

Date Proposal Issued: 11/20/20
Proposal Number: 001
Proposal Opening: 11/20/20

Address: 4230 Travis Street Unit 1 Dallas, TX 75205

Request for Proposal: Third Future Schools-Texas “Learning Securing Accelerated Enrichment” (LSAE) Model Implementation and Administrative Operations Support at Sam Houston Collegiate Preparatory

Proposal Submission Deadline: 5:00 P.M. (C.T.), 12/17/2020

Contact Person for this Proposal: Carey Davis at thirdfuturetx@gmail.com

Introduction, Scope of Work & Instructions to Bidders

Request for Proposal:

Third Future Schools-Texas “Learning Securing Accelerated Enrichment” (LSAE) Model Implementation and Administrative Operations Support at Sam Houston Collegiate Preparatory, Midland, Texas, has been issued and posted.

This proposal solicitation is for an organization to work with Third Future Schools-Texas to implement the Third Future Schools-Texas LSAE instructional model at Sam Houston Collegiate Preparatory in Midland, Texas, and to provide administrative operations support. If Third Future Schools-Texas chooses to use your services, a contract will be negotiated and approved by the Board prior to services being provided.

Please email Carey Davis at thirdfuturetx@gmail.com with questions. Answers will be posted online for the benefit of all proposers to see. Any questions or clarifications must be received by 12/10/2020 to ensure adequate response time from Third Future Schools-Texas. All questions and answers are posted to the online site <https://www.midlandisd.net/samhoustoncollegiatepreparatoryelementary>. In addition, any addenda will also be posted online at that site. It is the vendors’ responsibility to regularly review the RFP posting site to ensure that they have received all addenda issued for this proposal.

Schedule of Events

In order to meet Third Future Schools-Texas’ schedule it is extremely important that requests for clarification or additional information be submitted in writing no later than 5:00 P.M. (C.T.), 12/10/2020. Questions submitted after this date may not elicit a response.

The following Schedule of Events represents the organization’s estimate of the timetable that will be followed in connection with this solicitation.

Event	Date
Release Request for Proposal	11/20/20
Deadline for Questions and/or Comments	12/10/2020
Proposal Due	12/17/2020
Evaluations	12/18/2020- 12/23/2020
Negotiations	12/28/2020- 1/20/2021
Estimated Contract Award Date	1/20/2021

Third Future Schools-Texas reserves the right, at its sole discretion, to adjust this Schedule of Events as it deems necessary. If necessary, the organization will communicate adjustments to any event in the Schedule of Events in the form of an amendment. Amendment to this RFP will only be issued and posted on the website at:

<https://www.midlandisd.net/samhoustoncollegiatepreparatoryelementary>.

Rationale: Third Future Schools-Texas (TFS-TX) seeks additional capacity and expertise in implementing the LSAE model and carrying out administrative operations. Because Midland ISD (MISD) provides some services as a function of the district-charter partnership, we anticipate that the administrative operations services required from a third party will require dedication of significantly less than one full-time equivalent staff person to provide the administrative support services over the course of the year.

Structural Overview: Third Future Schools-Texas is a Texas nonprofit incorporated in 2020. The approved charter application for the first Third Future Schools-Texas school in Midland commits the organization to implement the LSAE model. The TFS-Texas nonprofit is led by Executive Director, Zach Craddock.

District Partnership: Third Future Schools-Texas is the operator of Sam Houston Collegiate Preparatory in an in-district, Senate Bill 1882 partnership with Midland ISD. The partnership is governed by a performance contract that outlines the performance expectations and roles and responsibilities of the nonprofit partner and the district.

Sam Houston teachers and administration remain MISD employees, but the nonprofit partner has selection, evaluation, and compensation authority. MISD handles payroll and benefits for Sam Houston employees, and TFS-TX pays for these services from its monthly allotment. MISD also provides the facility, transportation, food, janitorial, maintenance, security, and substitute teacher services. In coordination with TFS-TX, MISD applies for state and federal grants on behalf of the campus and works with TFS-TX to coordinate related purchases. The district will annually offer a menu of district services with actual prices to TFS-TX.

In addition to full authority over curriculum, assessments, and instructional practices, TFS-TX employs, evaluates, and compensates the executive director and any future nonprofit employees. TFS-TX's board shall approve both a campus and nonprofit budget and pass financial policies. The nonprofit may engage in private fundraising. As a nonprofit, TFS-TX must ensure compliance with state and federal nonprofit requirements.

Third Future Schools-Texas at Sam Houston Collegiate Preparatory Overview:

Sam Houston Collegiate Preparatory currently serves grades PK-5, enrolls around 349 students, and is in its first year of the Senate Bill 1882 partnership. Sam Houston was previously at risk of closure due to consecutive years of low performance and is in year 1 of implementing the unique model of Third Future Schools-Texas. 100% of teachers and administrators at Sam Houston are new to the model.

The vision of Third Future Schools-Texas is founded on the notion that a Year 2030 workplace will require new skills and the ability to think critically:

Third Future Schools-Texas prepares students for college and the modern workplace. Through personalized learning and a focus on critical thinking skills, our school closes achievement gaps and allows every student to reach her/his potential.

The mission focuses on building a high-performance and caring culture that has high expectations and where the main instructional delivery model is personalized learning:

A team of dedicated teachers and leaders, working in a high-performance and caring culture, maintains an intense focus on academic achievement and performance outcomes. Students find success and are engaged through personalized learning, which allows students to work at their own pace and learn in a way more suited to their strengths. Third Future Schools-Texas holds high expectations for students and staff and believes that everyone can create their future.

Key Features of Third Future Schools-Texas

Among the many systemic and conceptual differences between Third Future Schools-Texas and traditional schools, five are the most important:

1. Modified personalized learning
2. A different employee value proposition
3. A Year 2030 curriculum
4. Checks and balances governance system
5. Partnerships to support student learning

Third Future Schools-Texas Guiding Principles

1. Learning happens everywhere and anytime
2. Learning is personalized and students own their learning

3. Parents have access to an expanded number of choices and programs
4. The system offers a new employee value proposition and compensation is tied to what the system values most
5. Learning is increasingly focused on how to think and how to learn
6. The School, community, and family provide students with a set of required experiences, not just specific courses
7. Community groups are tapped to educate students in many non-core subjects
8. Governing entities check and balance one another and encourage innovation

Scope of Work Overview:

Third Future Schools-Texas seeks a provider to support multiple areas of need related to implementation of the Third Future Schools-Texas LSAE model at Sam Houston. The provider will lead professional development and training for teachers and staff in implementing the Third Future Schools-Texas LSAE model in a hybrid format (students participating virtually and in person). The provider shall have experience operating schools characterized by key features and guiding principles substantially similar to those that characterize the LSAE model. The provider must be prepared to provide ongoing consultation on model implementation to TFS-TX leadership, school administration, and teachers upon request.

Third Future Schools-Texas conducts a “5th Quarter” summer school program available to all interested students. The provider will be responsible for supporting the implementation of the program by Sam Houston, including conducting training and professional development for teachers and providing ongoing implementation support to teachers to implement the Third Future Schools-Texas LSAE model.

Finally, the provider will provide administrative support services and lead the budgeting process for Third Future Schools-Texas at Sam Houston. These services include, but are not limited to: accounts payable, general ledger, documentation, preparation of reports, maintenance of financial information, federal grants management, budgeting, preparation for annual audit, bank reconciliation, and consulting support.

Program Activities and Deliverables Required:

Third Future Schools-Texas LSAE Model Implementation Support

- Ongoing Professional Development: provide ongoing professional development to Sam Houston teachers and staff to implement and improve their implementation of the Third Future Schools-Texas LSAE model
- Model Implementation Consulting: serve as the “go-to” resource for all questions and challenges related to LSAE, dyads, school layout, and Art of Thinking curriculum
- 5th Quarter Implementation Support: provide training and professional development to Sam Houston teachers and staff working 5th quarter. Consult on 5th quarter instructional calendar, campus layout, and staffing for 5th quarter.

Third Future Schools- Texas Administrative Operations Support

- Accounts Payable: Prepare and execute payments to all TFS-TX staff, consultants, and vendors
- Payroll and Benefits: Select and manage payroll system and benefits plans for any future staff; onboard new staff to payroll and benefits plans
- Teacher Retirement System (TRS) Enrollment and Management: register nonprofit as an eligible entity and manage future TFS-TX staff enrollment and reporting
- General Ledger: Maintain a general ledger complying with TEA coding requirements; post all journal entries and balance the general ledger and all funds prior to month end closing and close out each fiscal year
- Documentation: Maintain copies of documentation of all transactions
- Operational Calendar: Create an operational calendar with key dates and instructions for submitting required reports as needed (registrations, 990s, etc.)
- Reports and Presentations: Assist in preparation of reports and develop presentations for management purposes for Third Future Schools-Texas, Third Future Schools, and Midland ISD Boards, including Statement of Financial Position, Budget to Actual Reporting by Fund and overall cash position
- Financial Information: Maintain all financial information according to Generally Accepted Accounting Principles of Fiscal Management and the Texas Education Agency Financial Accountability System Resource Guide, as applicable
- Federal Grants Management: Provide assistance with budget information in grant applications, budget determinations and management of grants. Provide assistance with various compliance reporting as it relates to financial activity. Work with TFS-TX staff to ensure allowability of grant expenditures and compliance with grant requirements.
- Philanthropic Grants: Assist in creating budgets for grant applications; prepare and submit required reports for private donors
- Budgeting: Assist in annual budget preparation and budget amendments for both nonprofit entity and Sam Houston Collegiate Preparatory, including:
 - Development of budget plan and review schedule
 - Staffing budget sessions to assist in development of next year's staffing budgets, including positions, salary, coding, and special programs compliance
 - Finalize development of all budgets based on historical data and planning sessions
 - Input budget into accounting system using TEA account codes
 - Make budget amendment recommendations
 - Meet with TFS-TX staff to assist in evaluating potential costs associated with objectives established in Sam Houston Campus Improvement Plan
- Annual Audit Preparation:
 - Provide information from copy of records submitted by TFS-TX for the auditor and assist the auditor in reviewing submitted records
 - Meet with auditor and TFS-TX so that data needs and timelines can be agreed upon. Be available to respond to all audit questions and request
 - Close fiscal year and work with auditors on annual financial audit requirements
 - Review and discuss draft audit when available with TFS-TX staff and auditor

- Bank Reconciliation: Reconcile all bank accounts necessary for operations according to TEA and nonprofit regulations
- TFS-TX Financial Policies: Comply with Board policies and suggest policy adjustments as needed
- District Relations: Serve as first point of contact for questions from district finance teams
- Consulting Services: Consult in the following areas as needed: purchasing, investments, grant management, fundraising activities, and governmental regulations
- Software: provide business services software as needed
- Emergency Disbursements: Prepare check on an emergency basis when requested
- Future District Application Support: Prepare budget submissions for authorization processes in new districts and participate in related capacity interviews

Proposal Response

The response to this RFP is to be submitted by electronic mail. You are required to provide a detailed written narrative as a response along with a detailed breakdown of your proposed pricing for these services. In addition, please submit a completed proposal submittal sheet, the Representations and Certifications form, the addendum contract provisions for contracts under federal awards, the Conflict of Interest Questionnaire, the Form 1295 Form, and a W-9 from your company. These forms will be posted on the website at:

<https://www.midlandisd.net/samhoustoncollegiatepreparatoryelementary>.

Term

Service would need to start as soon as possible, and continue as needed throughout the term of the underlying partnership between TFS-TX and MISD. This partnership is governed by a performance contract that outlines the performance expectations and roles and responsibilities of TFS-TX, as the nonprofit partner, and MISD, and will be posted on the website at:

<https://www.midlandisd.net/samhoustoncollegiatepreparatoryelementary>.

Evaluation Criteria

In determining this proposal award, Third Future Schools-Texas may consider:

Evaluation Criteria	Max Points
Purchase price	20
Experience and reputation:	
<ul style="list-style-type: none"> ● Experience operating a school characterized by the features and guiding principles substantially similar to the LSAE model 	20
<ul style="list-style-type: none"> ● Experience coaching educators to be effective in schools characterized by the features and guiding principles 	10

substantially similar to the LSAE model	
<ul style="list-style-type: none"> Experience directly providing blended (in person and virtual), personalized summer school 	5
<ul style="list-style-type: none"> Experience providing administrative support services support for charter schools 	20
Quality of good and services	
<ul style="list-style-type: none"> Extent to which the goods and services meet the organization's needs in the request for proposal 	15
Other relevant factors specifically listed in the Request for Proposal or Qualifications:	
<ul style="list-style-type: none"> Scope of services that will be delivered by vendor 	10
Total:	100

In this proposal document, Third Future Schools-Texas has asked for specific information to assist in evaluating this proposal. The proposal evaluation will be based on the evaluation criteria listed above.

Late Proposals

Third Future Schools-Texas will not consider late proposals.

Award of Proposal

It is the intent of Third Future Schools-Texas to award this proposal by 5:00 P.M. (C.T.), 12/23/2020 to one (1) successful bidder. If Third Future Schools-Texas chooses to use your services, a contract will be negotiated and approved by the Board prior to services being provided and winning the right to negotiate such contract does not guarantee that terms acceptable to the successful bidder will be offered or accepted by Third Future Schools-Texas.

Proposal Cost

Third Future Schools-Texas will not be liable for any cost not listed in the proposal response. In the proposed amount offered by potential providers, all travel and travel-related expenses to and from Midland and other relevant locations must be included in the turn-key amount proposed.

Ethics

The proposer shall not offer gifts, or anything of value, nor initiate any business arrangement with any employee, official, or agenda of Third Future Schools-Texas during the pendency of the RFP.

Liability and Reserved Rights

By submitting a proposal, each bidder agrees to waive any claim it has against Third Future Schools-Texas and/or Midland ISD, and its respective employees arising out of in connection with the administration, evaluation, or recommendation of any proposal; waiver of any requirements under the request for proposal documents, or the contract documents, acceptance or rejection of any proposals; and award of the contract.

Third Future Schools-Texas reserves the right, at its sole discretion, to reject any and all proposals, or any part thereof, that it receives as a result of this request for proposal. Third Future Schools-Texas also reserves the right to waive errors, deficiencies, informalities, technicalities and minor irregularities in those proposals received, and retains the right to negotiate separately with and source whatsoever, in any manner necessary, to serve the best interests of Third Future Schools-Texas. Third Future Schools-Texas will, at its discretion, award a contract to the most favorable bidder(s) submitted in accordance with the requirements of the request for proposal documents, submitting the best response that complies with the terms of this packet and/or which Third Future Schools-Texas believes is in the best interest of Third Future Schools-Texas and the best value to the nonprofit and which may not represent the lowest prices submitted.

By execution and submission of this proposal, the bidder hereby represents and warrants to Third Future Schools-Texas as follows: "The bidder has read and understands the request for proposal documents and therefore made it in accordance with those documents." The General Terms and Conditions are an integral part of this request for proposal.

Please note that on any company contract that Third Future Schools-Texas may be asked to sign, the venue shall be Midland County and the governing law shall be that of the State of Texas. Third Future Schools-Texas can only indemnify up to the amount allowed by law and we cannot agree to the use of arbitration in resolving conflicts.

This request for proposals does not obligate Third Future Schools-Texas to award a contract or to pay costs incurred in the preparation or submittal of any offer. Third Future Schools-Texas is not liable for any costs incurred by the vendor prior to the issuance of any agreements, contracts, or purchase orders, and will not pay for information solicited or obtained in response to this RFP. The information obtained will be used solely to determine the suitability of the products or services offered. Subsequent procurement, if any, will be in accordance with appropriate rules and regulations.

This document does not commit Third Future Schools-Texas to pay any cost incurred in the preparation or submission of any proposal or to procure or contract for any services.

Third Future Schools-Texas reserves the right to amend this document by an addendum issued prior to the date set for receipt of proposals. Changes to this request for proposal, prior to opening, may be made in the form of an addendum posted on the website at: <https://www.midlandisd.net/samhoustoncollegiatepreparatoryelementary>. If revisions are of such a magnitude as to warrant, in Third Future Schools-Texas' sole opinion, the postponement of the date for the receipt of proposals, an addendum will be issued announcing the new date will be posted on the website at: <https://www.midlandisd.net/samhoustoncollegiatepreparatoryelementary>.

Contractual Terms and Conditions

Any contract resulting from this solicitation is contingent upon the continued availability of funds and is subject to cancellation, without penalty, either in whole or in part, if funds are not appropriated, flowed or paid by MISD or otherwise not made available to Third Future Schools-Texas.

Contract Changes

No verbal agreement or conversation with any officer, agent or employee of Third Future Schools-Texas either before or after the execution of the contract resulting from the document or follow-up negotiations shall affect or modify any of the terms or obligations contained in the written contract resulting from the RFP. No alterations to the terms and conditions of the contract shall be valid or binding unless made in writing and signed by the Purchasing Agent and an authorized contractor representative.

Use of Nonprofit Documents

Proposals must be submitted on forms or in the format provided or required by Third Future Schools-Texas. No alteration to the Third Future Schools-Texas forms or format will be permitted, including substitutions, additions, deletions or interlineations, without written consent of Third Future Schools-Texas. Reproduction of Third Future Schools-Texas documents is permitted, so long as reproduced copies are exactly the same in size, format, and content as forms prepared by Third Future Schools-Texas. Any proposal submitted in altered form shall result in rejection of such proposal at the option of Third Future Schools-Texas.

Questions and Contestation

There are no other specifications other than what is included in this package besides what has been provided as attachments and referenced materials (if any). For questions, please email your question(s) to the contact person for this proposal who will post your question to the website for the benefit of all proposers to see.

Any questions or clarifications must be received by 12/10/2020 to ensure adequate response time from Third Future Schools-Texas. All questions and answers will be posted to the online site: <https://www.midlandisd.net/samhoustoncollegiatepreparatoryelementary>. In addition, all addendums will be posted online at the same site. It is the vendors' responsibility to review the online site to ensure that they have received all addenda issued for this request for proposal.

Vendors finding errors, omissions, or corrections that need to be made to the specifications shall contact Third Future Schools-Texas as soon as possible before the proposal is due.

Anyone wishing to contest a recommendation for award of proposal(s) and/or to present additional information relevant to the proposal, will be required to complete a special form stating the reason(s) for information relevant to the proposal award. The completed form shall be filed with Third Future Schools-Texas. The vendor may not inject new information other than that presented on the input form. Vendor must contact the contact person for this proposal to receive this form.

Submittal Information

Do not submit this proposal by email.

The proposer shall submit one (1) original proposal submitted by sealed mail to Carey Davis at 4230 Travis Street Unit 1 Dallas, TX 75205. Proposal responses must be received no later than: 5:00 P.M. (C.T.), 12/17/2020. Proposals received after the time stated will not be considered.

Late Proposals: Third Future Schools-Texas will not consider late proposals.

By submitting a proposal, each bidder agrees to waive any claim it has against Third Future Schools-Texas, and its respective employees arising out of in connection with the administration, evaluation, or recommendation of any proposal; waiver of any requirements under the proposal documents, or the contract documents, acceptance or rejection of any proposals; and award of the contract.

By execution and submission of this proposal, the bidder hereby represents and warrants to Third Future Schools-Texas as follows: "The bidder has read and understands the request for proposal documents and the contract documents and this proposal is made in accordance with the documents."

This request for proposal does not obligate Third Future Schools-Texas to award a contract or to pay costs incurred in the preparation or submittal of any offer. Third Future Schools- Texas shall have the right to accept or reject any or all proposals, or any part thereof, and to waive any technicalities in the best interest of the district.

*****THIRD FUTURE SCHOOLS- TEXAS HAS IMPLEMENTED A "NO CONTACT" PROCEDURE DURING THE BIDDING PROCESS. THIS MEANS THAT FROM THE DATE THE REQUEST FOR PROPOSAL IS ISSUED UNTIL THE DATE THE PROPOSAL IS AWARDED BY THE BOARD, THERE SHALL BE NO CONTACT BY ANY VENDOR TO ANY NONPROFIT EMPLOYEE, OR BOARD MEMBER IN RELATION TO THIS PROPOSAL, UNLESS AUTHORIZED BY THE DIRECTOR OF BUSINESS SERVICES*****