



STATE OF INDIANA

REQUEST FOR INFORMATION 23-74834

INDIANA DEPARTMENT OF ADMINISTRATION

**ON BEHALF OF THE
Indiana Department of Education**

**SOLICITATION FOR:
Equitable Services Purchasing and
Reimbursement for Title Services**

Response Due Date and Time:

March 21, 2023 @ 3:00 PM ET

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Indiana Department of Administration

Procurement Division

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REQUEST FOR INFORMATION 23-74834

1.1 Introduction

This is a Request for Information (RFI) issued by the Indiana Department of Administration (IDOA) on behalf of the Indiana Department of Education (IDOE) regarding the Equitable Services & Reimbursement.

It is the intent of IDOA to solicit responses to this Request for Information in accordance with the specifications contained in this document and associated attachments. Neither this RFI nor any response (proposal) submitted hereto is to be construed as a legal offer.

THE STATE MAY ELECT TO LIMIT PARTICIPATION IN ANY FUTURE COMPETITIVE SOLICITATION TO VENDORS THAT RESPOND TO THIS RFI.

BACKGROUND AND OBJECTIVE OF THE RFI

The purpose of this product is to provide more technical support to school districts' purchasing and reimbursement for nonpublic schools' Title services. Public school districts operate as financial custodians over nonpublic schools' equitable services programming. To support federal guidelines, we would like to create a system with a third-party vendor to streamline the process. The program will also allow us to monitor and recognize trends with nonpublic schools' services.

The purchasing and reimbursement program in line with Federal guidelines could have the following but not limited by:

- *Establish budget and controls*
 - *Individualized nonpublic budgets reviewed and approved by school district, state educational agency or third-party approved vendor*
 - *Budgets have spending limits*
 - *Nonpublic schools can have multiple allocations to reflect each Title fund*
 - *Trackable affidavits to certify school districts and nonpublic school adhere to federal guidelines*
 - *Title budget categories aligning reimbursements to approvable categories*
 - *Vendors apply and are approved by the state education agency*
 - *Individualized accounts allowing nonpublic and school districts administrators to access their unique budgets*
 - *Public school districts may be custodians to multiple nonpublic schools within their geographical school attendance zones*
- *Manage payments and receipts*
 - *Functions to upload and approve reimbursement documents*
 - *Technical support provided by vendor*
- *Set approval and access reports*
 - *Monthly reports for public districts and nonpublic schools' reimbursements*
 - *Approval and denial notifications for nonpublic budgets*
 - *Create custom queries to see nonpublic school budgets and trends among school districts' nonpublic schools and across the state*

In your response please also provide the following:

1. *Please provide a portfolio of the product solution you propose to solve the problem statement above.*
2. *Elaborate on previous experience working with school districts or state level education agencies.*

3. *Capacity to provide technical support to trouble shoot problems that arise at the local level.*
(School districts/ local administrators)

The goal of this RFI is to gather general functionality and general pricing structures from vendors for the development of a potential Request for Proposal (RFP).

Indiana Department of Education is requesting information to formalize the scope of work for a potential RFP by allowing the vendor community to apprise the IDOE on information that should be considered as part of the scope of work.

RESPONSE FORMAT AND ATTACHMENTS

Respondents should submit responses to the RFI describing how they will meet the specific requirements of this RFI and the deliverables included within. All narrative responses must be provided to the State in Microsoft Word format. Respondents must structure their response according to the sections outlined below to facilitate the State's review of the responses. **THE TOTAL RESPONSE SHOULD NOT BE MORE THAN 15-20 PAGES IN LENGTH NOT INCLUDING THE INDEX OF ATTACHED DOCUMENTS.**

If you would like to provide a response/feedback to this RFI for a potential RFP for IDOE, you must provide your response to State as shown in the RFI Timeline and Response Submission section below.

RFI TIMELINE

The following timeline is only an illustration of this RFI process. The dates associated with each step are not to be considered binding.

Anticipated RFI Dates:

Activity	Date
Issuance of RFI	February 28, 2023
Deadline to Submit Written Questions (3:00PM Eastern Time)	March 7, 2023
Response to Written Questions/RFI Amendments	March 14, 2023
Due Date for Submissions (3:00PM Eastern Time)	March 21, 2023

QUESTION / INQUIRY PROCESS

All questions/inquiries in regards to RFI 23-74834 must be submitted in writing via email using **Attachment A**, Questions and Answers Template, by the deadline of March 7, 2023, **by 3:00PM ET** to rcohen@idoa.in.gov. The email subject line should contain the following phrase:

“REQUEST FOR INFORMATION 23-74834, QUESTION AND INQUIRIES.”

Following the question/inquiry due date, IDOA will compile a list of the questions/inquiries submitted by all Respondents. The responses will be posted to the IDOA website as soon as possible. Only answers posted on the IDOA website will be considered official and valid by the State. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any State employee.

Please note that Robert Cohen (rcohen@idoa.in.gov) is the State's single point of contact for this RFI.

Inquiries are not to be directed to any staff member of IDOE. Such action may disqualify respondent from further consideration in this RFI and any subsequent RFP process.

If it becomes necessary to revise any part of this RFI, or if additional information is necessary for a clearer interpretation of provisions of this RFI prior to the due date for submissions, an addendum will be posted on the IDOA website.

CLARIFICATIONS AND DISCUSSIONS

The State reserves the right to request clarifications on information submitted to the State. The State also reserves the right to conduct discussions, either oral or written, with the Respondents. These discussions could include requests for additional information, requests for cost information or technical requirements response attachment revision, etc. Additionally, in conducting discussions, the State may use information derived from the responses submitted by competing Respondents only if the identity of the Respondent providing the information is not disclosed to others. The State will provide equivalent information to all Respondents which have been chosen for discussions.

The Procurement Division will schedule all discussions. Any information gathered through oral discussions must be confirmed in writing.

CONFIDENTIALITY

It is important to note that all information submitted in Respondent's proposals to this RFI will be kept confidential and will not be made available to the public unless this RFI does not result in the release of a solicitation at a later date. If a solicitation results from this RFI, then the information contained in the proposal submissions for this RFI must be made available to the public once the resulting solicitation has been awarded and the protest period has ended.

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 et seq., and, after award, the entire solicitation file may be viewed and copied by any member of the public, including news agencies and competitors.

Please note citing "Confidential" on an entire section is not sufficient. The Public Access Counselor (PAC) provides guidance on APRA. Respondents are encouraged to read guidance from the PAC on this topic as this is the guidance IDOA follows:

- [18-INF-06; Redaction of Public Procurement Documents Informal Inquiry](#)

Respondents claiming a statutory exception to the APRA must indicate so on a separate attachment labeled "**Confidential Documentation Listing**". That document should include the following information:

- List all documents where claiming a statutory exemption to the APRA;
- Specify which statutory exception of APRA that applies for each document;
- Provide a description explaining the manner in which the statutory exception to the APRA applies for each document.

When claiming confidential information, respondents should submit two versions of their response:

- 1) A confidential version (for the State's review and evaluation)
 - a. Confidential Information must be clearly marked in a separate folder.
- 2) A redacted version (for public records requests)

If the Respondent does not identify the statutory exception, the Procurement Division will not consider the submission confidential. The State also reserves the right to seek the opinion of the PAC for guidance if the State has doubts the cited exception is applicable.

Prices are **NOT** confidential information.

RESPONSE SUBMISSION INSTRUCTIONS

Firms interested in providing information to IDOA should submit responses via email to Robert Cohen at rcohen@idoa.in.gov. All responses must be received no later than **March 21, 2023, by 3:00PM ET**. The subject line of the email submission must clearly state the following:

“RESPONSE TO REQUEST FOR INFORMATION 23-73903”

Templates outlined in this document should be returned in their native file format.

The State accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.