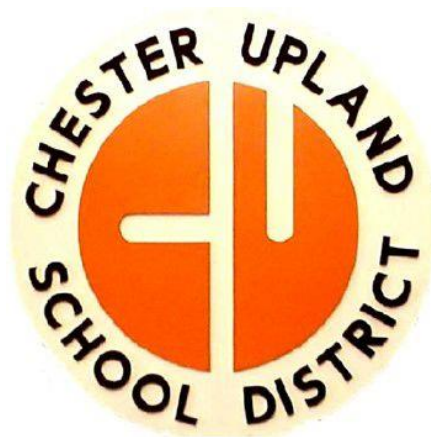


**Request for Proposal for
Potential Outsourcing
of Management or Operations of District Schools
for Chester Upland School District
October 26, 2020**

(REVISED TO REFLECT CHANGES: Highlighted in Yellow)



Issued By:

District Receiver, Dr. Juan Baughn

Chester Upland School District

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

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**Request for Proposals for Potential Outsourcing of Management or Operations
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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 inadequate support systems. 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 analysis of feasible options that articulate performance expectations that can be measured, monitored, and maintained with fidelity. The ultimate goal of the analysis 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 despite 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 other Chester Upland School District stakeholders.

Strategic Options Initiative Progress To Date

The Receiver has made significant progress on implementing the Strategic Options Initiative.

- (1) **Restructuring of the District's Central Office:** The Resolution of the Receiver Restructuring the Operations of CUSD, dated September 17, 2020, is presented In Appendix Item #7. In order to achieve greater efficiency and effectiveness in central office functions, the Receiver solicited proposals from four Intermediate Units in southeastern Pennsylvania to determine their interest in providing a variety of services to the District. Ultimately, the [Chester County Intermediate Unit \("CCIU"\)](#) was selected and has been contracted to manage and operate the

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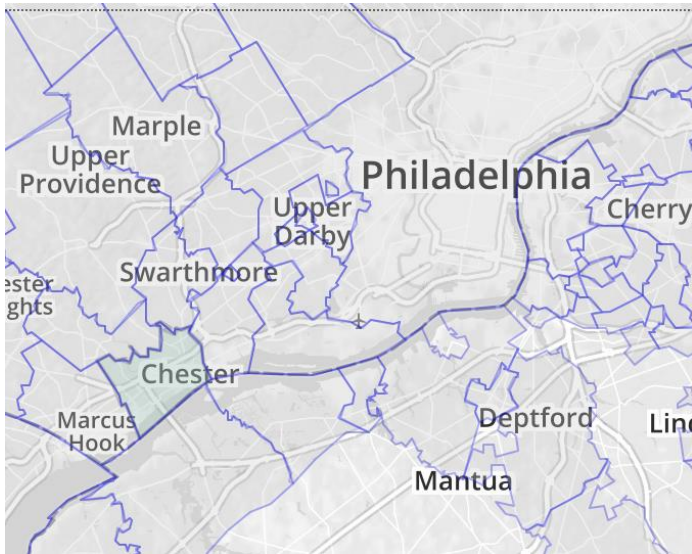
District's Business Services, Instructional Technology, Human Resources, Special Education, Federal Programs, and Student Services functions. CCIU has commenced its work in the District and will be delivering support services to CUSD schools including those which may be selected through this RFP process.

- (2) **Request for Interests (Phase 1 of Strategic Options Initiative)** This Request for Proposals (RFP) is being distributed only to Educational Management Organizations (EMOs) or Charter Management Organizations (CMOs) which completed the initial phase of the SOI, the Request for Interest (RFI). RFI's were reviewed for completeness, accuracy, and appropriateness for CUSD's various needs by the District's Strategic Advisor, with recommendations to Receiver Baughn to accept or not accept those submissions.
- (3) **Virtual Bidders' Meeting:** On October 8, 2020, Receiver Baughn convened a Virtual Bidders' Meeting that was facilitated by Strategic Advisor Dr. Leroy D. Nunery II. The meeting provided updates from the Receiver, District Counsel, and the District's strategic advisory team on CUSD's needs and aspirations for the RFP process. A recorded version of the Bidders' Meeting is available (only to participants) in the Bidders' Dropbox folder.

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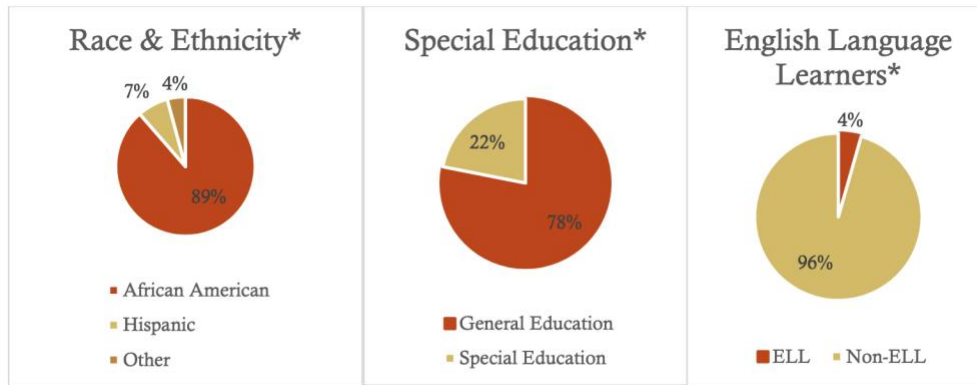
CUSD Demographics, Community, and Catchment Area

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 May 2019 student population is 52% male and 48% female and average attendance is approximately 65% across the District. The demographic breakdown is as follows:

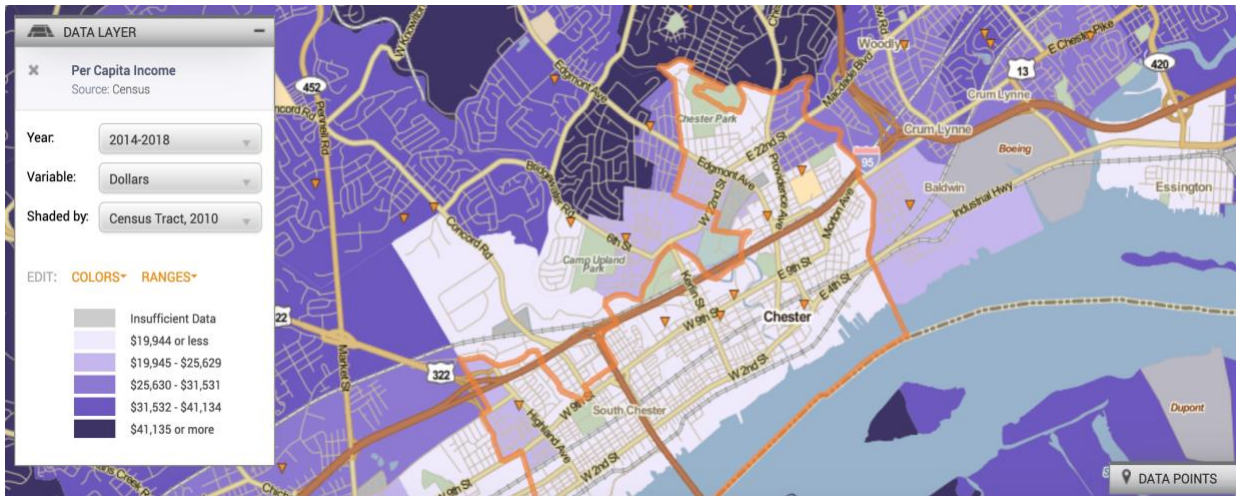
- American Indian/Alaskan Native (not Hispanic): 0.0%
- Asian (not Hispanic), Native Pacific Islander or Hawaiian: 0.1%
- Black or African American (not Hispanic): 90.8%
- Hispanic (any race): 7.5%
- White (not Hispanic): 1.6%

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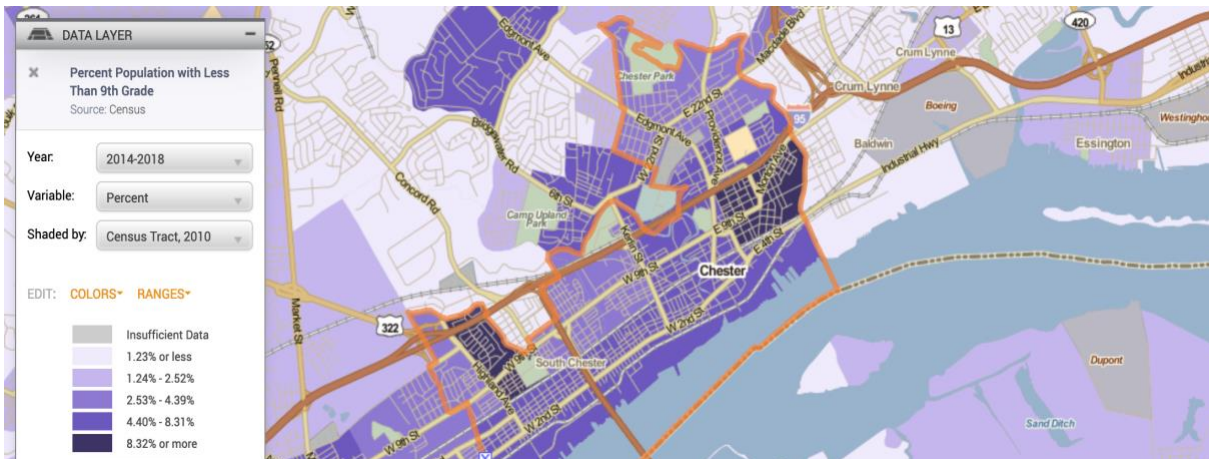
Chester Upland Snapshots

The following maps from Policy Map™ portray some relevant CUSD demographic data that further highlight the need for the SOI. Please see the legends in each snapshot for an explanation of the data.

Chester Upland Per Capita Income

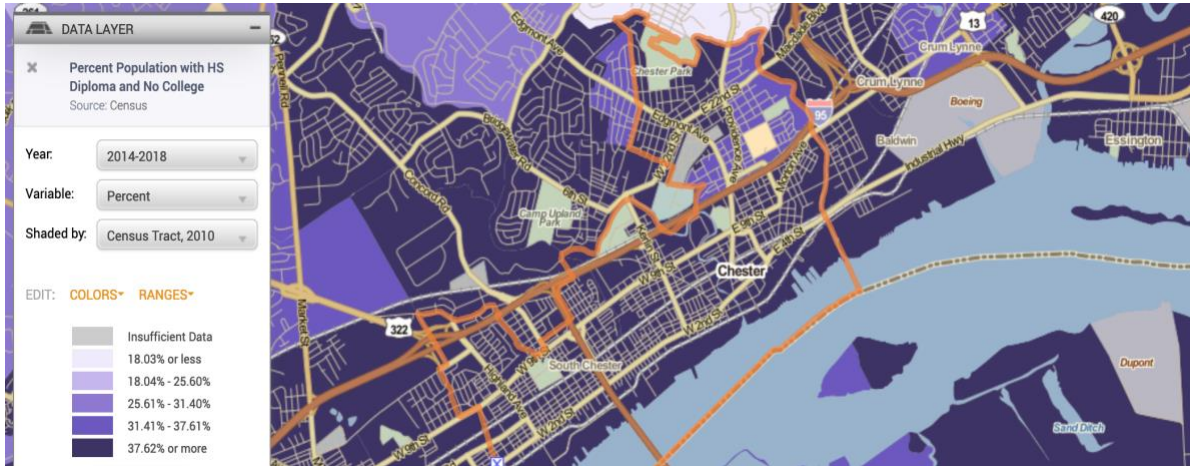


Chester Upland: Estimated percent of population with less than a 9th grade education, 2014-2018.

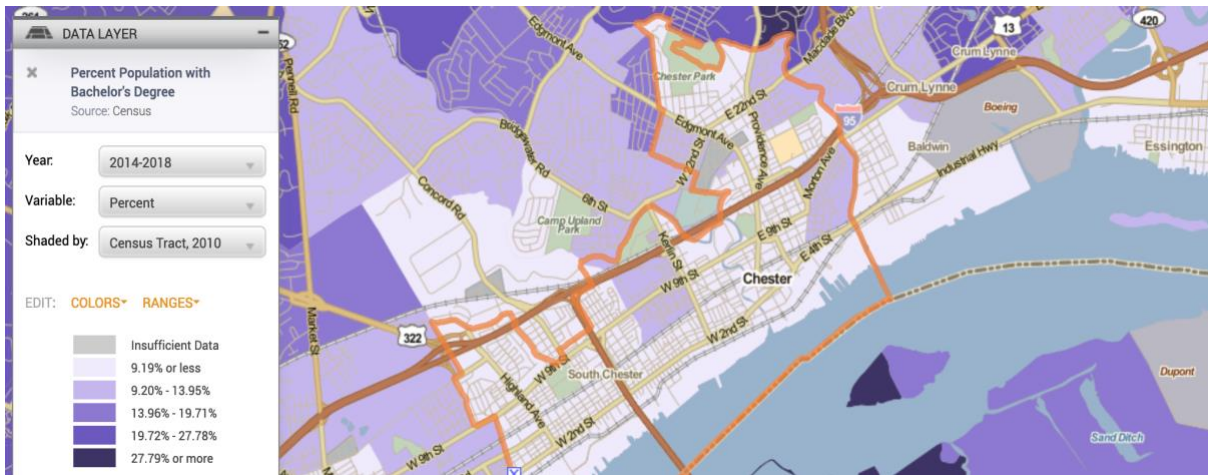


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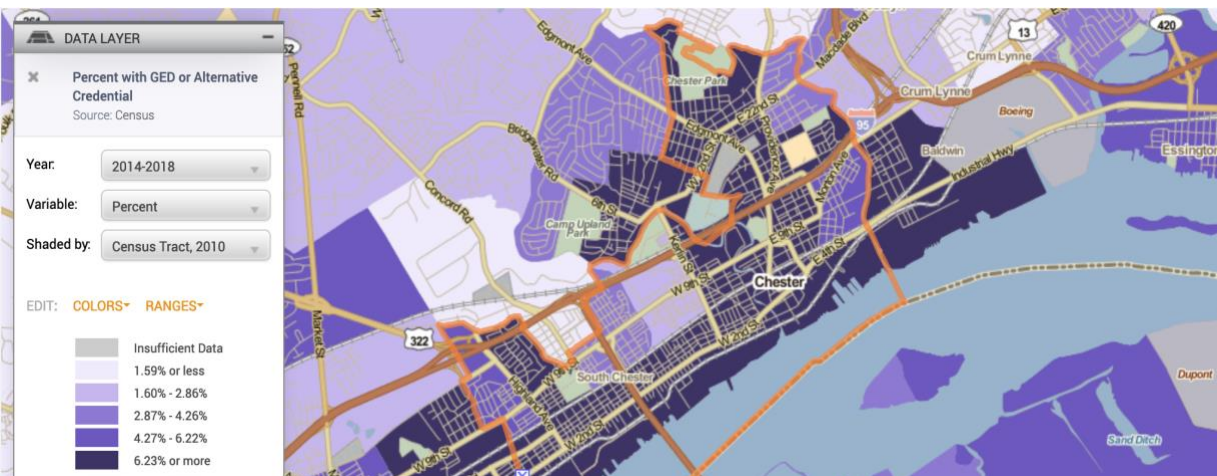
Chester Upland: Estimated percent of people with a high school diploma and no college, 2014-2018.



Chester Upland: Estimated percent of people with a bachelor's degree, 2014-2018.

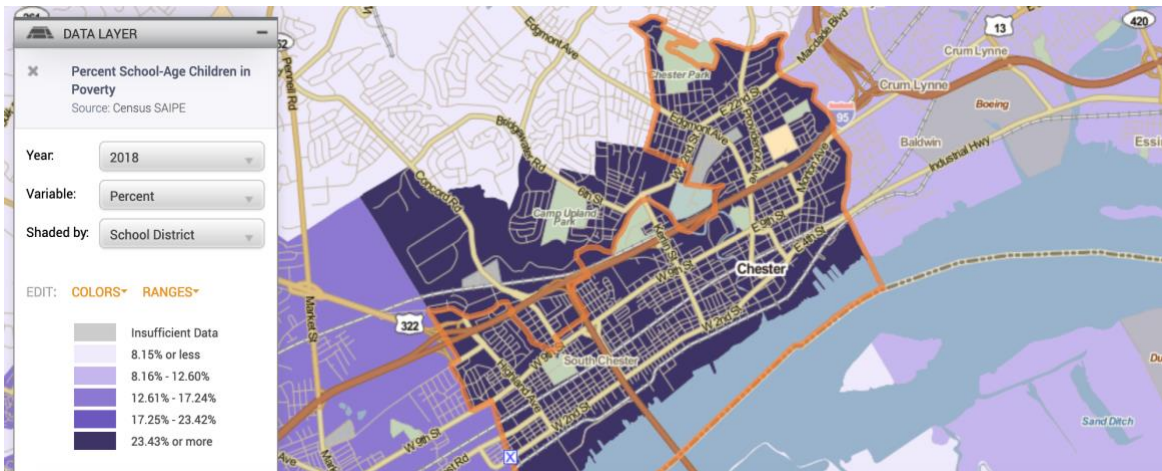


Chester Upland: Estimated percent of people age 25 or older with a GED or alternative credential, 2014-2018.

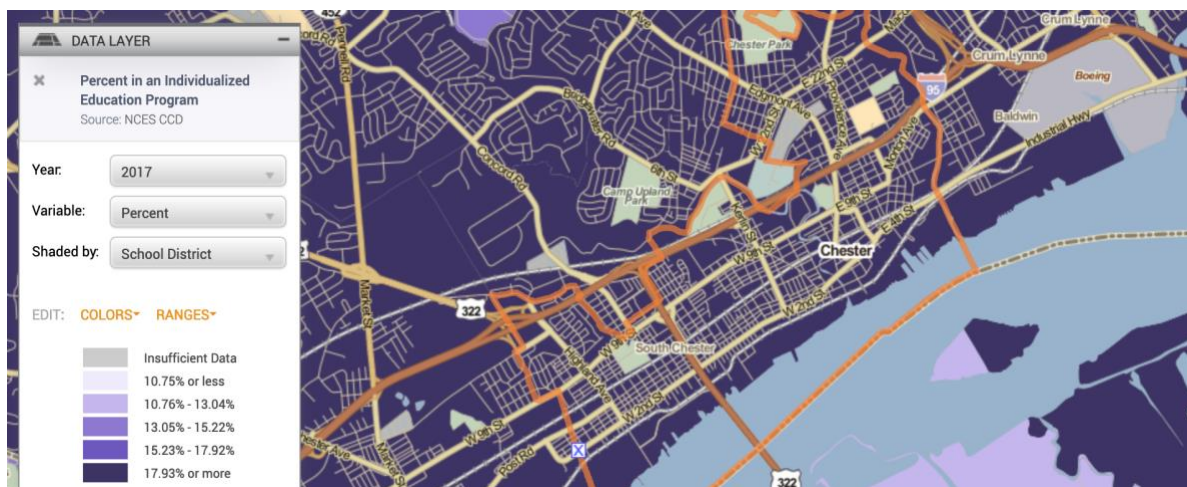


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Chester Upland: Percent of school-age children in poverty in 2018.



Chester Upland: Percent of students that were in an Individualized Education Program in 2016-17.



Other District Facts

The Receiver encourages all readers to review the [Revised Financial Recovery Plan, the Continuity of Education 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 District's funding is received in the form of Federal funds, which represents approximately 4% of budgeted revenues. The 2020-2021

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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
State (Pennsylvania)	\$102.234	76%
Local	\$24.452	18%
Federal	\$7.457	6%
Total	\$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%.

COVID-19 IMPACT

The COVID-19 pandemic has affected CUSD like other school districts around the country. Students have been educated remotely since March 2020, and state mandated testing in the spring of 2020 was suspended by order of the Secretary of Education. Respondents to this RFP must consider the feasibility and functionality of their proposed solutions under uncertain conditions.

The District has convened a Pandemic School Reopening Task Force, headed by Superintendent Dr. Carol D. Birks. This task force consists of faculty, board members, community and staff, and convenes weekly to discuss all aspects of school operations relevant to the school community during the pandemic. The Task Force is also divided into five workgroups – family and community engagement, learning and teaching, organizational efficiencies and safety, talent management, and development and technology – that are examining organizational efficiencies and effectiveness. Recently the Task Force conducted community forums and town meetings to garner input prior to finalizing recommendations.

Earlier in the year, CUSD filed a [Continuity of Education Plan](#) (see Appendix for link) with PDE to address, in detail, how it would sustain educational services under COVID-19 conditions. The Plan remains in effect as of this RFP publication. During the 2020-2021 academic school year, when students are required to attend school remotely and online, planned instruction will occur using school issued computers and/or personal mobile devices, the Internet, and digital platforms such as Zoom and Google Classroom. All students will be issued a consistent daily schedule that meets the

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required instructional minutes as per PA Code 22 § 11.3. Monday through Friday, teachers will facilitate synchronous lessons, in real-time and post weekly plans with mandatory assignment completion dates for grades PreK-12.

As part of the Continuity of Education Plan, the District also has written and published a Health and Safety Plan which states that schools will be in virtual operation at least until January 2021. Laptops and/or Chromebooks have been distributed to students to facilitate e-learning, with the goal of maintaining a 1:1 device-to-student environment. The District has been working with families without internet access to provide them with low-cost options, such as Internet Essentials from Comcast, or a Verizon hotspot for families who are not eligible for low-cost Internet.

CUSD School Profiles

Background information on the District's six schools can be found on the websites for each school:

Chester High School (9 - 12): <https://www.chesteruplandsd.org/chs/home>

Stetser Elementary (PreK - 6): <https://www.chesteruplandsd.org/stetser/home>

STEM at Showalter (7 - 12): <https://www.chesteruplandsd.org/stem/home>

Toby Farms Intermediate (4 - 8): <https://www.chesteruplandsd.org/toby/home>

Main Street Elementary (PreK - 5): <https://www.chesteruplandsd.org/main/home>

Chester Upland School of the Arts (CUSA) (PreK - 5): <https://www.chesteruplandsd.org/cusa/home>

The Revised Financial Recovery Plan has detailed information on each school's performance and the District's academic strategic priorities and initiatives called the "Four Building Blocks", outlined below. By engaging proven Providers, the Receiver is utilizing the Strategic Options Initiative 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.

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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

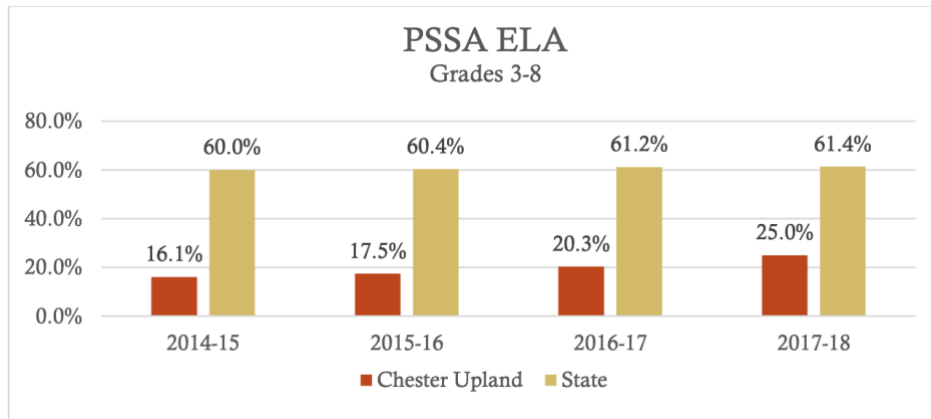
Students from the Chester Upland catchment area enrolled at charter schools primarily attend Chester Charter Community School, Widener Partnership Charter School, and Chester Charter School for the Arts. Other District students attend Camelot Alternative Education School

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

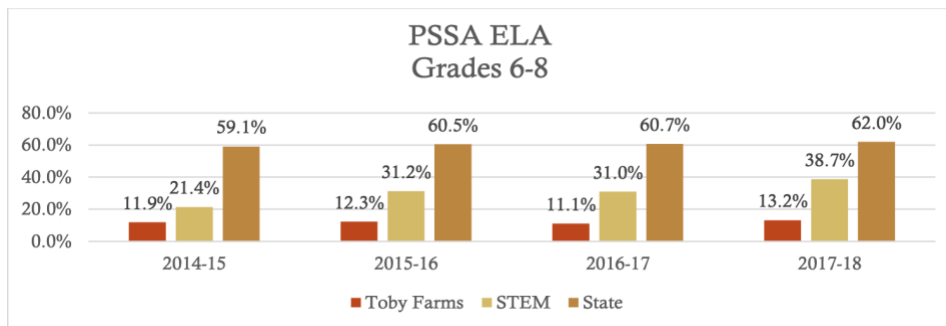
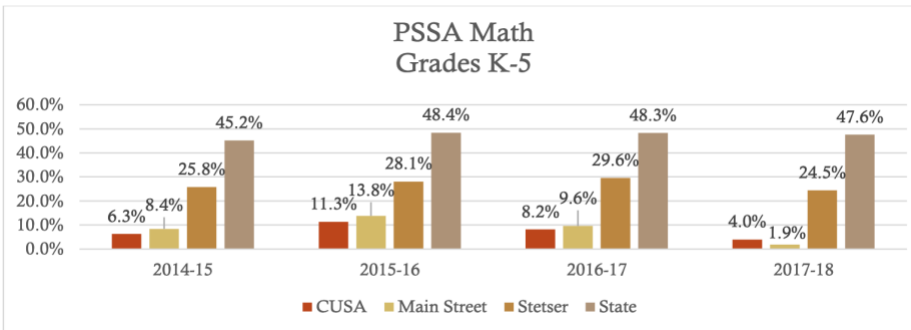
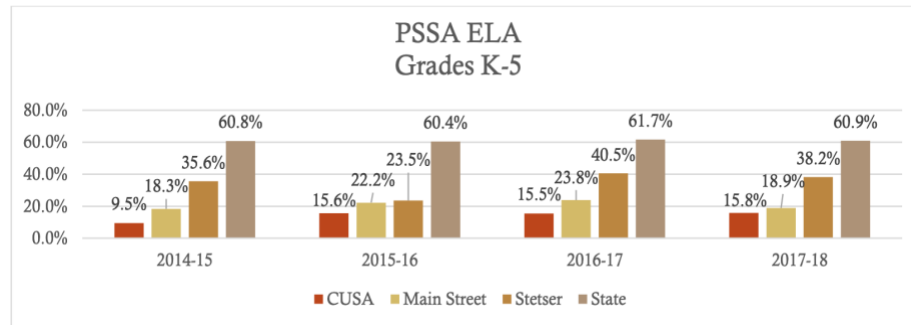
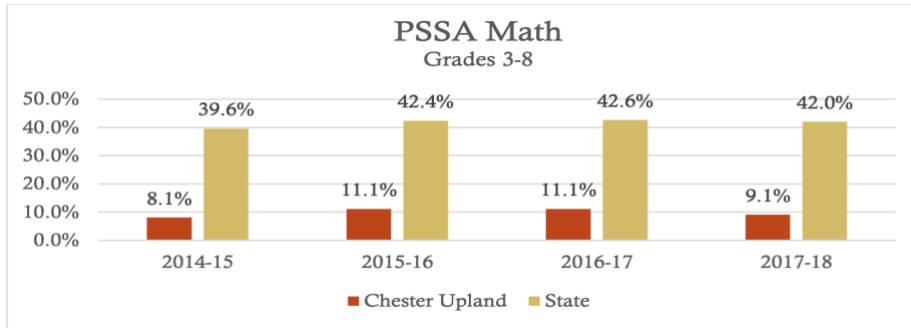
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CUSD Academic Performance

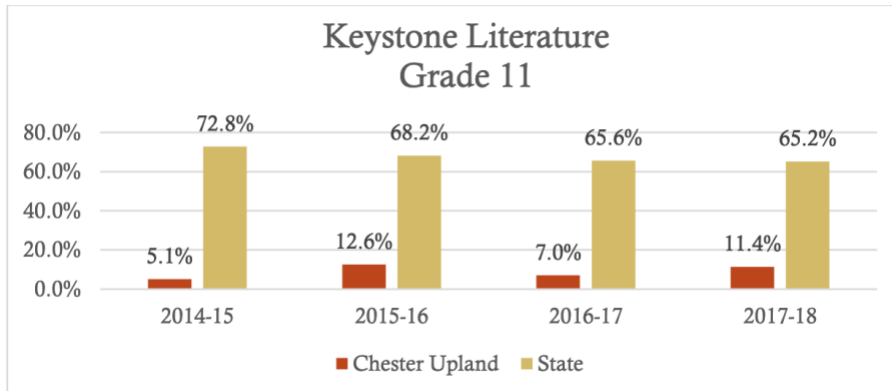
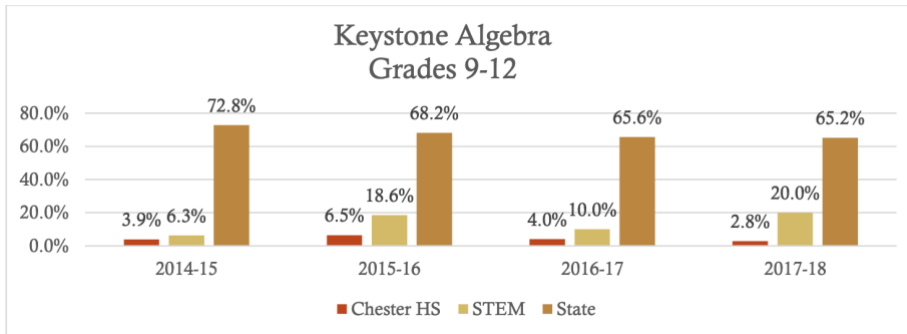
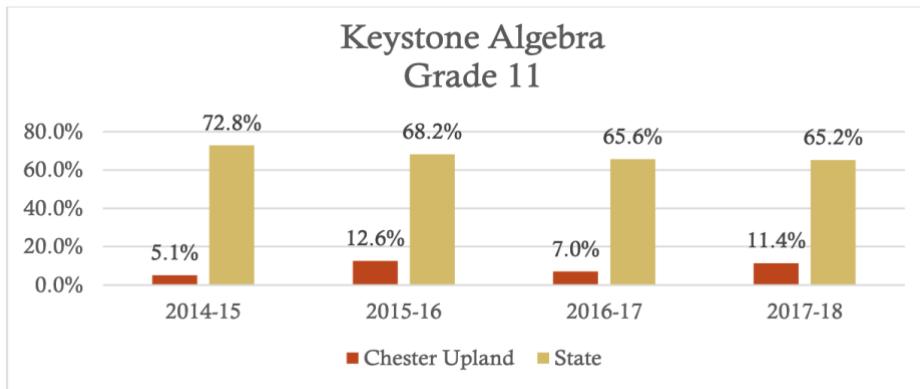
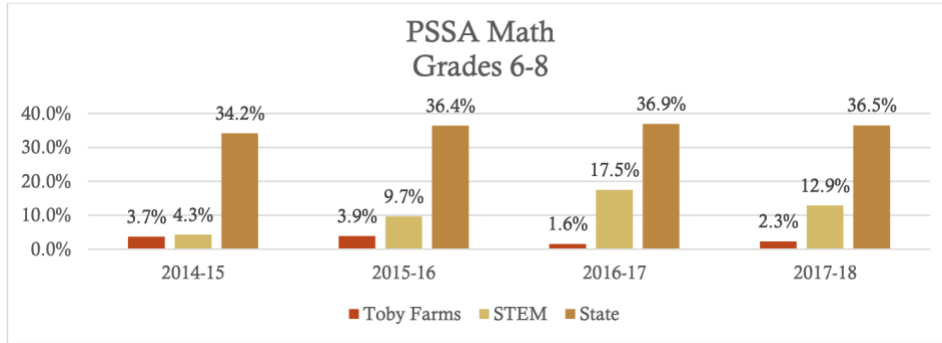
In 2019, [Mass Insight](#) was engaged to diagnose the District’s academic and operational conditions. The following snapshots are from their May 2019 diagnostic report and are incorporated in the District’s Revised Financial Recovery Plan of December 2019. More detailed information on the diagnostics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



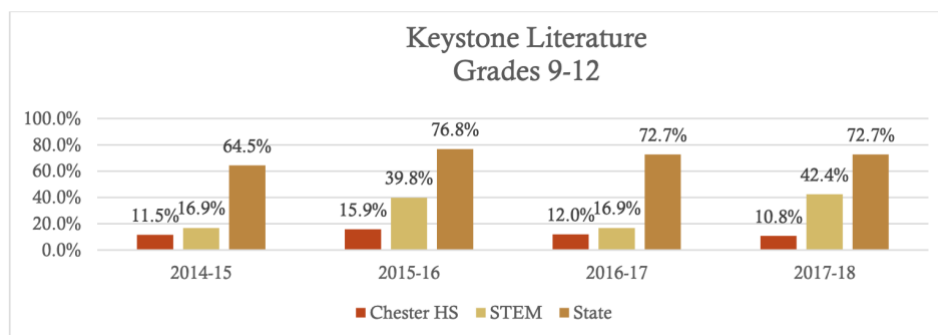
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Providers submitting affirmative responses to this Request for Proposal can access the Dropbox folder for more detailed academic achievement data on a school-by-school basis, and some limited cohort basis, upon request. The Pennsylvania Future Ready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

Potential Strategic Options for CUSD

As stated in the Request for Interest, Receiver Baughn and the CUSD Board of Education are considering cost effective strategic options that will address the district’s most severe challenges. CUSD will leverage the experience of proven subject matter experts 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.” During the Virtual Bidders’ Meeting, Dr. Baughn affirmed that the District wants to attract the best ideas and programs to achieve these mandates.

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 improvement in academic performance *for every student in the District*. The “best fits” and “best matches” for the District must ensure that all CUSD students have access to programs, instruction, and support services that meet their needs. ***Although each of CUSD’s Pre-Kindergarten – 12th 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.*** As stated earlier, the Receiver has

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already approved the transition of the District's central office functions to the Chester County Intermediate Unit to manage and oversee those operations.

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

* The Receiver has determined that Options 1 and 2 are preferred alternatives for the initial years of the SOI. Options 1 and 2 appear to offer the most feasible pathways toward early success for the Initiative as compared to Options 3 and 4, which are conversions to charter status. It is advisable for each Provider to consider if its proposed solutions can be accomplished under a contract management structure.

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 well their qualifications and proposed solutions respectively meet the needs of the students. 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.

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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 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

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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 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.

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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 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 study 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 has undertaken a two-part process: (1) a **Request for Interest**, and (2) a **Request for Proposals**. The Request for Interest step concluded on September 18, 2020. This document serves as (2) the **Request for Proposals**.

Phase 1: Request for Interest

CUSD's Receiver engaged an independent Strategic Advisor, PlusUltre LLC, to develop the RFI document and solicit interest in the Initiative from potential Providers. The RFI process has yielded significantly positive interest from Education Management Organizations and Charter Management Organizations within and outside of Pennsylvania. The Strategic Advisor has recommended several submissions to the Receiver to proceed to the Request for Proposals phase.

Phase 2: Request for Proposals

This document serves as the CUSD Strategic Options Initiative Request for Proposals (RFP). Only those Providers which have submitted RFI's, and whose RFI's meet the District's needs, are eligible to submit RFP responses. The District's Strategic Advisor is responsible for developing and distributing the RFP to eligible Providers.

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CUSD Rights

In its sole discretion, CUSD reserves the right to:

- a) Award contracts in CUSD's best interest, all factors considered, with or without negotiations.
- b) Award contracts for distinct portions of a proposal without accepting other portions of the proposal.
- c) Award contracts to supplier(s) other than the supplier submitting the lowest priced proposal.
- d) Reject any or all proposals received.
- e) Cancel or withdraw this RFP without awarding any contracts.
- f) Grant or deny any request for an extension of the proposal deadline.
- g) Modify the evaluation procedure described in this RFP.
- h) Waive informalities and irregularities in proposals received.

An oral interpretation of this RFP is not binding on CUSD or any Provider. Any correction will be issued in the form of a written addendum to this RFP and will be mailed, faxed, or otherwise delivered to all prospective suppliers. No clarification or revision to this RFP made other than by a written addendum is binding on CUSD. A Provider should promptly notify CUSD's Strategic Advisor of any ambiguity, inconsistency, or error that is discovered upon examination of this RFP or any proposal document.

It is a Provider's responsibility to seek clarification of any inconsistency, ambiguity, error, or other issue regarding this RFP, and to ascertain any condition that might affect the Provider's proposal. CUSD is under no obligation to allow a Provider to: (i) correct an error or omission made by a Provider in its proposal, or (ii) in any way modify the contents of a proposal after the due date.

CUSD reserves the right to request additional information which, in its opinion, is necessary or advisable to assure that the Provider's competence, number of qualified employees, business organization, and financial resources are adequate to perform the requirements of this RFP.

CUSD may make investigations as deemed necessary to determine the ability of the Offeror to complete the anticipated outsourced services, and provide high quality services, and the Offeror shall furnish to the CUSD all requested information and data. CUSD reserves the right to reject any proposal if the evidence submitted by, or investigation of such Provider fails to satisfy the CUSD that such Provider is properly qualified and has sufficient resources.

Confidentiality of Proposal

All proposals and other material submitted in response to this RFP are CUSD's property. CUSD may use, for any purpose it may deem appropriate, any information submitted in connection with this RFP. Any request for confidential treatment of any portion of a proposal must be submitted in writing concurrently with the submission of a proposal. Information for which confidential treatment is

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requested must be (1) separately submitted, (2) labeled CONFIDENTIAL, and (3) specifically identified in the non-confidential portion of the proposal or amendment (by reference to the confidential portion). A Provider must indicate in detail the justification for confidential treatment of each item of information for which confidential treatment is requested and demonstrate the harm that would result from the public release of the information. A statement simply indicating that disclosure of the information would result in competitive harm is not sufficient. The fact that the information is not available to the public from another source must be stated, if this is the case. By submitting a proposal to CUSD, the Provider agrees to accept CUSD's determination of the confidentiality and acknowledge that material for which confidential treatment is not granted may be disclosed after award. If CUSD determines that confidentiality cannot be afforded, a Provider will be notified and permitted to withdraw its proposal.

Disclosure of Confidential District Information to Third Parties

In the event a Provider expects a need to disclose confidential District Information to a third party, agent or subcontractor, the Provider must request written approval from CUSD before disclosing that confidential District Information. If requested by CUSD, a Provider shall require any such third party, agent or subcontractor, by means of an appropriate written agreement and in connection with the Provider's proposal, to maintain the confidentiality of Confidential CUSD Information ("Confidentiality Agreement"). The Confidentiality Agreement shall prohibit the parties from further using, divulging or disclosing confidential CUSD Information to any other party. Failure to carry out the requirements of this provision may result in significant harm to CUSD and CUSD may exercise any available remedies at law or equity. Provider shall inform its employees, agents, and subcontractors, if any, of the requirements in this paragraph.

Provider Representations

By submitting a proposal, a Provider represents and warrants that:

- a) The Provider has carefully examined this RFP and is fully informed of the character and quality of the good/services required and that Provider's proposal is made in accordance therewith;
- b) The Provider has attached all documentation requested by this RFP, and except to the extent specifically and clearly indicated otherwise in the proposal, the goods and/or services proposed conform to all specifications of this RFP;
- c) The Provider has the technical capability, equipment, financial resources, and personnel necessary to effectively and successfully perform Provider obligations if awarded a contract;
- d) The Provider:
 - a. Is legally authorized to do business in the United States;
 - b. will provide the required services, in compliance with applicable law of the Commonwealth of Pennsylvania and the United States; and,

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- c. is not prohibited from doing business with any public school district, private school or academy, any governmental or quasi-governmental entity, agency, or organization for any reason;
- e) The person submitting the proposal on the Provider's behalf is authorized by the Provider to bind the Provider to the provisions of Provider's proposal and this RFP;
- f) The Provider has followed the requirements for treatment of any information for which the Provider is requesting confidential treatment; and
- g) The Provider acknowledges that the Provider has read the RFP terms and conditions and by submitting a proposal, agrees to comply with the terms and conditions herein.

Evaluation Criteria And Equal Opportunity

CUSD does not discriminate on the basis of race, color, religion, sex, age, national origin, disability, marital status, sexual orientation, gender identity, or genetic information in the solicitation, award, or administration of contracts. CUSD also promotes the acquisition of goods and services from small businesses. CUSD is committed to ensuring that all firms interested in doing business with CUSD, including minority-owned and women-owned businesses, have the maximum practicable opportunity to participate fairly in contracts awarded by CUSD.

CUSD requires that its suppliers confirm in writing their commitment to the principle of equal opportunity in employment and contracting. By submitting a proposal, Provider confirms Provider's commitment to the principle of equal opportunity in employment and contracting.

The contract will be awarded to one or more responsible and responsive Providers at the sole discretion of CUSD after consideration of the quality of service, price, and other factors that CUSD deems relevant to the procurement. The CUSD will be separately scoring each section of this RFP. Multiple contracts may be awarded to one or more Providers based upon a Provider's score on a particular section.

The following factors, listed in priority order, will be considered in evaluating proposals submitted in response to this RFP:

- a) Provider written proposal;
- b) Provider response to questions from the District's Receiver, Strategic Advisors, RFP Review Task Force, or the CUSD Board of Education;
- c) Provider presentation(s) to the District's Receiver, Strategic Advisors, RFP Review Task Force, or the CUSD Board of Education;
- d) Conformance to specifications set forth in the requirements, such as presentations of proposed services, due diligence visits to existing Provider sites or schools, interviews, etc.;
- e) Costs to CUSD; and
- f) Ability to adhere to SOI timetable.

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Provider Responsibility and Commitment to Workforce Diversity

The burden is upon a Provider to clearly demonstrate its responsibility. CUSD may require such additional information concerning a Provider's responsibility as CUSD deems necessary. A factor bearing on a Provider's responsibility is a Provider's ability to demonstrate its commitment to the principle of equal opportunity in employment and contracting. Each Provider doing business with CUSD must agree to the maximum extent possible and consistent with applicable law and to provide for the fair inclusion of minorities and women in its work force. To the extent permitted by applicable law, each Provider must agree to implement its commitment in the awarding of subcontracts by requiring its subcontractors, if applicable, to provide, to the maximum extent possible and consistent with applicable law, for the fair inclusion of women and minorities in their respective work forces. Accordingly, a Provider agrees to provide documentation to CUSD of the actions the Provider have undertaken to evidence Provider good faith efforts to provide for the fair inclusion of minorities and women in the Provider's work force if requested by CUSD. The request for such documentation, when applicable, will be implemented through a Good Faith Efforts questionnaire process separately from this RFP.

Other factors bearing on Provider responsibility include, without limitation: adequate financial resources to perform the contract or the ability to obtain them; ability to comply with the required or proposed delivery or performance schedule, taking into consideration all existing business commitments; record of satisfactory performance with respect to contracts with other school districts or entities; satisfactory record of integrity and business ethics; necessary organization, experience to perform the work, accounting and operational controls, and technical skills; and licenses necessary for eligibility to receive an award under applicable law, or the ability to obtain them. Those lacking present authority must demonstrate to CUSD's satisfaction that such authority will be timely obtained.

Limitations of CUSD Liability

Issuance of this RFP and CUSD's receipt of any information and/or proposal does not obligate CUSD to perform any act or incur any liability, financial or otherwise. CUSD assumes no obligation to reimburse or in any other way compensate Provider for any loss or expense incurred with respect to submitting a proposal.

RFP Amendments

CUSD specifically reserves the right to extend the schedule, modify, supplement, clarify, or correct any information and data contained in this RFP or a related document, as CUSD may deem useful or necessary, without incurring any liability to any supplier or third party. Any amendment will be issued in the form of a written addendum to this RFP and will be delivered to all prospective Providers.

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Provider Inquiries Concerning This RFP

During the RFP process, any questions, comments, and other communications concerning this RFP must be submitted in writing, without exception, to the authorized agent of CUSD, by the specified date, as stated in this RFP. Contact regarding this RFP with any other employee of the CUSD may be cause for disqualification of Provider proposal.

A Provider must designate a single point of contact for all questions regarding this RFP. Please see Attachment A to designate the point of contact. Questions regarding this RFP should be submitted by sending an electronic message to Dr. Leroy D. Nunery II, CUSD Strategic Advisor, lnunery2@comcast.net or ldnunery2@plusultrellc.net.

CUSD Discussions with Providers

CUSD may negotiate with any Provider or more than one Provider or terminate negotiations with any Provider and undertake negotiations with other Providers. Negotiations with a Provider do not constitute acceptance or rejection of a proposal or a counteroffer. Conducting negotiations with a Provider after the receipt of proposals, including the request for an oral presentation, does not jeopardize CUSD's right to accept or reject any proposal.

Withdrawal of Proposal

A Provider may withdraw its proposal at any time before the deadline for submitting a proposal by making the request in writing to CUSD's authorized agent before the deadline for submitting a proposal.

Late Proposals

A proposal received after the exact time set for submission of proposals is "late," unless the CUSD has granted in writing an extension of the proposal deadline. A late proposal will not be considered unless it is determined by CUSD that the late receipt was due solely to mishandling by CUSD after receipt at CUSD.

Disqualification of Proposal

Reasons for CUSD's disqualifying/rejecting a proposal include, but are not limited to, the following:

- a) Failure to submit a response to Good Faith Efforts questionnaire;
- b) Failure to submit a proposal in the required format;
- c) Lack of Provider responsibility; or
- d) The proposal contains omissions, alterations of form, additions not called for, conditions, limitations, unauthorized alternate proposals, or irregularities of any kind.

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Notification of Award

After the successful Provider(s) has been determined, each Provider that submitted a proposal will be notified.

Proposal Submissions

To be considered, providers should submit a complete response to this RFP to the Receiver using the format provided in Attachments A and B, providing both eight printed copies, and PDF copies submitted on a standard USB flash drive or via a link to a secure online cloud storage system (e.g., Box, Dropbox, etc.). Spreadsheets included in the submission should be provided in Excel, and Providers may not lock or protect any cells or tabs.

Freedom of Information Act

Provider proposals may be subject to the Freedom of Information Act (FOIA).

Evaluation Criteria

The Receiver will consider and approve a Provider’s proposal if it thoroughly meets the stipulated qualifications and criteria listed in this RFP. 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, as follows. The RFP Review Task Force will review each written RFP response, discuss its merits, and then score each response using a weighted rubric (shown below).

Evaluation Criteria	Weight	Maximum No. of Pages
<i>Section 1: Provider Background, Theory Of Change, and Rationale</i>	5%	3
<i>Section 2: Proposed School(s) Model(s)</i>	20%	10
<i>Section 3: Proposed Curriculum And Instructional Approach</i>	25%	20
<i>Section 4: School Climate and Student Motivation</i>	10%	10
<i>Section 5: Human Resources and Talent Development</i>	10%	10
<i>Section 6: Parental and Community Engagement</i>	10%	10
<i>Section 7: Provider Management, Operational, and Financial Capacities</i>	10%	10
<i>Section 8: Provider Cost Proposal</i>	10%	5
<i>Total</i>	100%	

To be eligible for selection, a proposal must both be timely received from the Provider and be properly signed by an officer of the Provider who may legally bind the Provider. These requirements are the only RFP requirements that the CUSD will consider to be non-waivable. CUSD reserves the right, in its sole discretion, to (1) waive any other technical or immaterial nonconformities in a Provider’s proposal, (2) allow the Provider to cure the nonconformity, or (3) consider the nonconformity in the scoring of the Provider’s proposal.

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Evaluation of the proposals involves a weighing of different economic and non-economic interests, and thus there is no single numeric metric that will be applied. In evaluating the proposals to determine the best responsible offer, a non-exclusive list of elements likely to be considered by the CUSD include:

A. Educational Factors

- Expected annual academic growth of CUSD students.
- Expected impact of proposed school model on student success (PSSA scores, PVAAS trends, Future Ready Index, promotion and graduation).
- Curricular approach for all student cohorts, including special needs students and gifted and talented students.
- Capacity and capability to recruit and retain highly qualified and highly motivated instructional and noninstructional teams.
- Ability to innovate and create new and different approaches to increasing student success.
- Capacity to design and deliver top quality professional and staff development.
- Capacity to utilize and leverage technology to develop and deliver educational content.
- Effectiveness and efficacy of proposed school climate and discipline approaches.
- **Alternative arrangements for current students who chose not to attend a charter school if any District schools are converted to a charter school.**
- **Ability to provide continuity of quality educational curriculum and extra-curriculum programs.**
- **Ability to meet needs of current and future students with disabilities.**
- Other educational factors.

B. Engagement Factors

- Ability to provide student engagement programs and avenues for increasing the likelihoods of student success.
- Capacity to engage with parents and community members in similar environments.
- Quality of programs to increase parental and community engagement.
- Other engagement factors.

C. Technical Factors

- History of performance with similar school districts or other educational systems.
- Record of legal and financial compliance in operation of similar school districts or other educational systems.
- Financial structure of Provider, and ability to perform obligations under the contract, and whether such abilities are conditioned on market or other conditions.
- Requirements for approval and expected likelihood of approval of outsourced services by the Court.

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- Other technical factors.

D. Financial Factors.

- Capacity of Provider to meet expectations under a multi-year contractual engagement.
- Ability of Provider to successfully execute proposed school model within CUSD’s economic constraints.
- Ability of Provider to attract new, additional funding to its proposed school.
- **Demonstrate that converting an existing public school building or a portion of an existing public school building to a charter school will result in financial savings.**
- Other financial factors.

CUSD RFP Review Task Force

The district’s strategic advisor will form and facilitate a CUSD RFP Review Task Force that will include administrators, community members, District faculty, and staff. Proposals will be prioritized 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 responsibilities of the RFP Review Task Force are as follows:

- Represent the interests and concerns of the CUSD stakeholder community in the successful implementation of the Strategic Options Initiative;
- Provide objective and meaningful feedback on proposer submissions and presentations;
- Read, review, and critique each RFP submission for clarity, adequacy of solutions to CUSD’s needs, and expected outcomes;
- Conduct in-person capacity interviews, and possibly visit the schools where bidding Providers can demonstrate the effectiveness of their programs; and
- Provide and present a report on each Provider submission to the Receiver with recommendations for action.

It is anticipated that the RFP Review Task Force will be fully staffed and operational on or before the RFP submission date of **Friday, January 22, 2021 at 5:00PM.**

Evaluation Criteria and Selection Rubric

Selected 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 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 five (5) 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, financial, 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 RFP Timetable (As of October 26, 2020)

The following target dates and action steps are tentative and the Receiver may adjust the timing and action steps change as the RFP process evolves. Adjustments to the timing or action steps will be communicated to Providers by the Strategic Advisor.

Target Dates	Action Steps
<i>October 26, 2020</i>	Issuance of RFP to potential Providers who qualified via the RFI process
<i>October 26, 2020</i>	Strategic Advisor to schedule site visits/walk-throughs of CUSD schools. <u>Potential Dates for Walkthroughs: PLEASE ALLOW 2 – 3 DAYS ADVICE NOTICE!</u> Friday, October 30 Monday, November 2 Friday, November 6 Monday, November 9 Wednesday, November 11 Thursday, November 12 Friday, November 13 Monday, November 16 Wednesday, November 18 Friday, November 20

<i>January 22, 2021</i>	RFP's due – NEW REVISED DATE
<i>January 22 – February 15, 2021</i>	Evaluation of RFP's by CUSD RFP Review Task Force Recommendation to Receiver on finalist Providers Presentation of findings to CUSD Receiver by RFP Review Task Force
<i>February 26, 2021</i>	Receiver decision on SOI finalists
<i>February 26 - March 12, 2021</i>	Finalist Providers' presentations to Receiver, CUSD Board, RFP Review Task Force CUSD RFP study group visits finalist Provider schools Due diligence checks (PlūsUltré and CUSD)
<i>March 31, 2021</i>	Final recommendations on Providers
<i>April 2, 2021</i>	CUSD decision on ultimate Provider and submission of decision to Court of Common Pleas and PDE Public announcement on selection recommendations
<i>April 9, 2021</i>	Decision/Approval by Court of Common Pleas Contract negotiations with Provider on Service Agreement, etc.
<i>May 15, 2021</i>	Contracts signed Transition of student records, personnel records, etc. commences
<i>May 15, 2021 – June 30, 2021</i>	Provider preparation, staffing, on-site meetings, and implementation planning District preparation for transition to external Provider system
<i>July 1, 2021</i>	SOI Initiative goes "live"

Process for RFP Response

A complete response to the RFP will include (1) **RFP Cover Letter** (see Attachment A) and (2) **Response to the RFP** (see Attachment B) with exhibits or attachments. Responses may be submitted in one of three (3) ways:

- **USB device**
- **Link to secure online cloud storage system (e.g., Box, Dropbox, OneDrive)**
- **Hard copy (Eight (8) copies)**

Responses must be submitted to Receiver Dr. Juan Baughn ***no later than Friday, January 22, 2021 at 5:00PM Eastern at the following address:***

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

There will be no exceptions to the RFP submission dates unless determined otherwise by the Receiver.

RFP Format

The RFP document should be written to respond to the questions in the Evaluation Criteria section. ***To expedite access to a Provider's background materials, please 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 PlūsUltré LLC, and Strategic Advisor for the CUSD Receiver's Strategic Options Initiative is accessible to any Provider if there are questions regarding the RFP at ldnunery2@plusultrellc.net or (215) 888-7333.

Attachment A – RFP Cover Letter

Please return this RFP Cover Letter to Receiver Baughn no later than 5:00 P.M. EST, January 22, 2021, to the following address via one of three (3) ways: (1) USB device, (2) Link to secure online cloud storage system (e.g., Box, Dropbox, OneDrive), or (3) hard copy (eight (8) copies. Please use certified US mail or express delivery for delivery options (1) or (3).

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

Date: _____

Organization Name: _____

Provider Type: (please choose one)

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

	Selected Strategic Option:(Check One)	Name of CUSD School/Schools
<input type="checkbox"/>	Option 1 (Outsourcing/Contracted Management of a Single CUSD School).	
<input type="checkbox"/>	Option 2 (Outsourcing or Contracted Management of a Multiple CUSD Schools).	
<input type="checkbox"/>	Option 3 (Conversion of a CUSD School to Charter School Structure).	
<input type="checkbox"/>	Option 4 (Conversion of a Multiple CUSD Schools to Charter Schools).	
<input type="checkbox"/>	Option 5 (Facilities Management and Operation).	

Name of Respondent Representative: _____

Signature*** _____

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 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. ***

Attachment B: RFP Narrative and Evaluation Criteria (Options 1 – 4)

Narrative Format

- Format: Arial, Font = 11, Margins = 1”
- 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.

RFP Narrative

Section 1: Provider Background (5 points)

Provide a summary of your organization (**maximum of 3 pages**) including:

- a) Provider’s background, founder(s), and management profiles;
- b) Provider’s Theory of Change or guiding principles; and
- c) Provider’s rationale for operating and/or managing school(s) in CUSD.

(Note: Providers have previously submitted detailed background documentation in the Request for Information phase. This section requires only a brief summary of that background information).

Section 2: School Model (20 points)

Describe the proposed school(s) model, highlighting mission-critical needs (i.e., “must haves”) and expected outcomes:

- a) Which CUSD school(s) and grades are you proposing for consideration, and what is your selection rationale?
- b) What elements of your school model differentiate it from the proposed school’s model? How will your school model align with the school’s assets and needs, especially for improving educational outcomes?
- c) What is your organization’s academic growth plan for the first 3 years of operation in your proposed school? How will the proposed school model equip all students with specific knowledge and skills that will help them acquire new learning, such as project-based learning? Please provide as much detail as possible on any proposed innovations, programs, changes in grade configurations, etc., that will be incorporated in the growth plan.
- d) Please describe how the proposed school model has been successfully implemented in schools or school districts that are similar to CUSD (in terms of demographics, academic achievement, etc.). Please provide evidence of success with similar student populations or, for innovative or untested models, a strong rationale for the likelihood of success.

Section 3: Curriculum and Instruction (25 points)

Describe the proposed curricular and instructional approach for the school(s), keeping in mind that CUSD's current remote learning environment may be wholly or partially in place in 2021 and beyond:

- a) How is the proposed curriculum aligned to Pennsylvania Department of Education Academic Standards and the Pennsylvania Danielson Frameworks for Teaching (or similar framework for monitoring instructional efficacy)?
- b) How will you align your teaching and learning approach with the articulated goals of the state's Future Ready Index for proficiency and growth for each grade and cohort?
- c) What are your proposed 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? What is your approach to working with struggling students?
- d) What is the proposed instructional approach for the school(s), i.e., direct instruction vs. inquiry learning, and why is this approach optimal for the selected school(s)?
- e) CUSD has adapted the instructional design of core content lessons to align with the National Standards for Quality Online Courses, Programs, and Teaching (Virtual Learning Leadership Alliance and Quality Matters) and ISTE Standards for Educators. How does you propose to align content to similar research-driven and proven curricular standards? (See Appendix: CUSD Continuity of Education Plan).
- f) What baseline assessment systems will be utilized, and why?
- g) How will you utilize virtual platforms (Zoom, Google Classroom, etc.) to sustain planned instruction?
- h) Will you use synchronous or asynchronous methods in instruction? What are the benefits and detriments to your approach?
- i) What is the expected use of adaptive technologies in delivering instruction?
- j) What is your organization's approach to exceptional student education or the needs of students with learning differences? Be as specific as possible, providing an explanation of your organization's use of inclusive classrooms, internal or external support services (including

subcontractors), etc.

- k) What is your organization's overall approach to high school, post-secondary, and/or career readiness? Do you propose to implement Career and Technical Education courses or classes?
- l) What grading and promotion standards are expected to be implemented?
- m) What is your organization's approach to alternative education for students who may be challenged to progress in a more traditional learning environment?
- n) What is your organization's approach to educating English Language Learners?

Section 4: School Climate and Student Motivation (10 points)

Describe your organization's approaches to managing school climate and building and sustaining productive and positive learning environments. Please include concrete examples of your organization's experience in each of the following areas of School Climate in your response, where applicable, and how implementing those approaches can be expected to boost academic achievement.

- a) Enrollment program and admissions
- b) Attendance and student mobility
- c) Student engagement and classroom management
- d) Out-of-classroom learning opportunities (e.g., clubs, activities, sports, trips)
- e) Pupil services and student support
- f) School discipline, Restorative justice programs, etc.
- g) Multi-Tiered System of Supports (MTSS) and/or Response to Intervention (RTI)
- h) Graduation and promotion support
- i) Mentoring
- j) Security
- k) Auxiliary services (e.g., Food Services)
- l) Other School Climate-related services

Section 5: Human Resources and Talent Development (10 points)

Describe your organization's approach human resources policies and practices, especially the hiring, retention, and development of instructional and non-instructional staff. Please include concrete examples of your organization's experience in each of the following areas of Human Resources and Talent Development. Elaborate on your experience in working with represented (i.e., unionized) workforces, if applicable. Please include a copy of your most current Human Resources policies and

Code of Conduct with your submission.

- a) Teacher recruitment, hiring, and retention
- b) Staff recruitment, hiring, and retention
- c) Professional development for instructional staff, including onsite and offsite venues
- d) Professional development for non-instructional staff, including onsite and offsite venues

Section 6: Parental and Community Engagement (10 points)

Describe the Provider's approach to engaging parents and caregivers of students, and the approach to engaging school communities. Please include concrete examples of the organization's experience in each of the following areas of Parental and Community Engagement, where applicable.

- a) Frequency and type of communication with parents, by the school itself, teachers, staff members, or other employees, e.g., home visits, newsletters, social media, meetings, conferences, online school portals, class websites, or parent teacher apps.
- b) Frequency and type of communication with the school community (e.g., within the catchment area, nearby neighborhoods, etc.) e.g., home visits, newsletters, social media, meetings, conferences, and school portals.
- c) Parent-Teacher committees, organizations, or collaborative programs.
- d) Parent/Caretaker volunteering opportunities (in-school and out-of-school)
- e) Opportunities for skills acquisition (e.g., computer skills, literacy, etc.).
- f) Access to school materials in languages other than English.

Section 7: Provider Management, Operational, and Financial Capacities (10 points)

Describe an overview of your organization's management, operational, and financial capacities to undertake the proposed solutions, with particular focus on how your organization will expand its services into Chester Upland. Please submit your most recent Annual Report, Form 990, and/or related financial statements with your RFP Narrative.

- a) Describe your organization's plans to staff the proposed school model(s), including an organizational chart of expected personnel. Please explain how the proposed staff in CUSD

will report to, or be responsible to, your organization's headquarters/central office.

- b) How will your organization prepare and train staff to be engaged in CUSD?
- c) Describe how your CUSD school(s) will be handle day-to-day and/or long-range operational issues, including the decision-making process for your organization.
- d) Describe how your organization's current financial capacity enables its multi-year engagement in CUSD.
- e) Describe your organization's access to capital for potential capital investments in facilities, technology, and security in order to implement the proposed school design.
- f) Describe your organization's access to, and management of, philanthropy and/or grants (private, governmental, etc.) that would support the implementation of the proposed school design.

Section 8: Provider Cost Proposal (10 points)

Provide a description of the potential operational costs to implement your proposed school model, calculated on an expected per pupil enrollment, and on a total per school basis. Please use an Excel spreadsheet to respond to this question and include the spreadsheet with your submission. ***In order to inform your efforts in responding to Section 8, CUSD will provide a school-level budget to you in advance of your Narrative submission, including current PSERS, maintenance, and health insurance costs.*** Be sure to include:

- a) Personnel costs (Wages, benefits, etc.)
- b) Operational costs
- c) Curriculum and content acquisition (e.g., consumables, software, books, periodicals, content subscriptions and licenses, etc.)
- d) Technology costs (e.g., infrastructure or hardware, student devices, instructional staff devices, etc.)
- e) Contracted services (if any)
- f) Other costs for implementation (if any).

Attachment C: RFP Narrative and Evaluation Criteria (Option 5)

Narrative Format

- Format: Arial, Font = 11, Margins = 1"
- 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.

Option 5 RFP Narrative

Section 1: Provider Background (5 points)

Provide a summary of your organization (**maximum of 3 pages**) including:

- Provider's background, founder(s), and management profiles;
- Experience in managing or operating facilities in the education space, particularly in urban districts similar to Chester Upland;
- Provider's mission and guiding principles; and
- Provider's financial, and operational capacity to successfully operate, and manage CUSD facilities.

(Note: Providers have previously submitted detailed background documentation in the Request for Information phase. This section requires only a brief summary of that background information).

Section 2: Provider Capabilities (95 points)

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.

A. Facilities Operations:

- 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

- h) Service quality monitoring and metrics
- i) Safety record (e.g., benchmarks, lost hours, and reporting)
- j) Invoicing process (e.g., ease of use; transparency, and billing resolutions)
- k) Contingency/coverage for daily facilities management

B. Facilities and Real Estate Management:

The Receiver is mandated by court order to achieve long-term viability and sustainability for the District. Providers who wish to provide alternatives to the District for reconfiguring, repurposing, acquisition, and/or disposal of District-owned properties will be required to submit a separate detailed proposal to the Receiver no later than ***5:00 P.M. EST, January 22, 2021***.

Appendix: CUSD Background Materials

Note: Several supporting background documents will be placed in an online Dropbox folder. Access to the folder will be granted by Strategic Advisor Dr. Nunery via email to each bidding Provider. From time to time, more background information may be added to the Dropbox folder, or the folder may be updated. Notification of any changes to the Dropbox folder will be communicated to bidding Providers. Providers are encouraged to review CUSD's official website ([Chester Upland School District website: https://www.chesteruplandsd.org/](https://www.chesteruplandsd.org/)). Folder contents include:

1. **Chester County Intermediate Unit (CCIU)**

- Resolution of the Receiver Restructuring the Operations of the Chester Upland School District
- Article on selection of CCIU

2. **CUSD Collective Bargaining Agreements**

- Chester Upland Education Association
- Chester Upland Education Support Personnel Association

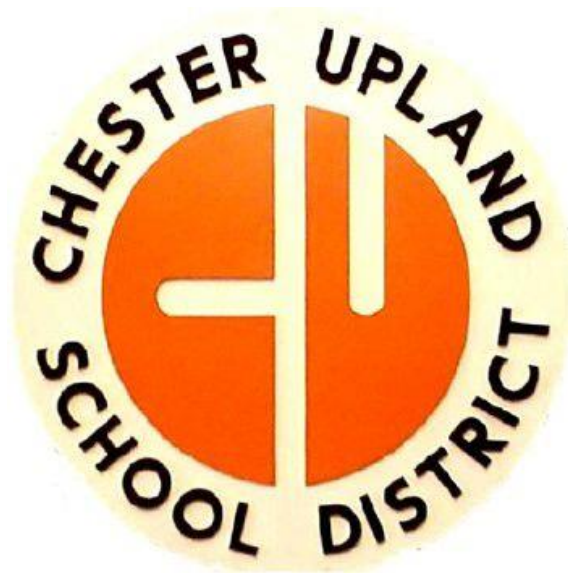
3. **CUSD Plans**

- CUSD District Level Comprehensive Plan 2019-2022
- CUSD General Fund Budget 2020-2021
- CUSD [2020 Continuing 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](https://www.chesteruplandsd.org/docs/district/VIRUS/Continuity%20Plan%20CUSD%20Original%20Template%20Final%20%20(1).pdf))
- Delaware County Court of Common Pleas, No. CV 2012-009781, dated May 14, 2020, authorizing Receiver Baughn to implement the Strategic Options Initiative.
- CUSD 2019 [Revised Financial Recovery Plan](https://www.chesteruplandsd.org/docs/district/Financial%20Recovery/December%202019%20CUSD%20Recovery%20Plan%20(12-19-19).pdf)
([https://www.chesteruplandsd.org/docs/district/Financial%20Recovery/December%202019%20CUSD%20Recovery%20Plan%20\(12-19-19\).pdf](https://www.chesteruplandsd.org/docs/district/Financial%20Recovery/December%202019%20CUSD%20Recovery%20Plan%20(12-19-19).pdf))
- CUSD Continuity of Education Plan

4. **CUSD School Based Data**

- CUSD DIBELS (2019-2020)
 - Chester Upland Schools - Future Ready Index Links: <https://futurereadypa.org/Search/District>
 - Individual school data: Main St., Stetser, CUSA
 - CDT Range Scores (for reference)
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- [Virtual Bidders' Meeting video](#), October 8, 2020

**Request for Proposal for
Potential Outsourcing
of Management or Operations of District Schools
for Chester Upland School District
October 26, 2020**



Issued By:

District Receiver, Dr. Juan Baughn

Chester Upland School District

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

[Phone: 610-447-3600](tel:610-447-3600)