COMMONWEALTH OF PENNSYLVANIA

DEPARTMENT OF EDUCATION

Request for Information

Buy American – Invoice Tracking Solution

Background.

The USDA Buy American provision requires School Food Authorities (SFAs) to purchase domestically grown and processed foods to the maximum extent practicable for all federally-funded USDA Child Nutrition Programs. Historically, when a non-domestic food item is purchased, the SFA must document the specific, allowable exception that justifies the purchase.

Effective the 2025-26 SY, SFAs must track the total cost from non-domestic program food purchases as a percentage of total food program purchases. The current USDA-suggested process for tracking compliance and exceptions is largely manual, relying on SFA staff to physically review invoices, identify non-domestic program food products, and calculate costs using USDA's [Buy American Exceptions Tracking Standard Form Template](#) or similar. This process is time-consuming, prone to error, and presents challenges for generating timely reports for audits and administrative reviews.

We are seeking viable solutions to make available to SFAs to streamline this workflow, improve accuracy, and create a robust, auditable record of SFA procurement practices.

Summary.

The Commonwealth of Pennsylvania, Department of Education, Bureau of Food and Nutrition (BFN), issues this Request for Information (RFI) to gather information on software solutions available at the SFA level that will assist SFAs with capturing data from invoices for purposes of populating USDA's [Buy American Exceptions Tracking Standard Form Template](#) or similar and performing extended calculations to assess for USDA Buy American compliance.

BFN is seeking information on available software solutions designed to automate the capture of data that is available on food purchase invoices. The primary goal of this initiative is to provide SFAs with suggested solutions that will allow them to efficiently capture data from food invoices and populate it to USDA's [Buy American Exceptions Tracking Standard Form Template](#) or similar while minimizing manual data entry to only data that is not captured on food invoices.

This RFI is issued to understand the landscape of available technologies available to SFAs, potential costs, and implementation approaches for local non-enterprise licenses. Responses will be used for

informational and planning purposes and do not constitute a commitment to procure any products or services.

The purpose of this RFI is to:

- Assess the current market of available software tools and vendors.

- Compile a resource list of solutions that can be provided to SFAs for their consideration that may aid in their documentation efforts.

Issues to Be Addressed.

The Commonwealth is requesting feedback from firms with expertise in Food Service Invoice and Tracking Solutions, as set forth below:

1) Include a cover letter with the RFI response on Company Letterhead, which includes a point of contact name, phone number, and email address.

2) Complete Attachment A, Buy American – Invoice and Tracking Solution Questionnaire. Please respond to the questions in the questionnaire and limit the responses to these questions only.

3) Complete Attachment B, Trade Secret/Confidential Proprietary Notice.

Point of Contact:

The sole point of contact for this RFI shall be

Due Date.

The Commonwealth is requesting that all responses to this RFI be submitted via email to

by   on

with the subject line of   .

Disclaimer.

This RFI is issued solely for information and planning purposes only and does not constitute a solicitation for future business, an offer for procurement, or any other type of current or future procurement or contractual action and is only intended to gather available options. The Commonwealth will not award a contract based on this RFI nor will it pay for information it receives. Responses to this notice are not offers and cannot be accepted by the Commonwealth to form a binding contract. No party is bound by the information provided in response to this RFI. Viable options obtained from this RFI will be compiled and made available to SFAs, in the form of a matrix, for their information, use, and potential local-level purchase.

Respondents are solely responsible for all expenses associated with responding to this RFI. The Commonwealth of Pennsylvania is not liable for any costs or expenses incurred by the Respondent in the preparation of its responses.

All material submitted shall be considered the property of the Commonwealth of Pennsylvania and may be returned only at the Commonwealth's option. Notwithstanding any Respondents copyright designations contained on responses, the Commonwealth shall have the right to make copies and distribute responses internally and to comply with public record or other disclosure requirements under the provisions of any Commonwealth or United States statute or regulation, or rule or order of any court of competent jurisdiction.

Respondents to this Request shall not provide recommendations as to specific courses of action and shall not be deemed to be an advisor or consultant to the Commonwealth. The Commonwealth will evaluate the information presented and determine any subsequent course of action, which may consist of contracting for the implementation of Commonwealth-determined work. Viable options obtained from this RFI will be compiled and made publicly available to SFAs, in the form of a matrix, for their information, use, and potential local-level purchase.

Such work may be procured through any available procurement method, and respondents to this Request may be considered for selection to perform it.

Responses to this RFI will not be returned. Respondents will not be notified of the review's outcome, nor will they be provided with copies of it.

Contents of Response.

A.   Confidential Information. The Commonwealth is not requesting, and does not require, confidential proprietary information or trade secrets to be included as part of the Respondents' response. Except as provided, Respondents should not label responses as confidential or proprietary or trade secret protected. A Respondent who determines that it must divulge such information must submit the completed Attachment B, Trade Secret/Confidential Proprietary Notice, and must additionally provide a redacted version of its response, which removes only the confidential proprietary information and trade secrets.

B.   Commonwealth Use. All material submitted with the response will be the property of the Commonwealth and may be returned only at the Department's option. The Commonwealth has the right to use any or all ideas not protected by intellectual property rights that are presented in any response. Notwithstanding any Respondent copyright designations contained on responses, the Commonwealth will have the right to make copies and distribute responses internally and to comply with public record or other disclosure requirements under the provisions of any Commonwealth or United States statute or regulation, or rule or order of any court of competent jurisdiction.

C.   Public Disclosure. All responses are subject to disclosure in response to a request for public records made under the Pennsylvania Right-to-Know Law, 65 P.S. § 67.101, et seq. If a response contains confidential proprietary information or trade secrets, a signed written statement to this effect must be

provided with the submission in accordance with 65 P.S. § 67.707(b) for the information to be considered exempt under 65 P.S. § 67.708(b)(11) from public records requests. Refer to Attachment 2, Trade Secret/Confidential Proprietary Information Notice that may be utilized as the signed written statement. If Attachment 2, Trade Secret/Confidential Proprietary Information, is not completed, any trade secret or confidential/proprietary information contained in the Respondents' response to this RFI may be released in response to a Pennsylvania Right-to-Know Law request.

Commonwealth Reservation of Rights.

The Commonwealth reserves the right to consider or reject any and all responses to this Request, to amend and/or reissue this Request and to abandon and then recommence at any time, or not recommence, this process. All costs of any response to this Request and participation in any presentations to the Commonwealth are solely the responsibility of the Respondent and the Commonwealth shall not be liable for payment of any such costs.

REQUEST FOR INFORMATION

ATTACHMENT A

BUY AMERICAN INVOICE TRACKING SOLUTION QUESTIONNAIRE

1. **Company Overview -** A brief description of your company and its experience providing similar solutions:

2. **Solution Description -** A detailed description of your proposed software. Please explain how your product meets each of the functional requirements outlined in the summary:

3. **Technical Details -** Information on the solution's architecture (e.g., cloud-based SaaS, on-premises installation), required desktop operating systems (if applicable), integration capabilities (e.g., APIs for connecting to accounting software), and data security protocols:

4. **Invoice and Data Capture Details:** A detailed description of functionality for each item.

   - **Automated Data Extraction:** Ability to scan paper invoices or process digital invoices (e.g., PDF, JPG) using Optical Character Recognition (OCR) technology:

   - **Key Field Recognition:** The system must accurately extract, at a minimum, the following data fields from an invoice:

     1. Vendor Name:

     2. Invoice Number:

     3. Invoice Date:

     4. Line Item Details: Including Product Description, Unit, Quantity, Unit Price, and Total Price.

   - **Country of Origin Identification:** The ability to identify and flag line items that are listed as non-domestic products based on information on the invoice (if available).

   - **Data Export Capabilities:** The solution must provide a robust data capture and export function allowing users to capture and extract invoice data for external reporting, auditing, and analysis. Check all that apply:
   ☐ **Exportable Fields:** The ability to recognize available fields from a variety of invoices, capture all key data fields, and export to USDA's Buy American Exceptions Tracking Standard Form Template or similar in the appropriate column, including:

     ☐ SFA Name

☐ Invoice Number

☐ Invoice Date

☐ Source (vendor)

☐ Product Description

☐ Domestic or Non-Domestic (if available on invoice)

☐ Unit

☐ Price per Unit

☐ Number of Units

☐ Total

Note: It is the responsibility of the SFA to extract and complete fields not included in this list (i.e., component and exceptions).

☐ **Standard File Formats:** The system must support exporting data into standard, non-proprietary formats, including at a minimum:

☐ Microsoft Excel (.xlsx)

☐ Comma-separated values (.csv)

☐ Other:

☐ **Implementation and Support:** Select support is available to the customer (check all that apply):

☐ **Implementation:** Provides product implementation and onboarding support.

☐ **Training:** Provides user training.

☐ **Support:** Provides post-implementation support.

5. **Pricing Model:** A brief explanation of your pricing structure (check all that apply):

☐ One-Time License $

☐ Annual Subscription $

☐ Monthly Subscription $

☐ Other: $

6. **Use Cases:** Provide two (2) examples of how other clients, particularly school districts, government entities, or food service organizations, have used your solution to solve similar compliance tracking challenges.

    1.

    2.