

STATE OF IOWA
IOWA DEPARTMENT OF EDUCATION
INFORMAL COMPETITIVE SOLICITATION POSTING

Procurement Title: Iowa Certification and Verification Spreadsheet(s)

Procurement Reference #: ED-KS108-01

Description of Solicitation Opportunity (Scope of Work):

The Iowa Department of Education Bureau of Nutrition and Health Services is seeking competitive bids from qualified vendors to design, create and test a spreadsheet program that Child Nutrition Program operators will 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. The application will 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 staff with limited technical skills. This tool will replace a current spreadsheet. This 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 is 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 spreadsheet turn inactive at midnight on June 30 every year for previous years eligibility and a second version 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 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, two 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.

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- 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 is the verification selection process and tracking. The verification process will determine the verification method and number of applications selected for verification. Reference #13.
- i. 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.
- ii. ALL SFAs are eligible to use 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.
- iii. The tool needs to instruct the SFA to select the appropriate verification method worksheet (standard, alternate one or alternate two).
- iv. 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 SFA’s 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. Income 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.

See Attachment A for more information

Proposals will be evaluated and a recommendation will be made using the following criteria, which are listed in no particular order:

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

Proposals submitted should include the Vendor’s Cost Proposal and sufficient information regarding the Vendor’s ability to perform the services as identified in the Scope of Work. The Vendor should also include references with its Proposal.

From the issue date of this Informal Solicitation until announcement of the successful proposal, Vendors may contact **ONLY** the Issuing Officer. The Issuing Officer will only respond to questions regarding the procurement process. Vendors shall be disqualified if they contact any State employee other than the Issuing Officer.

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All information submitted by a Vendor may be treated as public record, unless the Vendor properly requests that the information be treated as confidential in accordance with the public records laws of the State of Iowa (Iowa Code Chapter 22) at the time the Proposal is submitted.

The costs of preparation and delivery of the Proposal are solely the responsibility of the Vendor.

Proposals must be received by the close of business day on: May 8, 2023

1. Projected timeframe of awarded contracted: From May 10, 2023 to June 30, 2024

Any questions for clarification should be in writing to the Issuing Officer listed below and responses will be provided to all who have contacted the Issuing Officer with regards to this solicitation opportunity.

First and Last Name of the Issuing Officer for this Procurement:

First Name: Jill Last Name: Borgeson

Phone Number of the Issuing Officer for this Procurement: (515) 281-3002

Email Address of the Issuing Officer for this Procurement: OIAS@iowa.gov

The Iowa Department of Education reserves the right to:

- **Reject any and/or all Proposals, in whole or in part;**
- **Advertise for new Proposals;**
- **Abandon the need for such services; and/or**
- **Cancel this Informal Competitive Solicitation at any time prior to the execution of the written contract.**