

ATTACHMENT A

INFORMAL COMPETITIVE BID FOR IOWA CERTIFICATION AND VERIFICATION SPREADSHEET(S)

Regulations

All vendors submitting a competitive bid agree to comply with all the required contract provisions identified in Child Nutrition Programs procurement regulations for those programs the State Agency operates. The applicable regulations are NSLP 7 CFR Part 210.21, SBP 7 CFR Part 220.16, SMP 7 CFR Part 215.14a, SFSP 7 CFR Part 225.17, CACFP 7 CFR Part 226.22, FDP 7 CFR 250, as *applicable* and Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200).

Format and Content of the Bid

Instructions

All submitted responses should adhere to the instructions as outlined in this competitive bid. The instructions are designed to facilitate a uniform review process. Vendors are asked to be brief and to respond only with the information sought. Bids must provide all information noted per issued forms, or on vendor's letterhead, when appropriate and have required signatures. All information requested in the competitive bid must be received at the time of submission.

Format

The response should be typed. The Vendor Name, Authorized Vendor Representative's contact information including mailing address, email address and phone number. For clarity, the vendor's name should appear on every page, including Attachments. The *Pricing Sheet* Attachment must be included with the bid. The bid should be separated in two amounts: 1) the cost to create spreadsheets and make needed revisions found through testing by BNHS program staff members (May 10 through June 30, 2023); and, 2) the cost to provide annual maintenance including virtual training to BNHS program team between July 1, 2023 through June 30, 2024.

Background: The Iowa Department of Education Bureau of Nutrition & Health Services (BNHS) currently has a web based tool that participating Child Nutrition Program operators use to determine the free and reduced price meal eligibility status of households for participation in the USDA National School Lunch Program (NSLP) and Child and Adult Food Program (CACFP). On occasion, organizations may not have access to the current web based tool and instead need to use a spreadsheet version.

Scope of Work

The Department of Education BNHS is seeking competitive bids from qualified vendors to design, create and test a spreadsheet program that Child Nutrition Program operators use to determine if participants are eligible for free or reduced price meals. The determination of eligibility is based on income amount and family size. Income amounts may be entered weekly, bi-weekly, twice a month, monthly, and annually. Applications within a certain dollar amount of each frequency need to be identified as error prone. This application should also include a feature for schools to determine the number of households to include in the verification process. This tool will be updated annually and should be built to allow for income eligibility guidelines and other validations to be updated annually by Department program staff. This new tool will replace a current spreadsheet. This new tool must have the same or similar look and functionality as the current web-based version.

Requirements include:

1. Tool be user-friendly
2. Workbook and worksheet level security enabled to prevent end users from modifying form controls or validations.

3. Where possible, the form should incorporate basic spreadsheet tools and formatting, with limited or no use of ActiveX, VBscript, or macros.
4. Must be able to have the spreadsheet turn inactive at midnight on June 30 every year for previous years eligibility and a second version of the spreadsheet that becomes inactive at midnight on September 30 every year.
5. The spreadsheet should meet core accessibility requirements and best practices as outlined here <https://support.microsoft.com/en-us/office/make-your-excel-documents-accessible-to-people-with-disabilities-6cc05fc5-1314-48b5-8eb3-683e49b3e593> (you could also reference contents or similar from this example <https://www.hhs.gov/sites/default/files/hhs-508-excel-checklist.xlsx>).
6. Resulting tool should be easy to maintain and edit. Instructions and initial training (may be virtual) for Department staff to update the form should be provided.
7. This tool must have the capability to allow for income eligibility guidelines to be updated annually by the Department of Education Bureau of Nutrition and Health Services. Instructions for updating the income guidelines annually must be included.
8. At a minimum, 2 different parts of the spreadsheet(s)
 - a. Part 1 will calculate the eligibility determination for free and reduced price meal application. Reference #12. The school food authority (SFA) must enter income and household size information from each completed Iowa Eligibility Application into the spreadsheet.
 - i. There are separate worksheets for income reported as annual, weekly, every two weeks, monthly, and twice a month. The worksheet the SFA uses must match the income frequency each household reported on the Iowa Eligibility Application.
 - ii. If the household reported only one frequency of income, such as weekly, the weekly worksheet must be used for eligibility determination.
 - iii. The annual income worksheet is used only when income is reported in more than one income frequency. The income guidelines for each pay period increment should be on each income pay period.
 - iv. There is a "Family Size" table on each worksheet with check boxes ranging from 1-15, corresponding to the total household size. When the SFA official enters the income and checks the correct household size box, the tool needs to display the eligibility determination (free, reduced price or denied) next to the checked household size box.
 - v. The tool needs to be designed to assist with the error prone verification selection process. Applications that are within \$100 monthly, \$23 weekly, \$46 bi-weekly, \$50 twice a month or \$1200 annually of the cut-off limit for free or reduced price meal eligibility are identified with a message "error prone" in red letters to the left of the check box for family size.
 - b. Part 2-will determine the verification selection process and tracking. The verification process includes determining the verification method and number of applications selected for verification. Reference #13.
- .The SFA must be able to enter data from the Verification Summary Report from the prior year to identify the type of verification sampling method(s) the SFA may use to complete verification. Using this worksheet will guide SFAs in selecting the verification sampling methods they are qualified to use.
- i. ALL SFAs are eligible to use a standard sampling method, but only SFAs that reported a low non-response level during verification in the prior year may use alternate one or alternate two methods.
- ii. The tool needs to instruct the SFA to select the appropriate verification method worksheet (standard, alternate one or alternate two).
- iii. When the SFA enters the numbers of applications approved based on income, Supplemental Nutrition Assistance Program (SNAP), Family Investment Program (FIP) or error prone (if applicable) on the worksheet, the number of applications required for verification is displayed. This tool will assist the SFA to assure that all the steps necessary to complete verification are done.
9. Instructions for how participating organizations use the income calculator and verification calculator must be included
10. May reference ICAVES web tool (<https://reports.educateiowa.gov/ICAVES/>).

11. Must include USDA and Iowa nondiscrimination statements (<https://educateiowa.gov/pk-12/nutrition-programs/civil-rights-child-nutrition-programs>) and allow for statements to be updated.
12. USDA Income Eligibility Guidelines for 2023-24 guidelines: <https://www.fns.usda.gov/cn/income-eligibility-guidelines>
13. Verification Guidelines pages 96-105 and USDA Eligibility Manual: https://fns-prod.azureedge.us/sites/default/files/cn/SP36_CACFP15_SFSP11-2017a1.pdf.
14. If awarded the bid, a meeting will be held prior to beginning spreadsheets to answer questions and determine functionality.

Contract Period

The contract period will begin approximately May 10, 2023 and end June 30, 2024. Creation of spreadsheets for use will begin as of the contract initiation date and end June 30, 2023 with support, maintenance and training provided for one additional year from July 1, 2023 through June 30, 2024.

Federal Terms and Conditions (check, as applicable)

- ☐ **Equal Employment Opportunity** (*required for all procurement, regardless of value*): By submitting a response to the request for price quotations, the vendor has agreed to affirmatively cooperate in the implementation of the policy and provision of Executive Order 11246; Executive Order 11375, and 40 CFR part 61. To comply the vendor will:
 - 1) Provide equal opportunity to all qualified persons to prohibit discrimination in employment on the basis of race, color, religion, sex, or national origin.
 - 2) Will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin.
 - 3) Employ and treat employees fairly during employment, which shall include, but is not limited to the following: upgrading, demoting, or transferring, recruitment, layoff or termination, rates of pay or other forms of compensation, and selection for training.
- ☐ **Targeted Small Business Certification** (*required for all procurement, regardless of value*): – Businesses owned, operated, and managed by women, minority persons, and individuals with disabilities or service-connected to disabled veterans are encouraged to respond to the solicitation. Vendor should attach a copy of the Targeted Small Business (TSB) certification issued by the Iowa Department of Economic Development.
- ☐ **Iowa Gift Law (Iowa Code Chapter 68B)** – The gift law prohibits a public employee or that person's immediate family member from accepting or receiving, directly or indirectly, any gift or series of gifts from a "restricted donor." A restricted donor is defined in the law as a person or company who is or is seeking to be a party to a sale, purchase, lease or other type of contract with the employer of the public employee. For more information on how the gift law applies to employees of a SFA go to: [Iowa Gift Law- legal lessons](#).
- ☐ **Examination of Public (Open) Records (Iowa Code Chapter 22)** – The law states that any person shall have the right to examine and copy a public record and to publish or otherwise disseminate a public record or the information contained in a public record. This includes all documents related to food service procurement. A person should be allowed to examine the procurement documents in the physical possession of the SFA free of charge. The examination and copying of the public record will be done in the presence of the SFA's designated authority. A request for a copy of procurement documents received in writing, by telephone, or by electronic means (emails) must be fulfilled by the SFA. The request for a copy of the procurement documents may be contingent upon the receipt **of** payment of expenses to be incurred in fulfilling the request. The estimated expenses shall be communicated to the person requesting the records. If the SFA copy equipment is used, the SFA shall provide a reasonable number of copies of the procurement documents upon the payment of a fee. The fee for copying shall not exceed the actual cost of providing the service. The copy of procurement documents must be done in the presence of the SFA's authorized designee. For more information go to: [Iowa Code Chapter 22](#).

USDA Nondiscrimination Statement

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: <https://www.usda.gov/sites/default/files/documents/USDA-OASCR%20P-Complaint-Form-0508-0002-508-11-28-17Fax2Mail.pdf>, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. **mail:**
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or
2. **fax:**
(833) 256-1665 or (202) 690-7442; or
3. **email:**
program.intake@usda.gov

This institution is an equal opportunity provider.

Iowa Nondiscrimination Statement

It is the policy of this CNP provider not to discriminate on the basis of race, creed, color, sex, sexual orientation, gender identity, national origin, disability, age, or religion in its program, activities, or employment practices as required by the Iowa Code section 216.6, 216.7, and 216.9. If you have questions or grievances related to compliance with this policy by this CNP Provider, please contact the Iowa Civil Rights Commission, Grimes State Office building, 400 E. 14th St. Des Moines, IA 50319-1004; phone number 515-281-4121, 800-457-4416; website: <https://icrc.iowa.gov/>."

Pricing Sheet Based on Scope of Work

Vendor must return price quotes by: [Click here to enter text.](#)
Vendor(s) will be awarded based on ☐ line item or ☐ bottom line

<u>Vendor Name:</u>		
<u>Specifications for Service(s):</u>	Price	Comments by vendor
Name/job title of the individual quoting prices:		

INFORMAL COMPETITIVE BID EVALUATION MATRIX

<u>Vendor Name:</u>			
Products/Services	Price	Price	Price
Demonstrated understanding of the child nutrition program			
Demonstrated ability to provide customization in a timely manner			
Demonstrated ability to provide all maintenance and investigate software problems and identify solutions			
Strong communication skills			
Cost, including costs for training			
Expertise in the content area for which they are applying as a developer.			
Evidence of content expertise and experience developing materials.			
Proposed spreadsheet(s) must be user friendly without extensive spreadsheet knowledge needed			
Other relevant experiences and expertise			
Total:	\$	\$	\$
**Vendor Selected (VS) – if bottom line	** <input type="checkbox"/>	** <input type="checkbox"/>	** <input type="checkbox"/>
*Vendor Selected (VS); the SFA can award all products to one vendor (lowest total price) or award purchase on a line item basis (lowest line item price).			