

State of Louisiana

Louisiana Department of Education

**Request for Information (RFI) Related to the Design,
Development & Implementation of an Education
Savings Account Program Management System for
the Louisiana Department of Education, Office of
School Choice (LDOE/OSC)**

June 2024

This Request for Information (RFI) should not be construed as a Request for Proposal (RFP). This is not a solicitation for offers. This RFI will be reviewed and discussed by the Louisiana Department of Education and may be used, in conjunction with information obtained through discussions with potential contractors, as the basis for negotiation of a contract.

Overview

1.0 Purpose of the Request for Information

The State of Louisiana, Louisiana Department of Education, Office of School Choice (LDOE/OSC), collectively referred to throughout this document as “The State,” is seeking information from respondents with the technology that offers or provides a solution to meet the requirements of potential Education Savings Account programs.

2.0 Preferred Vendor Experience

The State is seeking information regarding vendor interest in and ability to provide services as outlined in this Request for Information (RFI). The Agency is seeking information regarding:

- Vendor experience and successes with the design, development, and implementation of Education Savings Account systems or experience with currently operating Education Savings Account systems.
- Vendor experience and successes in administering an Education Savings Account or similar program’s application process.
- Vendor experience and successes in enrolling students into an Education Savings Account or similar program.
- Vendor experience and successes in receiving and accounting funds, verifying expense eligibility, disbursing funds for approved expenses, and auditing expenditures for proper use of funds by parents and families.
- Vendor experience in fraud mitigation/prevention in administration of Education Savings Account or similar programs.
- Vendor experience in creating reports, collecting data, and preparing reports on account funds to meet reporting requirements.
- Vendor experience and successes in training system users.
- Vendor experience and successes in providing Help Desk support.
- Vendor experience and successes for ensuring information/data security posture as it relates to the proposed solution.

3.0 Objectives of the Request for Information

- Understand the level of interest and availability of potential vendors that could provide a system to the State of Louisiana in order to implement and administer an Education Savings Account system.
- Gain a more comprehensive understanding of business models and industry best practices related to Education Savings Account systems.
- Identify issues, roadblocks, and barriers to successful Education Savings Account system implementations.
- Identify possible vendors for consideration for a contract with the State, Department of Education for an electronic system that supports the implementation and management of an Education Savings Account program.

4.0 RFI Coordinator

RFI responses must be directed to the RFI coordinator:

Kaleb Moore
Louisiana Department of Education - Office of School Choice
1201 N 3rd St
Baton Rouge, LA 70802
(225) 362-9867
kaleb.moore@la.gov

All communications relating to this RFI must be directed to the RFI Coordinator named above. All communications between respondents and State staff members, other than the RFI Coordinator, concerning this RFI will be strictly prohibited.

5.0 Schedule of Events

The State reserves the right to revise this Schedule of Events.

Event	Date	Time
Public Notice of RFI	June 20, 2024	4:00 p.m.
Deadline for Receipt of Questions/Inquiries	June 27, 2024	11:59 p.m.
Deadline for State's Response to Questions/Inquiries	July 2, 2024	11:59 p.m.
Deadline for Receipt of RFI Responses	July 8, 2024	11:59 p.m.

6.0 Response Preparation Cost

The State will not pay for the preparation of any information or response submitted in reference to this RFI, nor will it pay for any use of response information. The respondent assumes sole responsibility for any and all costs and incidental expenses associated with the preparation and reproduction of any response submitted in response to this RFI. This includes preparations for discussions.

7.0 RFI Addenda/Cancellation

The State reserves the right to revise any part of the RFI by issuing an addendum to the RFI at any time. Issuance of this RFI, or subsequent addendum (if any), does not constitute a commitment by the State to issue an RFP or any other process resulting in award of a contract of any type or form. In addition, the State may cancel this informal process at any time, without penalty.

8.0 Proprietary and/or Confidential Information

Pursuant to the Louisiana Public Records Act (La. R.S. 44:1 et.seq.), all public proceedings, records, contracts, and other public documents relating to this RFI shall be open to public inspection. Respondents should refer to the Louisiana Public Records Act for further clarification, including protections sought for proprietary and/or trade secret information. Respondents are reminded that any material within a response to this RFI identified as confidential or proprietary must be clearly marked. Any response marked as confidential or proprietary in its entirety may be rejected without further consideration or recourse.

9.0 Written Inquiry/Response Process

Respondents may submit written inquiries to the RFI Coordinator via JOT form according to the Schedule of Events herein. The State shall provide responses to all written inquiries, according to the Schedule of Events, in the form of an RFI addendum, posted to LaPAC at <https://wwwcfprd.doa.louisiana.gov/osp/lapac/pubMain.cfm>.

10.0 Response Submission

All responses should be received by the due date and time indicated on the Schedule of Events. Responses received after the due date and time might not be considered. It is the sole responsibility of each respondent to assure that its response is delivered at the specified location prior to the deadline. Responses which, for any reason, are not so delivered might not be considered.

Electronic submissions may be made using the Dropbox File Request system via the following link. Electronically submitted responses should be in Microsoft Word and/or PDF format.

Submission Link: <https://form.jotform.com/241687372166161>

No hard copy submissions will be accepted.

No submissions will be accepted via email.

11.0 Ownership of Response

All responses become the property of the State and will not be returned to the respondent. The State retains the right to use any and all ideas or adaptations of ideas contained in any response received in response to this RFI.

12.0 Format of Response

All responses shall be submitted in digital format (PDF or Word is preferred), not to exceed 100 pages, in 10pt. Font or larger according to the following outline:

- **Corporate Background and Experience**

Respondents shall provide a brief description of the company, including a brief history, corporate structure, and organization and the number of years in business.

- **Business Model for Contracting of Services**

Respondent shall describe its approach to a contract for its services should it be awarded a contract and include cost information in its response. The structure of billing should be described including information such as on a per student account basis, percentage of awards, or similar. If the Respondent sells its services via the NASPO contract that should be noted.

- **Approach and Methodology**

Respondent shall describe its proposed solution for delivery of services. Include all information in response to the Preferred Vendor Experience section (page 3 of 11) and the Scope of Services sections (page 8 of 11 - page 11 of 11).

- **Implementation Timeframe of Solution**

Respondents shall indicate the minimum time frame from contract execution for full implementation of its solution, inclusive of equipment acquisition, configuration, and testing.

- **Security**

Respondent shall provide either a Soc2 Type2 report or a completed [Third-Party Information Security Questionnaire](#) per the Scope of Work 6.0 Security section. This section can be submitted in excess of the 100 pages noted for the response.

13.0 Optional Discussion

To solicit feedback and ask follow-up questions based upon vendor RFI responses, the State reserves the right at its sole discretion to conduct a structured Discussion for respondents to this RFI only. If the Discussions are scheduled to take place, the discussion session will begin with a presentation by the State. Following the presentation, State representatives and the vendor community will participate in a structured question and answer session. An agenda, specific questions and other expected topics for discussion will be e-mailed prior to the discussion.

Scope of Services

1.0 Background

The mission of the LDOE is to give all children the opportunities and tools they deserve so they are prepared to graduate high school ready for success in a career, college, or service. The LDOE believes that every child can reach their potential, no matter where they're from, how much money their family makes, or where they live.

The LDOE/OSC is responsible for ensuring that families are empowered to make school choices that are most likely to enable their child to thrive. As such, it services a broad range of families and education providers. In preparation for the implementation of the Education Savings Account program approved by the Louisiana Legislature and Governor this year, the LDOE/OSC desires to seek information regarding potential vendors for a program management system commensurate with the above-mentioned goals and responsibilities. The LDOE envisions a system capable of handling the demands of a large-scale government education program and student account management entity.

The respondent is encouraged to provide detail and invited to suggest and comment on any other related issues not specifically outlined below.

2.0 Program Management System Design, Development, and Implementation

Respondents should describe their approach to the design, development, and implementation of a program management system which will be used to administer a statewide Education Savings Account program in Louisiana. The program management system should provide a user-friendly interface to prospective Education Savings Account families, participating Education Savings Account families, prospective education service providers, participating education service providers, and LDOE administrators. Responsibilities of the contracted program administrator may include:

- Determining student/family eligibility;
- Processing student/family applications;
- Determining education service provider eligibility;
- Processing education service provider applications;
- Marketing the program;
- Implementing an online Education Savings Account platform that is fully operational to begin enrollments on March 1, 2025;
- Providing training and technical assistance to users (e.g., parents, education service providers, LDOE administrators);
- Creating and updating internal dashboards of program information for LDOE administrators;
- Providing and managing the financial platform including the receipt, payment and reconciliation of funds;
- Verifying allowability of proposed account purchases;
- Monitoring and reporting on compliance of service providers with Louisiana statute and BESE policy governing the Education Savings Account program;
- Collecting program metrics and accounting information;
- Reporting on program metrics and accounting of funds; and
- Auditing of expended funds by individual student accounts for allowability of uses.

3.0 Prioritizing Program Usability

Respondents shall describe how their solution prioritizes usability for families, education service providers, and LDOE administrators. The following elements may be included in the platform to address this priority:

- Accessible on a variety of devices including mobile devices;

- Easy-to-access on demand customer service and technical support within certain working hours;
- Language accessibility to meet state population needs;
- Simple and intuitive user interface that clearly signals the status of applications and payment;
- Dashboards (e.g. fund balances, applications) that are customizable by the user (e.g., LDOE administrators, education service providers, families); and
- Allocation and payment transaction automation and tracking through the platform.

4.0 User Training

Respondents should describe how they will perform multi-level training of LDOE administrators, prospective Education Savings Account families, and prospective Education Savings Account education service providers.

Respondents should also describe how their system is designed so that most prospective Education Savings Account families are able to access and use the system without support or training.

5.0 Maintenance & Operations

Respondents should describe how they will support an ongoing help desk for LDOE administrators, Education Savings Account families, and education service providers. Respondents should also describe their approach to providing maintenance and operations of the Program Management System throughout the ongoing implementation of the Education Savings Account program.

6.0 Data Security

The LDOE seeks to ensure that the personal information of students, families, and providers is housed and managed in the most secure manner possible. Respondents should describe how they ensure the security of all data, both at rest and in transit, relevant to the program. Respondents will be required to meet the State's [Information Security Policy](#). If the Respondent has a Soc2 Type2 security report, the Respondent should note or include a copy of the report with their response. If the Respondent needs the State to sign an NDA to share the SOC2Type2 report, please include the NDA with their response. If the Respondent does not have a Soc2 Type2, the respondent should complete the State's [Third-Party Information Security](#)

Questionnaire. The questionnaire or report will allow the State to determine if the proposed solution meets minimum security standards for solutions being purchased by the State.

In addition, if the Respondent is using any third-party vendors who will have access to Personally Identifiable Information, the third-party vendors must also meet all Data Security Requirements in section 6.0.