Western Carolina University
Contract No: 73-RFP-00775
Request for Dining Services Proposal

Exhibit A

University Submittal Requirements

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I. UNIVERSITY SUMMARY

A. OVERVIEW OF WESTERN CAROLINA UNIVERSITY (WCU)

1. WCU's main campus sits in Cullowhee, North Carolina, near the Great Smoky and Blue Ridge mountains, fifty-two miles west of Asheville. The location in the rural mountains amidst incredible biodiversity and unique communities creates an opportunity for academic discovery service. The campus covers approximately 600 acres.

   WCU also operates an instructional site at Biltmore Park Towne Square in Asheville, offering undergraduate degree programs in nursing and engineering, as well as graduate programs in accounting, business administration, entrepreneurship, and education.

2. WCU's student body is comprised of more than 11,000 students, including more than 9,000 undergraduate students. Approximately 59 percent of students are female and 41 percent male. More than 23 percent of students self – identifies as members of a racial minority group.

3. WCU provides more than 115 undergraduates majors and concentrations, as well as more than 40 graduate programs. The university focuses on high – demand degrees including a variety of programs in engineering, science, healthcare, education, humanities, business, and the arts.

4. Mission -As Western North Carolina's regional comprehensive university, WCU is dedicated to academic excellence, affordability, and access. WCU inspires student learning through innovative teaching, nationally recognized programs, exceptional support, and a robust connectedness with surrounding communities in Southern Appalachia, including the Eastern Band of Cherokee Indians. Through a broad range of scholarly activities, our faculty and students seek to better understand our region, state, nation, and world. With an emphasis on engaging students both inside and outside the classroom, WCU's bachelor's, master's, and professional doctoral programs in Cullowhee, Asheville, and online aim to improve lives and promote economic prosperity throughout Western North Carolina and beyond.

5. Vision - Western Carolina University will be a national model for public comprehensive universities serving rural regions and an innovative driver for the social and economic mobility of its students. WCU will break barriers to student access and opportunity, and leverage the expertise of its faculty, staff, and students in confronting the complex health, educational, social, and economic challenges in its region and state.

6. Core Values: The University is guided by the following values.

   a) Excellence in Teaching, Learning, and Scholarship

   b) Collaboration with and Respect for our Communities

   c) Free and Open Interchange of Ideas

d) Diversity and Inclusive Excellence

e) Robust and Engaging Student Experience

f) Investment in our People

g) Environmental Stewardship

II. OVERVIEW OF DINING SERVICES

A. DINING SERVICE LOCATIONS

1. The Dining Services (Services) at WCU (University) include exclusive residential dining, exclusive retail dining, and first right of refusal of catering events on campus including:

   a) Exclusive rights to Two (2) All-You-Care-To-Eat (AYCTE) residential dining halls.

      (i) The Lodge at Brown Hall

      (ii) Catamount Cafe

   b) Exclusive rights to retail dining venues

      (i) Chick-fil-A

      (ii) 1889 Bistro

      (iii) BellaSui

      (iv) Starbucks Courtyard

      (v) Catamount Eats Food Truck

      (vi) Einstein Bros. Bagels

      (vii) H.H.S Java City & P.O.D Market

      (viii) Moes Southwestern Grill

      (ix) Noble Convenience Store

      (x) Townhouse

      (xi) Panda Express

      (xii) Freshens

      (xiii) Papa Johns

      (xiv) Starbucks at Brown Hall

      (xv) Which Wich Sandwiches

      (xvi) Taproom at Townhouse

   c) Exclusive rights to:

      (i) Catering Services: See Section DD in Statement of Work

(ii) Camps and Conferences

(iii) Athletic Concessions with exception to donor and volunteer events

(iv) Snack Vending

d) Exclusions and special considerations:

(i) Beverage Vending Services

B. DINING SERVICE GOALS

1. The incumbent Dining Services provider (current Contractor) will not automatically be awarded the next contract. Once the completed RFP documents are received, the University will evaluate proposals with the intention of selecting a Regional or National Contractor, whichever business arrangement is best able to serve the University's Dining Services Operation and Management requirements at its campus.
2. The University aims to develop a strategic relationship with the selected Contractor; therefore, any Bidder that fails to meet the expressed qualitative requirements may be excluded, regardless of cost competitiveness.
3. The University is "Thinking forward and embracing new Culinary dimensions." The Dining Services intends to meet the goals and objectives of the University overall, and the Dining Services Contractor must be an ideal match with the people, culture, and strategy.
4. The University seeks a Contractor that will flawlessly execute best practices in collegiate dining that ensure quality, customer service, and financial stewardship.

C. FINANCIAL OBJECTIVES

1. The University is interested in contracting with a Dining Services Contractor that has financial strength and capacity to develop a robust dining program that provides an attractive annual return to the University.
2. Refer to Exhibit C, "Financial Model & Performance Metrics"
3. The University is not requiring capital investments for site improvements. However, proposals that include investment dollars to enhance the customer experience and/or functional improvements will be entertained. To be clear, the University does not wish to limit the Bidder's creativity in proposing improvements to Dining Services.

D. RFP RESPONSE REQUIREMENTS

1. For this RFP, all communication between Bidder and University must go through the Issuing Officer. Strict adherence to this requirement significantly reduces the spread of incorrect information while ensuring all participants receive the same information at the same time. Do not attempt to contact any other University employee or any third-party agents of the University about this RFP.

2. Bidders must respond to all applicable portions of this RFP in the manner required by the University. Any requirement not addressed where applicable may lead to disqualification.
3. General Requirements:
   a) All RFP submittals must be electronic files and submitted to the following email address **https://wcu.bonfirehub.com/portal/?tab=openOpportunities**
   b) Proposal should include a title page with the name, address, telephone number, and email of the Bidder.
   c) A Table of Contents should list the proposal parts and sub-parts.
   d) Technical and Financial Proposals must be submitted as separate documents within the proposal.

III. TECHNICAL PROPOSAL SUBMITTALS FOR THE RFP

A. TECHNICAL PART 1 – THE PROPOSAL LETTER

1. Please provide a proposal cover letter that must be signed by an authorized officer of the Bidder and include evidence of his/her authority. The proposal letter shall also include the names, addresses, and telephone numbers of the following individuals:
   a) Authorized persons to communicate with the University regarding the proposal.
   b) Authorized persons to conduct negotiations, and authorized officer to sign the Agreement.

B. TECHNICAL PART 2 – CLARIFICATIONS OR EXCEPTIONS TO THE RFP

1. Please identify any provisions, requirements of terms of the RFP that you believe may present a concern or require clarification.

C. TECHNICAL PART 3 – BIDDER'S ORGANIZATION AND RESOURCES

1. Provide a brief narrative introduction and company background.
2. Provide a management organizational chart indicating the lines of communication and authority from the on-site management team to regional and corporate levels of management.
3. Indicate the location of all your area offices where administrative support applicable to the University is provided.
4. Provide a complete list of all Bidder-managed collegiate Dining Services. Include:
   a) A list of at least three (3) current accounts with operations of similar scope and size comparable to the University to be used as references.

b) A list of accounts in the same geographic region of the University, approximately within 200 miles or nearest accounts.

5. The above should include:
   a) Account name and details of the scope of services provided.
   b) Include the annual sales volume for residential dining, retail dining, and catering.
   c) Provide a list of any current legal disputes, or any current or past disputes that may in any way jeopardize the reputation of the Contractor or the University.

D. TECHNICAL PART 4 – MEAL PLANS,

1. Please provide recommendations for any new meal plan options, enhancements, or adjustments to the University's current meal plan structure that you believe would improve the student dining experience, increase value, and/or provide greater flexibility for students.

E. CONCEPTS AND MENUS

1. Provide a narrative description of proposed Residential, Retail and Market concepts including:
   a) Location
   b) Name
   c) Concept and/or brand
   d) Hours of operation
   e) Meal exchange or equivalency program, if applicable
   f) Carryout meal program, if applicable
   g) Description of services, such as a narrative of how and where the customer will place orders, make payment/swipes, and so forth. The University is interested in understanding the Bidder's model for efficiency and a positive customer experience.
   h) Please indicate what concepts will be offered during each meal or time.
2. Provide the following sample menus that represent the Bidder's interpretation of the RFP requirements:
   a) Sample Residential Dining menus that meet the objectives of the University and students.
   b) Submit sample summer menus for camps and conferences.
   c) Submit sample menus for athletic concessions.
   d) The University is using local food truck providers managed by the current Contractor and would like to continue this program. Explain how the Bidder can enhance the program.

e) List any proposed national, regional, or company brands. List the specific site(s) for which brands are proposed and the outcomes expected from the implementation of the brand.

f) Sample menus and concepts for any other proposed on-site services.

F. TECHNICAL PART 5 – CATERING

1. Provide a detailed Catering proposal including policies, procedures, menu items, prices, and any packing, set-up, and/or delivery charges for catering services. Provide catering brochures and identify how the Bidder would promote the Catering department and increase business through strategic marketing.
2. Catering is a key Dining Services element. The University requires varying levels of service and pricing. Please provide sample menus for at least the following tiers of catering:
   a) Budget Services: Foods and beverages available for pick up (with no Contractor set up, or bus service), including menu items for student organizations.
   b) Value Service: Drop off and pick up buffet service (with limited Contractor set up, and bus service limited to clean up).
   c) Full, Premium, and Presidential Service: Buffets or served meals (with full wait staff and bus service).
3. Additionally, provide menus and/or pricing for the following:
   a) Coffee Breaks and Beverage/snack breaks: Service for meetings with refreshments.
   b) Hors d'oeuvres/Receptions: Stand-alone event or reception prior to a banquet.
   c) Submit sample menus of boxed meals for student-athletes needing to travel to away games/matches.

G. TECHNICAL PART 6 – PROPOSED STAFFING AND MANAGEMENT SCHEDULE

1. The University recognizes the importance of maintaining continuity of dining operations during the transition to a new Contractor. Bidders shall describe their approach to recruiting, onboarding, and retaining qualified food service employees during the transition.

   The University encourages the successful Contractor to consider qualified incumbent employees for available positions; however, all employment decisions, including hiring, compensation, benefits, scheduling, supervision, discipline, and termination, shall remain solely the responsibility of the Contractor.

   The Contractor shall be responsible for developing and implementing its employee transition and staffing plan in a manner that minimizes disruption to dining operations and maintains appropriate staffing levels and service quality.

2. SPECIAL NOTE: Student workers are encouraged at the University. Please provide your recommendations to best attract, manage, and teach student workers.
3. Provide staffing and management schedules for all University facilities included in this RFP. For each operation, include:
    a) Position
    b) Management/hourly status
    c) Area of responsibility (service, production, driver, etc.)
    d) Wage type – full-time/part-time/student
    e) Work schedule
    f) Hours per week (Hourly)
    g) Hourly rate (Hourly)
    h) Total annual hours – calculated.
    i) Hours per week (salary)
    j) Hourly rate (salary)
4. Include a proposed wage scale for all position.

H. TECHNICAL PART 8 – TRANSITION PLAN/SERVICES LAUNCH

1. Provide a detailed outline for the implementation plan and Services launch. Include a work plan with start dates, key people assignments, and support from regional, national, and/or campus offices.
2. Provide a risk table for transition with mitigation plans.

I. TECHNICAL PART 9 – QUALITY ASSURANCE PROGRAM & FINANCIAL MONITORING

1. Provide information on the Bidder's Quality Assurance Program, including sample survey instruments, data gathering tools, and reporting. These should be the precise programs that will be utilized at the University.
2. Provide information in detail on tools and processes the Bidder will utilize to manage and monitor costs in the following areas:
    a) Product cost
    b) Labor cost
    c) Direct and indirect expenses
3. Describe the process to provide financial information to the University and methods the Bidder will use to recommend solutions to improve financial performance.
4. Recommend Key Performance Indicators that will monitor Student satisfaction, Sanitation, Financial Performance and any other KPI's.

J. TECHNICAL PART 10 – INFORMATION TECHNOLOGY

1. Provide information on the use of current and future online or service technology, including but not limited to remote ordering, robotics, web-based nutrition information access, catering management, and other technology and how these systems will be used to efficiently operate the University's Dining Services. Important are technologies that improve customer participation, experience, knowledge, and convenience.
2. List the Web, online or mobile-based applications recommended for use in the Dining Services, and any associated costs.
3. Describe technology solutions the Bidder will implement to improve access to health and wellness information.

K. TECHNICAL PART 11 – SUSTAINABILITY PROGRAMS AND ENERGY MANAGEMENT

1. Describe your approach to sustainability as it relates specifically to the University's dining program. The University is not seeking extensive corporate sustainability materials or general corporate marketing information.

   Please limit your response to **five (5) pages maximum** and address the following:

   a) **Current Practices:** Identify the key sustainability practices you currently implement in university or comparable dining operations.

   b) **Proposed Initiatives:** Identify **3–5 specific sustainability initiatives** you would propose for the University during the first two years of the contract.

   c) **Measurable Outcomes:** For each proposed initiative, provide a measurable goal, anticipated timeline, and method of measurement.

   d) **Food Waste:** Describe your approach to reducing food waste, including measurement and reporting.

   e) **Local and Sustainable Purchasing:** Describe your approach to local, seasonal, and sustainably sourced food purchasing and how results will be measured.

   f) **Student Engagement:** Describe how you would engage students and the campus community in sustainability initiatives.

   Do not include corporate sustainability reports, brochures, or other materials that do not directly address the University's dining program. If desired, bidders may provide a link to their corporate sustainability report as supplemental information; it will not be included in the page limit.

L. TECHNICAL PART 12 – HEALTH/WELLNESS AND DIETARY PROGRAMS

1. Provide the health and wellness menus, educational programs, promotions, and efforts to be implemented at the University. This is to include providing menu options for Vegan and Vegetarian diets in the Residential Dining Halls.
2. Provide an overview of the role of the Company Registered Dietitians role.
3. Describe how the Bidder will meet the needs of customers with dietary restrictions, and personal or cultural preferences.
4. Describe how you will accommodate students with allergies.

M. TECHNICAL PART 13 – MARKETING

1. Provide a detailed narrative description of all programs, activities, and promotions to enhance the customer experience and improve participation. Limit your response to eight (8) pages.

N. TECHNICAL PART 14 – SPECIAL SERVICE

1. Provide a complete description of any alliance services the Bidder will offer over and above those required by this RFP. These could include donations, scholarships, internships, initiatives, equipment or smallware's funds, Chancellor's catering funds, and others.
2. The University currently relies upon funding for certain programs and events, explain how you can support programs at University campuses.
3. **NOTE: Specific financial commitments should NOT be included in this Technical Proposal section. Please reserve those for the Financial Proposal.**

O. TECHNICAL PART 15 –UPGRADES AND ENHANCEMENTS (FACILITIES, EQUIPMENT, OR OTHER)

1. Please provide any proposed upgrades that would be required to implement the concepts and services proposed by the Bidder. In particular, at the following sites:
   a) Apodaca Science Building (This will be shown during the onsite visit)
   b) Starbucks at Brown (an alternative to the Starbucks brand)
   c) Which Wich
   d) The Lodge in Brown (change style of service, concepts and flow)
   e) HHS
   f) Noble C store
2. Notes: While not required, the Bidder may choose to propose capital improvements that enhance the customer experience and/or functionality. It is required that Bidders consider maximum value at minimum cost to the University for any such proposed improvements.

3. The University does not wish to limit the Bidder's creativity in proposing functional improvements to the Services. **NOTE: Financial details should not be included in this Technical Submittal section. Please provide any associated costs in the appropriate Financial Submittal section only.**

IV. FINANCIAL PROPOSAL SUBMITTALS FOR THE RFP

A. FINANCIAL PART 1 – FINANCIAL OPERATING PRO FORMA PROJECTIONS

1. **Pro Forma Requirements:** The University will provide bidders with a standardized two-year financial model containing University-provided revenue assumptions, and the Not-to-Exceed amount. Bidders shall complete the financial model using the University's assumptions and shall not modify University-provided revenue, Annual Guaranteed Maximum Percentage (AGMP), or other designated assumptions. All bidder-proposed assumptions shall be clearly identified and supported within the designated sections of the financial model. Bidders shall use 3.5% inflation rate for years one and two and a not exceed AGMP of 80.9% (note if the AGMP is higher the Contractor is responsibe for the overage). Bidders shall use the Operating hours indicated in the Historical Data Exhibit D. Please respond to these following questions:
   a) What Revenue assumptions are projecting for new Concepts?
   b) What product spend are you projecting by category (storeroom, frozen, produce, etc.)?
   c) What purchasing efficiencies are incorporated into your Cost of Goods Assumptions?
   d) What is your proposed cost per plate in Residential AYCTE?
   e) Provide a projected staffing model for each location broken down by Student, FTE, Temporary, as well as Hourly Rates, Labor Burden and Total Labor Cost.
   f) What is your annual wage escalation?
   g) Identify all Corporate overhead charges, technology and on-line ordering costs
   h) What financial risks are not included in the proposed Pro Forma?
   i) If the University revenue assumptions and targeted percent of cost to revenues are fixed what specific assumptions are you making to achieve the proposed financial result?
2. **Start-up/ Transition Costs** -Please provide a detailed schedule of any one-time transition or start-up costs identified for the first year of the contract term. Specify in a statement that these costs are the responsibility of the Bidder, and not the University.

3. **New Concepts.** Bidders may propose new dining concepts, locations, services, or other enhancements not specifically identified in the University's Scope of Work. (See New Concept tab in the "Excel Pro froma Workbook") Any proposed new concept shall be separately identified in the Contractor's financial proposal on a separate tab marked "New Concepts" and shall include all associated revenue, operating expenses, labor, food costs, capital/start-up costs, and other financial impacts. Bidders shall not incorporate projected revenue or expenses from proposed new concepts into the University's base financial model or Not-to-Exceed amount unless specifically authorized by the University. Any new concept approved by the University after contract award shall be subject to the University's prior written approval, including agreement on the financial impact and any corresponding adjustment to the Not-to-Exceed amount. The Contractor shall not implement or incur costs associated with a new concept without the University's prior written approval.

B. MEAL PLANS

1. Based on your answer to section D of the Technical response provide any anticipated financial impact to the University and students.

C. SUSTAINABILITY

1. Based on your answer to section K of the Technical response, identify any proposed initiatives that would require additional University funding or are expected to generate savings.

D. FINANCIAL PART 2 –CAPITAL INVESTMENT

1. Referencing Technical Part 15 - Upgrades and Enhancements – provide a detailed list of any investment to be made by the Bidder or any investment required from the University. This includes facilities upgrades, equipment, smallware's, technology, vehicles, or otherwise. Clearly state the specific items, costs, and responsibilities necessary to implement the proposed Services.
2. Provide the disbursement dates, buy-back, depreciation, and amortization terms and conditions related to any proposed investment by the Bidder if applicable.
3. **NOTE: The University will have the right to re-allocate investment funds at its discretion, and the parties will mutually agree on disbursement dates and amortization schedules.**

E. FINANCIAL PART 3 – OVERHEAD OR INDIRECT COSTS

1. Provide a list of any proposed overhead or indirect costs of operation such as general and administrative overhead charges, purchasing charges, and other corporate charges to the account. It is a requirement of the RFP that all such costs be clearly disclosed on an item-by-item basis as part of the proposal.

F. FINANCIAL PART 4 – SENSITIVITY ANALYSIS

1. The University would like to understand the impact of the following scenarios in the table below. Indicate the dollar impact and your assumptions.
   a) Scenario 1-
      (i) Revenues- Negative 5% & the Dollar Impact +/- on Annual Cost
   b) Scenario 2-
      (i) Revenues- Positive 5% & the Dollar Impact +/- on Annual Cost
   c) Scenario 3-
      (i) Cost of Goods Plus 1% from Pro Forma & the Dollar Impact +/- on Annual Cost
   d) Scenario 4-
      (i) Labor Cost Plus 5 from Pro Forma & the Dollar Impact +/- on Annual Cost
   e) Scenario 5-
      (i) $1 Increase per Hour & the Dollar Impact +/- on Annual Cost
   f) Scenario 6-
      (i) Inflation 2% above 3.5% & the Dollar Impact +/- on Annual Cost

G. FINANCIAL PART 5 – COST OF SPECIAL SERVICES

1. In support of Technical Part 14 in Section N, Special Services, please provide a complete description of those services and the proposed financial commitment.
2. Any in-kind donations, gifts, or other funds not included in the proposed capital investment shall not be subject to amortization or any buy-back terms and conditions.

H. FINANCIAL PART 6 – REBATES ON PURCHASES

1. Manufacturer and/or supplier rebates, vendors' discounts and incentives are known sources of income for Contractors. Provide a statement as to how the Bidder intends to share (rates, percentages, vehicle of payment) these finances with the University.

I. FINANCIAL PART 7 – MANAGEMENT FEE

1. Indicate the proposed annual management fee and the portion of the management fee you are willing to place at risk as a percentage based on achievement of the University's established Key Performance Indicators.
2. Based on your response above what percentage of the at risk would you place for each of the Key Performance Indicators below:
   a) Student Satisfaction (Annual survey)
   b) Quality Assurance (Third Party inspection Bi – annually, measuring sanitation, systems and processes, customer service and food quality)

END OF DOCUMENT