

Scholar Academy
Request for Proposal

Education Service Provider Services

Selection I

Selection Schedule

Advertisement of Bid Proposal: March 20, 2024- April 3, 2024, published on School's website: www.scholarcharter.org

Submission of Proposal (Deadline): 5:00 pm on April 9, 2024 to Traelle Gailey at the school's address or tgailey@scholarcharter.org. Proposals must comply with Section IV of this RFP.

Proposal Opening: 9:00 am on April 10, 2023, to Traelle Gailey at the school address 928 N. 100 E. Tooele, Utah

Review of Submitted Proposal: April 10, 2024

Recommendation to Board of Directors: April Board of Directors meeting,
Date TBD

Tentative Contract Award Date: May 1, 2024

Contract Duration: 10 years

Offer to Begin Service: July 1, 2024

Section II

Introduction:

A. Scholar Academy is requesting proposals for a public charter school Education Service Provider. (ESP)

B. Scholar Academy (SA), a local charter school committed to providing quality education to the community, is seeking proposals from qualified and experienced business management companies to provide comprehensive business management services. The selected firm will be responsible for assisting in financial planning, budgeting, accounting, procurement, and other related services to ensure the efficient and effective operation of our school.

C. DISCLAIMER & ACKNOWLEDGEMENT. Authorization to continue operating Scholar Academy as a Utah public charter school is expressly contingent on SA's charter not being terminated by the Utah State Board of Education. SA reserves the right to cancel any and all ESP service agreements executed pursuant to this RFP in the event the School's charter is terminated for any reason. All offerors must agree to the cancellation of said agreements and to hold SA, its directors, officers, employees, and agents harmless for any loss of potential profits and costs/expenses incurred in the event the School's charter is terminated for any reason. Submission of an ESP proposal in response to this RFP shall be deemed an acknowledgment and consent by the offeror to the cancellation provisions contained in this paragraph.

D. TERM OF CONTRACT. In the interest of maintaining continued services, SA will award the contract for ESP services for a period up to, but not to exceed, ten (10) years, beginning June 1, 2024. The contract entered into by SA's Board of Directors for ESP services shall be in writing and shall incorporate the above-mentioned "Disclaimer & Acknowledgment."

E. AWARD OF CONTRACT. The contract will be awarded to the offeror whose proposal is determined to be the most advantageous to SA, taking into consideration the price and the evaluation factors set forth in this RFP. No other factors or criteria will be used in the evaluation. Due to recent changes to the Utah Procurement Code, the cost is evaluated independently of the substantive evaluation factors. The final determination shall be in writing and shall be determined at the sole discretion of SA's Board of Directors. The contract file will contain the basis on which the award is made. SA can reject all proposals, and it can waive any informality or technicality in any submission received if SA's Board of Directors determines it would serve the best interests of SA. SA will open proposals publicly, identifying only the names of the offerors. Following the award decision, all proposals become public information.

Section III

Proposal Information

- A. Proposals must be submitted in compliance with Section IV of this RFP
- B. The services required and offered in a proposal should meet the needs described below. Only one proposal from each offeror may be submitted and considered. Offerors may include any special or unique services they plan to provide.
- C. Submission of a proposal will be construed to mean that the offeror understands the requirements contained herein, and the offeror can supply the described services for the fee contained in their submitted proposal.
- D. Proposals will be opened publicly at Scholar Academy at 8:30 AM, April 10, 2024, at Scholar Academy 928 N 100 E, Tooele, UT 84074. Proposals will be opened to avoid disclosure of contents to competing offerors during the process of negotiation. However, a register of proposals will be prepared and shall be open for public inspection after the contract is awarded. The School will cooperate with all potential offerors, to the extent reasonably possible, in their attempt to obtain information. Discussions may be conducted with offerors who submit proposals for the purpose of assuring full understanding of, and responsiveness to, the solicitation requirements.
- E. If selected by the Scholar Academy Board of Directors, the successful offeror must be prepared to execute a written education services provider agreement containing the services, terms, and conditions outlined in the successful proposal.
- F. It is understood that SA's issuance of this RFP does not obligate SA to accept any of the proposals submitted in response to this RFP, nor does it guarantee

that SA will accept any of the said proposals. To the extent permitted by law, SA's Board of Directors reserves the right to accept or reject any or all proposals and/or to waive any or all formalities in any proposal or in the proposal process deemed to be in the best interest of SA. No agreement exists between SA and any offeror until a written contract is approved and executed by SA's Board of Directors and the offeror.

- G. Proposals received by telephone, fax, mail, or any other unapproved form are not acceptable and will not be considered. Proposals must be submitted by email in accordance with Section IV.
- H. This RFP does not oblige SA to pay for any costs that may be incurred by an offeror/respondent or any third parties in connection with a proposal. All proposals, responses, and supporting documentation shall become the property of SA. Further, SA shall not be liable to any offeror, person, or entity for any losses, expenses, costs, claims, or damages arising from, because of, or attributable to, the offeror responding to the RFP.
- I. At any time during the evaluation process, the evaluation committee may, with appropriate approval, request the best and final offers, as provided for in Utah Code § 63G-6a-707.5, from responsible offerors who submit responsive proposals that meet any minimum qualifications, evaluation criteria, or score thresholds identified in this RFP.

Section IV

Proposal Requirements

Potential offerors are hereby invited to submit a proposal for Education Service Provider services for Scholar Academy Charter School.

- A. It is mandatory that each proposal contain a cover letter that includes the following:
1. A statement of the offeror's intent to provide the services outlined in the proposal;
 2. The legal company name;
 3. Complete company address;
 4. Company contact person's name, phone number, and email address;
 5. Company's website address;
 6. The signature of the company's authorized representative, including position/title; and
 7. The date of submission.

B. Proposals must address the Proposal Specifications set forth in Section V.

C. Proposals must be emailed to Traelle Gailey at the school address or

tgailey@scholarcharter.org, on or before April 9, 2023 at 5 PM.

PROPOSALS MUST BE IN PDF FORMAT AND SEPARATED BY COST AND NON-COST RELATED INFORMATION. ALL COST INFORMATION PROVIDED BY THE OFFEROR MUST BE CONTAINED IN A SEPARATE PDF FILE(S) AND CLEARLY IDENTIFIED AS COST INFORMATION. NO COST INFORMATION MAY BE SUBMITTED IN THE SAME PDF FILE AS THE REST OF THE PROPOSAL. The phrase "PROPOSAL FOR EDUCATION SERVICE PROVIDER SERVICES" must be included in the subject line of the email.

D. Proposals must be signed by the offeror.

Section V

Proposal Specifications

- A. The ESP will be expected to act as an independent contractor in the delivery of educational support services.
- B. SA is seeking comprehensive educational support services, also known as charter school management services, to begin in July 2024 with the intent of utilizing the successful offeror's expertise in the effective planning, implementation, and delivery of its educational program. The successful offeror must have expertise and experience in applicable state and federal legislation regarding the operation of Utah charter schools. Each offeror must provide a response in their proposal, in narrative format, to each of the following management components:
 - 1. ESP Experience, Qualifications, and Track Record. Provide a narrative demonstrating a proven and successful track record for providing educational support services to public charter schools. Preference may be given to offerors who demonstrate a successful operating history with Utah-based charter schools. Evidence of success must:
 - a. Include a list of all client charter schools, indicate the duration of your contractual relationship with each client school, and provide contact information for the charter school's current board president and principal. Note: SA reserves the right to contact the individuals listed herein. If you do not desire SA to contact any individual, please indicate it and provide an explanation.
 - b. Include a list of all management-level personnel and a description of their qualifications and experience. Also, include a summary of other personnel and their qualifications and experience.
 - c. Include a list of any litigation, arbitration or other alternative dispute resolution the ESP, or any individual or affiliate of the ESP, has had with a charter school client within the past

ten years, as well as a brief explanation of each matter to the extent such information is publicly available.

- d. Include a list of any charter school client of the ESP that has been formally put on probation (pursuant to Utah Rule 277-481-3, or previous applicable Utah Rule) or had their charter terminated by the Utah State Charter School Board in the last ten years. If applicable, please describe why the School was placed on probation and indicate whether the client is still on probation.

2. Scope of Offered Services. Provide a list and brief description of education services / management services offered in this proposal. Describe which, if any of these services relieve school staff and administration from duties they would otherwise be required to perform internally. Additionally, please provide specific responses to the following management elements:

- a. Detail the experience, expertise, and services offered regarding the coordination of required start-up activities e.g. completion and filing of state corporate documents, assistance with IRS Form 1023 Application for Recognition of Exemption Under Section 501(c)3, submission of the Utah Registration for Exemption from Corporate Franchise or Income Tax, marketing, and staff recruitment.
- b. Detail your expertise and services offered, if any, regarding the process of identifying and addressing a new charter school's facility needs.
- c. Detail your expertise and services, if any, regarding legal services to Scholar Academy.
- d. Detail your experience, expertise, and services offered regarding charter school human resources needs. This may include advertising for teaching/administrative positions, candidate screening, and interviewing, as well as assistance with employment agreements, employee evaluations, and

employee termination. Include in this section the ESP's experience and services to train school board members and directors.

- e. Detail the services offered, if any, regarding the scheduling, record keeping, coordination, involvement, and attendance at regular and special meetings of the Board of Directors.
- f. SA recognizes the need to properly maintain and safeguard school records. Detail the services offered, if any, regarding the maintenance of school records. In this section differentiate employee versus student records.
- g. The successful offeror will be charged with managing the financial affairs of SA in cooperation with the SA Director. Detail your experience and related expertise as it relates to the preparation of annual budgets, financial forecasts, and strategic financial plans for the board's review, input, and approval. In addition, describe any expertise and experience in maintaining appropriate financial documentation, instituting proper internal controls, and providing financial audit support.
- h. Detail the services offered, if any, regarding SAs accounts receivable, accounts payable, maintenance of school financial records, and other bookkeeping duties.
- i. Detail the services offered, if any, regarding assistance with solicitation and monitoring of major grants available to SA.
- j. Detail the services offered, if any, to train and assist schools in the lottery system, state SIS system and Utah student data collection system.
- k. Detail the services offered, if any, regarding assistance with preparation of reports required by SAs authorizer or the Utah State Office of Education.
- l. Describe the services offered, if any, regarding assistance with the identification of curricula that support the mission of SA.
- m. Provide a summary of any additional services offered as part

of your proposal and not listed above

3. Compensation – Cost Formula. ALL COST INFORMATION PROVIDED BY THE OFFEROR MUST BE SUBMITTED IN A SEPARATE PDF FILE(S) AND CLEARLY IDENTIFIED AS COST INFORMATION. NO COST INFORMATION MAY BE SUBMITTED WITH THE REST OF THE PROPOSAL. Provide the fee to be charged for the services contained in your proposal as outlined below. Regardless of whether your fees are based on a flat or per-pupil rate, please compute and provide your fees as follows:
- n. Provide the total fee for a projected enrollment of ~1,000 students in grades K-8.
 - i. Indicate whether your fee is based on a flat or per-pupil rate and explain relevant factors in your fee computation that could modify the proposed fee; and
 - ii. Identify potential or applicable discounts.
 - o. Divide your proposed fee by the projected enrollment of 1,000 for per-pupil cost (“Proposed Fee” ÷ 1,000 = Per-Pupil Cost).
3. Selection and Scoring. Selection of the Education Service Provider will be based on the responses to the above-listed management components in relation to the Evaluation Criteria set forth in the following section. The successful proposal will demonstrate a complete understanding of each of the service items, as well as a description of how the service items will be accomplished. The Evaluation Criteria contain a numerical score for each of the scored management components, and proposals will be ranked based on their score.

Section VI

Evaluation Criteria

Criteria Unrelated to Cost

A. Offeror's Experience and Qualifications (20 points): This criterion is based on the responsiveness to the questions contained in Section V(B)(1) and (1)(a)-(b).

1. This criterion involves the overall depth and quality of the offeror's experience demonstrated by overall years of experience in management, the number of client schools, the length of contractual relationships, and the financial stability of client schools. (10 points)

2. This criterion involves the demonstrated qualifications of the offeror's personnel. (10 points)

B. Scope of Services (30 points total):

1. General and Business Services (10 points). This criterion is based on the responsiveness to the questions contained in Section V(B)(2)(a)-(c).

2. Financial Support & Services (10 points). This criterion is based on the responsiveness to the questions contained in Section V(B)(2)(d)-(e).

3. School Support (10 points). This criterion is based on the responsiveness to the questions contained in Section V(B)(2) and Section V(B)(2)(f)-(j).

C. Quality of References: (10 points): This criterion is based on the information obtained regarding the quality of the offeror's services from the references provided. Information obtained from references that are Utah charter schools currently working with the offeror will be weighted more heavily.

D. RFP Proposal Specifications Compliance (10 points): This criterion is based on how well the offeror complied with the RFP requirements and provided a detailed response to each item contained in the Proposal Specifications. Criteria Related to Cost*

E. Cost (30 points): This criterion is based on the fee proposed in Section V(B)(3) and other financial analysis (example: Section V(B)(4)) as deemed necessary in light of the proposed scope of service.

Total points available based on Evaluation Criteria: 100 points

* NOTE: Cost is evaluated and scored independently from the substantive evaluation factors