

PROPOSAL PREPARATION INSTRUCTIONS

A. To assure timely and equitable evaluation of proposals, schools must follow the instructions contained herein. Schools are required to meet all solicitation requirements, including terms and conditions and technical requirements. Failure to meet a requirement may result in an offer being ineligible for award. **Schools must clearly identify any exception to the solicitation terms and conditions and provide complete accompanying rationale.** The response shall consist of three (3) separate parts: Part I – Technical Proposal; Part II-Financial Capability; Part III – Lease Certification.

B. Specific Instructions:

1. **PART I –TECHNICAL PROPOSAL** - Submit original plus five (5) copies.

Limited to no more than 75 pages. The school will provide a detailed proposal (business plan) outlining methodology to ensure all criteria in the Statement of Requirements (SOO), paragraph 5.0 and sub-paragraphs are addressed. Schools should review the technical evaluation factors when developing their technical proposal.

2. **Part II - FINANCIAL CAPABILITY** – Submit original plus one (1) copy.

a. Schools shall provide Financial Statements, as defined below, and other documentation as required for all Significant Parties in order to demonstrate the School's financial strength. Significant Parties are defined as entities or individuals that meet any one or more of the following criteria: a) the entity or individual is proposed to execute the lease of property; b) the entity or individual will consolidate 50% or more of the financial performance of the School entity into their financial statements; or c) the entity or individual owns 10% or more of the School entity and articulates in a written statement a financial responsibility to the School entity.

NOTE: Financial Statements is defined as the financial statements accompanied by an auditor's assertion of accuracy or the most recent two years. The auditor must be a nationally recognized firm in the accounting industry and the assertion of accuracy must state that the financial statements have been audited in accordance with Generally Accepted Accounting Principles (GAAP).

(1.) Any Significant Party that is a public company subject to reporting to the Securities and Exchange Commission (SEC) shall submit Financial Statements or provide reference to a publicly available source from which Financial Statements can be reviewed, including the two latest Forms 10-K and all Forms 8-K submitted to the SEC within the last two years.

(2.) Any Significant Party that is either not a public company subject to reporting to the SEC or a newly formed public company subject to reporting to the SEC that does not

have two Forms 10-K available shall submit any Forms 10-K and Forms 8-K submitted to the SEC within the last two years along with their Financial Statements.

(3.) If Financial Statements are not available, Significant Parties may submit either a) entity financial statements that have been reviewed by a Certified Public Accountant and an assertion of accuracy from the entity's Chief Financial Officer or equivalent; or b) individual's Internal Revenue Service (IRS) tax filings that have been executed and submitted to the IRS by the individual or a certified preparer.

(4.) If any Financial Statements and information submitted note any litigation, disputes, claims, UCC filings or similar circumstances, provide the current status of each matter in full detail.

- b. Schools shall demonstrate they have a source of sufficient equity to support a long-term charter school.
- c. Schools shall demonstrate an organization structure depicting a relationship of Significant Parties that is financially accountable for performance.

3. **PART III – LEASE CERTIFICATION** – Submit signed original plus one (2) copies.

The School shall provide the following statement and signature from a representative authorized to commit the school to the lease:

“_____ (School Name) hereby certifies we have reviewed the lease terms and exhibits and agree to all terms and conditions. If selected, the school will work with the Government to finalize the lease with signatures by authorized representatives. The lease must be approved by HQ USAF and require Congressional Notice prior to beneficial occupancy of the facility/property.”

The School may submit its plan as to what improvements they may provide to the base as well as a schedule to accomplish such improvements at said school facility. Please provide an itemized list detailing your plan of action in order of your preference. Attached is an excerpt from 10 U.S.C. § 2667, in regards to In-Kind Consideration.

The School shall provide their Alteration Plan with their Lease Certification. The Plan shall be approved by the FW Commander prior to execution of any alterations.

C. Documents submitted in response to this RFP must be fully responsive to and consistent with the following:

- 1. Requirements of the RFP and government standards and regulations.
- 2. Evaluation Factors for Award in the section entitled “BASIS FOR CONTRACT AWARD” of this RFP.

3. Any limitation on the number of proposal pages. Pages exceeding the page limitations set forth in this section will not be read or evaluated, and will be removed from the proposal.

4. Format for proposal:
 - a. The proposals will be 8 1/2" x 11" paper except for fold-outs used for charts, tables, or diagrams, which may not exceed 11" x 17".
 - b. A page is defined as one face of a sheet of paper containing information.
 - c. Typing shall not be less than 12 pitch.
 - d. Elaborate formats, bindings or color presentations are not desired or required.

BASIS FOR CONTRACT AWARD: This is a competitive best value source selection in which an award shall be made to the school whose offer is conforming to the requirements of the solicitation and is determined to represent the overall Best Value to the Government based on an optimal combination of Technical Factors and the Financial Capability. Financial Capability will be evaluated on a Pass/Fail basis. By submission of its offer, the school accedes to all solicitation requirements. Failure to meet a requirement may result in a proposal being determined technically unacceptable. **Schools must clearly identify any exception to the solicitation terms and conditions and provide complete accompanying rationale.** While schools may propose exceptions to the solicitation requirements, the government is not obligated to accept such offers. Any change to the requirement as a result of accepting an exception shall be reflected within the resultant contract.

The technical evaluation factors are listed below:

Factor 1: Instructional Effectiveness:

- Quality and Satisfaction Rating of Charter School in the Past Three Years: The school will provide Achievement Profiles from AZLEARNNS System from the Arizona Department of Education covering the past three (3) years. In addition, the school will explain corrective actions taken in the past, if any, for substandard performance and any current performance problems. The school may also provide letters, metrics, customer surveys, awards, independent surveys, etc., which demonstrates overall job performance and quality.
- Proposal offers electives meeting the basic requirements of the SOO and complements the educational program. Electives can include foreign language classes, fine arts, etc.
- Proposal offers after-school activities and/or athletics
- Proposal will outline how technology is integrated into and supports the curricular program. Curriculum should include instruction in the use of technology as a tool. A technology plan including computer to student ratios and proposed computer locations, and a plan indicating ability to respond to rapid technology developments.
- Proposal will outline how placement examinations will be used to access students
- Proposal will outline Library services and use of Computer and Science Labs

Factor 2: Personnel

- Detailed plan for hiring staff demonstrates ability to staff school appropriately
- Teacher qualification requirements indicate the level of instructional quality being required
- Ability to attract and retain experienced and high quality instructional personnel at all levels
- Pupil/teacher data including number of classroom teachers and non-classroom teachers (specialists), and student/teacher ratios indicate school demonstrates capability to meet or exceed the minimum state requirements.

Factor 3: Special Needs

- Proposal details program delivery for special needs students, regardless of type or severity of disabling condition. If capabilities to serve all types and degrees of handicapping conditions are outside the school's current capabilities, detailed contingency plans for obtaining services in a timely manner that comply with laws and relations are included.

- Proposal includes plans for providing appropriate and challenging programs to serve gifted students.

Factor 4: Non-instructional effectiveness

- Proposal shall provide plan for ensuring positive and consistent two-way communications with parents, the Installation Leadership, and community leaders
- Proposal includes School Nurse and Guidance Counselor on a full-time basis
- Proposal shall provide plan for provisioning and staffing the school to ensure school starts on a schedule similar to other local public schools and services comply with the requirements of the SOO
- Proposal offers student food service program for students which is comparable to that provided in local public schools and complies with federal and state laws and regulations. Additionally, the school offers a subsidized free lunch/reduced lunch program in accordance with applicable federal and state laws
- Proposal provide plans for a renovation/re-utilization of current activities room, may include one or more of the following: basketball court, locker rooms with showers, and/or expandable bleachers.
- Proposal includes instituting school dress code similar to local districts
- Proposal includes a plan to install student's lockers

Factor 5: General Management Plan

- Operational/Support Technology: Plan for maintaining and modernizing technology to ensure hardware and software are up-to-date and provide maximum use of technology in support of the educational program and operations.
- Curriculum Planning: Proposal ensures curriculum uses up-to-date information and incorporates current best practices in education.

Proposals will be evaluated against the following criteria for the Technical Factors:

FACTOR 1: Instructional Effectiveness

Exceptional – The proposal clearly demonstrates an understanding of all aspects of the areas listed and exhibits exceptional strengths that represent significant benefit to the Government in performance or qualifications. A rating of this magnitude indicates high probability of successful completion of all work and tasks with no stated weaknesses. Evidence will include:

- The government has a high expectation that the school will successfully perform the required effort based on the school’s performance record of “Performing Plus” or higher as reported by the Achievement Profiles available on AZLEARNS System
- Program offers extensive electives beyond basic requirements of the SOO and complements the educational program
- Proposal offers extensive/multiple after-school activities and/or athletics
- Proposal details use of placement examinations to include inclusion in gifted programs or special needs
- Proposal includes library services and labs which exceed requirements of the SOO

Acceptable: The proposal demonstrates an understanding of the factor although there may be minor omissions or misunderstandings. This rating indicates minor deficiencies in one of the areas or that the school minimally meets, but does not exceed, the requirements. Minor deficiencies would require correction before the school would be permitted to begin work. This rating indicates that the school could probably complete all work and tasks, however, should services be even slightly reduced or problems develop, there would be significant chance of non-compliance with the stated requirements. Evidence would include:

- The government has an expectation that the school will successfully perform the required effort based on the school’s performance record of “Performing” as reported by the Achievement Profiles available on AZLEARNS System
- Proposal meets the minimum elective requirement
- Proposal includes an average cycle of review which neither encourages or discourages implementation of best education practices
- Proposal offers minimal (1 to 2) after-school activities and/or athletics
- Proposal mentions use of placement examinations to balance classroom abilities
- Proposal meets minimum requirements for Library, Computer, Science labs

Unacceptable – The proposal has major omissions and fails to meet the minimum requirements of the SOO. The school would have to completely revise major portions of the proposal to be acceptable. There is little probability of successful completion. Evidence would include:

- The government has no expectation that the school will be able to successfully perform the required effort based on the school’s performance record of “Underperforming” or lower as reported by the Achievement Profiles available on AZLEARNS System
- Proposal does not meet minimum requirements for electives, curriculum improvement,

Library, Computer or Science.

- Proposal does not offer a placement examination

FACTOR 2: Personnel

Exceptional – The proposal clearly demonstrates an understanding of all aspects of the areas listed and exhibits exceptional strengths that represent significant benefit to the Government in performance or qualifications. A rating of this magnitude indicates high probability of successful completion of all work and tasks with no stated weaknesses. Evidence will include:

- History of effective staffing plan that addresses hiring and retaining high quality personnel
- Pupil/Teacher data indicates ability to exceed the minimum state and SOO requirements
- Percentages of teachers with advanced degrees and more experience exceed those of other local schools
- Percentages of teachers licensed in teaching exceed those of other schools

Acceptable: The proposal demonstrates an understanding of the factor although there may be minor omissions or misunderstandings. This rating indicates minor deficiencies in one of the areas or that the school minimally meets, but does not exceed, the requirements. Minor deficiencies would require correction before the school would be permitted to begin work. This rating indicates that the school could probably complete all work and tasks, however, should services be even slightly reduced or problems develop, there would be significant chance of non-compliance with the stated requirements. Evidence would include:

- Evidence of staffing plan that addresses hiring and retaining personnel
- Pupil/Teacher data indicates ability to meet minimum state and SOO requirements
- Percentage of teachers with advanced degrees and experience are equal to other schools
- Percentage of teachers licensed in teaching are equal to other schools

Unacceptable – The proposal has major omissions and fails to meet the minimum requirements of the SOO. The school would have to completely revise major portions of the proposal to be acceptable. There is little probability of successful completion. Evidence would include:

- No evidence of adequate staffing plan
- Pupil/Teacher data does not meet the minimum state or SOO requirements
- Percentage of teachers with advanced degrees and experience are below other schools
- Percentage of teachers licensed in teaching are below other schools

FACTOR 3: Special Needs

Exceptional – The proposal clearly demonstrates an understanding of all aspects of the areas listed and exhibits exceptional strengths that represent significant benefit to the Government in performance or qualifications. A rating of this magnitude indicates high probability of successful completion of all work and tasks with no stated weaknesses. Evidence will include:

- Proposal offers programs which are individually developed and designed specifically to meet the different needs of the special needs population

- Proposal includes a variety of delivery methods normally expected in special education programs and consistent with current research and educational practices
- Proposal addresses provision of all related services required and/or detailed plans for provision of these services in a timely manner within appropriate educational venues
- Proposal offers extensive enrichment programs; program offerings include extensive higher level classes; a wide variety of programs are offered to provide gifted students with challenges appropriate to their abilities.

Acceptable: The proposal demonstrates an understanding of the factor although there may be minor omissions or misunderstandings. This rating indicates minor deficiencies in one of the areas or that the school minimally meets, but does not exceed, the requirements. Minor deficiencies would require correction before the school would be permitted to begin work. This rating indicates that the school could probably complete all work and tasks, however, should services be even slightly reduced or problems develop, there would be significant chance of non-compliance with the stated requirements. Evidence would include:

- Proposal meets statutory requirements for special needs programs
- Basic gifted program is in place but does not exceed requirements

Unacceptable – The proposal has major omissions and fails to meet the minimum requirements of the SOO. The school would have to completely revise major portions of the proposal to be acceptable. There is little probability of successful completion. Evidence would include:

- Proposal for special needs or gifted students do not meet statutory requirements

FACTOR 4: Non-instructional Effectiveness

Exceptional – The proposal clearly demonstrates an understanding of all aspects of the areas listed and exhibits exceptional strengths that represent significant benefit to the Government in performance or qualifications. A rating of this magnitude indicates high probability of successful completion of all work and tasks with no stated weaknesses. Evidence will include:

- Proposal includes evidence of extensive, positive communications programs geared to keeping community informed as well as receiving input from all stakeholders
- Proposal includes detailed plans for providing school services beginning when other schools start and outlining when all requirements of the SOO will be achieved.
- Proposal offers student food service program for students which is comparable to that provided in local public schools and complies with federal and state laws and regulations. Additionally, the school offers a subsidized free lunch/reduced lunch program in accordance with applicable federal and state laws.
- Proposal provides plans for a new gymnasium, to include a basketball court, locker rooms with showers, and/or expandable bleachers.
- Proposal includes requirement of uniforms and/or adherence to strict dress code.
- Proposal includes a plan to install student's lockers

Acceptable: The proposal demonstrates an understanding of the factor although there may be minor omissions or misunderstandings. This rating indicates minor deficiencies in one of the areas or that the

school minimally meets, but does not exceed, the requirements. Minor deficiencies would require correction before the school would be permitted to begin work. This rating indicates that the school could probably complete all work and tasks, however, should services be even slightly reduced or problems develop, there would be significant chance of non-compliance with the stated requirements. Evidence would include:

- Proposal includes evidence of communications programs which neither encourages or discourages input from stakeholders
- Proposal includes School Nurse and Guidance Counselor IAW SOO requirements
- Proposal includes a plan for providing school services beginning when other schools start
- Proposal offers student food service program for students which is comparable to that provided in local public schools and complies with federal and state laws and regulations.
- Proposal provide plans for a renovation/re-utilization of current activities room
- Proposal includes instituting school dress code similar to local districts

Unacceptable – The proposal has major omissions and fails to meet the minimum requirements of the SOO. The school would have to completely revise major portions of the proposal to be acceptable. There is little probability of successful completion. Evidence would include:

- Proposal offers no official communication plan
- Proposal shows no clear plan to begin school
- Proposal indicates no student food service program
- Proposal includes no plans for addition, renovation, and/or re-utilization
- Proposal indicates no school dress code

FACTOR 5: General Management Plan

Exceptional – The proposal clearly demonstrates an understanding of all aspects of the areas listed and exhibits exceptional strengths that represent significant benefit to the Government in performance or qualifications. A rating of this magnitude indicates high probability of successful completion of all work and tasks with no stated weaknesses. Evidence will include:

- Proposal includes evidence of extensive, positive reviews and implementations of all educational programs curriculum and accompanying textbooks and incorporates best education practices from other education institutions
- Proposal ensures hardware and software is up-to-date and provides maximum use of technology in support of education programs for students and faculty.

Acceptable: The proposal demonstrates an understanding of the factor although there may be minor omissions or misunderstandings. This rating indicates minor deficiencies in one of the areas or that the school minimally meets, but does not exceed, the requirements. Minor deficiencies would require correction before the school would be permitted to begin work. This rating indicates that the school could probably complete all work and tasks, however, should services be even slightly reduced or problems develop, there would be significant chance of non-compliance with the stated requirements. Evidence would include:

- Proposal includes an average cycle of review which neither encourages or discourages

- implementation of best education practices
- Proposal ensures adequate hardware and software upgrades are available in support of education programs for students and faculty.

Unacceptable – The proposal has major omissions and fails to meet the minimum requirements of the SOO. The school would have to completely revise major portions of the proposal to be acceptable. There is little probability of successful completion. Evidence would include:

- No official curriculum planning cycle is in-place and/or technology is minimal and provides little, if any, support for the education programs.

Financial Capability Assessment: The government technical evaluation team shall evaluate the financial capability of those schools with an “Acceptable” or higher Technical Evaluation rating. Financial capability will be evaluated on a Pass/Fail basis. This factor is met when the School’s Proposal demonstrates that:

- The School is financially sound and any adverse information, such as litigation, disputes, claims, etc., has been resolved, or it will not negatively impact this project.
- The School possesses the financial capability, bonding capacity, and institutional relationships necessary to obtain financing for a project of this size and scope.
- The School identified sufficient sources of equity to be used for the project.

Schools are cautioned to submit sufficient information and in the format specified in the PROPOSAL PREPARATION INSTRUCTIONS. The Source Selection Authority will review the evaluation summary for each school and make a best value decision based on the above criteria. The government intends to award a lease without discussions with respective schools. Communication conducted to resolve minor or clerical errors will not constitute discussions and the contracting officer reserves the right to award a contract without the opportunity for proposal revision. The government, however, reserves the right to conduct discussions if deemed in its best interest.