating to the submission of bids for this contract.

_____ (Name and Company Position)

SWORN TO AND SUBSCRIBED
BEFORE ME THIS ___ DAY
OF _____, 20___

_____ (Notary Public)

My Commission Expires _____

[END OF ATTACHMENT]

ATTACHMENT C: ADDENDUM ACKNOWLEDGEMENT FORM

Indicate below your confirmation of all addendums received for the above aforementioned bid. This document will become part of the bid documents and will need to be submitted with the balance of bid documentation.

We hereby confirm receipt of all addendums indicated below in response to the CAFCO 2016-17 Bakery Requirements Bid #156-151.

____ ADDENDUM #1

Date_____

Signature_____

____ ADDENDUM #2

Date_____

Signature_____

____ ADDENDUM #3

Date_____

Signature_____

[END OF ATTACHMENT]

PIGGYBACK CLAUSE ACCEPTANCE AGREEMENT

AUTHORIZATION FOR OTHER PUBLIC PROCUREMENT UNITS TO PURCHASE DIRECTLY FROM VENDOR ACCORDING TO THE TERMS OF THIS CONTRACT

THIS FORM MUST BE RETURNED AS PART OF THE BID RESPONSE WHETHER OR NOT THE VENDOR AGREES TO PARTICIPATE IN THE PIGGYBACKING PROVISIONS.

If the Vendor indicates its agreement to the piggybacking arrangement, the following conditions will apply:

1. Vendor will have the option to sell services, supplies, materials, and equipment directly to any of the other public procurement units in the Commonwealth of Pennsylvania, in those counties indicated below, that submit purchase orders to the vendor per this bid, and such public procurement units shall have the option to purchase from vendor pursuant to this bid.
2. By this agreement, vendor is required to accept all or any such purchase order requests; provided, however, that vendor may impose reasonable limits on the quantities it is willing to provide to other public procurement units and additional reasonable delivery charges.
3. If vendor agrees to sell items to other public procurement units on a piggybacking arrangement, as evidenced by its acceptance below, vendor agrees that all terms and conditions of its agreement with IU13 including, but not limited to, specifications, price, and quality will apply to items sold to other public procurement units, and such terms including all guarantees and warranties will extend directly to the additional public procurement unit. Vendor acknowledges that IU13 will not be a party to any such sales agreements and will not serve as an intermediary or assume any responsibility with respect to such transactions.
4. Payment for items sold to other public procurement units will be the responsibility of such public procurement units and will be made directly to vendor. To this end, IU13, the vendor, and other public procurement units waive any obligation of those other public procurement units under the application status to make payments directly to IU13.
5. The decision of the vendor to make its product available to other public procurement units under this piggybacking arrangement shall not alter or affect its obligation of full performance to IU13 and the participants listed in Section 29 of the General Terms and Conditions of this bid.
6. Although IU13 intends, by this provision, to make the piggybacking process available to other public procurement units, subject to the vendor's acceptance as evidenced below, IU13 makes no representation as to the ability of other public procurement units to purchase directly from the vendor without separate compliance with any applicable competitive bidding statutes and vendor and all other public procurement units participating in the process assume the responsibility to determine whether such compliance is excused by this provision and any and all applicable laws or regulations.

Vendor _____

Vendor agrees to accept the piggybacking option:

(Please Sign)

Vendor does not agree to accept the piggybacking option:

(Please Sign)

Circle below all Pennsylvania Counties where Piggyback offer will apply:

- Adams
- Allegheny
- Armstrong
- Beaver
- Bedford
- Berks
- Blair
- Bradford
- Bucks
- Butler
- Cambria
- Cameron
- Carbon
- Centre
- Chester
- Clarion
- Clearfield
- Clinton
- Columbia
- Crawford
- Cumberland
- Dauphin
- Delaware
- Elk
- Erie
- Fayette
- Forest
- Franklin
- Fulton
- Greene
- Huntingdon
- Indiana
- Jefferson
- Juniata
- Lackawanna
- Lancaster
- Lawrence
- Lebanon
- Lehigh
- Luzerne
- Lycoming
- McKean
- Mercer
- Mifflin
- Monroe
- Montgomery
- Montour
- Northampton
- Northumberland
- Perry
- Philadelphia
- Pike
- Potter
- Schuylkill
- Snyder
- Somerset
- Sullivan
- Susquehanna
- Tioga
- Union
- Venango
- Warren
- Washington
- Wayne
- Westmoreland
- Wyoming
- York
- ALL



BID REGION ACCEPTANCE AGREEMENT

Vendor _____

Vendor agrees to deliver product in the following counties: _____
(Please Sign)

Vendor does not agree to deliver product in the following counties: _____
(Please Sign)

Check below the Pennsylvania Counties where vendor will deliver product:

- Adams
- Cumberland
- Dauphin
- Franklin
- Lancaster
- Lebanon
- York
- All

CAFCO SUPPLEMENTAL BIDS

TIMELINE

- **June 27, 2016:** Bid specifications and documentation completed
- **July 5, 2016:** Bid issue date
- **July 18, 2016:** Deadline to submit RFP questions
- **July 25, 2016:** Proposal due date
- **August 4, 2016:** Recommended award documentation ready for IU13 Board
- **August 10, 2016:** IU13 Board approval
- **August 11, 2016:** Contract award

PROOF OF PUBLICATION NOTICE IN

State of Pennsylvania}
 } ss:
County of Lancaster}

Penny L. Stauffer of the County and State aforesaid, being duly sworn, deposes and says that the LNP, a daily newspaper of general circulation published at Lancaster, County and State aforesaid, was established 1794-1877 since which date said daily newspaper has been regularly issued in said county, and that a copy of the printed notice or publication is attached hereto exactly the same as was printed and published in the regular editions and issues of said daily newspaper on the following dates:

4TH, 11TH AND 18TH DAY OF JULY 2016

Affiant further deposes that she is the Clerk duly authorized by the LNP Media Group, Inc., a corporation, publisher of said LNP, a newspaper of general circulation, to verify the foregoing statement under oath, and also declares that affiant is not interested in the subject matter of the aforesaid notice or advertisement and that all allegations in the foregoing statement as to time, place and character of publication are true.

BIDS WANTED
The Lancaster-Lebanon Intermediate Unit 13 (IU13) invites sealed electronic bids for Milk, Bread, and Ice Cream for participating agencies. Bid information and instructions are available from Diane Bates, Lancaster-Lebanon IU13, 1020 New Holland Ave, Lancaster, PA 17601, (717)606-1494. Bids will be received electronically up to 12:00 pm, July 25, 2016, and will be publicly opened at 2:00 pm. The IU13 reserves the right to accept or reject any or all bids and to waive any irregularities pertaining to.
Gina Brillhart
Board Secretary

Penny L. Stauffer

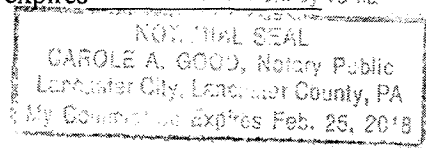
(Signature)

COPY OF NOTICE OF PUBLICATION

Sworn and subscribed before me this
18TH DAY OF JULY 2016
Carole A. Good

Notary Public

My commission expires ^{Commonwealth of Pennsylvania}



Proof of Publication
State of Pennsylvania

AD # 0001616048-01

Rec'd 7/25/14
Trans # 376058

Lebanon Daily News is the name of the newspaper(s) of general circulation published continuously for more than six months at its principal place of business, 718 Poplar Street, Lebanon, PA.

Attach Copy of
Advertisement here

The printed copy of the advertisement hereto attached is a true copy, exactly as printed and published, of an advertisement printed in the regular issues of the said **Lebanon Daily News** published on the following dates, viz:

Public Notice **Public Notice**

BIDS WANTED

The Lancaster-Lebanon Intermediate Unit 13 (IU13) invites sealed electronic bids for Milk, Bread, and Ice Cream for participating agencies. Bid information and instructions are available from Diane Bates, Lancaster-Lebanon IU13, 1020 New Holland Ave, Lancaster, PA 17601, (717)606-1494. Bids will be received electronically up to 12:00 pm, July 25, 2016, and will be publicly opened at 2:00 pm. The IU13 reserves the right to accept or reject any or all bids and to waive any irregularities pertaining to.

Gina Brillhart
Board Secretary

7/4/2016, 7/11/2016, 7/18/2016

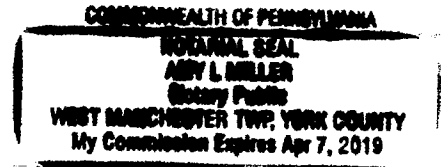
**COMMONWEALTH OF PENNSYLVANIA
COUNTY OF LEBANON**

Before me, a Notary Public, personally came Pam Rodencal who being duly sworn deposes and says that she is the Legal Advertising Clerk of Lebanon Daily News and her personal knowledge of the publication of the advertisement mentioned in the foregoing statement as to the time, place and character of publications are true, and that the affiant is not interested in the subject matter of the above mentioned advertisement.

Sworn and subscribed to before me, on
this 18 day of July 2016

Amy L. Miller
Notary Public

} Pam Rodencal



The charge for the following publication of above mentioned advertisement and the expense of the affidavit.

Advertisement Cost	\$211.60
Affidavit Fee	\$5.00
Total Cost	\$216.60

Request approval to award Bid #156-151 (Reference Section BS – Appendix A)

Purpose: To award contract under the Collaborative Services' Collaborative Purchasing Program. Collaborative Services solicits districts' needs; develops specifications; and creates, advertises and makes a recommendation to award to the lowest responsible bidder complying with bid specifications. The 2016-17 CAFCO Bakery Bid was opened on July 25, 2016, and reviewed by the CAFCO Advisory Team and Collaborative Services on July 28, 2016. The Bid Award recommendation is to award to one primary vendor in each geographical (county) region. This is a no-requirements based bid. A detailed analysis of all bids received is maintained in the IU13 Business Office.

2016-17 CAFCO Bakery Requirements Bid #156-151
Bid Award Recommendation-Lancaster, Lebanon, York, Adams and Dauphin Counties

ITEM #	ITEM DESCRIPTION	UNIT OF MEASURE	UNIT PRICE	RECOMMENDED AWARDED VENDOR
NA	100% WW, WG or WGR Sandwich Loaf (at least .75 OEG)	24 slice loaf	no bid	Moribito
NA	100% WW, WG or WGR Sandwich Loaf (at least 1.0 OEG)	24 slice loaf	\$ 1.39	Moribito
NA	100% WW, WG, WGR Hot Dog Roll (at least 1.75 OEG)	12 pack	\$ 1.26	Moribito
NA	100% WW, WG, WGR Hot Dog Roll (at least 2.0 OEG)	12 pack	\$ 1.46	Moribito
NA	100% WW, WG or WGR Hamburger Rolls (at least 1.75 OEG)	12 pack	\$ 1.26	Moribito
NA	100% WW, WG or WGR Hamburger Rolls (at least 2.0 OEG)	12 pack	\$ 1.46	Moribito
NA	100% WW, WG or WGR Kaiser Rolls	12 pack	\$ 2.02	Moribito
NA	100% WW, WG, or WGR Dinner Rolls (at least 1 OEG)	12 pack	\$ 1.44	Moribito
NA	100% WW, WG, or WGR Club Rolls (at least 2 OEG)	12 pack	\$ 2.36	Moribito
NA	100% WW, WG, or WGR Bread Stick (at least 1 OEG)	8 pack	\$ 1.90	Moribito
NA	100% WW, WG, WGR Hot Dog Roll (at least 2.0 OEG) (IW)	12 pack	\$ 16.50	Moribito
NA	100% WW, WG or WGR Hamb. Rolls (at least 2.0 OEG) (IW)	12 pack	\$ 10.75	Moribito
NA	Whole Grain, White Wheat Hagie Rolls, 24 oz, 12 pk	12 pack	\$ 2.62	Moribito
NA	Reg White Hot Dog Roll	12 pack	\$ 1.20	Moribito
NA	Reg White Hamburger Roll	12 pack	\$ 1.22	Moribito
NA	Regular Marble	26 slice loaf	\$ 4.65	Moribito
NA	Regular Pumpernickel	26 slice loaf	\$ 5.62	Moribito
NA	Regular Rye	26 slice loaf	\$ 5.62	Moribito

ITEM #	ITEM DESCRIPTION	UNIT OF MEASURE	UNIT PRICE	RECOMMENDED AWARDED VENDOR
NA	Regular Rye Combo	26 slice loaf	\$ 5.62	Moribito
NA	Reg White 6" steak Roll	12 pack	\$ 2.62	Moribito
NA	Reg white Kaiser Roll	12 pack	\$ 2.88	Moribito
NA	Reg Pastries	package	\$ 13.45	Moribito
NA	Reg. Donuts	package	\$ 7.85	Moribito
NA	IW coffe cake	package	\$ 10.50	Moribito
NA	IW Bear Claws	package	\$ 14.24	Moribito

2016-17 CAFCO Bakery Requirements Bid #156-151
Bid Award Recommendation-Franklin and Cumberland Counties

ITEM #	ITEM DESCRIPTION	UNIT OF MEASURE	UNIT PRICE	RECOMMENDED AWARDED VENDOR
NA	100% WW, WG or WGR Sandwich Loaf (at least .75 OEG)	24 slice loaf	no bid	Schmidts
NA	100% WW, WG or WGR Sandwich Loaf (at least 1.0 OEG)	24 slice loaf	\$ 1.45	Schmidts
NA	100% WW, WG, WGR Hot Dog Roll (at least 1.75 OEG)	12 pack	no bid	Schmidts
NA	100% WW, WG, WGR Hot Dog Roll (at least 2.0 OEG)	12 pack	\$ 1.92	Schmidts
NA	100% WW, WG or WGR Hamburger Rolls (at least 1.75 OEG)	12 pack	no bid	Schmidts
NA	100% WW, WG or WGR Hamburger Rolls (at least 2.0 OEG)	12 pack	\$ 1.92	Schmidts
NA	100% WW, WG or WGR Kaiser Rolls	12 pack	\$ 2.46	Schmidts
NA	100% WW, WG, or WGR Dinner Rolls (at least 1 OEG)	12 pack	\$ 1.23	Schmidts
NA	100% WW, WG, or WGR Club Rolls (at least 2 OEG)	12 pack	no bid	Schmidts
NA	100% WW, WG, or WGR Bread Stick (at least 1 OEG)	8 pack	no bid	Schmidts
NA	100% WW, WG, WGR Hot Dog Roll (at least 2.0 OEG) (IW)	12 pack	no bid	Schmidts
NA	100% WW, WG or WGR Hamb. Rolls (at least 2.0 OEG) (IW)	12 pack	no bid	Schmidts
NA	Whole Grain, White Wheat Hagie Rolls, 24 oz, 12 pk	12 pack	\$ 3.06	Schmidts
NA	Reg White Hot Dog Roll	12 pack	\$ 1.46	Schmidts
NA	Reg White Hamburger Roll	12 pack	\$ 1.41	Schmidts
NA	Regular Marble	26 slice loaf	no bid	Schmidts
NA	Regular Pumpernickel	26 slice loaf	\$ 2.76	Schmidts
NA	Regular Rye	26 slice loaf	\$ 2.76	Schmidts

ITEM #	ITEM DESCRIPTION	UNIT OF MEASURE	UNIT PRICE	RECOMMENDED AWARDED VENDOR
NA	Regular Rye Combo	26 slice loaf	no bid	Schmidts
NA	Reg White 6" steak Roll	12 pack	\$ 2.92	Schmidts
NA	Reg white Kaiser Roll	12 pack	\$ 2.75	Schmidts
NA	Reg Pastries	package	no bid	Schmidts
NA	Reg. Donuts	package	no bid	Schmidts
NA	IW coffe cake	package	no bid	Schmidts
NA	IW Bear Claws	package	no bid	Schmidts

BUSINESS SERVICES

- B. Request approval to sublease properties from Lancaster-Lebanon Joint Authority as listed on the Leased Property Schedule. (Reference Business Services Exhibit A)**

(Purpose: This approval is requested to lease office and program facilities from the Lancaster-Lebanon Joint Authority for fiscal year 2016-17.)

- C. Request approval to award Bid #156-151, CAFCO Bakery Bid. (Reference Reference Business Services Exhibit B)**

(Purpose: To award contract under the Collaborative Services' Collaborative Purchasing Program. Collaborative Services solicits districts' needs; develops specifications; and creates, advertises, and makes a recommendation to award to the lowest responsible bidder complying with bid specifications. The 2016-17 CAFCO Bakery Bid was opened on July 25, 2016, and reviewed by the CAFCO Advisory Team and Collaborative Services on July 28, 2016. The Bid Award recommendation is to award to one primary vendor in each geographical (county) region. This is a no-requirements based bid. A detailed analysis of all bids received is maintained in the IU13 Business Office.)

- D. Request approval to award Bid #156-153, CAFCO Milk and Tea Bid. (Reference Business Services Exhibit C)**

(Purpose: To award contract under the Collaborative Services' Collaborative Purchasing Program. Collaborative Services solicits districts' needs; develops specifications; and creates, advertises, and makes a recommendation to award to the lowest responsible bidder complying with bid specifications. The 2016-17 CAFCO Milk and Tea Bid was opened on July 25, 2016, and reviewed by the CAFCO Advisory Team and Collaborative Services on July 28, 2016. The Bid Award recommendation is to award to one primary vendor in each geographical (county) region. This is a no-requirements based bid. A detailed analysis of all bids received is maintained in the IU13 Business Office.)

To: CAFCO Membership

From: Steve Frey, Senior Collaborative Services Manager

Date: August 15, 2016

Subject: Executive Summary - 2016-2017 SY CAFCO Bakery Requirements Bid #156-151

The 2016-2017 CAFCO Bakery Requirements Bid was opened on July 25, 2016, reviewed by IU13 Collaborative Services and the CAFCO Advisory Council during the week of August 1, 2016, with final award by the IU13 Board of School Directors on August 10, 2016.

This was the first year that CAFCO has issued a Bakery Requirements, which is a zero-requirements based bid. A total of 25 line items, representing the majority of school bakery products, were specified on this year's bid.

A total of three vendors participated in this year's bid, with two (Moribito and Schmidt's) receiving Awards.

Similar to the CAFCO regular bid, bid benchmarking data, as compared to several other major cooperative bidding programs, will be attempted later in the year.

Additional information concerning the bid has already been forwarded and included the following:

- 2016-17 CAFCO Bakery Requirements Summary, indicating the recommended awards.
- Vendor contact information

CAFCO SUPPLEMENTAL BID AWARD CONTACTS – Bakery

Morabito

Tom Mirabile

757 Kohn St, Norristown, PA 19401

thomasm@morabito.com

610-275-5419

Schmidt Baking Company

Cinnamon O'Connor

Office Manager & Contracts Administrator

7801 Fitch Lane, Baltimore, MD 21236

coconnor@schmidtbaking.com

Phone -410-668-8200, Ext 5625

Cell - 443-618-0983

Fax -410-882-2051



August 10, 2016

Morabito Baking Co Inc
ATTN: Tom Mirabile
757 Kohn St
Norristown, PA 19404

Dear Sirs,

The Lancaster-Lebanon Intermediate Unit 13 (IU13) is pleased to inform you that at its regular meeting on August 10, 2016, the IU13 Board of School Directors awarded portions (Lancaster, Lebanon, York, Adams and Dauphin Counties) of the CAFCO Bakery Bid #156-151 to Morabito Baking Company, Inc. based on your proposal submitted to IU13.

The contract effective start date will be July 1, 2016 with a term of one year, expiring on June 30, 2017.

Congratulations on this award. IU13 and its participating agencies look forward to working with you.

Sincerely,

A handwritten signature in cursive script that reads 'Steven M. Frey'.

Steven M. Frey
IU13 Senior Collaborative Services Manager



August 10, 2016

Schmidt Baking Company, Inc.
ATTN: Stephen Paterakis
7801 Fitch Lane
Baltimore, MD 21236

Dear Sirs,

The Lancaster-Lebanon Intermediate Unit 13 (IU13) is pleased to inform you that at its regular meeting on August 10, 2016, the IU13 Board of School Directors awarded portions (Franklin and Cumberland Counties) of the CAFCO Bakery Bid #156-151 to Schmidt Baking Company, Inc. based on your proposal submitted to IU13.

The contract effective start date will be July 1, 2016 with a term of one year, expiring on June 30, 2017.

Congratulations on this award. IU13 and its participating agencies look forward to working with you.

Sincerely,

A handwritten signature in black ink that reads 'Steven M. Frey'. The signature is written in a cursive, slightly slanted style.

Steven M. Frey
IU13 Senior Collaborative Services Manager



Book	Policy Manual
Section	000 Board Procedures
Title	Board Governance Standards/Code of Conduct
Number	011
Status	Active
Adopted	June 15, 2011

Standards for Effective School Governance

To promote student growth and achievement, an effective Board...

1. Advocates for a thorough and efficient system of public education by:

- a. Promoting public education as a keystone of democracy.
- b. Engaging and promoting community support by seeking input, building support networks and generating action.
- c. Allocating resources in a manner designed to facilitate student achievement consistent with Intermediate Unit goals and plans.
- d. Maintaining legislative awareness and communicating with members of local, state and federal legislative bodies.
- e. Ensuring strong management of the Intermediate Unit programs by hiring, setting goals with and evaluating the Executive Director.
- f. Employing qualified staff to meet student and program needs.

2. Models responsible governance and leadership by:

- a. Staying current with changing needs and requirements by reviewing educational literature, attending professional development opportunities prior to Board service and continuously during Board service, and preparing to make informed decisions.
- b. Interacting with school officials in member school districts and using resources provided by organizations and agencies committed to effective governance and management of Intermediate Unit programs.
- c. Leading with respect and taking full responsibility for Board activity and behavior.
- d. Adopting and acting in accordance with the PSBA Code of Conduct for Members of Pennsylvania School Boards.
- e. Engaging all community stakeholders.

- f. Complying with Board policy and all applicable local, state and federal laws and regulations.
 - g. Operating as a collective Board in making decisions.
 - h. Participating in Board retreats when scheduled.
3. Governs through policy by:
- a. Seeking input from stakeholders and following an established procedure for consideration.
 - b. Regularly reviewing and, as necessary, revising and adopting Board policy.
 - c. Delegating to the Executive Director responsibility for implementation of Board policy.
 - d. Ensuring public access to adopted Board policy.
 - e. Purposefully linking its actions to applicable Board policies.
4. Ensures that effective planning occurs by:
- a. Adopting and implementing a collaborative strategic planning process, including regular reviews.
 - b. Setting annual goals that are aligned with the Strategic Plan.
 - c. Linking Board actions to the Strategic Plan.
 - d. Adopting a financial plan that considers short-term and long-term needs.
 - e. Adopting professional development plans for Board and staff.
 - f. Adopting a plan to ensure evaluation of student growth and achievement using relevant data.
 - g. Adopting a master facilities plan conducive to teaching and learning.
 - h. Adopting a plan for curriculum review and development.
5. Monitors results by:
- a. Using data appropriately to make informed decisions.
 - b. Ensuring effective practices for evaluation of staff, programs, plans and services.
 - c. Evaluating its own performance.
 - d. Assessing student growth and achievement.
 - e. Evaluating the effectiveness of the Strategic Plan.
6. Communicates with and engages the community by:
- a. Distributing relevant information about the Intermediate Unit.
 - b. Providing methods of communication to the Board and appropriate staff.

c. Seeking input through a variety of methods.

d. Including stakeholders in all communications.

Code of Conduct for Board Members

1. We, as members of the Board, representing all the residents of our member school districts, believe that:

- a. Striving toward ideal conditions for effective Board service to our community, in a spirit of teamwork and devotion to public education, is the greatest instrument for preserving and perpetuating our representative democracy.
- b. The future welfare of this community, commonwealth and nation depends upon the quality of education we provide in the public schools and Intermediate Units.
- c. In order to maintain a free and strong country, our civic obligation to the community, commonwealth and nation is to maintain free and strong public schools in the United States of America, without surrendering our responsibilities to any other person, group or organization.
- d. Boards share responsibility for ensuring a "thorough and efficient system of public education" as required by the Pennsylvania Constitution.
- e. Our fellow residents have entrusted us with the advocacy for and stewardship of the education of the youth of the member school district communities.
- f. The public expects that our first and greatest priority is to provide equitable educational opportunities for all youth.

2. Accordingly:

- a. The member school districts' communities should be provided with information about the Intermediate Unit and be engaged by the Board and staff to encourage input and support for the Intermediate Unit.
- b. Devoting time, thought and study to our duties and responsibilities as Board members is critical for rendering effective and credible service.
- c. Board members should work together in a spirit of harmony, respect and cooperation, despite differences of opinion.
- d. Personal decisions should be based upon all sufficient facts, we should vote our honest conviction without partisan bias, and we will abide by and uphold the majority decision of the Board.
- e. Individuals have no legal authority outside the meetings of the Board, and should conduct their relationships with all stakeholders and media on this basis.
- f. We will not use our positions as Board members to benefit ourselves or any individual or agency.
- g. Boards must balance their responsibility to provide educational programs with the need to be effective stewards of public resources.
- h. We should recognize that the primary responsibility of the Board is to adopt policies by which the Intermediate Unit is to be administered.

- i. We should respect that the Executive Director and his/her staff are responsible and accountable for the delivery of the educational programs and the conduct of Intermediate Unit operations.
- j. Communication with all stakeholders and the media should be conducted in accordance with Board policy.



Book	Policy Manual
Section	800 Operations
Title	Conflict of Interest
Number	827
Status	Active
Adopted	June 15, 2016

Purpose

This policy shall affirm standards of conduct established to ensure that Board members and employees avoid potential and actual conflicts of interest, as well as the perception of a conflict of interest.

Definitions

Business with which a person is associated shall mean a business in which the person is a director, officer, owner, employee, or has a financial interest.

Confidential information shall mean information not obtainable from reviewing a public document or from making inquiry to a publicly available source of information.[1]

Conflict or Conflict of interest shall mean use by a Board member or Intermediate Unit employee of the authority of his/her office or employment, or any confidential information received through his/her holding public office or employment, for the private pecuniary benefit of him/herself, a member of his/her immediate family or a business with which s/he or a member of his/her immediate family is associated. The term does not include an action having a de minimis economic impact, or which affects to the same degree a class consisting of the general public or a subclass consisting of an industry, occupation or other group which includes the Board member or Intermediate Unit employee, a member of his/her immediate family or a business with which s/he or a member of his/her immediate family is associated.[1]

De minimis economic impact shall mean an economic consequence which has an insignificant effect.
[1]

Financial interest shall mean any financial interest in a legal entity engaged in business for profit which comprises more than five percent (5%) of the equity of the business or more than five percent (5%) of the assets of the economic interest in indebtedness.[1]

Honorarium shall mean payment made in recognition of published works, appearances, speeches and presentations, and which is not intended as consideration for the value of such services which are nonpublic occupational or professional in nature. The term does not include tokens presented or provided which are of de minimis economic impact.[1]

Immediate family shall mean a parent, parent-in-law, spouse, domestic partner, child, spouse of a child, brother, brother-in-law, sister, sister-in-law, or the domestic partner of a parent, child, brother or sister.[1]

Business partner shall mean a person who, along with another person, plays a significant role in owning, managing, or creating a company in which both individuals have a financial interest in the

company.

Delegation of Responsibility

Each employee and Board member shall be responsible to maintain standards of conduct that avoid conflicts of interest. The Board prohibits members of the Board and Intermediate Unit employees from engaging in conduct that constitutes a conflict of interest as outlined in this policy.

Guidelines

All Board members and employees shall be provided with a copy of this policy and acknowledge in writing that they have been made aware of it. Additional training shall be provided to designated individuals.

Disclosure of Financial Interests

No Board member shall be allowed to take the oath of office or enter or continue upon his/her duties, nor shall s/he receive compensation from public funds, unless s/he has filed a statement of financial interests as required by law.[2]

The Intermediate Unit solicitor and designated Intermediate Unit employees shall file a statement of financial interests as required by law and regulations.[3][4]

Standards of Conduct

The Intermediate Unit maintains the following standards of conduct covering conflicts of interest and governing the actions of its employees and Board members engaged in the selection, award and administration of contracts.[5]

No employee or Board member may participate in the selection, award or administration of a contract supported by a federal award if s/he has a real or apparent conflict of interest as defined above, as well as any other circumstance in which the employee, Board member, any member of his/her immediate family, his/her business partner, or an organization which employs or is about to employ any of them, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract.
[5]

The Intermediate Unit shall not enter into any contract with a Board member or employee, or his/her spouse or child, or any business in which the person or his/her spouse or child is associated valued at \$500 or more, nor in which the person or spouse or child or business with which associated is a subcontractor unless the Board has determined it is in the best interests of the Intermediate Unit to do so, and the contract has been awarded through an open and public process, including prior public notice and subsequent public disclosure of all proposals considered and contracts awarded. In such a case, the Board member or employee shall not have any supervisory or overall responsibility for the implementation or administration of the contract.[1]

When advertised formal bidding is not required or used, an open and public process with regard to the above paragraph shall include at a minimum:

1. Public notice of the intent to contract for goods or services;
2. A reasonable amount of time for potential contractors to consider whether to offer quotes; and
3. Post-award public disclosure of who made bids, quotes, or applications and who was chosen, except that in the event of an employment application, post-award disclosure need only include who was chosen.

Any Board member or employee who in the discharge of his/her official duties would be required to vote on a matter that would result in a conflict of interest shall abstain from voting and, prior to the vote being taken, publicly announce and disclose the nature of his/her interest as a public record.[1]

For this purpose, "conflict of interest" shall mean a real, apparent, or potential interest of any kind in the matter by the Board member or his or her immediate family, business partner, or an organization which employs or is about to employ any of them. It shall not be limited to "conflict" as defined at the start of this policy.

No public official or public employee shall accept an honorarium.[1]

Board members and employees may neither solicit nor accept gratuities, favors or anything of monetary value from contractors or parties to subcontracts, unless the gift is an unsolicited item of nominal value. Gifts of a nominal value may be accepted in accordance with Board policy. Items of a nominal value may be accepted in accordance with Board policy. Items considered to be of nominal value shall include any gift, hospitality, transportation, or lodging that may be accepted under Pennsylvania's Ethics Act, but shall be subject to reporting on a Statement of Financial Interests if the value thereof is such as to require reporting under the Ethics Act.[5][6]

Improper Influence

No person shall offer or give to a Board member, employee or nominee or candidate for the Board, or a member of his/her immediate family or a business with which s/he is associated, anything of monetary value, including a gift, loan, political contribution, reward or promise of future employment based on the offeror's or donor's understanding that the vote, official action or judgment of the Board member, employee or nominee or candidate for the Board would be influenced thereby.[1]

No Board member, employee or nominee or candidate for the Board shall solicit or accept anything of monetary value, including a gift, loan, political contribution, reward or promise of future employment, based on any understanding of that Board member, employee or nominee or candidate that the vote, official action or judgment of the Board member, employee or nominee or candidate for the Board would be influenced thereby.[1]

Organizational Conflicts

Organizational conflicts of interest may exist when due to the Intermediate Unit's relationship with a subsidiary, affiliated or parent organization that is a candidate for award of a contract in connection with federally funded activities, the Intermediate Unit may be unable or appear to be unable to be impartial in conducting a procurement action involving a related organization.[5]

In the event of a potential organizational conflict, the potential conflict shall be reviewed by the Executive Director or designee to determine whether it is likely that the Intermediate Unit would be unable or appear to be unable to be impartial in making the award. If such a likelihood exists, this shall not disqualify the related organization; however, the following measures shall be applied:

1. The organizational relationship shall be disclosed as part of any notices to potential contractors;
2. Any Intermediate Unit employees or officials directly involved in the activities of the related organization are excluded from the selection and award process;
3. A competitive bid, quote or other basis of valuation is considered; and
4. The Board has determined that contracting with the related organization is in the best interests of the program involved.

Reporting

Any perceived conflict of interest that is detected or suspected by any employee or third party shall be reported to the Executive Director. If the Executive Director is the subject of the perceived conflict of interest, the employee or third party shall report the incident to the Board President.

Any perceived conflict of interest of a Board member that is detected or suspected by any employee or third party shall be reported to the Board President. If the Board President is the subject of the perceived conflict of interest, the employee or third party shall report the incident to the Executive Director, who shall report the incident to the solicitor.

No reprisals or retaliation shall occur as a result of good faith reports of conflicts of interest.

Investigation

Investigations based on reports of perceived violations of this policy shall comply with state and federal laws and regulations. No person sharing in the potential conflict of interest being investigated shall be involved in conducting the investigation or reviewing its results.

In the event an investigation determines that a violation of this policy has occurred, the violation shall be reported to the federal awarding agency in accordance with that agency's policies.

Disciplinary Actions

If an investigation results in a finding that the complaint is factual and constitutes a violation of this policy, the Intermediate Unit shall take prompt, corrective action to ensure that such conduct ceases and will not recur. Intermediate Unit staff shall document the corrective action taken and, when not prohibited by law, inform the complainant.

Violations of this policy may result in disciplinary action up to and including discharge, fines and possible imprisonment. Disciplinary actions shall be consistent with Board policies, procedures, applicable collective bargaining agreements and state and federal law.[7]

- Legal
1. 65 Pa. C.S.A. 1101 et seq
 2. Pol. 004
 3. 51 PA Code 15.2
 4. 65 Pa. C.S.A. 1104
 5. 2 CFR 200.318
 6. Pol. 322
 7. Pol. 317
 - Pol. 011
 - Pol. 319
 - Pol. 609
 - Pol. 702

CAFCO Food and Paper Line Item Annual Bid Procurement Procedures

1. **CAFCO Advisory Council Team Meeting-*specification review***
 - Lancaster-Lebanon Intermediate IU13 Collaborative Services (IU13) meets with the CAFCO Advisory Council in early fall to analyze the previous year's bid and start the development of the next bid.
 - Agenda items include:
 - Previous bid vendor performance.
 - Previous bid product performance.
 - Previous bid miscellaneous issues.
 - Specification review for current products.
 - Specification review and research for new items which may be included on the bid.
 - Review of bid terms and conditions.
 - Bid timeline
 - IU13 begins the development of a line item bid worksheet and any changes to the bid terms and conditions.

2. **CAFCO Membership Meeting**
 - The CAFCO Membership holds an annual fall meeting at which time vendor and product performance is discussed.
 - At this meeting, each district receives a new participation agreement which is completed by districts planning to participate for the upcoming year.
 - Each district is asked to provide a list of any new items or discontinued items to the Advisory Council.

3. **CAFCO Advisory Council Team Meeting-*additional specification review***
 - IU13 and the Advisory Council meet a second time during the fall to review new product submissions, ensure initial specifications are clear, and review terms and conditions once more.
 - IU13 completes a draft version of the bid worksheet and forwards it to the Advisory Council for review.

4. **District Requirements Due**
 - Before the 2015-16 bid year, districts received the bid worksheet for the purpose of inserting their annual requirements.
 - After the worksheet was completed, it was sent back to IU13, where it was totaled with all other districts requirements and indicated on the final bid document.
 - For the 2015-16 bid year and beyond, CAFCO has utilized annual velocity reports from the awarded vendors to satisfy bid requirement amounts.

5. **CAFCO Advisory Council Team Meeting-*additional specification review***
 - IU13 and The Advisory Council meet a third time for final bid specification review, velocity report analysis and final terms and conditions.

6. **Pre-bid Conference**

- A required pre-bid conference is held for vendors planning to submit proposals. The conference agenda items include the following:
 - Bid packet terms and conditions.
 - Line item specification review.
 - Scope of work.
 - Delivery parameters.
 - Award criteria.
 - Addendums.
 - Proposal response requirements.
 - Questions and answers.

7. **Bid Advertisement**

- IU13 develops a bid advertisement to run in two local newspapers for three consecutive weeks.

8. **Bid Opening**

- IU13 facilitates a public bid opening.
- IU13 confirms and documents vendor compliance to proposal response deadlines.
- IU13 confirms and documents vendor compliance to proposal documentation.
- IU13 begins a review process to ensure vendor compliance to bid specifications.
- IU13 creates a bid worksheet used to compare proposal pricing.

9. **CAFCO Advisory Council Team Meeting-bid review**

- IU13 and the Advisory Council meet soon after the bid opening to analyze each proposal by line item and or category, and make a recommended award.

10. **Bid Award**

- IU13 prepares a final bid recommendation packet and submits it to the IU13 Board of School Directors for award at their June Board Meeting.
- Following the bid award, IU13 forwards bid results and any pertinent vendor information to each participating district.
- Each district then procures their requirements directly with the awarded vendors.