

**005-RFP-2579-2026 – Equitable Services for ESEA Programs**

**REQUEST FOR PROPOSAL**

**RFP COVER SHEET**

**Administrative Information**

<b>RFP Number</b>	005-RFP-2579-2026	<b>Title of RFP</b>	Equitable Services for ESEA Programs
<b>Agency</b>	Iowa Department of Administrative Services (DAS) on behalf of the Iowa Department of Education		
<b>State Issuing Officer:</b> Katelyn Howells Phone: 515-721-7856 E-mail: Katelyn.Howells@iowa.gov			
<b>PROCUREMENT TIMETABLE—Event or Action</b>			<b>Date/Time (Central Time)</b>
State Posts Notice of RFP on the TSB website			March 25, 2026
State Issues RFP			March 27, 2026
Follow-up RFP written questions, requests for clarification, and suggested changes from Respondents due (no questions accepted or responded to after this date)			April 6, 2026 at 4:00PM
Proposals Due			April 15, 2026 at 3:00PM
<b>Relevant Websites</b>			
Internet website where the Addenda to this RFP will be posted <a href="http://bidopportunities.iowa.gov">http://bidopportunities.iowa.gov</a> and <a href="#">IMPACS Electronic Procurement System</a> .			
Internet website where contract terms and conditions are posted <a href="https://das.iowa.gov/sites/default/files/procurement/pdf/050116%20terms%20services.pdf">https://das.iowa.gov/sites/default/files/procurement/pdf/050116%20terms%20services.pdf</a> <a href="https://das.iowa.gov/sites/default/files/procurement/pdf/Terms%20and%20Conditions%20for%20Federal%20Compliance.pdf">https://das.iowa.gov/sites/default/files/procurement/pdf/Terms%20and%20Conditions%20for%20Federal%20Compliance.pdf</a>			
<b>Firm Proposal Terms</b> The minimum number of days following the deadline for submitting proposals that the Respondent guarantees all proposal terms, including price, will remain firm is 120 Days.			

**SECTION 1 INTRODUCTION**

**1.1. Purpose**

The purpose of this Request for Proposals (RFP) is to solicit proposals from Responsible Respondents to provide the goods and/or services identified on the RFP cover sheet. The Agency intends to award a Contract(s) for the initial period identified on the RFP cover sheet, and the Agency, in its sole discretion, may extend the Contract(s) for up to the number of annual extensions identified on the RFP cover sheet.

**1.2. Definitions**

For the purposes of this RFP and the resulting contract, the following terms shall mean:

**“Agency”** means the agency identified on the RFP cover sheet that is issuing the RFP and any other agency that purchases from the Contract.

**“Contract”** means the contract(s) entered into with the successful Respondent(s) as described in Section 6.1.

**“Contractor”** means the awarded business/person to provide the contractual services agreed upon.

**“Deliverable”** means the completion of a milestone or accomplishment of a task.

**“General Terms and Conditions”** means the General Terms and Conditions for Services Contracts as referenced on the RFP cover page.

**“Proposal”** means the Respondent’s proposal submitted in response to the RFP.

**“Respondent”** means the company, organization or other business entity submitting a proposal in response to this RFP.

**“Responsible Respondent”** means a Respondent that has the capability in all material respects to perform the scope of work and specifications of the Contract. In determining whether a Respondent is a Responsible Respondent, the Agency may consider various factors including, but not limited to, the Respondent’s competence and qualifications to provide the goods or services requested, the Respondent’s integrity and reliability, the past performance of the Respondent and the best interest of the Agency and the State.

**“Responsive Proposal”** means a Proposal that complies with the material provisions of this RFP.

**“RFP”** means this Request for Proposals and any attachments, exhibits, schedules or addenda hereto.

**“State”** means the State of Iowa, the Agency, and all state agencies, boards, and commissions, and any political subdivisions making purchases from the Contract as permitted by this RFP.

**1.3. Overview of the RFP Process**

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This RFP is designed to provide Respondents with the information necessary for the preparation of competitive Proposals. The RFP process is for the Agency's benefit and is intended to provide the Agency with competitive information to assist in the selection process. It is not intended to be comprehensive. Each Respondent is responsible for determining all factors necessary for the submission of a comprehensive Proposal.

**Respondent should review Request for Confidentiality, for more information if its Proposal contains confidential information. Any Proposal marked "Confidential" or "Proprietary" on every page may be disqualified.**

It is the Agency's intention to evaluate Proposals from all Respondents that submit timely Responsive Proposals, and award the Contract(s) in accordance with the evaluation and selection criteria provided in this RFP.

### 1.4. Background

The Elementary and Secondary Education Act of 1965 (ESEA) has required the local education agencies (LEA) to provide equitable services to eligible nonpublic school students and teachers in certain ESEA programs after engaging in timely and meaningful consultation with the appropriate nonpublic school officials. The reauthorization of the ESEA by the Every Student Succeeds Act (ESSA) in 2015 continues this equitable services requirement under two provisions: Title I, Part A and Title VIII, Part F, Subpart 1.

After meaningful consultation, the LEA may contract with a third-party vendor to provide services to the nonpublic school. Contracting with a third-party vendor is not required, however, it may be a practical way to deliver high-quality, compliant, and consistent equitable services to the nonpublic schools. The LEA remains responsible and may have limited staff, multiple nonpublic schools, or highly specialized services.

### 1.5. Objectives

The Iowa Department of Education (IDE) seeks proposals from qualified, independent third-party providers to support the implementation of equitable services under the Elementary and Secondary Education Act (ESEA). The selected third-party provider will support the Local Education Agency (LEA) in the planning, coordination, implementation, documentation, and oversight of the equitable services for eligible private nonprofit school participants while ensuring full compliance with all applicable federal, state, and local requirements.

Participation by LEAs is voluntary. Services under this contract shall be provided only to LEAs that formally opt in for services.

**SECTION 2 SPECIFICATIONS**

**Overview**

The successful Respondent shall provide the goods and/or services to the State in accordance with the specifications and technical specifications as provided in this Section. The Respondent shall address each specification in this Section and indicate whether or not it will comply with the specification. If the context requires more than a yes or no answer or the section specifically indicates, Respondent shall explain how it will comply with the specification. Proposals must address each specification. Merely repeating the specifications may be considered non-responsive and may disqualify the Respondent. Proposals must identify any deviations from the specifications of this RFP or specifications the Respondent cannot satisfy. If the Respondent deviates from or cannot satisfy the specification (s) of this section, the Agency may reject the Proposal.

All items listed in this section are Mandatory Specifications. Respondents must indicate either “**yes**” or “**no**” to each specification in their Proposals and provide an explanation as to how the specification is met. By indicating “yes” a Respondent agrees that it shall comply with that specification throughout the full term of the Contract, if the Respondent is successful. In addition, if specified by the specifications or if the context otherwise requires, the Respondent shall provide references and/or supportive materials to verify the Respondent’s compliance with the specification. The Agency shall have the right to determine whether the supportive information and materials submitted by the Respondent demonstrate that the Respondent will be able to comply with the Mandatory Specifications. If the Agency determines the responses and supportive materials do not demonstrate the Supplier will be able to comply with the Mandatory Specifications, the Agency may reject the Proposal.

**2.1. Respondent Requirements**

- 2.1.1.** Demonstrated experience administering Elementary and Secondary Education Act (ESEA) equitable services.
- 2.1.2.** Knowledge of federal fiscal compliance and procurement requirements.
- 2.1.3.** Capacity to serve multiple Local Education Agencies (LEAs) simultaneously.
- 2.1.4.** Ability and capacity to designated point(s) of contact for each participating LEA.
- 2.1.5.** Capacity to design and deliver services that are secular, neutral, and non-ideological.
- 2.1.6.** Experience providing high-quality instructional or support services aligned to identified student needs and approved program goals.
- 2.1.7.** Relevant credentials, certifications, or documented experience appropriate to the services provided.
- 2.1.8.** Ability to comply with all applicable federal, state, and local procurement requirements.

**SECTION 3 SCOPE OF WORK**

**Overview**

The Successful Respondent shall provide the services to the State in accordance with the requirements as provided in this Scope of Work.

**3.1. Service Categories**

All proposed supplemental services allowable under ESEA "SEC. 8015 Participation by Private School Children and Teachers" must meet all federal requirements of eligible ESEA programs. Vendors must propose allowable supplemental services as specified in the "Title VIII, Part F of the ESEA: Equitable Services for Eligible Private School Children, Teachers, and Other Educational Personnel Non-Regulatory Guidance, and Title I, Part A of the ESEA, as Amended by the Every Student Succeeds Act: Providing Equitable Services to Eligible Private School Children, Teachers, and Families. All allowable supplemental services must adhere to the requirements of all eligible programs:

- Title I, Part C - Education of Migratory Children;
- Title II, Part A - Supporting Effective Instruction;
- Title III, Part A - English Language Acquisition, Language Enhancement, and Academic Achievement;
- Title IV, Part A - Student Support and Academic Enrichment Grants;
- Title IV, Part B - Nita M. Lowey 21st Century Community Learning Centers (21st CCLC), and
- Title I, Part A - Improving Basic Programs Operated by LEAs.

**3.2. Contractor Responsibilities**

**3.2.1. Consultation and Participation Process (Facilitation Only)**

- 3.2.1.1. Support the Local Education Agency (LEA) in conducting a timely, meaningful, and ongoing consultation with participating private school officials
- 3.2.1.2. Assist with coordination, communication, and document collection related to:
  - Notice of Intent to Participate;
  - Affirmation of Consultation;
  - Notifications of equitable share amounts.
- 3.2.1.3. Support private school officials in developing yearlong service plans that align with demonstrated needs and allowable uses of funds.
- 3.2.1.4. Ensure all plans follow applicable supplement not supplant requirements.

**3.2.2. Fiscal Management and Invoicing**

- 3.2.2.1. Procure services, materials, and activities on behalf of the LEA under the vendor management.

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3.2.2.2. Submit monthly, itemized invoices to the LEA which include:

- Program-specific charges per ESEA program;
- Administrative charges per ESEA program, if applicable;
- Student-level detail, if applicable;
- Descriptions of expenditures explaining allowability if applicable.

3.2.2.3. Align invoicing with the State required chart of accounts and LEA account coding structures.

3.2.2.4. Follow LEA procurement policies and procedures.

### **3.2.3. Data Collection and Program Evaluation Support**

3.2.3.1. Collect and maintain program-specific performance and participation data aligned to the needs of the students.

3.2.3.2. Monitor implementation fidelity and effectiveness of services.

3.2.3.3. Collaborate with the LEA and nonpublic school officials to recommend adjustments to services or plans as needed.

3.2.3.4. Support the LEA in completing the required program evaluations and reporting.

3.2.3.5. Assist with collecting and organizing documentation required for state or federal monitoring, including:

- Consultation Records;
- Service Plans or Needs Assessment;
- Evaluation documentation.

### **3.3. Contractor Independence and Compliance Requirements**

The provider must comply with all applicable statutory requirements, including but not limited to the following:

**3.3.1.** The Family Educational Rights and Privacy Act of 1974 (FERPA), as applicable.

**3.3.2.** The Health Insurance Portability and Accountability Act of 1996 (HIPAA), as applicable.

**3.3.3.** The requirement that it must not supplant the LEA's responsibilities and must not make final determinations related to eligibility, equitable share calculations, approval of services, or compliance determinations. Final authority must remain with the LEA.

**3.3.4.** The provider must:

3.3.4.1. Be fully independent of all participating private schools, with no administrative, fiscal, or governance control over any private school.

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- 3.3.4.2. Comply with ESEA equitable services requirements, including sections 1117 and 8501.
- 3.3.4.3. Adhere to 2 CFR Part 200 (uniform administrative requirements, cost principals, and audit requirements for federal awards).
- 3.3.4.4. Ensure all programs and services are secular, neutral, and non-ideological.
- 3.3.4.5. Acknowledge that all funds, title to materials, equipment, and property purchased with federal funds remain under the control of the LEA.
- 3.3.4.6. Act solely in a supporting capacity including providing related/supplemental services as requested by the subgrantee.
- 3.3.4.7. The provider **must** support the LEA in responding to monitoring findings and corrective actions; however, responsibility for final submissions and implementation of corrective actions **must** remain with the LEA.

### 3.4. Service Delivery Requirements

#### 3.4.1. Vendor Requirements:

- 3.4.1.1. Deliver services only after subgrantee task orders are signed by the subgrantee.
- 3.4.1.2. Provide services only to eligible participants as determined by the subgrantee.
- 3.4.1.3. Provide subgrantees with detailed invoices separating programmatic charges from administrative charges

#### 3.4.2. Structure

- 3.4.2.1. Department approval constitutes a master service agreement
- 3.4.2.2. Department shall not be financially responsible for any costs
- 3.4.2.3. Task orders occur directly between subgrantees that opt in and the vendor
- 3.4.2.4. Vendor must execute separate task orders with each participating subgrantee

### 3.5. Expected Deliverables

- 3.5.1. Monthly fiscal and activity reports.
- 3.5.2. Annual consultation timeline and documentation package per participating LEA.
- 3.5.3. Yearlong service plans for each participating private school.
- 3.5.4. End-of-year summary report including services delivered, expenditures, and evaluation results.

### 3.6. Department Responsibilities

- 3.6.1. Provide oversight, guidance, and technical assistance.

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- 3.6.2. Monitor LEA compliance with federal equitable services provisions.
  - 3.6.3. Review and approve applications, assurances, and claims, as applicable.
  - 3.6.4. Provide training and support related to consultation, equitable share calculations, and service delivery.
  - 3.6.5. Investigate complaints and ensure timely resolution in accordance with federal requirements.
  - 3.6.6. Schedule mandatory check in meetings to review compliance.
- 3.7. Local Education Agency Responsibilities**
- 3.7.1. Retain final authority for the equitable services program.
  - 3.7.2. Conduct timely and meaningful consultation with nonpublic school officials.
  - 3.7.3. Ensure compliance with federal statutory and regulatory requirements.
  - 3.7.4. Assure that equitable services are secular, neutral, and non-ideological.
  - 3.7.5. Remain in control of all ESEA funds.
  - 3.7.6. Procure third-party providers in accordance with federal, state, and local procurement requirements.
  - 3.7.7. Monitor service delivery and provider performance.
  - 3.7.8. Submit all required claims, reports, and assurances.
- 3.8. Nonpublic School Official Responsibilities**
- 3.8.1. Participate in the consultation process and the implementation of equitable services delivery.
  - 3.8.2. Engage in timely and meaningful consultation with the LEA.
  - 3.8.3. Provide input on student needs, program design, service delivery, and evaluation.
  - 3.8.4. Identify potentially eligible students, teachers, or families.
  - 3.8.5. Assist with scheduling and coordination of services.
  - 3.8.6. Ensure access to facilities and students as needed for service delivery.
  - 3.8.7. Provide feedback on the effectiveness of services.

**SECTION 4 FORM AND CONTENT OF PROPOSALS**

**4.1. Instructions**

These instructions describe and define the format and content of the Proposal. They are designed to facilitate a uniform review process. Failure to adhere to the Proposal format may result in the rejection of the Proposal.

**4.1.1.** The Proposal shall be divided into two parts: (1) the Technical Proposal and (2) the Cost Proposal. The Technical Proposal and the Cost Proposal shall be labeled as such as separate files. The files shall be labeled with the following information:

**005-RFP-2579-2026 - Respondent Name - Technical Proposal**

**005-RFP-2579-2026 - Respondent Name - Cost Proposal**

Files must attach to Respondent’s submission in the State’s [IMPACS Electronic Procurement System](#).

**4.1.2.** If the Respondent designates any information in its Proposal as confidential pursuant to Section 2, the Respondent must also submit a public copy Proposal from which confidential information has been excised as provided in Section 2 and which is marked “Public Copy”.

**005-RFP-2579-2026 - Respondent Name - Public Copy**

**4.1.3.** Proposal shall not contain promotional or display materials.

**4.1.4.** Attachments shall be referenced in the Proposal.

**4.1.5.** If a Respondent proposals more than one solution to the RFP specifications, each shall be labeled and submitted in a separate Proposal, and each will be evaluated separately.

**4.2. Technical Proposal**

Any information provided in the Technical Proposal is subject to consideration for consideration, evaluation, and scoring. The following documents and responses shall be included in the Technical Proposal in the order given below:

**Exhibit 1 - Transmittal Letter**

An individual authorized to legally bind the Respondent shall sign the transmittal letter. The letter shall include the Respondent’s mailing address, electronic mail address, and telephone number.

**Exhibit 2 - Executive Summary**

The Respondent shall prepare an executive summary and overview of the goods and/or services it is offering, including all of the following information:

- Statements that demonstrate that the Respondent has read and understands the terms and conditions of the RFP including the Contract provisions in Section 7.
- An overview of the Respondent’s plans for complying with the specifications of this RFP.
- Any other summary information the Respondent deems to be pertinent.

### **Exhibit 3 - Mandatory Specifications**

The Respondent shall answer whether or not it will comply with each specification in Section 2 of the RFP. Where the context requires more than a yes or no answer or the specific specifications so indicates, Respondent shall explain how it will comply with the specification. Merely repeating the Section 2 specifications may be considered non-responsive and result in the rejection of the Proposal. Proposals must identify any deviations from the specifications of the RFP or specifications the Respondent cannot satisfy. If the Respondent deviates from or cannot satisfy the specification(s) of this section, the Agency may reject the Proposal.

### **Exhibit 4 - Experience**

The Respondent must provide the following information regarding its experience:

- Number of years in business.
- Number of years of experience with providing the types of services sought by the RFP.
- The level of technical experience in providing the types of services sought by the RFP.
- A list of all goods and/or services similar to those sought by this RFP that the Respondent has provided to other businesses or governmental entities.
- Letters of reference from three (3) previous or current customers or clients knowledgeable of the Respondent's performance in providing goods and/or services similar to the goods and/or services described in this RFP and a contact person and telephone number for each reference.

### **Exhibit 5 - Personnel**

Provide key staff/dedicated team background to include main point of contact(s) for customer service/support. Provide a brief resume of experience for all team members proposed to be assigned to the project.

### **Exhibit 6 - Implementation Plan**

Describe recommended implementation strategy including on-site coordination and support services, best practice consulting options and professional services. Identify any third-party subcontractors involved in Respondent's implementation strategy and describe these relationships. Describe the skills and time required by nonpublic school officials and LEAs for implementation and support of the Scope of Work.

### **Exhibit 7 - Consultant Services**

Respondent shall demonstrate its understanding of the services requested under this RFP, the expertise of the personnel who will provide the requested services, and the Respondent's ability to logically plan and achieve the stated objectives and goals of this RFP. Respondent's services shall align with one or more of the following areas. Such alignment shall be identified in the proposal.

- Student Supports
- Professional Development
- Family Engagement Services
- Assessment and Evaluation Support

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- Assistance with Management of Equitable Services

### **Exhibit 8 - Consulting Strategy**

Describe recommended strategy including on-site coordination and support services, best practice consulting options and professional services. Identify any third party subcontractors involved in Respondent's strategy and describe these relationships.

### **Exhibit 9 - Deliverables**

Provide a description of deliverables to be provided, including sample reports and plans.

### **Exhibit 10 – Service Options**

The Respondent must provide the following information regarding the Services to be provided:

- Detailed list(s) of services they can provide to nonpublic school officials.
- Detailed list(s) of services they can provide to Local Education Agencies.
- Describe the documentation provided to Local Education Agencies for each nonpublic school. Include sample forms/documents with Proposal.

### **Exhibit 11 – Independence and Compliance**

Describe how Respondent shall meet Independence and Compliance requirements in Section 3.2.

### **Exhibit 12 - Optional Services**

Provide detailed information for any optional services that may be available. (Include costs for these items in the Cost Proposal)

#### **4.3. Cost Proposal**

The Respondent shall provide its Cost Proposal in a separate file for the proposed goods and/or services. All prices are quoted pursuant to the terms and conditions of this RFP. Respondent's Cost Proposal shall include an all-inclusive, itemized, total cost in U.S. Dollars (including all travel, expenses, etc. in prices) for the proposed services. All pricing to be FOB Destination, freight cost, and all expenses included; and based on Net 60 Days Payment Terms. If travel is included in the Scope of Work, travel expenses must comply with Iowa State Accounting Enterprise [Policy 210](#). Cost proposals must include the following:

- Rate sheet for each service category offered
  - Student Supports
  - Professional Development
  - Family Engagement Services
  - Assessment and Evaluation Support
  - Assistance with Management of Equitable Services
- Unit cost structure (hourly, per session, per pupil/participant, etc.)
  - Include typical market rates and what will be charged under this contract
- Administrative fee structure (if applicable)
- Travel cost structure (if applicable)
- Any other costs associated with proposed services.

**SECTION 5 ADMINISTRATIVE INFORMATION**

**4.1. Issuing Officer**

The Issuing Officer identified in the RFP cover sheet is the sole point of contact regarding the RFP from the date of issuance until a Notice of Intent to Award the Contract is issued.

**4.2. Restriction on Communication**

From the issue date of this RFP until a Notice of Intent to Award the Contract is issued, Respondents may contact only the Issuing Officer. The Issuing Officer will respond only to written questions regarding the procurement process. Questions related to the interpretation of this RFP must be submitted as provided in Section 2. Oral questions related to the interpretation of this RFP will not be accepted. Respondents may be disqualified if they contact any State employee other than the Issuing Officer about the RFP except that Respondents may contact the State Targeted Small Business Office on issues related to the preference for Targeted Small Businesses.

This section shall not be construed as restricting communications related to the administration of any contract currently in effect between a Respondent and the State.

**4.3. Downloading the RFP from the Internet**

The RFP and any addenda to the RFP will be posted at <http://bidopportunities.iowa.gov/> and [IMPACS Electronic Procurement System](#). The Respondent is advised to check the website periodically for addenda to this RFP, particularly if the Respondent downloaded the RFP from the Internet as the Respondent may not automatically receive addenda. It is the Respondent's sole responsibility to check daily for addenda to posted documents.

**4.4. Procurement Timetable**

The dates provided in the procurement timetable on the RFP cover sheet are provided for informational and planning purposes. The Agency reserves the right to change the dates. If the Agency changes any of the deadlines for Respondent submissions, the Agency will issue an addendum to the RFP.

**4.5. Questions, Requests for Clarification, and Suggested Changes**

Respondents are invited to submit written questions and requests for clarification regarding the RFP. Respondents may also submit suggestions for changes to the specifications of this RFP. The questions, requests for clarifications, or suggestions must be in IMPACS on or before the date and time listed. Oral questions will not be permitted. If the questions, requests for clarifications, or suggestions pertain to a specific section of the RFP, Respondent shall reference the page and section number(s). The Agency will post written responses to questions, requests for clarifications, or suggestions received from Respondents in IMPACS.

The Agency assumes no responsibility for oral representations made by its officers or employees unless such representations are confirmed in writing and incorporated into the RFP through an addendum.

**4.6. Pre-Proposal Conference**

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If the RFP cover sheet indicates a pre-proposal conference will be held in conjunction with this RFP, it will be held at the date, time, and location listed on the RFP cover sheet. The purpose of the pre-proposal conference is to discuss with prospective Respondents the work to be performed and allow prospective Respondents an opportunity to ask questions regarding the RFP. Oral discussions at the pre-proposal conference shall not be considered part of the RFP unless confirmed in writing by the Agency and incorporated into this RFP. The conference may be recorded. Questions asked at the conference that cannot be adequately answered during the conference may be deferred. A copy of the questions and answers will be added to the solicitation in the [IMPACS Electronic Procurement System](#).

### **4.7. Amendment to the RFP**

The Agency reserves the right to amend the RFP at any time using an addendum. The Respondent shall acknowledge receipt of all addenda in its Proposal. If the Agency issues an addendum after the due date for receipt of Proposals, the Agency may, in its sole discretion, allow Respondents to amend their Proposals in response to the addendum.

### **4.8. Amendment and Withdrawal of Proposal**

The Respondent may amend or withdraw and resubmit its Proposal at any time before the Proposals are due. The Proposal must be updated and submitted using IMPACS. Electronic mail and faxed amendments will not be accepted. Respondents must notify the Issuing Officer in writing prior to the due date for Proposals if they wish to completely withdraw their Proposal(s).

### **4.9. Submission of Proposals**

Respondents must submit Proposals in the State's [IMPACS Electronic Procurement System](#) before the "Proposals Due" date and time listed on the RFP cover sheet. This is a mandatory specification and will not be waived by the Agency. Any Proposal received after this deadline will be rejected and returned unopened to the Respondent. Respondents sending Proposals must allow ample upload time to ensure timely receipt of their Proposals. It is the Respondent's responsibility to ensure that the Proposal is received prior to the deadline. Electronic mail and faxed Proposals will not be accepted. There is a 50MB per file size limitation, but no limit to the number of files. Plan accordingly.

Respondents must furnish all information necessary to enable the Agency to evaluate the Proposal. Oral information provided by the Respondent will not be considered part of the Respondent's Proposal unless it is reduced to writing.

### **4.10. Proposal Opening**

The Agency will open Proposals after the deadline for submission of Proposals has passed. The Proposals will remain confidential until the Agency has issued a Notice of Intent to Award a Contract. See Iowa Code Section 72.3. However, the names of Respondents who submitted timely Proposals will be publicly available after the Proposal opening. The announcement of Respondents who timely submitted Proposals does not mean that an individual Proposal has been deemed technically compliant or accepted for evaluation.

### **4.11. Costs of Preparing the Proposal**

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

### **4.12. No Commitment to Contract**

The Agency reserves the right to reject any or all Proposals received in response to this RFP at any time prior to the execution of the Contract. Issuance of this RFP in no way constitutes a commitment by the Agency to award a contract.

### **4.13. Rejection of Proposals**

The Agency may reject outright and not evaluate a Proposal for reasons including, without limitation:

- 4.13.1.** The Respondent fails to deliver the Cost Proposal in a separate file.
- 4.13.2.** The Respondent acknowledges that a mandatory specification of the RFP cannot be met.
- 4.13.3.** The Respondent's Proposal changes a material specification of the RFP or the Proposal is not compliant with the mandatory specifications of the RFP.
- 4.13.4.** The Respondent's Proposal limits the rights of the Agency.
- 4.13.5.** The Respondent fails to include information necessary to substantiate that it will be able to meet a specification of the RFP as provided in Section 5 of the RFP.
- 4.13.6.** The Respondent fails to timely respond to the Agency's request for information, documents, or references.
- 4.13.7.** The Respondent fails to include proposal security, if required.
- 4.13.8.** The Respondent fails to include any signature, certification, authorization, stipulation, disclosure, or guarantee as provided in Section 7 and in IMPACS.
- 4.13.9.** The Respondent presents the information requested by this RFP in a format inconsistent with the instructions of the RFP or otherwise fails to comply with the specifications of this RFP.
- 4.13.10.** The Respondent initiates unauthorized contact regarding the RFP with a State employee other than the Issuing Officer.
- 4.13.11.** The Respondent provides misleading or inaccurate responses.
- 4.13.12.** The Respondent's Proposal is materially unbalanced. A Proposal in which line item prices are structured so that it is possible that the Respondent who appears to be low will not end up having the lowest overall cost to the State due to high prices on particular line items.
- 4.13.13.** There is insufficient evidence (including evidence submitted by the Respondent and evidence obtained by the Agency from other sources) to satisfy the Agency that the Respondent is a Responsible Respondent.

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**4.13.14.** The Respondent is a “scrutinized company” included on a “scrutinized company list” created by a public fund pursuant to Iowa Code section 12J.3

### **4.14. Nonmaterial Variances**

The Agency reserves the right to waive or permit cure of nonmaterial variances in the Proposal if, in the judgment of the Agency, it is in the State’s best interest to do so. Nonmaterial variances include but are not limited to, minor failures to comply that: do not affect overall responsiveness, are merely a matter of form or format, do not change the relative standing or otherwise prejudice other Respondents, do not change the meaning or scope of the RFP, or do not reflect a material change in the specifications of the RFP. In the event the Agency waives or permits cure of nonmaterial variances, such waiver or cure will not modify the RFP specifications or excuse the Respondent from full compliance with RFP specifications or other Contract specifications if the Respondent is awarded the Contract. The determination of materiality is in the sole discretion of the Agency.

### **4.15. Reference Checks**

The Agency reserves the right to contact any reference to assist in the evaluation of the Proposal, to verify information contained in the Proposal and to discuss the Respondent’s qualifications and the qualifications of any subcontractor identified in the Proposal.

### **4.16. Information from Other Sources**

The Agency reserves the right to obtain and consider information from other sources concerning a Respondent, such as the Respondent’s capability and performance under other contracts, the qualification of any subcontractor identified in the Proposal, the Respondent’s financial stability, past or pending litigation, and other publicly available information.

### **4.17. Verification of Proposal Contents**

The content of a Proposal submitted by a Respondent is subject to verification. If the Agency determines in its sole discretion that the content is in any way misleading or inaccurate, the Agency may reject the Proposal.

### **4.18. Proposal Clarification Process**

The Agency reserves the right to contact a Respondent after the submission of Proposals for the purpose of clarifying a Proposal. This contact may include written questions, interviews, site visits, a review of past performance if the Respondent has provided goods and/or services to the State or any other political subdivision wherever located, or requests for corrective pages in the Respondent’s Proposal. The Agency will not consider information received from or through Respondent if the information materially alters the content of the Proposal or the type of goods and/or services the Respondent is offering to the Agency. An individual authorized to legally bind the Respondent shall sign responses to any request for clarification. Responses shall be submitted to the Agency within the time specified in the Agency's request. Failure to comply with requests for additional information may result in the rejection of the Proposal.

### **4.19. Disposition of Proposals**

All Proposals become the property of the State and shall not be returned to the Respondent. Once the Agency issues a Notice of Intent to Award the Contract, the contents of all Proposals will be

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public records and be available for inspection by interested parties, except for information for which Respondent properly requests confidential treatment according to exceptions provided in Iowa Code Chapter 22 or other applicable law.

### **4.20. Public Records and Requests for Confidential Treatment**

The Agency's release of public records is governed by Iowa Code Chapter 22. Respondents are encouraged to familiarize themselves with Chapter 22 before submitting a Proposal. The Agency will copy and produce public records upon request as required to comply with Chapter 22 and will treat all information submitted by a Respondent as non-confidential records unless the Respondent requests specific parts of the Proposal be treated as confidential at the time of the submission as set forth herein **AND the information is confidential under Iowa or other applicable law.**

### **4.21. Copyright Permission**

By submitting a Proposal, the Respondent agrees that the Agency may copy the Proposal for purposes of facilitating the evaluation of the Proposal or to respond to requests for public records. By submitting a Proposal, the Respondent consents to such copying and warrants that such copying will not violate the rights of any third-party. The Agency shall have the right to use ideas or adaptations of ideas that are presented in Proposals.

### **4.22. Release of Claims**

By submitting a Proposal, the Respondent agrees that it will not bring any claim or cause of action against the Agency or the State based on Respondent's misunderstanding concerning the information provided in the RFP or concerning the Agency's or the State's failure, negligent or otherwise, to provide the Respondent with complete, pertinent, or accurate information in this RFP, or for any failure to provide information that any Respondent might consider relevant for purposes of making a decision to submit a Proposal or to enter into any Contract resulting from this RFP.

### **4.23. Respondent Presentations**

Respondents may be required to make a presentation. The determination as to need for presentations, and the location, order, and schedule of the presentations is at the sole discretion of the Agency. The presentation may include slides, graphics and other media selected by the Respondent to illustrate the Respondent's Proposal. The presentation shall not materially change the information contained in the Proposal.

### **4.24. Evaluation of Proposals Submitted**

Proposals that are timely submitted and are not rejected will be reviewed in accordance with Section 6 of the RFP. The Agency will not necessarily award a Contract resulting from this RFP to the Respondent offering the lowest cost. Instead, the Agency will award the Contract(s) to the Responsible Respondent(s) whose Responsive Proposal the Agency believes will provide the best value to the Agency and the State.

### **4.25. Award Notice and Acceptance Period**

Notice of Intent to Award the Contract(s) will be sent to all Respondents submitting a timely Proposal and may be posted at the website shown on the RFP cover sheet. Negotiation and

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execution of the Contract(s) shall be completed no later than thirty (30) days from the date of the Notice of Intent to Award or such other time as designated by the Agency. If the successful Respondent fails to negotiate and deliver an executed Contract by that date, the Agency, in its sole discretion, may cancel the award and award the Contract to the remaining Respondent the Agency believes will provide the best value to the State.

#### **4.26. No Contract Rights until Execution**

No Respondent shall acquire any legal or equitable rights regarding the Contract unless and until the Contract has been fully executed by the successful Respondent and the Agency.

#### **4.27. Choice of Law and Forum**

This RFP and the Contract shall be governed by the laws of the State of Iowa. Changes in applicable laws and rules may affect the award process or the Contract. Respondents are responsible for ascertaining pertinent legal requirements and restrictions. Any and all litigation or actions commenced in connection with this RFP shall be brought in the appropriate Iowa forum.

#### **4.28. Preference**

By virtue of statutory authority, a preference will be given to products and provisions grown and coal produced within the state of Iowa. Preference application: Tied responses to solicitations, regardless of the type of solicitation, are decided in favor of Iowa products and Iowa-based businesses per 11 IAC 117.6(1)-(2), 117.13(4).

#### **4.29. Restrictions on Gifts and Activities**

Iowa Code Chapter 68B restricts gifts which may be given or received by State employees and requires certain individuals to disclose information concerning their activities with State government. Respondents are responsible to determine the applicability of this Chapter 68B to their activities and to comply with its requirements. In addition, pursuant to Iowa Code section 722.1, it is a felony offense to bribe or attempt to bribe a public official.

#### **4.30. No Minimum Guaranteed**

The Agency does not guarantee any minimum level of purchases under the Contract.

#### **4.31. Post Solicitation Debriefing**

A debriefing is available to any Respondent who submitted a proposal in response to this RFP. Respondent shall submit a written request for a debriefing to the Issuing Officer via email or other delivery method. All Respondents will be accorded fair and equal treatment with respect to its opportunity for debriefing. The debriefing shall be scheduled by the Agency as soon as practicable after the receipt of debriefing request.

#### **4.32. Appeals**

A Respondent whose Proposal has been timely filed and who is aggrieved by the Notice of Intent to Award of the Department may appeal the decision by emailing a written notice of appeal (in accordance with 11—Chapter 117.20, Iowa Administrative Code) to the Director of the Department of Administrative Services and carbon copy to the Issuing Officer. The notice must be filed within five (5) days of the date of the Notice of Intent to Award issued by the Department, exclusive of Saturdays, Sundays, and legal state holidays. The written notice may be filed by fax

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transmission to 515.725.2064. The notice of appeal must clearly and fully identify all issues being contested by reference to the page, section and line number(s) of the RFP and/or the Notice of Intent to Award. A notice of appeal may not stay negotiations with the apparent successful Respondent.

**SECTION 6 EVALUATION AND SELECTION**

**6.1. Introduction**

This Section describes the evaluation process that will be used to determine which Proposal(s) provides the greatest value to the State. Agency will not necessarily award the Contract to the Respondent offering the lowest cost to the Agency. Instead, the Agency will award to the Respondent whose Responsive Proposal the Agency believes will provide the best value to the State.

**6.2. Evaluation Committee**

The Agency will use an evaluation committee to conduct a comprehensive, fair, and impartial evaluation of Technical Proposals received in response to this RFP. The evaluation committee will recommend an award based on the results of their evaluation to the Agency or to another person or entity that must approve the recommendation.

**6.3. Technical Proposal Evaluation and Scoring**

All Technical Proposals will be evaluated to determine if they comply with the Mandatory Specifications. The evaluation committee will fully evaluate and score all Responsive Proposals submitted by Responsible Respondents in accordance with this Section. In addition to other RFP requirements, to be deemed a Responsive Proposal, the Technical Proposal must:

- Answer “Yes” to all parts of Section 2 and include supportive materials as required to demonstrate the Respondent will be able to comply with the Mandatory Specifications in that section and
- Obtain the minimum score for the Technical Proposal. If a Technical Proposal does not meet the minimum score, it will be rejected and the Respondent’s Cost Proposal will not be evaluated.

Technical Proposals will be evaluated based on the following criteria:

ROUND 1	RFP Section	
Mandatory Specifications	Section 5	Pass/Fail
ROUND 2*	RFP Section	Possible Points
Experience	Exhibit 4	50
Implementation Plan	Exhibit 6	50
Consultant Services	Exhibit 7	200
Consulting Strategy	Exhibit 8	150
Service Options	Exhibit 10	150
Independence and Compliance	Exhibit 11	100

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<b>Total Possible Technical Proposal Points</b>		<b>700</b>
<b>ROUND 3</b>	<b>RFP Section</b>	<b>Possible Points</b>
Cost Proposal	Section 6.4	200

\*A Respondent must score a minimum Technical Score of 490 points to be eligible for the next round of evaluation and consideration for award.

**6.4. Cost Proposal Scoring**

After the Technical Proposals are evaluated and scored, the Cost Proposals will be opened and scored.

The Cost Proposals will remain sealed during the evaluation of the Technical Proposals and any demonstrations. Only prospective Respondents who obtain the minimum score for their Technical Proposal will be considered during the cost evaluation phase of the review process. When a Technical Proposal does not meet the minimum score, the associated Cost Proposal will remain unopened and will be returned to the Respondents upon request after the Department issues a Notice of Intent to Award the Contract. After the Technical Proposals are evaluated and scored, the Cost Proposals will be opened and scored.

To assist the Agency in evaluating, Cost Proposals will be evaluated and points awarded as follows:

<b>Criteria</b>	<b>Meets Expectations</b>	<b>Possible Points</b>
<b>Clarity and Organization</b>	Pricing sheet is clear, well-organized, and easy to interpret. Information is logically formatted and labeled to align with the proposed services.	50
<b>Alignment to Scope of Work</b>	Pricing directly reflects the scope of work described in the proposal. All services and deliverables are clearly accounted for.	50
<b>Scalability and Flexibility</b>	Proposal includes scalable pricing (e.g., per participant, per session) and offers flexible options for districts of different sizes.	50
<b>Transparency of Fees and Terms</b>	All fees, terms, and potential additional costs are fully disclosed and easy to understand. No hidden costs.	50

**6.5. Tied Score and Preferences**

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- 6.5.1.** An award shall be determined by a drawing when responses are received that are equal in all respects and tied in price. Whenever it is practical to do so, the drawing will be held in the presence of the Respondents who are tied in price. Otherwise the drawing will be made in front of at least three non-interested parties. All drawings shall be documented.
- 6.5.2.** Notwithstanding the foregoing, if a tied score involves an Iowa-based Respondent or products produced within the State of Iowa and a Respondent based or products produced outside the State of Iowa, the Iowa Respondent will receive preference. If a tied score involves one or more Iowa Respondents and one or more Respondents outside the state of Iowa, a drawing will be held among the Iowa Respondents only.
- 6.5.3.** In the event of a tied score between Iowa Respondents, the Agency shall contact the Iowa Employer Support of the Guard and Reserve (ESGR) committee for confirmation and verification as to whether the Respondents have complied with ESGR standards. Preference, in the case of a tied score, shall be given to Iowa Respondents complying with ESGR standards.
- 6.5.4.** Second preference in tied scores will be given to Respondents based in the United States or products produced in the United States over Respondents based or products produced outside the United States.
- 6.5.5.** Preferences required by applicable statute or rule shall also be applied, where appropriate.

## SECTION 7 CONTRACT TERMS AND CONDITIONS

### 7.1. Contract Terms and Conditions

The Contract that the Agency expects to award as a result of this RFP shall comprise the specifications, terms and conditions of the RFP, written clarifications or changes made by the Agency to the RFP through an amendment to the RFP in accordance with the provisions of the RFP, the Terms and Conditions, the offer of the successful Respondent contained in its Proposal, and any other terms deemed necessary by the Agency. No objection or amendment by a Respondent to the provisions or terms and conditions of the RFP or the Terms and Conditions shall be incorporated into the Contract unless Agency has explicitly accepted the Respondent's objection or amendment in writing.

The Contract terms and conditions in this Section 7, the General Terms and Conditions to the extent referenced and linked to on the RFP cover page, and/or any Terms and Conditions attached to and accompanying this RFP as an attachment hereto, will be incorporated into the Contract. The Terms and Conditions may be supplemented at the time of contract execution and are provided to enable Respondents to better evaluate the costs associated with the RFP specifications and the Contract. All costs associated with complying with such Terms and Conditions should be included in any pricing quoted by the Respondent.

By submitting a Proposal, Respondent acknowledges its acceptance of the terms and conditions of the RFP and the Terms and Conditions without change except as otherwise expressly stated in its Proposal. If the Respondent takes exception to a provision, it must identify it by page and section number, state the reason for the exception, and set forth in its Proposal the specific RFP or Terms and Conditions language it proposes to include in place of the provision. If Respondent's exceptions or proposed responses materially alter the RFP, or if the Respondent submits its own terms and conditions or otherwise fails to follow the process described herein, the Agency may reject the Proposal, in its sole discretion.

The Agency will evaluate all Proposals without regard to any proposed modifications to any terms and conditions of the RFP or Terms and Conditions by Contractor. Once a Proposal has been identified as the one for which an Award recommendation has been made, but prior to notifying Respondents of the decision, the Agency, in its sole discretion, may consider any proposed modifications to the terms and conditions of the RFP or Terms and Conditions identified in that Proposal. The Agency reserves the right to either award a Contract(s) without further negotiation with the successful Respondent or to negotiate Contract terms with the successful Respondent if the best interests of the State would be served. As such, if any proposed modifications are not determined to be in the best interests of the State, or appear to pose a substantial impediment to reaching agreement, the Agency may, in its sole discretion:

- 7.1.1. Issue a Notice of Intent to Award in favor of the successful Respondent, but decline to agree to or further negotiate any proposed modifications to terms and conditions identified by the Respondent in its Proposal;

- 7.1.2.** Issue a Notice of Intent to Award in favor of the successful Respondent, and identify in the Notice proposed modifications to terms and conditions identified by the Respondent in its Proposal with which the agency will or will not agree or further negotiate;
- 7.1.3.** Enter open-ended negotiations with the successful Respondent; provided, that any such negotiations shall be limited to the proposed modifications to terms and conditions identified by Respondent in its Proposal;
- 7.1.4.** Change the Agency’s recommendation for Award and issue a Notice of Intent to Award to a Respondent whose proposal does not pose as great of a challenge to the Agency.

Any ambiguity, vagueness, inconsistency or conflict, either internal to such modification(s) or arising when read in conjunction with other portions of the Contract, shall be construed strictly in favor of the State. Only those proposed modifications identified in the Notice of Intent to Award issued by the Agency as terms and conditions with which the agency will or will not agree or further negotiate shall be part of the Contract, and the State may ignore all proposed modifications, accept one or more and ignore others, accept all or, through negotiations after an award, agree to compromise language concerning one or more proposed modifications to be incorporated into a final Contract between the parties. By executing and submitting its Proposal in response to this RFP, Respondent understands and agrees that the State may exercise its discretion not to consider any or all proposed modifications Respondent may request and may accept Respondent’s proposal under the terms and conditions of this RFP and the Terms and Conditions.

**7.2. Contractual Terms and Conditions - No Material Changes/Non-Negotiable**

Notwithstanding anything in this RFP to the contrary, Respondent may not take exception to or propose including language in any resulting contract that conflicts with or is otherwise inconsistent with the following:

**7.2.1. Indemnification**

Without specific authority to do so, the State, or agencies, cannot enter into agreements indemnifying Respondents, or any other entity, against third-party claims. A clause that intends to seek indemnification from the State, whether or not the clause contains the words “indemnity” or “indemnify,” are not clauses to which the State may agree. The State will not agree to clause that includes the language “to the extent permitted by law” because, as explained, the State cannot indemnify Respondents to any extent.

**7.2.2. Limitation of Liability**

Iowa Code section 8A.311(22) and 11 Iowa Admin. Code Chapter 120 establish the rules to allow for the State to agree to a contractual limitation of vendor liability clause in limited circumstances. Any request by Respondent for the State to limit damages not in accordance with Iowa law or administrative rules is a request with which the State cannot agree.

**7.2.3. Jurisdiction and Venue**

Iowa Code chapter 13 establishes that the Iowa Attorney General is the State’s attorney for all purposes, including management of litigation and claims against the state. The State may not preempt the Attorney General’s authority by agreeing in advance to control the way litigation may be managed in the event of a dispute. Likewise, the State cannot agree to the jurisdiction or laws of another state or its courts, cannot agree to venue in another state, and cannot agree to participate in any form of alternative dispute resolution.

**7.2.4. Confidentiality**

All Iowa state agencies are subject to Iowa public records laws. The State cannot agree to contractual terms that attempt to prevent it from disclosing or disseminating records that constitute public records under Iowa Code chapter 22.

**7.2.5. Unliquidated Expenses (i.e. Attorney Fees, Add-ons, or Cost Increases)**

The State may not agree to clauses which may obligate it to pay for claims that might exceed its current funding appropriation. The State may only obligate those funds that have been appropriated to it by the Iowa Legislative Assembly and may only obligate those funds for the purposes for which the funds were appropriated.

**7.3. Special Terms and Conditions**

**7.3.1. Term Length**

The Contract shall have an initial term of one (1) year, beginning on the date of contract execution (the “**Effective Date**”). At the end of the Contract’s initial term, the State shall have the option, in its sole discretion to renew the Contract on the same terms and conditions for up to a total of five (5) additional one-year terms, for a total contract term not to exceed six (6) years. The State will give the Vendor written notice of its intent whether to exercise each option no later than ninety (90) days before the end of the Contract’s then-current term.

**7.3.2. Payment Terms**

**7.3.2.1. Payment Methods**

The State of Iowa, in its sole discretion, will determine the method of payment for goods and/or services as part of the Contract. The State Pcard and EAP are preferred payment methods, but payments may be made by any of the following methods: Pcard/EAP, EFT/ACH, or State Warrant. Respondents shall indicate in their Cost Proposals all of the payment methods they will accept. This information will not be scored as part of the Cost Proposal or evaluated as part the Technical Proposal.

**7.3.2.2. Electronic Funds Transfer (EFT) by Automated Clearing House (ACH)**

The State of Iowa may make payment by EFT by ACH. Payments are deposited into the financial institution of the claimant's choice three working days from the issue date of the direct deposit.

[https://das.iowa.gov/sites/default/files/acct\\_sae/man\\_for\\_ref/forms/eft\\_automation\\_form.pdf](https://das.iowa.gov/sites/default/files/acct_sae/man_for_ref/forms/eft_automation_form.pdf)

**7.3.2.3. State Warrant**

The State of Iowa's warrant drawn on the Treasurer of State is used to pay claims against the departments of the State of Iowa. The warrant is issued upon receipt of proper documentation from the issuing department.

**7.3.2.4. Credit Card or ePayables**

The State of Iowa's Purchasing Cards (Pcards) and ePayable solution (EAP) are commercial payment methods utilizing the VISA credit card network. The State of Iowa will not accept price changes or pay additional fees if Respondent uses the Pcard or EAP payment methods. Pcard-accepting Respondents must abide by the State of Iowa's Terms of Pcard Acceptance. Respondents must provide a statement regarding their ability to meet the requirements in this subsection, as well as identifying their transaction reporting capabilities (Level I, II, or III).

**7.3.2.5. Terms and Conditions for State of Iowa Purchasing Cards**

The State of Iowa shall pay Contractor's invoices using its Purchasing Card Program (Pcard) whenever possible. The Pcard is a VISA credit card issued by U.S. Bank to allow authorized employees to make purchases on behalf of the State. It is a faster, more convenient alternative to traditional invoicing and remittance processing, allowing US Bank to pay the Contractor directly, generally within 48 hours of the transaction. Contractor shall comply with security measures for Pcard payments including:

7.3.2.5.1. Contractor shall comply with Payment Card Industry Data Security Standard (PCI DSS) to ensure confidential card information is not compromised;

7.3.2.5.2. Contractor shall adhere to Fair and Accurate Credit Transactions Act requirements that limit the amount of consumer and account information shared for greater security protection;

7.3.2.5.3. Contractor shall not write down card numbers or store card information. When accepting orders by phone, Contractor shall process the transaction during the call and send itemized receipts (excluding card numbers) to the cardholder by fax, email, or mail (with delivery);

7.3.2.5.4. Contractor shall process payment for items when an order is placed only for items currently in stock and available for shipment, and only for services already rendered;

7.3.2.5.5. Contractor shall confirm that the name of purchaser matches the name on the card;

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7.3.2.5.6. Contractor shall ensure Internet orders are processed via secure websites, featuring Verisign, TRUSTe, BBBOnline, or “https” in the web address;

7.3.2.5.7. Contractor shall shred any documentation with credit card numbers.

**7.3.2.6. Payment Terms**

Per Iowa Code 8A.514 the State of Iowa is allowed sixty (60) days to pay an invoice submitted by a Contractor

**7.3.2.7. Respondent Discounts**

Respondent shall state in their Cost Proposals whether they offer any payment discounts.

**7.3.2.8. Prompt Payment Discount**

The State can agree to pay in less than sixty (60) days if an incentive for earlier payment is offered.

**7.3.2.9. Invoices**

Any invoices submitted must comply with applicable rules concerning payment of claims, including but not limited to those set forth in Iowa Administrative Code chapter 11-41.

**7.3.3. Insurance**

The Contract will require the successful Respondent to maintain insurance coverage(s) in accordance with the insurance provisions of the General Terms and Conditions and of the type and in the minimum amounts set forth below, unless otherwise required by the Agency.

Type of Insurance	LIMIT	AMOUNT
General Liability (including contractual liability) written on an occurrence basis	General Aggregate	\$2 million
	Products –	
	Comp/Op Aggregate	\$1 Million
	Personal injury Each Occurrence	\$1 Million \$1 Million
Automobile Liability (including contractual liability) written on an occurrence basis	Combined single limit	\$1 Million
Excess Liability, Umbrella Form	Each Occurrence	\$1 Million
	Aggregate	\$1 Million
Workers Compensation and Employer Liability	As Required by Iowa law	A required by Iowa law

Acceptance of the insurance certificates by the Department shall not act to relieve Contractor of any obligation under this Contract. It shall be the responsibility of Contractor to keep the respective insurance policies and coverages current and in force during the life of this Contract. Contractor shall be responsible for all premiums, deductibles and for any inadequacy, absence or limitation of coverage, and the Contractor shall have no claim or other recourse against the State or the Department for any costs or loss attributable to any of the foregoing, all of which shall be borne solely by the Contractor. Notwithstanding any other provision of this Contract, Contractor shall be fully responsible and liable for meeting and fulfilling all of its obligations under this section of the Contract.

**7.3.4. Quarterly Report**

The Contractor shall keep a record of purchases made pursuant to the Contract and submit a report to the Iowa Department of Administrative Services, Central Procurement on a quarterly basis. Reports shall be in Excel format and submitted electronically as outlined on the DAS Payments and Invoices Web Page (<https://das.iowa.gov/vendors/payments-invoices>). The report, at a minimum, shall follow the submission template. An example of the submission template can be found in Attachment A. The State reserves the right to change the report requirements, the submission template, and request more detailed information (ad-hoc reporting) at any time and on an individual or specific basis for a specific product, department, time frame, or for a range of products, departments, or time frames.

**7.3.5. Administrative Fee**

Without affecting the approved Good or Service prices or discounts specified in the Master Agreement, the State of Iowa shall be entitled to receive a one percent (1.00%) administrative fee on all sales made within the State of Iowa against this agreement. The administration fee due to the State of Iowa shall be paid quarterly by Contractor directly to the State, made payable to the "Iowa Department of Administrative Services – Central Procurement."

**7.4. Order of Precedence**

If there is a conflict or inconsistency between any documents comprising the Terms and Conditions, such conflict or inconsistency shall be resolved according to the following priority, ranked in descending order: (1) any terms and conditions specifically set forth in this Section 7 (Contract Terms and Conditions & Administration) under a subsection with a heading entitled Special Terms & Conditions; (2) the General Terms and Conditions for Services Contracts or Goods Contracts to the extent referenced and linked to on the RFP cover page the Contract; (3) if neither the General Terms and Conditions for Service Contracts or Goods Contracts are linked to on the RFP cover page, any terms and conditions attached to and accompanying this RFP as a separate attachment (Terms and Conditions); and (4) any terms and conditions specifically set forth in this Section 7 (Contract Terms and Conditions & Administration) set forth under a subsection with a title other than Special Terms & Conditions.

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**Response Check List**

RFP REFERENCE SECTION	RESPONSE INCLUDED	
	Yes	No
<b>Technical Proposal</b>		
Exhibit 1 - Transmittal Letter		
Exhibit 2 - Executive Summary		
Exhibit 3 - Mandatory Technical Specifications		
Exhibit 4 - Experience		
Exhibit 5 - Personnel		
Exhibit 6 - Implementation Plan		
Exhibit 7 - Consultant Services		
Exhibit 8 - Consulting Strategy		
Exhibit 9 - Deliverables		
Exhibit 10 - Service Options		
Exhibit 11 - Independence and Compliance		
Exhibit 12 - Optional Services		
<b>Public Copy of Technical Proposal</b> with Confidential Information Excised (Optional)		
<b>Cost Proposal</b>		