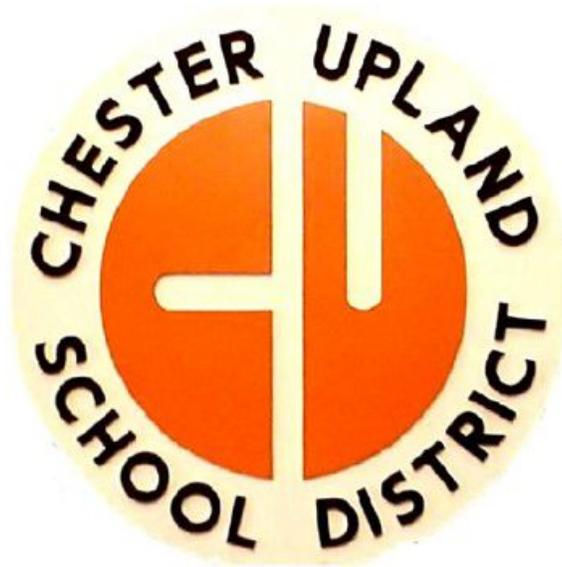


**Request for Interest and Case Statement  
Potential Outsourcing  
of Management or Operations of District Schools  
Chester Upland School District  
July 30, 2020**



**Issued By:**

**District Receiver, Dr. Juan Baughn**

**Chester Upland School District**

**232 W. 9th St. | Chester, PA 19013**

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of District Schools for Chester Upland School District**

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## Background

CUSD faces substantial near-term and long-term challenges, including lagging academic results, financial constraints, substantial amounts of deferred maintenance, inadequate operational and administrative work processes, and support. Unfortunately, despite over two decades of interventions via Pennsylvania's Department of Education, the District's progress towards administrative, fiscal, and operational self-sufficiency has been much slower than desired.

To address these long-standing issues, the District's Receiver, Dr. Juan Baughn, has been charged to explore innovative alternatives to the District's current operational structure, academic programs, support systems, staffing models, and financial and budgetary status. Pursuant to an Order of the Delaware County Court of Common Pleas (No. CV 2012-009781), dated May 14, 2020, the **CUSD Framework for Strategic Options Initiative (SOI)** was approved for implementation. The Court Order specifies that the Receiver has the authority and responsibility for implementing the SOI. In response to that Court Order, Receiver Baughn is considering a number of bold solutions such as outsourcing the management or operations of District schools or District central office operations and is committed to undertaking an intensive analyses of feasible options that articulate performance expectations that can be measured, monitored, and maintained with fidelity. The ultimate goal of the analyses is for the District to realize its mission and vision, as follows:

**Mission Statement:** The Chester Upland School District is committed to providing all students the opportunity to achieve excellence in the four A's: Academics, Athletics, the Arts, and Activities.

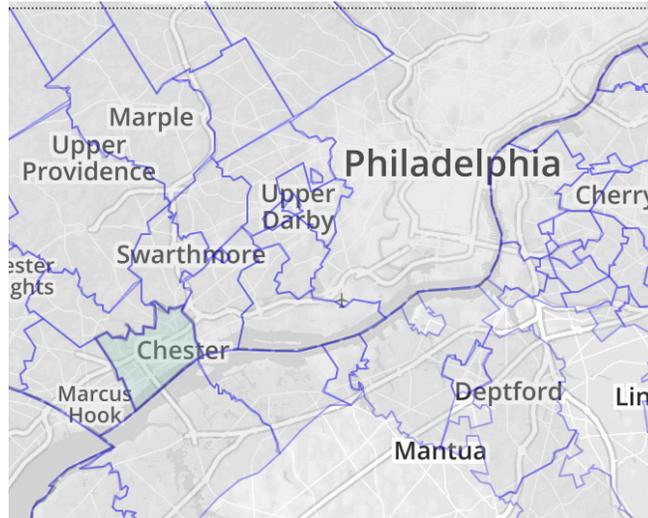
**Vision Statement:** The Vision of the Chester Upland School District is for every student to graduate from high school ready for college and/or a career in spite of any and all challenges.

Throughout the SOI process, Dr. Baughn will share the results with the Delaware Court of Common Pleas, the CUSD Board of Education, and Chester Upland School District stakeholders.

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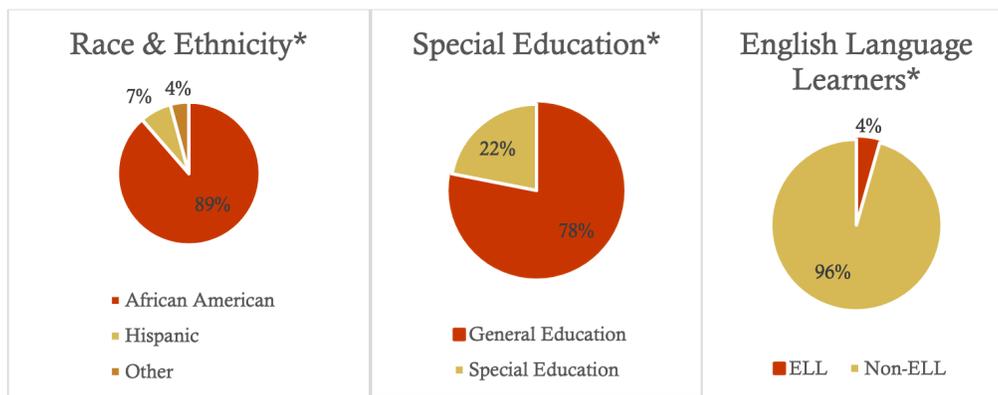
## CUSD Demographics, Community, and Catchment Area

The **Chester Upland School District** is located in Delaware County, Pennsylvania. The total population of 41,365 resides in a 6.9 square mile area, southwest of Philadelphia.



### Student Demographics and Populations

Chester Upland School District has six (6) schools offering grades Pre-KF, K5F, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, and 12. There are approximately 7,000 K-12 school-aged children in the district catchment area. CUSD currently educates approximately 3,000 students and approximately 4,000 school aged children attend charter schools in or around the CUSD catchment area.



\*Source: Mass Insight May 2019 School District of Chester-Upland District Diagnostic

The CUSD student population at is 52% male and 48% female and average attendance is approximately 65% across the District. The demographic breakdown is as follows:

- American Indian/Alaskan Native (not Hispanic): 0.0%

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- Asian (not Hispanic), Native Pacific Islander or Hawaiian: 0.1%
- Black or African American (not Hispanic): 90.8%
- Hispanic (any race): 7.5%
- White (not Hispanic): 1.6%

### Other District Facts

The Receiver encourages all readers to review the [Revised Financial Recovery Plan](#) and other substantial background documents in the Appendix for information on the District’s financial and operating conditions. The School District had an approved budget of \$135 million for the 2019-2020 school year and employs approximately 240 employees, including 200 teachers and instructional staff. The District is highly dependent on State funding to provide the majority of its revenue. Budgeted state funding for 2019-2020 constitutes approximately 76% of the total revenue for the District. Local tax revenue constitutes the second largest source of funding for the District, accounting for 20% of total budgeted revenue in 2019-2020. Local tax revenues are dominated by real estate taxes, with much smaller proportions coming from realty transfer taxes, utility taxes, and other miscellaneous sources. The remainder of the School District’s funding is received in the form of Federal funds, which represents approximately 4% of budgeted revenues. The 2020-2021 Final General Fund Budget reflects similar proportional expenditures to the 2019-20 fiscal year (see <https://www.chesteruplandsd.org/docs/district/Financial%20Recovery/GFBPackage%202020-2021.pdf>).

Source of 2020 21 District Revenues	Budget Amount (\$millions)	Percentage of Revenues
<b>State (Pennsylvania)</b>	\$102.234	76%
<b>Local</b>	\$24.452	18%
<b>Federal</b>	7.457	6%
<b>Total</b>	\$134.143	100%

CUSD’s budgeted Regular Education Per Pupil Funding for 2020-21 is \$11,596, and budgeted Special Education Per Pupil Funding is \$ 14,881. One hundred percent (100%) of the students are eligible for free lunch. The School District’s goal is to increase enrollment to 3,200 by 2024 and believes that this is achievable with continued and focused recruitment efforts and that it has the capacity to do so without hiring additional staff. The current student-teacher ratio across the District is 16:1. Chester High School’s graduation rate is just under 60%.

### CUSD School Profiles

Background information on the District’s six schools can be found on the websites for each school: Chester High School (Grades 9 - 12): <https://www.chesteruplandsd.org/chs/home>

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Stetser Elementary (Grades PreK - 6): <https://www.chesteruplandsd.org/stetser/home>  
STEM at Showalter (Grades 7 - 12): <https://www.chesteruplandsd.org/stem/home>  
Toby Farms Intermediate (Grades 4 - 8): <https://www.chesteruplandsd.org/toby/home>  
Main Street Elementary (Grades PreK - 5): <https://www.chesteruplandsd.org/main/home>  
Chester Upland School of the Arts (CUSA) (Grades PreK - 5):  
<https://www.chesteruplandsd.org/cusa/home>

The Revised Financial Recovery Plan (enclosed in the Appendix) has detailed information on each school's performance and the District's academic strategic priorities and initiatives called the "Four Building Blocks", outlined below. Providers who wish to respond to this Request For Interest are encouraged to closely read the Revised Financial Recovery Plan for more details on the Building Blocks. By engaging proven providers, the Receiver is publishing the Strategic Options Initiative in order to accelerate the implementation of the Building Blocks.

**Building Block #1: Teaching and Learning:** Student performance outcomes and standards-aligned instructional system.

**Building Block #2: Investing in People:** Effective, collaborative, and accountable teachers and staff, and capable, collaborative, and accountable leadership at all levels.

**Building Block #3: Ensuring a Rich, Robust, Educational Experience:**  
Further improve and expand the opportunities for student involvement in the areas of Academics, Activities, Arts, and Athletics (The Quad A's);  
Collect, analyze, and disseminate assessment data efficiently and effectively for use by LEA leaders and instructional teams, and  
Implementation of Comprehensive Support and Improvement (CSI) Initiatives.

**Building Block #4: Mass Insight Roadmap:** District Vision, Strategy, and Culture; Organizational Clarity and Collaboration; Focus on Instruction; Talent Development; and Finance.

#### Charter Schools in Chester Upland

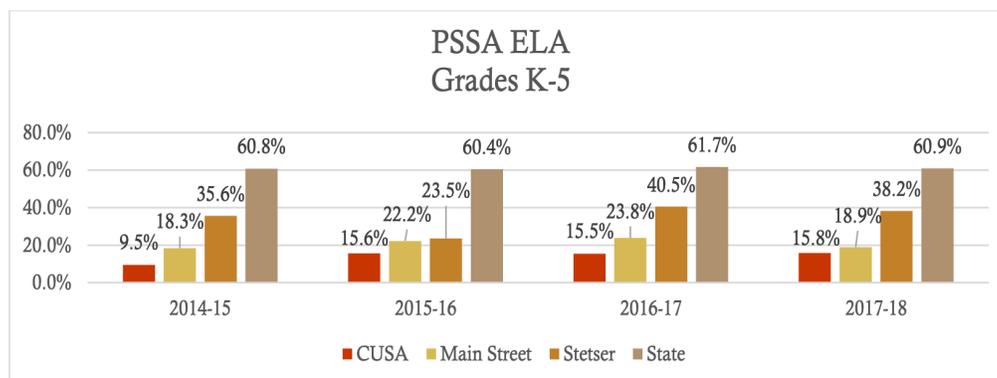
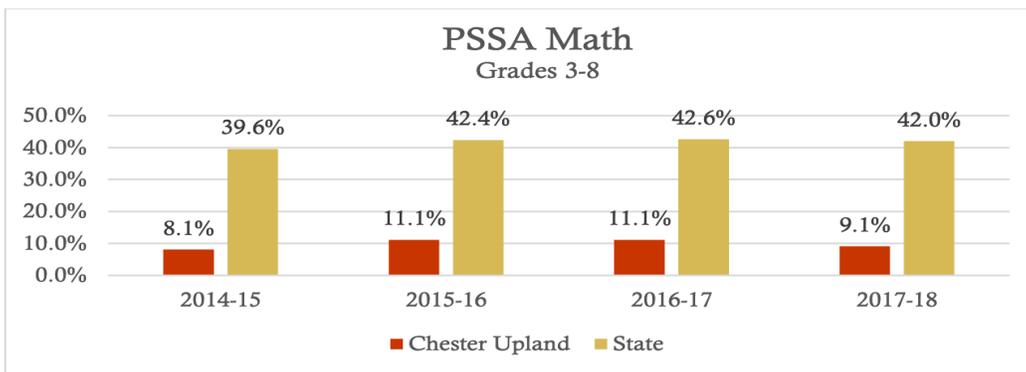
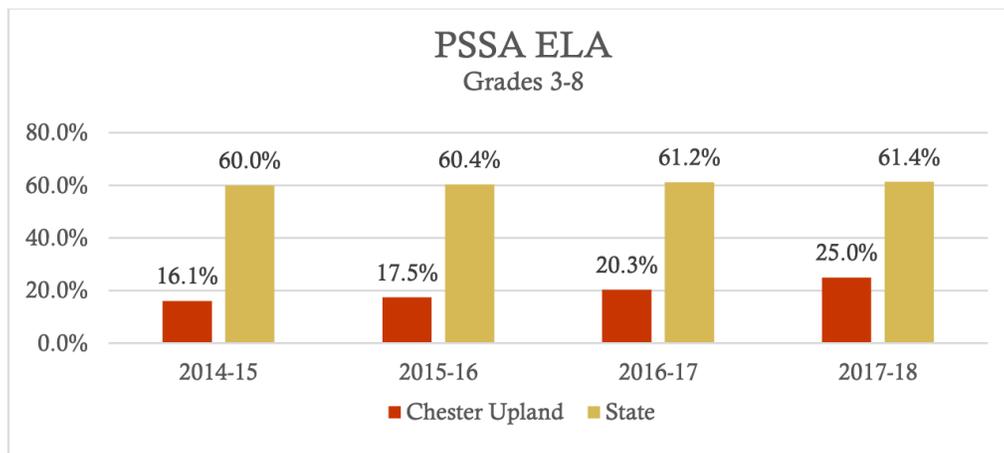
Students from the Chester Upland catchment area who are enrolled at charter schools primarily attend Chester Charter Community School, Widener Partnership Charter School, and Chester Charter School for the Arts. Other District students attend Camelot Alternative Education School

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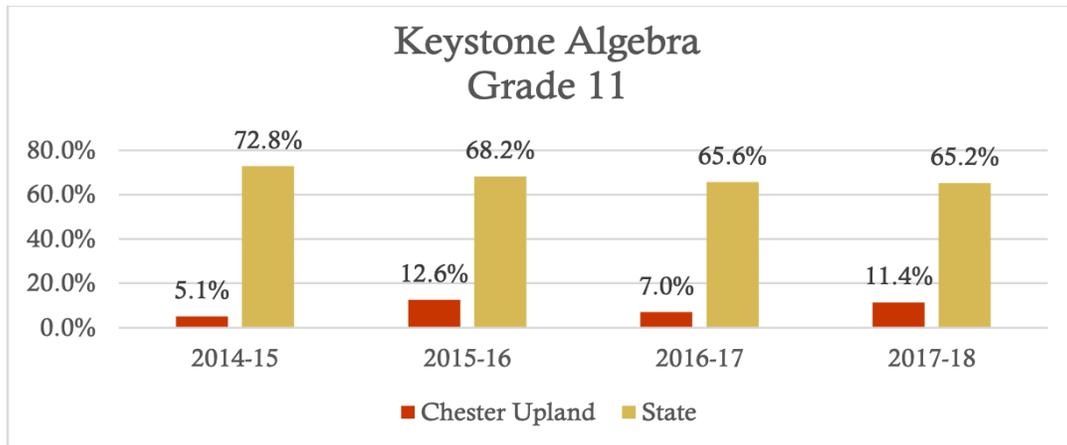
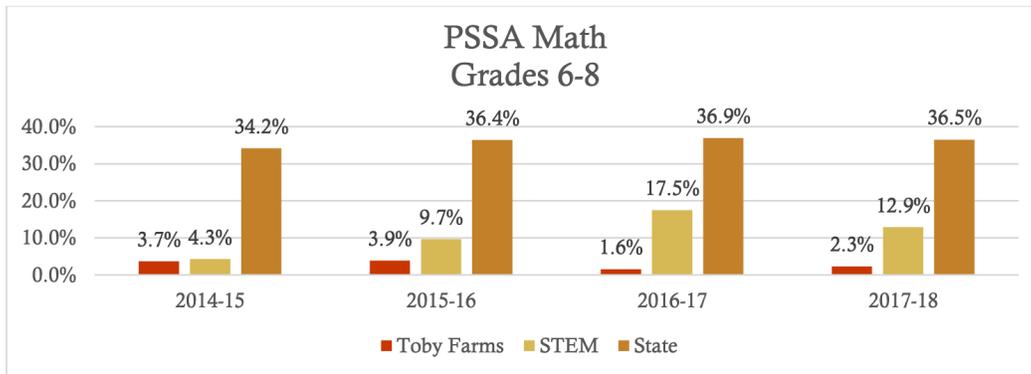
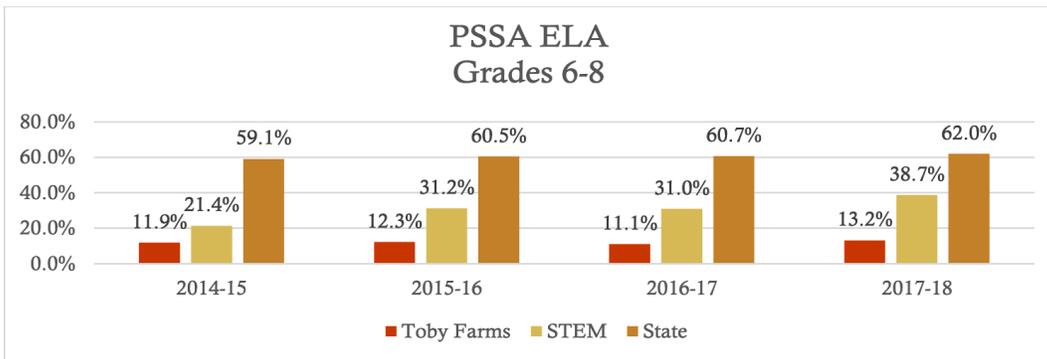
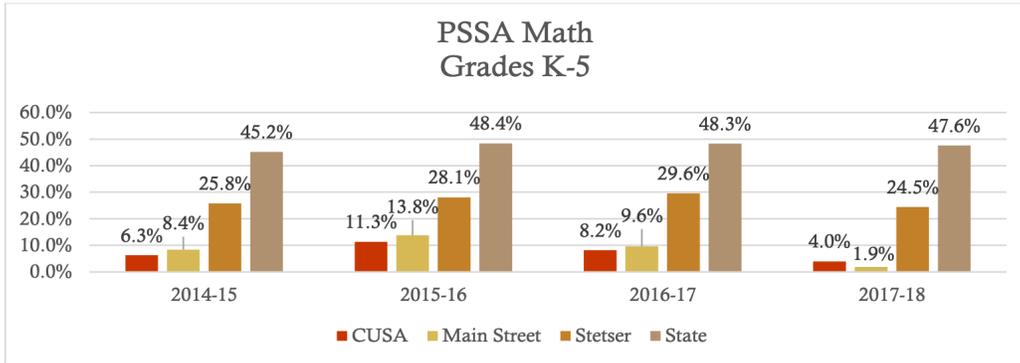
<https://www.chesteruplandsd.org/camelot/home> or Digital Academy  
<https://www.chesteruplandsd.org/digital/home>.

### CUSD Academic Performance

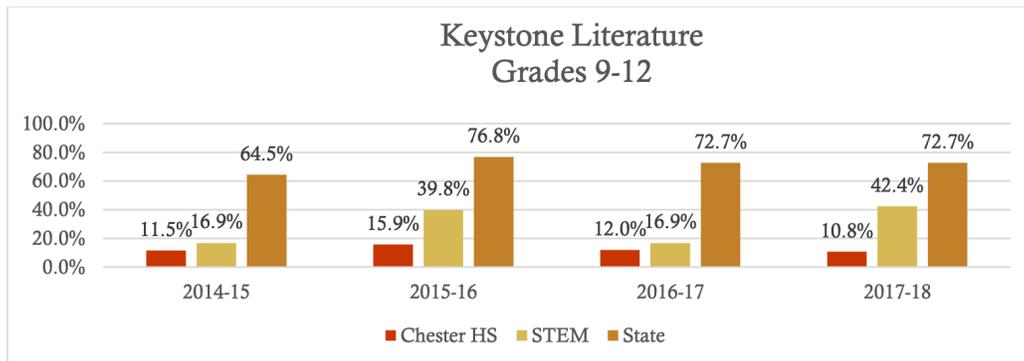
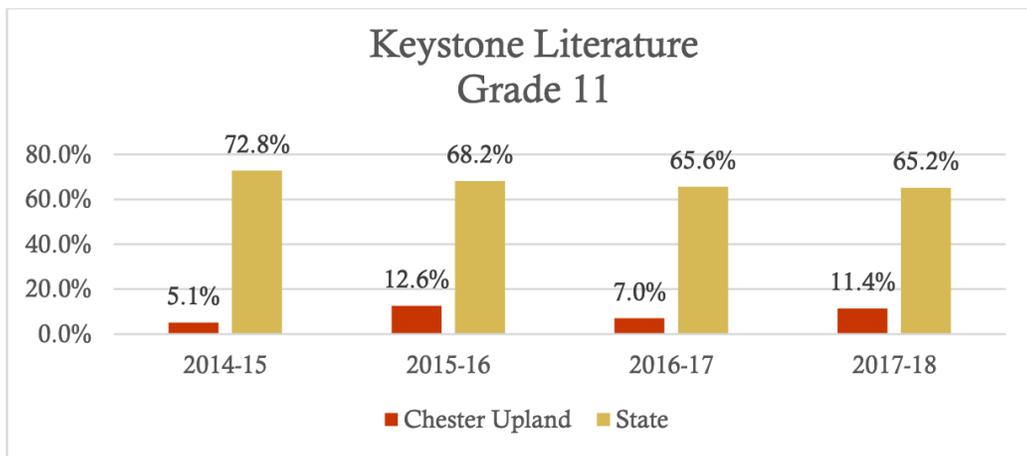
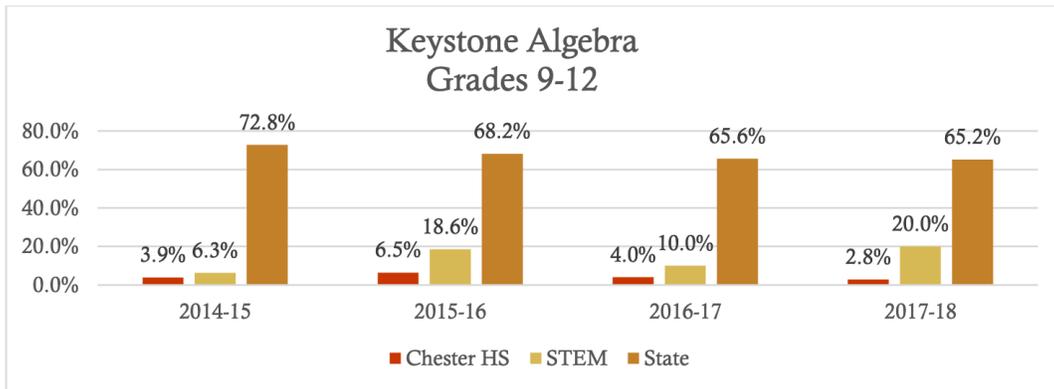
In 2019, [Mass Insight](#) was engaged to diagnose the District’s academic and operational conditions. The following snapshots are from their May 2019 diagnostic report and are incorporated in the District’s Revised Financial Recovery Plan of December 2019. More detailed information on the diagnostics can be found in the Plan.



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Providers submitting affirmative responses to this Request For Interest will be given access to more detailed academic achievement data, on a school-by-school and cohort basis, upon request. The Pennsylvania Future Ready Index (<https://futurereadypa.org/Search/District>) can also provide relevant information to interested providers on each District school, grade cohorts, and student demographical performance metrics.

## Potential Strategic Options for CUSD

Receiver Baughn and the CUSD Board of Education are considering cost effective strategic options that will address the district’s most severe challenges. CUSD intends to leverage the experience of subject matter expertise on district reorganizations and examine best practice examples from several urban school districts that have embarked upon similar initiatives to restructure the delivery of education to their students. The Court Order and the Receiver are clear that any strategic options for managing CUSD’s schools must effectively demonstrate, “continuity of quality educational curriculum and extra-curricular programs, and meet the needs of current and future students with disabilities, as well as alternative quality arrangements for students who choose not to attend the conversion charters.” Therefore, the Strategic Options Initiative has been constructed to identify, evaluate, and eventually contract with Education Management Organizations, or Charter Management Organizations, or any other K-12 education service organizations (“Providers”) that offer the **“best fits”** and **“best matches”** for CUSD’s needs for dramatic improvements in academic performance *for every student in the District*. Additionally, the “best fits” and “best matches” for the District must ensure that all of CUSD’s students have access to programs, instruction, and support services that meet their needs. In addition to this RFI, the Receiver will be considering proposals for rethinking the management and operations of the District’s central office functions (e.g., student support services, transportation, and food services) with the ultimate goal of achieving cost effectiveness and operational efficiencies

In the evaluation of Provider proposals, the Receiver will consider a range of potential options, including but are not limited to, the following:

Option 1: Outsourced/contracted management for selected CUSD schools

Option 2: Outsourced/contracted management for a subset of CUSD schools

Option 3: Conversion of individual District school to a charter school

Option 4: Conversion of a subset of District schools to charter school

Option 5: Outsourced/contracted management of District facilities and real estate

It is possible that the Receiver could select and contract with multiple organizations to execute the SOI and may consider partnering Providers in an individual or subset of schools depending upon how

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well their qualifications and proposed solutions respectively meet the needs of the students. Although each of CUSD's Pre-Kindergarten – 12<sup>th</sup> grade schools will be considered under this initiative, the highest priority will be placed on schools which have been challenged in meeting the District's mission and vision and where academic achievement has been historically below expectations. It is possible that the District may maintain responsibility and control for some of its schools, if it determines that doing so is in the best interest of the students and CUSD community.

#### [Option 1: Outsourced/Contracted Management For Selected CUSD Schools](#)

The Receiver may consider outsourcing the management of each CUSD school, under contract with an external third party, non-CUSD organization with the expected outcome of improving academic outcomes and operations, with the highest priority placed on addressing the needs of the District's lowest performing schools. Under this scenario, the successful provider may be a for-profit Education Management Organization, non-profit entity (such as a Charter Management Organization), or other education organization that has a proven track record in turning around failing or struggling individual schools.

Under Option 1, CUSD will mandate the academic, budgetary, operational, and administrative guidelines for each school and engage the Provider to deliver services and functions to meet or exceed those guidelines. The guidelines will include academic growth and corrective action plans and require the Provider to incorporate the following elements: academic growth and corrective action plans; development strategies for school leadership teams; curriculum, instruction, and assessment strategies; and direct and indirect services for students.

The contracted Provider will be supplementary and/or substitutional of existing CUSD functions and will report to CUSD's Receiver, who will maintain oversight and establish performance targets for each contractor.

#### [Option 2: Outsourced/Contracted Management for a Subset of CUSD Schools](#)

Option 2 calls for a greater degree of restructuring through the outsourcing of all or a subset of CUSD schools to a single Education Management Organization, or multiple Education Management Organizations, non-profit entity or entities (such as Charter Management Organizations), or other education organizations that have proven track record in turning around failing or struggling individual schools. Under this scenario, the Provider will have greater decision-making autonomy over the schools within its purview. Similar to Option 1, the successful Provider(s) will be selected because of proven track records in turning around portfolios of failing or struggling schools.

Under Option 2, a successful Provider will be responsible for developing and implementing solutions that meet or exceed the needs of each school in the portfolio. The Provider's solutions will be based upon annual academic, budgetary, operational, and administrative guidelines that CUSD will

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establish. The guidelines will require the Provider to incorporate academic growth and corrective action plans; development strategies for school leadership teams; curriculum, instruction, and assessment strategies; and direct and indirect services for students. The successful Provider may sub-contract services to other providers depending upon their respective competencies and capabilities.

Retention of current CUSD staff would be subject to the review of individual staff member performance records, and it is possible that new staff would be hired or existing staff repositioned, depending upon the needs of the school. The Provider would be responsible for all aspects of a school's operations and would report directly to CUSD's Receiver who will maintain oversight and establish performance targets.

### [Option 3: Conversion Of Individual District School To A Charter School Structure](#)

Under Option 3, the Receiver will consider the conversion of an individual school to a charter school structure. Similar to Option 1, the Provider will be an external third party, non-CUSD organization contracted to improve academic outcomes and operations, and may be a for-profit Education Management Organization, non-profit entity (such as a Charter Management Organization), or other education organization that has a proven track record in turning around failing or struggling individual schools, and will be responsible for developing and implementing solutions that meet or exceed the needs of the student population.

Under Option 3, however, the Provider will be mandated to install a whole-school model that entails all aspects of the academic experience including counseling, student support, and professional development and will operate as a standalone entity with district oversight. Enrollment in an Option 3 school will be determined by the Receiver and be guided by the needs for the current populations in the existing school. Additionally, an Option 3 school will have greater autonomy to implement its program as long as that program aligns with the District's mission, vision, and the Building Blocks described in the 2019 Revised Financial Recovery Plan.

The Receiver will be the authorizing body for an Option 3 school under Public School Code Of 1949 ( 24 P.S. §§ 17-1701-A - 17-1732-A - Amended for Act 70). It is contemplated that under Option 3 the Provider will be given an initial five (5) year charter, with options for renewal of the charter based upon performance.

### [Option 4: Conversion Of A Subset Of District Schools To A Charter School Structures](#)

Under Option 4, the Receiver will consider the conversion of a subset of District schools to a charter schools. The Provider(s) will be an external third party, non-CUSD organization contracted to improve academic outcomes and operations, and may be a for-profit Education Management Organization, non-profit entity (such as a Charter Management Organization), or other education organization that

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has a proven track record in turning around failing or struggling individual schools, and will be responsible for developing and implementing solutions that meet or exceed the needs of the student population. It is contemplated that each school in an Option 4 group of schools will have goals and objectives that are customized to meet those students' needs.

Under Option 4, the Provider(s) will be mandated to install whole-school models that entail all aspects of the academic experience including counseling, student support, and professional development and will operate as a standalone subset with District oversight. Enrollment in an Option 4 school will be determined by the Receiver and be guided by the needs for the current populations in the existing schools. Additionally, an Option 4 school will have greater autonomy to implement its program as long as that program aligns with the District's mission, vision, and the Building Blocks described in the 2019 Revised Financial Recovery Plan.

The Receiver will be the authorizing body for Option 4 schools under Public School Code Of 1949 (24 P.S. §§ 17-1701-A - 17-1732-A - Amended for Act 70). It is contemplated that under Option 4 the Provider will be given an initial five (5) year charter, with options for renewal of the charter based upon performance.

#### [Option 5: Outsourced/Contracted Management Of District Facilities And Real Estate](#)

As stated in the Revised Financial Recovery Plan (pp. 86 - 90), it has been noted that District enrollment has dropped largely because of substantial amounts of deferred maintenance and underfunded capital improvement budgets. Moreover, changing academic program requirements, e.g., educational technologies and career and technical education programs, mean that school buildings should be reconfigured and upgraded to deliver the best educational experience for students. The District accordingly embarked upon a comprehensive study of its facilities and capital improvement needs in 2019 and studied the related impact on the condition of District's facilities and its ability to service its bond debt obligations. The studies revealed that the district has approximately \$30 million in prioritized capital expenditures and facilities improvements.

Under Option 5, the Receiver is considering the most appropriate way to manage, operate, reconfigure, invest in, and upgrade its facilities and will consider proposals from facilities management companies, real estate companies, and other qualified organizations. The successful provider will present numerous options for improving the infrastructures and systems for each district building. Additionally, providers may submit alternatives for the consideration of the Receivers, such as sale, sale/leaseback, partitioning, or other methods to reduce the District's facilities-related liabilities.

## CUSD Strategic Options Initiative Process

At the direction of the Receiver, CUSD is undertaking a two-part process: (1) a **Request for Interest**, and (2) a **Request for Proposals**. This document serves as the Request for Interest.

### I. Request For Interest

CUSD's Receiver has engaged an independent Strategic Advisor, PlusUltre LLC, to develop this Request For Interest (RFI) which summarizes CUSD's background, outlines the case for the Strategic Options Initiative, and lays out the opportunities for provider engagement.

The Strategic Advisor is responsible for developing a list of potential providers and for cultivating interest in the SOI. It is expected that the potential providers may include Education Management Organizations, Charter Management Organizations, and private education companies which have proven capabilities to turn around schools similar to CUSD's and knowledge of the Chester Upland area and demographics. It is anticipated that providers within and outside of Pennsylvania will have interest in the SOI opportunity. This RFI contains minimum qualifications for engagement. Interested providers will be expected to submit an Intent To Reply form that will be reviewed and evaluated by the Strategic Advisor (See page 19). The Strategic Advisor will recommend to the Receiver which interested providers should be invited to proceed to the Request For Proposals phase of the SOI process.

### II. Request For Proposals

The CUSD Strategic Options Initiative Request for Proposals (RFP) will be issued subsequent to a review of the RFI's by the Receiver and Strategic Advisor. The RFP will document and describe the District's needs, individual school profiles, and comprehensive data on District functions. Only those providers which have submitted RFI's, and whose RFI's meet the District's needs, will be allowed to submit RFP responses.

The RFP response will entail detailed plans, terms and conditions, expectations, costs, and implementation steps for each school for which a provider proposes to manage. The District's Strategic Advisor will be responsible for developing and distributing the RFP. Within the RFP will be the following sections:

#### Background on CUSD

- Demographics and community statistics
- Catchment area for each school
- Record of academic progress:
  - PSSA scores by school and cohorts
  - PVAAS trends by school and cohorts

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- Future Ready Indices
- Graduation progress
- Operating statistics (e.g., Facilities, Transportation, Food Services)
- Budgets
- Attendance records

**Background on Bidding Providers (Options 1 – 4)**

Each bidding provider will be required to submit summaries and examples that capture the organization’s demonstrated previous successes, reputation, and track record in several domains, including:

- Academic program and curriculum
- Instruction and instructional support
- Facilities
- Operations
- Pupil Services
- Security
- Food services
- Transportation
- Procurement
- Alternative Education
- Special Education
- Career and Technical Education
- English Language Learners
- Student mobility
- Admissions
- Graduation requirements
- Multi-Tiered System of Supports
- Grants solicitation/Grants management
- Other non-academic operations
- Effectiveness and efficiency of solutions
- Financial stability
- Access to capital

**Requirements for Responding Providers (Option 1 – 4):**

Bidding providers will be required to submit documentation, case examples of their engagements, and references that include:

- Organization’s background, founder(s), and management profiles;
- Organization’s Theory of Change or guiding principles;
- Organization’s academic, financial, and operational capacity to successfully open, operate, and manage CUSD school(s);
- An overview of the proposed school model, highlighting mission-critical needs (i.e., “must haves”);
- An explanation of how the school model aligns with community assets and needs, including any need to improve educational outcomes in the community;
- Academic growth plan for the first 3 years of operation, including:
  - How provider intends to align its teaching and learning approach with PA state standards and the articulated goals of the state’s Future Ready Index for proficiency and growth for each grade and cohort;
  - Quantifiable strategies and goals for addressing a school’s most urgent concerns, such as: boosting PSSA and PVAAS scores for each grade and cohort; increasing attendance levels; or improving graduation rates;

- Evidence of success with similar student populations or, for innovative or untested models, a strong rationale for the likelihood of success;
- Potential capital investments in facilities, technology, and security in order to implement the proposed school design; and
- Potential operational costs calculated on per pupil basis, and per school basis.

#### Background on Bidding Providers (Option 5)

Each bidding provider for Option 5 (Outsourced/Contracted Management Of District Facilities And Real Estate) will be required to submit summaries and examples that capture the organization's demonstrated previous successes, reputation, and track record in several domains, including:

- Experience in the education industry, particularly in urban districts similar to Chester Upland
- Copies of Licenses and Certifications
- Employee sourcing, screening, and hiring procedures
- Staff training/professional development program
- Capacity to conduct visual inspections and assessments of all building exterior and interior areas, building systems and infrastructures (e.g., HVAC, electrical, plumbing, landscaping)
- Management/supervision structure
- Daytime and evening custodial services, including thorough cleaning of designated areas and cleaning procedures, with particular focus on CDC recommended cleaning procedures in response to the COVID-19 pandemic
- Response to emergency orders & service (e.g., response time, breadth of service coverage, strength of meeting service and warranty needs of members) and procedures for customer service, e.g., work order tracking system and management and maintenance of work order system or call center or help desk options
- Service quality monitoring and metrics
- Safety record (e.g.; benchmarks, lost hours, reporting)
- Invoicing process (e.g., ease of use; transparency, billing resolutions)
- Contingency/coverage for daily facilities management.

Because the Receiver is interested in the long-term viability and sustainability of the District, Option 5 will incorporate responses from providers who can provide alternatives to the District for reconfiguring, repurposing, acquisition, and/or disposal of District-owned properties. Bidding providers that submit real estate proposals will be required to provide detailed responses related to specific service areas.

Each bidding provider will be required to conduct site visits/walk-throughs of CUSD schools, facilities, and meetings with CUSD key personnel, and eventually meet with school communities. There will

also be at least one meeting with all potential bidders to respond to questions and concerns before final RFP documents are submitted.

#### Selection Rubric and CUSD RFP Review Group

The district's strategic advisor will prioritize proposals based on proven capacity to effectively and efficiently serve CUSD's needs using a "CUSD SOI Provider Selection Rubric". The Rubric will score provider responses to each of the required areas.

The advisor will form and facilitate a CUSD RFP Review Task Force that will include administrators, community members, District faculty and staff. The RFP Study group will conduct in-person capacity interviews, and possibly visit the schools where bidding providers can demonstrate the effectiveness of their programs.

Selected bidding providers will present their respective ideas to the Receiver and the RFP Review Group. Using the Rubric, Review Group recommendations, and site visit data, the District's strategic advisor will evaluate the RFP documentation, and then recommend the "best fit, best match" providers to the Receiver. Due diligence checks will be conducted by the Receiver and the Strategic Advisor.

The ultimate decisions on providers will be submitted for consideration to the Court of Common Pleas and Pennsylvania Department of Education. Public announcements on the process and final selections will be made after these reviews are completed.

#### Post Selection Process

Following the approval of the Court and PDE, the Receiver and Strategic Advisor will begin to prepare the successful bidder(s) for transitions. The preparations will include intensive reviews of school and District staffing and implementation planning. There will be regular (monthly) progress monitoring by the Strategic Advisor, reporting to the Receiver, PDE, and Court of Common Pleas.

#### Provider Contracts

It is envisioned that CUSD SOI provider contracts will be a minimum of three years to enable providers ample time to implement their programs and demonstrate success.

Provider contracts will entail terms and conditions that align with the district's mandate for improvement in academic and operational performance. Performance goals for each school will be established at the beginning of each provider's contract period. The Receiver will conduct mandatory monthly progress reviews with each provider and will conduct an annual review.

## Tentative RFI and RFP Timetables

The following target dates and action steps are tentative and the Receiver may adjust the timing and action steps change as the RFI and RFP processes evolve. Adjustments to the timing or action steps will be communicated to providers who

<p><b>July 31, 2020 – September 4, 2020</b></p>	
<p><b>September 4, 2020 – September 11, 2020</b></p>	<p>6. Evaluation of RFI’s and providers informed 7. Formation of CUSD RFP Review Task Force</p>
<p><b>September 14 – 18, 2020</b></p>	<p>8. Bidders meeting (virtual or on-site)</p>
<p><b>September 21, 2020</b></p>	<p>9. Issuance of RFP to potential providers who qualified via the RFI process</p>
<p><b>October 30, 2020</b></p>	<p>10. RFP’s due</p>
<p><b>October 30, 2020 - November 9, 2020</b></p>	
<p><b>November 13, 2020 - December 14, 2020</b></p>	<p>14. Presentation of findings to CUSD Receiver 15. Finalist providers’ presentations</p>
<p><b>December 18, 2020 – January 15, 2021</b></p>	

	19. CUSD decision on ultimate provider and submission of decision to Court of Common
<b>March 31, 2021</b>	21. Decision/Approval by Court of Common Pleas 22. Contract negotiations with provider on Service Agreement, etc.
<b>April 30, 2021</b>	23. Contracts signed
<b>May 1, 2021 – June 30, 2021</b>	24. Provider preparation, staffing, on-site meetings, and implementation planning 25. District preparation for transition to external provider system

## Process for RFI Response

Interested school management organization are asked to follow the process below:

- 1) **By August 10, 2020**, complete and send a **Letter of Intent** to indicate its intentions to submit a Request for Interest, to Receiver Dr. Juan Baughn (see Attachment A).
- 2) **By September 4, 2020**, complete and send a formal Request for Interest to Receiver Dr. Juan Baughn (see Attachment B and Project Narrative (Attachment C)).

## RFI Format

The RFI response should include the following minimum information:

- A. Indication of Interest (Attachment A) – *due August 10, 2020*
- B. Cover Letter (Attachment B) and Organizational Narrative (Attachment C) – *due September 4, 2020*. The Project Narrative is your opportunity to describe your organization’s qualifications, track record, and rationale for submitting the RFI. ***Please limit your narrative to no more than 20 pages excluding exhibits or attachments. Narratives that are longer than 20 pages will be disqualified. Please feel free to provide links to supporting documents via Dropbox, iCloud, or other cloud-based services. Please make sure to provide a secure sign on access for any supporting documents that are in cloud-based folders.***

## Summary

Dr. Leroy D. Nunery II, Founder & Principal of PlusUltré LLC, and has been appointed as Strategic Advisor for the CUSD Receiver’s Strategic Options Initiative. Please indicate if your organization is interested in learning more about this opportunity by contacting at [ldnunery2@plusultrellc.net](mailto:ldnunery2@plusultrellc.net) or (215) 888-7333.

Attachment A - Letter of Intent

**Please return this Letter of Intent form to Receiver Baughn no later than 5:00 P.M. EST, August 10, 2020 to the following address:**

**Dr. Juan Baughn  
Receiver  
Chester Upland School District  
232 W. 9th St.  
Chester, PA 19013  
E-mail: [jbaughn@chesteruplandsd.org](mailto:jbaughn@chesteruplandsd.org)**

**Organization Name:** \_\_\_\_\_ has received the Request for Interest and Case Statement for Strategic Options for the Chester Upland School District.

Please indicate your intentions:

\_\_\_ At this time, it is our organization's intent to submit a formal response to the Request for Interest for Option 1 (Outsourcing or Contracted Management of a Single CUSD School).

\_\_\_ At this time, it is our organization's intent to submit a formal response to the Request for Interest for Option 2 (Outsourcing or Contracted Management of a Multiple CUSD Schools).

\_\_\_ At this time, it is our organization's intent to submit a formal response to the Request for Interest for Option 3 (Conversion of a CUSD School to Charter School Structure).

\_\_\_ At this time, it is our organization's intent to submit a formal response to the Request for Interest for Option 4 (Conversion of a Multiple CUSD Schools to Charter Schools).

\_\_\_ At this time, it is our organization's intent to submit a formal response to the Request for Interest for Option 5 (Facilities Management and Operation).

\_\_\_ At this time, our organization is not intending to submit a formal response to the Request for Interest.

**Signature:** \_\_\_\_\_  
**Name (Please Print):** \_\_\_\_\_  
**Title:** \_\_\_\_\_  
**Date:** \_\_\_\_\_

Attachment B – Cover Letter Format

Responding Organization: \_\_\_\_\_

**Provider Type: (please choose one)**

- |  |   |
|--|---|
| <input type="checkbox"/> Charter Management Organization   | <input type="checkbox"/> Facilities Management Company  |
| <input type="checkbox"/> Education Management Organization | <input type="checkbox"/> Real Estate Management Company |
| <input type="checkbox"/> Academy                           | <input type="checkbox"/> Other _____                    |

Name of Respondent Representative: \_\_\_\_\_

Title: \_\_\_\_\_

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email of Primary Contact: \_\_\_\_\_

Mobile telephone number of Primary Contact: \_\_\_\_\_

Website: \_\_\_\_\_

Federal ID # (if applicable): \_\_\_\_\_

**\*\*\* By signing this letter, I hereby represent on behalf of the Respondent that I am authorized to submit this proposal on behalf of the Respondent. I further represent that all information provided in this proposal is accurate and truthful. I understand that the proposal will be immediately disqualified if any misrepresentations are made in the proposal. I further understand that the Respondent's proposal will be evaluated based on the qualifications of the Respondent to run a school on a daily basis. Responses that do not contemplate operating a school without additional resources, supports, or organizations will be disqualified. \*\*\***

Authorized Representative Signature: \_\_\_\_\_

Print Name, Title Here: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Please submit this Cover Letter along with Attachment C, Organization Narrative (page 22).**

## Attachment C: Proposer Organization Narrative

The Proposer Organization Narrative is your entity's opportunity to inform the Receiver about its track record, capabilities, and capacities to undertake a possible engagement with Chester Upland. ***Please limit your narrative to no more than 20 pages excluding exhibits or attachments. Narratives that are longer than 20 pages will be disqualified. Please feel free to provide links to supporting documents via Dropbox, iCloud, or other cloud-based services. Please make sure to provide a secure sign on access for any supporting documents that are in cloud-based folders.***

**Format:** 1" margins

**Font:** Arial, Font size 11

## Appendix

Note: All supporting background documents listed below will be placed in an online file or can be accessed by copying and pasting the links into your browser. Access to the background document will be granted by Dr. Nunery upon request. Please contact Dr. Nunery at [ldnunery2@plusultrellc.net](mailto:ldnunery2@plusultrellc.net) for access.

1. [Chester Upland School District website](https://www.chesteruplandsd.org/): <https://www.chesteruplandsd.org/>
2. Delaware County Court of Common Pleas, No. CV 2012-009781), dated May 14, 2020, authorizing Receiver Baughn to implement the Strategic Options Initiative.
3. [Revised Financial Recovery Plan](#)  
([https://www.chesteruplandsd.org/docs/district/Financial%20Recovery/December%202019%20USD%20Recovery%20Plan%20\(12-19-19\).pdf](https://www.chesteruplandsd.org/docs/district/Financial%20Recovery/December%202019%20USD%20Recovery%20Plan%20(12-19-19).pdf))
4. [Comprehensive Plan \(2019 – 2022\)](#)  
(<https://www.chesteruplandsd.org/docs/district/comprehensive%20plan/comprehensiveplan%20sy1819-publicreview.pdf?id=3699>)
5. Chester Upland Schools - Future Ready Index Links: <https://futurereadypa.org/Search/District>
6. CUSD [2020 Continuity of Education Plan](#)  
([https://www.chesteruplandsd.org/docs/district/VIRUS/Continuity%20Plan%20CUSD%20Original%20Template%20Final%20%20\(1\).pdf](https://www.chesteruplandsd.org/docs/district/VIRUS/Continuity%20Plan%20CUSD%20Original%20Template%20Final%20%20(1).pdf))