Soliciting Strong Proposals for an Online Application for Free or Reduced-Price School Meals

A well-designed online application can help school districts increase participation in school meal programs by simplifying the application process for district staff and families alike. It can also streamline program operations and strengthen program integrity. States and school districts will likely use their formal procurement process to select contractors or vendors to fulfill some or all of their school meal program needs.

The *Online Applications Guide — A Practical Guide for Selecting an Online Application for Free or Reduced-Price School Meals* is intended to help states and school districts produce Requests for Proposals (RFPs) that enable effective decision-making and yield high-quality contracts.

A strong RFP is key to successful procurement. An RFP will describe the scope of the work requested in the procurement of an online application. The scope of work will be unique to each district, depending in large part on their decisions regarding considerations raised in the Guide.

This RFP checklist is designed to help state and school district administrators determine their priorities and ensure that those priorities are included in their RFPs. The items in the checklist address specifications — the usability features, the functionality and programming of the tool, and conformity with legal requirements — to help administrators procure an online school meals application tool that will work well for staff and families alike. To the extent that a particular feature is not immediately feasible, the RFP can signal an interest in adding the feature in the future. (Note that some items appear more than once when they are relevant to multiple sections.) The Appendix of the Guide includes examples of how school districts have incorporated online application specifications into their RFPs.

Each state or school district can review the checklist below, make decisions about their priorities, and then work with their procurement teams to incorporate any or all of the items from the check list into their RFP specification language. They can incorporate the RFP specifications into the body of the RFP itself or as an appendix, clearly identifying those features from the RFP checklist that would like in their state or district's online application tool.

RFP Checklist (example)

Specifications	Yes	No	Notes
General			
Reflects recommendations in FNS' prototype (forthcoming)	Y	N	
Integrates with other school nutrition systems/software currently in use	Y	N	
Efficiency and Accuracy			
Calculates household income	Y	N	
Generates notices related to eligibility	Y	N	
Communicates eligibility status to other systems	Y	N	
Produces customized lists of applications by building, eligibility, or other factors	Y	N	
Identifies students who elect to have information shared with other programs	Y	N	
Automatically carries over eligibility from the prior year	Y	N	
Pre-populates applications for the new school year	Y	N	
Generates letters to those directly certified	Y	N	
Allows staff to export data to student information system	Y	N	
Allows for case management	Y	N	
Records and tracks changes	Y	N	
Scans paper applications and integrates data	Y	N	

Specifications	Yes	No	Notes
Household Communications			
Alerts families of application status	Y	N	
Generates customized household letters in multiple languages based on the household language of choice	Y	N	
Informs families about summer meal options at the end of the school year	Y	N	
Data Reporting and Analysis			
Generates reports that fulfill FNS requirements (such as the Verification Collection Report, form FNS-742)	Y	N	
Tracks history of incomplete or denied applications, including reasons	Y	N	
Stores archived applications	Y	N	
Integrates analytic tools	Y	N	
Management and Adaptation Over Time			
Customizable to add graphics, language, content, or links to applications or notices	Y	N	
Updated annually to reflect current eligibility standards	Y	N	
Updated as needed to incorporate rule changes	Y	N	
Maintained, supported, and improved by vendor	Y	N	
District staff are able to edit and control the data and ensure information is kept secure	Y	N	
Data will be available to appropriate staff in a timely manner	Y	N	
Usability Testing, Data Monitoring, and Feedback			
Worked with families to consider usability during the design and development stage	Y	N	

Specifications	Yes	No	Notes
Tested tool with families	Y	N	
Collects performance data and reports it to district	Y	N	
Offers a customer survey, comment, or complaint feature	Y	N	
Monitors consumer feedback and follows up	Y	N	
Household Simplifications			
Uses answers to initial questions to pre-populate later questions	Y	N	
Programmed for dynamic questioning, skip patterns/skip logic	Y	N	
Marks and treats "required" and "optional" questions differently	Y	N	
Asks simple income questions that don't require families to do math	Y	N	
Clearly explains who counts as a household member and which sources of income to list	Y	N	
Automatically checks for errors and prompts families to correct them	Y	N	
Auto-completes city and state based on zip code and checks if the address is within the school district	Y	N	
Includes error checks and flags applications likely to include errors before submission	Y	N	
Accepts information for all children in the household	Y	N	
Flags children from the same household who attend school in different districts	Y	N	
Exports data to be shared with other school districts	Y	N	

Specifications	Yes	No	Notes
Includes links to the applications of other school districts in the state	Y	N	
Allows families to fill out a single application for all children in the household regardless of where they attend school	Y	N	
Allows communication between districts to transfer eligibility mid-year	Y	N	
Compatibility			
Reformats to fit a smaller smartphone or tablet screen through responsive design	Y	N	
Features work on a touch screen	Y	N	
Offers a mobile app with all the features of the website	Y	N	
Mobile app offers additional features, such as uploading photos of relevant	Y	N	
Mobile app can be used without an active Internet connection	Y	N	
Offers privacy and security features unique to a mobile app	Y	N	
Works on programs that are typically available on public computers	Y	N	
Compliance			
Accurately addresses all rules of the school meal programs	Y	N	
Ensures continued benefits when a student moves to another school within the district	Y	N	
Ensures consistent results for all children in the same household	Y	N	
Provides categorical eligibility for students who qualify	Y	N	
Compiles data to meet FNS reporting requirements	Y	N	

Specifications	Yes	No	Notes
Generates data and records for administrative reviews	Y	N	
Ensures student confidentiality	Y	N	
Selects applications for verification	Y	N	
Readable for parents with limited literacy	Y	N	
Adapts the application for users needing additional services, such as audio voice-overs or large fonts	Y	N	
Meets software and website requirements under Section 508 of the Americans with Disabilities Act (ADA)	Y	N	
Offers the online application in languages other than English and provides links to USDA translations for other languages	Y	N	
Includes mechanisms to protect families' information entered online	Y	N	
Meets privacy and security requirements under local, state, and federal laws	Y	N	
Allows staff to see only the data they need to see ("role-based access")	Y	N	
Audits and monitors for unauthorized access and disclosure	Y	N	
Provides security protocols to protect against cyber-threats and accidental breaches	Y	N	
Describes the privacy policies, including providing clear language about how the information families enter will be used; how it will be protected from improper access, use, and disclosure; and families' privacy options	Y	N	
Refrains from requiring families to waive any privacy or other rights	Y	N	

Specifications	Yes	No	Notes
Direct Certification			
Extends direct certification to additional children in the household of a student directly certified based on SNAP or TANF data	Y	N	
Matches applicants against the direct certification list	Y	N	
Matches applicants against data from other programs	Y	N	
Helps families find case numbers or other information from programs that confer categorical eligibility	Y	N	
Verification			
Selects verification sample consistent with FNS rules	Y	N	
Generates verification notices	Y	N	
Maintains the verification history	Y	N	
Adjusts eligibility based on verification results	Y	N	
Allows uploads of documents	Y	N	
Matches data from applications selected for verification against data from other programs and directly verifies them if possible	Y	N	
Accessibility			
Clear and simple design	Y	N	
Good visual cues	Y	N	
Strong graphics, visually inviting	Y	N	
Welcoming and/or personalized language	Y	N	

Specifications	Yes	No	Notes
Text that addresses the needs of all different kinds of families	Y	N	
Audio voice-overs for Limited English Proficient (LEP) and visually impaired users	Y	N	
Text and functions that are compliant with ADA requirements	Y	N	
Information about alternative ways to apply	Y	N	
Ease of Use			
Introductory text, including a list of documents or information applicants will need to complete the application	Y	N	
Video with instructions	Y	N	
Visual aids	Y	N	
Clear directions	Y	N	
Navigation cues, user prompts, and/or a progress bar	Y	N	
Help text, pop-up features, FAQs, definitions/glossary, and/or tool tips	Y	N	
Explanatory text to cue or guide the user	Y	N	
Hyperlinks to further information	Y	N	
Readability level no higher than 6th grade	Y	N	
Only a few questions per page	Y	N	
Contact information for help	Y	N	

Specifications	Yes	No	Notes
Flexibility			
Applicant can go back to a previous screen without losing information	Y	N	
Saves an incomplete application	Y	N	
Provides summary to family for review and editing	Y	N	
Applicant can print or save a completed application	Y	N	
Provides an automatic confirmation upon submission	Y	N	
Applicant can check the status of the application	Y	N	
Applicant can set up an online account to reapply, see status, view communications, etc.	Y	N	
Applicant can upload documents if selected for verification	Y	N	
Applicant can submit updated information throughout the year	Y	N	
Pre-populates an application the following year	Y	N	

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