

PRIMAVERA TECHNICAL LEARNING CENTER, INC.  
 REQUEST FOR PROPOSAL #1920  
**EDUCATION SERVICE PROVIDER**

**SECTION 1**

**OVERVIEW**

Primavera Technical Learning Center, Inc. (“PTLC”), will operate a charter school on behalf of Valor Preparatory Academy, LLC (“VPA” or the “School”) which has been recently granted a charter by the Arizona State Board for Charter Schools (“ASBCS”) to open in the 2019-2020 school year. VPA will serve grades 7<sup>th</sup> through 9<sup>th</sup> in the first year and add a single grade level each subsequent year until VPA serves grades 7 through 12. VPA estimates 85 students for each grade level with a maximum of 255 students in first year and 510 students when fully enrolled with all grade levels. VPA estimates 12 full time employees in the first year growing to 29 when fully enrolled with all grade levels. VPA will operate an innovative, personalized, blended learning approach that balances traditional instruction with education technology designed for today’s student. VPA will be located in a 5,700 square foot facility at 13185 W Thomas Rd, Goodyear, AZ 85395.

Although charter schools are generally exempted, by the ASBCS, from Arizona procurement laws (specifically, Arizona Revised Statutes (“A.R.S.”) § 15-213 and Arizona Administrative Code R2-7-1001 et seq.), PTLC and VPA seek the highest standard of transparency and widest outreach of vendors to maximize the resources available in order to deliver the highest quality education to the students of Goodyear and surrounding communities. With that goal in mind, PTLC, on behalf of VPA, seeks to purchase a variety of products and services contained within this Request for Proposal (“RFP”).

**SECTION 2**

**SELECTION TIMELINE**

<b>ACTIVITY</b>	<b>ANTICIPATED DATE</b>
Advertisement of bid proposal: published on Valor Preparatory Academy of Arizona website: <a href="https://arizona.valorprepacademy.org/notices">https://arizona.valorprepacademy.org/notices</a>	7 Days Prior to Release of Proposal
Advertisement of bid proposal: published in the Arizona Business Gazette (The public notice resource for the Arizona Republic (statewide) and Arizona Business Gazette)	7 Days Prior to Release of Proposal
Proposal Released:	May 15 <sup>th</sup> , 2019
Submission of Proposal (Deadline)	June 17 <sup>th</sup> , 2019
Proposal Opening:	June 17 <sup>th</sup> , 2019
Review of Submitted Proposal:	June 17 <sup>th</sup> , 2019
Tentative Contract Award Date:	Subject to Next Available Board Meeting after proposal submissions
Contract Award Date:	Subject to Next Available Board Meeting after proposal submissions
Offeror to Begin Service:	July 1 <sup>st</sup> , 2019

## SECTION 3

### DISCLAIMER & ACKNOWLEDGEMENT

**Term of Contract:** In the interest of maintaining continued services, PTLC will award the contract(s) for services for a period up to, but not to exceed three (3) years beginning July 1, 2019. The contract entered into will be in writing and will incorporate the above mentioned cancellation provision.

**Award of Contract:** The contract will be awarded to the offeror whose proposal is determined to be the most advantageous to the VPA and its students. The determination will take into consideration not simply price, but specific evaluation factors set forth in this RFP at Section 7, below. No other factors or criteria will be used in the evaluation. The final determination will be in writing and will be determined at the sole discretion of PTLC. The contract file will contain the basis on which the award is made. PTLC may reject any and all proposals, and it may waive any informality or technicality in any proposal received if it determines that would serve the best interests of VPA.

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## SECTION 4

### PROPOSAL INFORMATION

- a) Proposals must be submitted in compliance with Section 5, below. Failure to comply with Section 5 will render a proposal null and void. Null and void proposals cannot be re-submitted for re-evaluation.
- b) The services required and offered in a proposal should meet the needs described below. Only one proposal may be submitted and considered. Offerors may include any special or unique services they plan to provide. For a complete list of goods and/or services, please see exhibit A
- 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) If selected by PTLC, the successful offeror must be prepared to execute an education services provider agreement containing the services, terms, and conditions outlined in the successful proposal.
- e) PTLC reserves the right to accept or reject any or all proposals and/or to waive any or all formalities in any bid or in the bid process deemed to be in the best interest of the School. No agreement exists until a contract is approved and executed by PTLC.
- f) Bid Questions on this RFP should be directed exclusively to Ryan Shook at either 310-913-1690 or [ryan.shook@primaveraeducationgroup.org](mailto:ryan.shook@primaveraeducationgroup.org). Contact with any other person regarding this RFP who is affiliated with PTLC or VPA, until a winner has been selected, may result in the offeror's disqualification.
- g) This RFP does not obligate PTLC or VPA to pay for any costs, of any kind whatsoever, that may be incurred by an offeror/respondent or any third parties in connection with a response to this RFP. All responses and supporting documentation will become the property of PTLC. Neither PTLC nor VPA will be liable to any offeror, person, or entity for any losses, expenses, costs, claims or damages of any kind arising out of, by reason of, or attributable to, the offeror responding to this RFP.

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## SECTION 5

### PROPOSAL REQUIREMENTS

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

Proposals are to include the following content, and for letter “a,” must adhere to follow the following format:

- a) May not exceed 30 pages including any graphics.
- b) A statement of intent to provide services.
- c) Company’s legal name and address.
- d) Company contacts person name, phone number, and e-mail address.
- e) Signed by an authorized representative of the company, who has authority to bind such contracts.
- f) Executive summary.
- g) Summarize the key elements of your submission including designated agents and those authorized to bind the company.
- h) Describe approach to working with PTLC and VPA
  - a. Clearly articulate how your company intends to approach this engagement and serve PTLC and VPA as a partner in your delivery of the goods or services.
- i) Describe Company’s Qualifications and Experience
  - a. State the size of the company, the size of the staff, the location of the office from which the work on this engagement is to be performed, and the number and nature of the professional staff to be employed in this engagement.
- j) Provide a summary of the company’s experiences over the past five (5) years in providing directly relevant goods or services.
- k) Price
  - a. Please provide pricing for any setup fee—please note that although services will not begin until July 1<sup>st</sup>, 2019, it may be necessary to perform certain functions, provide certain services, or furnish certain software in order to ensure the success of VPA. If your company feels that any of these services will be necessary and how your company intends to recaptures those costs (donation, setup fee, 1<sup>st</sup> year services, etc..)
  - b. Please provide pricing for the first, second, and third year of operations
  - c. Please have these broken out in three discreet prices for evaluation purposes. If there are any additional fees, please note in proposal.
- l) Proposals must be sent via e-mail, by the deadline stated in Section 2, to [ryan.shook@primaveraeducationgroup.org](mailto:ryan.shook@primaveraeducationgroup.org). Please include the RFP number in the subject line.

All proposals need to be in PDF format and under 20 megabytes in size. If file size exceeds 20 megabytes, please contact [ryan.shook@primaveraeducationgroup.org](mailto:ryan.shook@primaveraeducationgroup.org) in order to make alternative submittal arrangements.

- m) Proposals received after the deadline stated in Section 2 will not be considered.
- n) Incomplete proposals will not be considered and will be declared null and void
- o) Proposals must be signed by the offeror.

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## SECTION 6

### SPECIFICATIONS OF PROPOSAL

- a) PTLC is seeking comprehensive educational support services, for VPA, to begin on July 1, 2019, 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 laws, rules, and regulations regarding Arizona charter schools. Each offeror must provide a response in their proposal, in narrative format, to each of the following components.
1. Experience & Track Record. Provide a narrative demonstrating a proven and successful track record for providing education support services to public charter schools. Preference may be given to offerors who demonstrate a successful operating history with blended, online or Arizona-based charter Schools.
  2. Include a list of any litigation, arbitration or other alternative dispute resolution the offeror, or any individual or affiliate of the offeror, has had with a charter school or school district client within the past 5 years, as well as a brief explanation of each matter to the extent such information is publicly available. Please note that such matters will not exclude any bid, and PTLC is most interested in looking at how the offeror handled those matters.
- b) Scope of Offered Services. Provide a list and brief description of education services offered in your proposal. Describe which, if any of these services relieve VPA staff and administration from duties they would otherwise be required to perform internally or could choose to perform internally. A comprehensive list of services required are found in Exhibit A to this RFP. Ideally, a single service provider is being sought to provide all services identified in Exhibit A. If, however your proposal only offers certain services, please indicate which services you will **NOT** be providing.
- c) Please provide responses to the following:
1. Describe the services offered and how they specifically match the needs of Valor Preparatory Academy's charter application to deliver an exceptional education to the student of Goodyear and surrounding communities.
  2. Describe the products offered and how they specifically match the needs of Valor Preparatory Academy's charter application to deliver an exceptional education to the students of Goodyear and surrounding communities.
- d) Please provide pricing per proposal requirements in Section 5 (k). Proposals can be based on a per pupil basis, or flat fee basis. Please be explicit in your pricing formula.

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## SECTION 7

### EVALUATION CRITERIA

#### Selection Weight Criteria:

The following are anticipated weight criteria to be used in evaluating the proposals:

- a) **Aligned with application** (30 points): - Products and services that are aligned with the Valor Preparatory Academy charter application which enable VPA to efficiently, and effectively, deliver the highest quality education to the students of Goodyear and surrounding communities.
- b) **Offeror's Experience** (20 points): This criterion involves the overall depth and quality of the offeror's experience demonstrated by overall years of experience, planning experience, implementation experience, management experience, financial stability, and reference checks. In addition, points will also be awarded for experience related to the academic program as detailed in the School's Charter application.
- c) **Comprehensive supplier of services** (15 points): As stated in Section 6(b), above, PTLC believes that the fewer the vendors that can provide a comprehensive list of products and services from Exhibit A, is in the best interest of VPA and its students.
- d) **Price** (15 points): A detailed, transparent pricing plan that is aligned with the proposal and needs of VPA.
- e) **Personnel Qualifications** (10 points): This criterion is based on the demonstrated qualifications of the offeror's personnel who will be working with VPA, including the ability to implement the School's Charter.
- f) **RFP Proposal Specifications Compliance** (10 points): Offeror complied with the RFP requirements and provided a detailed response to each item contained the Proposal Specifications.

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## SECTION 8

### MISCELLANEOUS

- a) **Governing Law and Forum:** Arizona law governs this solicitation and any resulting contract. You must bring any action relating to this solicitation or any resulting contract in the state or federal courts located in Maricopa County, Arizona.
- b) **Proposal Firm Time:** By submitting your proposal, you agree that its terms will be effective, without change or modification, for a period of 180 days from the date of the proposal due date.
- c) **Charter Application:** To receive a copy of the charter application, either visit the Arizona Department of Charter Schools website, or send an e-mail to [ryan.shook@primaveraeducationgroup.org](mailto:ryan.shook@primaveraeducationgroup.org) to request a copy.

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## EXHIBIT A

### GOODS AND SERVICES

#### 1) MARKETING

- a. Recruiting students, including creation, design and preparation of recruitment materials and advertisements and dissemination thereof by (a) email and other digital means; (b) ad placement in newspapers, magazines and other printed publications; (c) radio and television; (d) signage and billboards; and (e) other physical advertising.
- b. Creating electronic feedback tools so that students, their parents, and teachers may submit comments and suggestions, and responding to suggestions and implementing improvements as deemed advisable by PTLC or VPA.
- c. Developing, designing, publishing, and maintaining an interactive website for VPA.

#### 2) BACK OFFICE OPERATIONS

- a. **USFRCS Compliant or USFRCS “abbreviated” Finance & Accounting**
  - i. Budgeting:
    - Work with VPA to create annual and multi-year budgets including monthly cash flow projections. Budgets will be loaded into an accounting system and tracked monthly against actual performance. Budgets need to be in a USFRCS compliant chart of accounts or an abbreviated version of the USFRCS may be used.
  - ii. Financial Statements:
    - Monthly year-to-date financial statements, and year-to-date actual compared to budget reports prepared for board meetings or as requested.
  - iii. Accounting:
    - Accounts and General Ledger - Setup VPA’s chart of accounts and general ledger and maintain USFRCS-compliant, or abbreviated USFRCS chart of accounts.
    - Customized account codes – Ability to add customized account codes for unique features of VPA’s program.
    - Restricted funds tracking – Track revenue and expenditures by fund, e.g. tracking by grant funds, expenses, and Title I or other Title expenditures.
    - Transaction recording – Record all transactions in a computerized accounting system that is available for viewing and reporting.
    - Journal entries and account maintenance – Prepare and record journal entries and maintain the general ledger according to generally

accepted accounting principles (“GAAP”).

- Bank reconciliation – Reconcile primary bank and investment accounts to general ledger monthly or upon receipt of statements. Revolving and petty cash accounts to be reconciled quarterly.
- Capitalized Assets – Record capital assets in the general ledger according to VPA’s financial policy and according to GAAP. Also record depreciation on an annual basis and maintain a schedule of capitalized assets and accumulated depreciation. (PTLC or VPA will be responsible for tagging and conducting inventory for all fixed assets).

**b. Accounts Payable and Receivable**

- i. Revenue verification – Work with designated individuals at PTLC or VPA to review and record revenue intake and verifies that the VPA is receiving accurate amounts of state and federal funds based on its enrollment and other pertinent factors.
- ii. Invoice processing - Conduct invoice processing. After coding from PTLV or VPA and approval from the designated representative, offeror will enter invoices into financial tracking software within 2 business days or receipt. PTLC/VPA are responsible for submitting weekly package (unless other time frame is agreed upon) of invoices, deposits, payment documents that conform to vendors’ forms and processes.
- iii. Invoice review – Offeror will review invoices to assist in the prevention of double payments or double billings on multiple invoices. Offeror will alert PTLC and VPA to payment issues with vendors.
- iv. Invoice payment support - Offeror will verify that funds are available to pay the bill and notifies VPA if there are not sufficient funds.

**c. Government / Sponsor Financial Reporting**

- i. Budgets - Work with PTLC/VPA to prepare preliminary and final budgets based on USFRCS or abbreviated USFRCS, or chart of accounts.
- ii. Interim financial reports – Work with PTLC/VPA to prepare and file the two interim financial reports to the authorizer in a timely manner.
- iii. Audited financial reports – Subject to timely receipt of information and/or materials from PTLC, VPA or the auditor, as applicable, offeror will prepare all financial information for the audit so that the auditor can file reports before state-required deadlines.

**d. Audit Support**

- i. Audited financial reports –Work directly with PTLC, VPA and the auditor to prepare audit. Subject to timely receipt of information and/or materials from VPA and/or the auditor, as applicable, offeror will prepare all financial information for the audit so that the auditor can file reports before state-required deadlines.

- e. **Monthly Board Meeting Financials**
  - i. Prepare month-to-date financials and other reports as requested by PTLC or VPA.
- f. **Payroll Support (Processing, Reporting, Payroll Records Maintenance, W-2 Processing, IRS, Workers Compensation, etc. Support)**
  - i. Payroll Reporting – Offeror and/or its payroll processor will prepare, and file all required payroll reports for submission to federal and state agencies and submit electronic payroll, payroll tax reports and payroll tax deposits to the appropriate authorities for a single tax ID number.
  - ii. W-2 Processing – Work with payroll processor (if that is not offeror) to prepare W-2 forms, which are mailed to PTLC.
  - iii. IRS, Workers Compensation Support – Assist in resolving payroll tax issues before the IRS and other federal and state reporting agencies in a non-legal capacity. Offeror will also assist PTLC/VPA with any workers compensation, unemployment insurance, or other payroll-related claims by providing supporting payroll reports.
- g. **Retirement Plan Administration**
  - i. Offeror will set up retirement system accounts and make appropriate deductions and payments.
- h. **HR & Medical Benefits Support (Employee file setup, teacher credentialing)**
  - i. Employee File Set Up – Provide PTLC or VPA with new-hire packets to help support compliance efforts with state and federal requirements regarding Live Scan procedures, TB test information, and/or credential verification information.
  - ii. Teacher Credentialing – Provide non-legal information and assistance to PTLC or VPA to help them evaluate teacher credentials.
  - iii. Offeror will manage employee medical benefits including enrollment, deductions, and all associated payments.
  - iv. Develop human resources policies, bonus plans, and strategic plans for staffing and growth.

### **3) TEACHER PROFESSIONAL DEVELOPMENT**

- a. Provide school leaders, administration, staff, teachers, counselors, and instructional support for teachers in connection with utilization of the curriculum, and assist PTLC/VPA in the evaluation and measurement of teacher performance.
- b. Propose educational goals, curriculum, methods of pupil assessment, and admissions policies.
- c. Conduct surveys, interviews, and/or user testing to obtain feedback on how to improve the curriculum.

- d. Provide teacher training on curriculum, assessment, and testing per the Valor Preparatory Academy model.
- e. Support teachers in answering technology-related questions from students, parents, teachers, and administrators.

**4) EDUCATIONAL TECHNOLOGY SUITE LICENSING**

- a. Ideal technology suite will be fully integrated with a) Arizona-compliant student information system b) Learning Management System c) curriculum d) parent/student portal
- b. Digital curriculum licensing, implementation, training, and on-going monitoring of digital curriculum that is aligned with the goals, teaching modalities, and unique model of Valor Preparatory Academy's charter application including:
  - i.* Digital curriculum must be aligned with Arizona standards
  - ii.* Digital curriculum must have third-party assessment partner to validate content's ability to master standards and high stakes testing.
  - iii.* Student Assessments should be built into the curriculum to avoid "over-testing".
- c. Digital curriculum licensing, implementation, training, and on-going monitoring of assessments that is aligned with the goals, teaching modalities, and unique model of Valor Preparatory Academy's charter application as well as ensuring that assessments are aligned with Arizona state standards.
- d. Student licensing of a student information system that is compliant with a blended learning program and compliant with the state of Arizona.

**5) STUDENT INFORMATION SYSTEMS, SUPPORT, AND COMPLIANCE**

- a. Implementing, configuring, and managing Arizona-compliant student information system
- b. Maintaining students' educational records.
- c. Maintaining student enrollment records and assisting PTLC/VPA with audits related to attendance.
- d. Managing online enrollment, registration and placement services.
- e. Ensuring electronic security of student records.
- f. Submitting AzEDS compliance reports in a accurate, and timely manner

**6) SCHOOL OPERATIONS SUPPORT**

- a. Implement VPA's admissions policy, including: (a) managing the application and enrollment process; (b) creating, designing and publishing of applications and enrollment packages; and (c) communicating with potential students and their families

and help families through the enrollment process.

- b. Respond to telephone calls, letters and e-mails regarding the School, its curriculum, the application/enrollment process, instructional materials, etc.
- c. Conduct exit interviews with any students and their parents who withdraw from the School, to the extent deemed necessary by PTLC or VPA in their sole discretion, in order to learn more about how to improve programs for students.

7) **TECHNOLOGY AND IT SUPPORT**

- a. Provide technology support services on the learning management system, student management system, the parent/student portal and computer and software issues.
- b. Coordinate web hosting contracts and relationships with vendors.
- c. Handle troubleshooting issues for hardware, software, and related technology used to deliver the curriculum.
- d. Provide onsite and telephone support for the administration of online programs.
- e. Implement policies and procedures regarding the responsible use of computer equipment.
- f. Maintain access to the technology needed for use of curriculum by VPA and its students, and monitor the online learning management system.
- g. Monitor and analyze network data and correct problems as issues may arise.
- h. Install and maintain a computer network to serve the School.
- i. Determine hardware configurations (including software and operating systems) for the School's technology needs.
- j. Provide web-based counseling tools to support college and career planning.