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February 1, 2019

FOR: Ms. Jessica Gies
Director of Nutrition Services
The Nelson County Schools
288 Wildcat Lane
Bardstown, KY 40004
(502)349-7000 ext. 2327
jessica.gies@nelson.kyschools.us

RE: Financial Fresh Eyes Review

ProTeam Foodservice Advisors (ProTeam) is a solutions-based food service consulting company, providing consulting services to school districts and food service operations throughout the United States. ProTeam specializes in helping foodservice operators achieve their goals by understanding the district's needs and then working collaboratively to vision and execute customized, comprehensive solutions.

ProTeam staff includes registered dietitian nutritionists (RDN), School Nutrition Specialists (SNS), chefs and business officials with five to 30 years of operational experience in school food service. ProTeam's comprehensive services include School Menu Solutions, School Training Solutions, School Operations Solutions, School Fiscal Solutions, School Equipment Solutions and School Marketing Solutions.

ProTeam Foodservice Advisors is pleased to offer a **Financial Fresh Eyes Review**. Our approach to this financial review will be comprehensive. Using sales reports, production records, vendor purchasing reports and inventory data, we will analyze the reports to get a clearer understanding of the financial discrepancies. Once we have established some benchmarks, we can come up with strategies to control the costs, and establish techniques to use in the future.

SCOPE OF WORK FOR FINANCIAL REVIEW:

The ProTeam consultants will facilitate the program review focusing on specific areas of concern or potential as identified by the client. ProTeam facilitator will start with a conference call to virtually meet key contacts in both food service and business services. ProTeam will request select documents to review and establish some basic findings. The first on-site visit will be conducted when the document review is complete. The findings from the initial review and visit will be summarized in a reference document to include recommended action steps for follow up.

Sample Timeline

- 1) Initial planning call to discuss the following:
 - a) Confirm dates and establish times and locations for on-site review
 - b) Determine areas for review and determine Interviewees:
 - i) Food Service Director
 - ii) Food Service Employees at affected site
 - iii) Food Service Employees at other district sites
 - c) Plan flow of on-site review:
 - i) Meet and greet with business official - review logistics.
 - (a) Interviews – key personnel identified.
 - (b) Review of meal service, storerooms, production and service areas.
 - (c) Review written plan for day(s) on site.
 - ii) Site visit protocols for visitors.
 - d) Identify and Discuss documents needed for review:
 - i) Electronic file of Sales Reports for affected site(s)
 - ii) Electronic file of Production Records for affected site(s)
 - iii) Electronic file of Inventory Sheets for affected site(s)
 - iv) Electronic file of Daily Ala Carte Records for affected site(s)
 - v) Access to Vendor Purchasing Reports, Invoices for affected site(s)
 - vi) Electronic files of each of the listed above for 1 similar site in District
- 2) On-site visit to perform the following:
 - a) Observe Production at affected site.
 - b) Observe Lunch Service at affected site.
 - c) Observe Production and Service at similar site in District.
 - d) Conduct Review of Storage Areas.
 - e) Meet with director, manager(s) and key staff.
 - f) Conduct Informal interview process and interact with students as appropriate.
 - g) Review daily paperwork, and observe techniques use to complete.
 - h) Exit meeting with Director and/or Financial Officer to discuss observations.
- 3) Draft report and action steps to Director of Nutrition within two weeks of site visit.
- 4) Follow up call to affirm next steps, if applicable.

COST OF WORK:

| Number of Schools to be Reviewed | Cost of Services | Number of consecutive Days on-site | Travel Costs (estimates) | Total |
|----------------------------------|------------------|------------------------------------|--------------------------|-------------|
| 1 | \$ 6,785.00 | 1.5 | \$1,300.00 | \$ 8,085.00 |
| 1-3 | \$ 7,985.00 | 2 | \$1,500.00 | \$ 9,485.00 |
| 1-5 | \$ 9,185.00 | 3 | \$1,850.00 | \$11,035.00 |
| 1-7 | \$10,385.00 | 3.5 | \$2,050.00 | \$12,435.00 |
| 1-9 | \$11,585.00 | 4 | \$2,350.00 | \$13,935.00 |
| 1-10 | \$12,185.00 | 4.5 | \$2,550.00 | \$14,735.00 |
| | | | | |

Cost of Services: Includes Prep Time, On-Site Time, Travel Time and Final Report

Travel Costs: Travel expenses (airfare, lodging, etc) to be submitted at actual cost

Total

See Table Above

It would be most cost effective to do all schools within one visit, to keep travel costs down. If you would like to split into multiple visits, the table costs would still be valid, but each visit would start with the 1 school cost, and build from there. We can also discuss the possibility of doing the paperwork remotely and not staying on-site for up to 4.5 days. This would reduce the travel estimates considerably. We are willing to discuss all options, but wanted to present you with the costs for the most comprehensive services, which would include both off site evaluation of records and on site review of processes and procedures.

Application of Cool School Cafe Points, if district participates, could possibly be used to reduce total cost of services.

Amount TBD

PROTEAM FOODSERVICE ADVISORS, LLC CURRENT INSURANCE COVERAGE:

| | |
|------------------------|--|
| Employers' Liability | \$ 100,000 per occurrence / \$ 300,000 policy limit |
| General Liability | \$ 2,000,000 per occurrence / \$ 4,000,000 aggregate |
| Professional Liability | \$ 1,000,000 per occurrence |
| Auto Liability | \$ 1,000,000 per occurrence |

In the event the District requires insurance amounts greater than the coverage levels listed above, the expense for the additional insurance coverage limits requested by the District shall be considered as a reimbursable expense. The Consultant shall furnish the District with a Certificate of Insurance evidencing the insurance levels listed above.

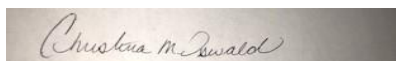
SUCCESSORS AND ASSIGNS

ProTeam Foodservice Advisors, LLC binds itself, successors, assigns and legal representative to the other party to this agreement, successors, assigns and legal representatives in respect to all covenants of this agreement. Pro-Team shall not assign, sublet or transfer interest in this agreement without the written consent of the other.

STATEMENT OF INDEPENDENCE

ProTeam Foodservice Advisors, LLC is an independent consulting firm; our firm including any of the firm principals or associates do not have any formal or informal relationship with food service management companies, software or equipment suppliers, dealers or manufacturers, other than in a normal course of representing our Client's interest. We receive no compensation other than fees from our Clients.

Submitted by:



February 1, 2019
Christina M. Oswald, SNS
Chief Operations Officer
Pro-Team Foodservice Advisors, LLC
christina@proteamadvisors.com
(844) 662-3767, extension 101

Approved by:

Date:

Printed Name:
