



REQUEST FOR QUOTE: BACK OFFICE SUPPORT PROVIDERS

This Request for Quote (RFQ) is for the purpose of obtaining competitive Quotes to provide various Support for Bradenton Classical Academy.

RFQ INFORMATION AT A GLANCE

Bid Title: Bradenton Classical Academy Back Office Support Provider

Send Quotes To: Bradenton Classical Academy
PO Box 14621
Bradenton, FL 34280
BCA_Admin@bradentonclassical.com

Due Date & Time: February 29, 2024

Contact Information: Karen Roland
Co-Founder, Board Consultant
Kroland.BCA@gmail.com

Bradenton Classical Academy has proposed the addition of a new public charter school to open in Manatee County in August 2025. It would serve K-3 in its first operational year and then add the next grade level each of the following years until it serves K-12 in year ten. The founding board of Bradenton Classical Academy (BCA) looks forward to introducing the community to classical education in the liberal arts, sciences and fine arts. BCA's culture will instill in each scholar a love for learning that develops her or him into a lifelong independent learner, whether the scholar will be going to college or preparing in other ways to be a productive and responsible citizen. BCA has been approved as a candidate school to be supported by the Hillsdale College's Barney Charter School Initiative.

At Bradenton Classical Academy, it is our mission to develop lifelong learners through a content-rich classical education in liberal arts, sciences, personal character and civic virtue.

Our vision is for a nation of scholars who ponder the deepest questions of truth, justice, beauty and opportunity for all and who engage wholeheartedly in the principles upon which our country was founded.

Demographics of Academy:

Year	Grades	Proposed Enrollment	Proposed Staff
1	K-3	342	31.4
2	K-4	448	38.4
3	K-5	558	48.8
4	K-6	668	55.4
5	K-7	778	61.6



The Board of Directors, the Academy and contract vendors will not discriminate against race, color, national origin, sex, disability, religion, marital status or any other classification protected by law.

The contractors report to the BCA Board of Directors for compliance and board administration, and will report directly to the Head of School for all business management functions. The contractor will be called upon to share information with the Manatee County School District, Florida Department of Education, and other entities, as requested by the Board of Directors or Head of School.

BCA is requesting cost quotes for contractual support teams, having expertise in charter school **operations to ensure the operational and financial success of the Academy**. This RFQ is requesting information and quotes for support in:

Financial Management

- contract management
- bookkeeping
- grant management
- inventory management
- financial reporting
- budget creation
- regulatory/compliance reporting
- establishment of the Academy's financial program in accordance to FLDOE Red Book

Human Resource Management

- program development (including policy manuals, and salary setting)
- hiring support
- onboarding and offboarding support
- payroll and benefit coordination
- staff legal guidance/advice
- regulatory/compliance reporting

Board Administration

- board governance
- record taking/keeping/posting
- agendas and schedules
- calendar management



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I. RFQ Submission and Award

1. Quotes will be accepted until 5:00pm on **February 29, 2024**. Quotes shall be submitted as follows:
 - a. Email electronic copy, titled “Back-Office Support”:
Kroland.BCA@gmail.com
BCA-Admin@bradentonclassical.com, and,
2. Bradenton Classical Academy reserves the right to reject any or all Quotes
3. Awards shall be made to the most qualified and responsible vendor whose Quote is the most responsive to this solicitation as judged by Bradenton Classical Academy.
4. Multiple vendors may be chosen for specific scope of work elements depending on the various vendors capacity and capabilities.
5. It is the responsibility of the prospective vendor to fully inform themselves of the conditions, requirements and specifications before submitting a Quote. Failure to do so will be at the vendor’s own risk.
6. Quotes shall include the following information:
 - a. Brief overview of the company/company profile
 - b. Product Details (include the types of Back Office Services your company can provide to our Academy i.e., General Accounting, Quarterly Services, Annual Budget, Board Meetings, Payroll, Human Resources and any other offerings available.
 - c. Pricing for all products listed
 - d. Value Added Details (i.e any early pay rebates etc.)
 - e. History of Charter School Experience within the State of Florida.
 - f. Three (3) Current references
7. If additional information is required, please contact Karen Roland, Board Consultant in writing at: kroland.bca@gmail.com or by phone at 941-232-2008

II. Specific Information Requested Within Quote

- **Statement of Support:** Preferences will be given to vendors who provide a statement of supporting the Academy’s mission and vision
- **Explanation of Experiences:** Preferences will be given first to vendors who have experience with classical charter schools, or Hillsdale College support, then to general charter schools experience. Experience with Educational institutions as a cornerstone of the practice is a requirement.
- **Explanation of knowledge of Regulations:** Preferences will be given to vendors who demonstrate knowledge of Florida Statutes governing public schools, and public charter schools, other requirements of FLDOE, in addition to knowledge of other regulatory agencies such as, but not limited to, State of Florida, IRS, and Manatee County School District Charter School Policies.
- **Abilities and Backgrounds of Personnel:** Vendors should list key personnel, and provide resumes for those individuals.
- **Ability to complete the Scope of Work:** Vendors should comment on their ability to complete the scope of work as described in Section III, listing any items they do not feel they would be able to complete, and any additional items they are able to provide beyond the scope.



- **Detailed Explanation of Costs:** Explain in detail how costs are calculated and what BCA can expect to pay for the services provided. Preference will be provided to those who are able to provide state contract pricing.
- **Software Preferences and Cost Expectations:** Vendors should detail which software package(s) they will be using and who is responsible for paying for such services. Please also indicate how BCA staff would have access to reporting or how reports can be requested to monitor fiscal responsibilities.
- **References:** Include references for BCA to contact regarding services received from vendor.

III. Scope of Work

Financial Management

General Accounting:

1. Assist the Academy with the creation of financial reporting chart of account to comply with the Financial and Program Cost Accounting and Reporting for Florida Schools Redbook. Set up and manage subsidiary accounts to manage supplemental financial programs such as donations, field trips, teacher supplies, NSLP, late fees, lost/damage textbook and supply reimbursements and others as needed.
2. Process accounts payable, purchase orders and other documentation provided by the Academy with appropriate coding as indicated by the Academy.
3. Prepare, record and copy checks then submit to the Academy for signature and distribution or work with a payment service provider for ACH payments for the Academy's Head of School or designee's approval for payment.
4. Research and respond to billing and payment questions.
5. Process accounts receivable and deposits based upon information provided by the Academy. Academy shall deposit money and provide a breakdown of accounts each deposit should be coded into.
6. Reconcile bank accounts and provide a bank reconciliation report to the Academy monthly (cash bank and credit card bank accounts).
7. Provide monthly detailed financial reports including profit and loss statements, comparison to annual budget, classes fund balances, and a balance sheet at least five days prior to regular scheduled Board of Directors meetings.
8. Be available to answer questions of the Board of Directors (by telephone is acceptable).
9. Provide monthly financial reports to the Academy's Sponsor utilizing the format required by the state and/or district.
10. Prepare and record all required journal entries, including but not limited to prepaid accounts and revenue accruals.
11. Maintain inventory records, including but not limited to maintain records of ownership, and financially recognizing depreciation, asset additions, asset disposition and any revaluation needed.
12. Perform monthly closing procedures after all monthly adjustments have been made.

Quarterly:

13. Prepare and submit quarterly financial reports to the Trustee of our Bond in accordance with our mortgage, as applicable.



14. Prepare and submit quarterly reconciliation of grant income and expenditures. Prepare request for reimbursements to for Head of School or designee to submit to Academy's sponsor or grantor.

Annually:

15. Perform year-end close and prepare for annual audit
16. Meet with the Academy's chosen independent auditor to plan for the annual audit, complete all requested schedules, provide copies of requested test documentation and respond to audit field staff requests.
17. Assist with the preparation of the annual budget by proving elements such as but not limited to historical expense information and calculating possible budget scenarios for the administration and budget committee.
18. Prepare annual 1099 for vendors as required by law.

Other projects:

19. Guide the Board, Head of School, or other Academy related organizations in securing, and management of Bonds, or other financial related complexities, such as but not limited to accepting of stock donations, and managing insurance policies.
20. Assist, and guide the Head of School and other Academy related organizations with other operational contract negotiations (such as but not limited to, large procurement purchases, service providers such as technology support, facility support, safety compliance support, ESE support, ESOL support, Uniform provider, Lottery services, marketing firm, Food Service Management, and transportation services).
21. Apply for grants with FLDOE, and other grant opportunities
22. Assist in financial management of fundraising events
23. Support and guide the operational and financial success of the Academy

HUMAN RESOURCES

24. Assist with creation and modification of human resource policies and salary schedules
25. Assist Head of School with recruitment and maintaining staffing of faculty and staff by processing onboarding, offboarding, background checks, clearance management and other regulatory compliance elements.
26. Assist with management of faculty contracts.
27. Process employee payroll, manage employee time and attendance, manage employee W2, and report taxes to regulatory compliance.
28. Coordinate and manage employee benefit and retirement packages with brokers in cooperation with Head of School.
29. Create and maintain Salary schedules, and ensure appropriate level pay for all faculty and staff.
30. Assist Head of School with addressing employee concerns and complaints.
31. Assist Head of School with recruitment programs.
32. Maintain a substitute pool and assist with scheduling for planned and unplanned faculty absences.
33. Management of Worker's compensation claims as needed.



34. Management of faculty and staff Professional Development records. Provide feedback and guidance to Head of School of faculty training gaps. Ensure faculty maintains appropriate Certifications.
35. Respond to the FLDOE FTE Survey Reporting.
36. Respond to FLDOE HR Survey.
37. Assist Head of School to ensure regulatory compliance to such as but not limited to ADA, FMLA, Title VII, OSHA, EPA, FLSA, others.

BOARD SUPPORT

38. Agenda: Assist the board chair and Head of School with the creation and posting of board agendas and public notifications.
39. Minutes: Assist the board secretary with the editing and posting of board minutes.
40. Public Records: Assist the board public record liaison and the Head of School with record keeping management and responding to record request according to Florida Statute.
41. Manage board member terms and required training in accordance the Board Bylaws.
42. Assist with creation of Board established policies and procedures as needed.
43. Assist with background and clearance check management for board members.
44. Assist and guide in public outreach and media relations.
45. Guide and assist with Strategic short- and long-term planning.
46. Assist other Academy related board organizations as needed.



IV. General Terms & Conditions

Scope: The Academy requests Quotes from agencies with experience providing services described herein with a negotiated starting date. Contract terms will be for a minimum of 5 years after the school opening, with negotiated termination clauses.

Delivery of Quotes: All Quotes to be delivered through email.

Background Checks: Vendors must agree to comply with the Jessica Lunsford Act, which requests requiring that any entity holding a contract with a public school and meets the any of the following three criteria must go through Level 2 screen, at the vendor's expense. The types of individuals who must have the background checks are individuals who are:

- are permitted access on school grounds when students are present or
- have direct contact with students or
- have access to or control of school funds

Method of Evaluation: The evaluation of Quotes will be by a committee. Each evaluator on the committee will independently score each Quote using the predetermined point system listed within Section V of this document. Each evaluator will compile a total score for each Quote, and will then individually rank each Quote based upon the total score. The Quote receiving the highest point score will be ranked 1, the second highest score will be ranked 2, and so on. After each evaluator completes this process, the facilitator of the evaluation process will ask each evaluator for the rank they gave each Quote. These rankings will be totaled for the committee to determine an overall ranking for each Quote. The highest ranked Quote will be recommended for award of the contract.

The evaluation committee reserves the right to negotiate further terms and conditions, including price, with the highest ranked respondent. If the evaluation committee cannot reach a mutually beneficial agreement with the first selected respondent, the committee reserves the right to enter into negotiations with the next highest ranked respondent and continue this process until agreement is reached.

Professional Liability: The successful bidder shall procure and maintain Professional Liability Insurance for the life of this contract/agreement, plus two years after completion. This insurance shall provide coverage against such liability resulting from this contract. The minimum limits of coverage shall be \$1,000,000.00 with a deductible not to exceed \$25,000. The deductible shall be the responsibility of the insured. Professional liability policies shall hold harmless the Academy and each officer, agent and employee of the Academy against all claims, for personal injury or wrongful death or property damage arising out of the negligent performance of professional services or caused by an error, omission or negligent act of the awarded bidder or anyone employed by the awarded bidder.

Non-Exclusive Agreement: This RFQ does NOT establish an exclusive arrangement between the Academy and vendor. The Academy reserves, but is not limited to, the following rights:

- The right to use others to perform work and services described in this RFQ;



- The right to request Quotes from other Vendors for work described in the RFQ;
- The unrestricted right to bid any work or services described herein.

Confidentiality of Information: The Academy reserves the right to retain all copies of vendor Quotes submitted in response to this Request for Quotes. You are hereby notified that under FS 119.07, ("Florida's Sunshine Law") Quotes submitted in response to this solicitation cannot be granted immunity from public scrutiny. All information submitted must be made available to the public for examination, except confidential exempt from disclosure as provided by law (social security numbers, phone numbers, bank account numbers, etc), if so requested. Vendor requests to hold certain submitted materials in confidence cannot be honored. If it is essential to your organization that certain materials be kept confidential, and they are a required element of this Request for Quote, it is recommended that you decline to respond to this solicitation.

Qualifications of Vendors & Eligibility Requirements: The Academy expressly reserves the right to reject any Quote if it determines that the business and technical organization, equipment, financial and other resources, or experience of vendor, compared to work proposed, justifies such rejection.

Quote Preparation Costs: The costs of developing Quotes are entirely the responsibility of the vendor, and shall not be charged in any manner to the Academy. This includes, but is not limited to, the direct cost of vendor personnel assigned to prepare vendor's response to the RFQ and any out-of-pocket expense (including, but not limited to, travel, accommodation, supplies) incurred by vendor in preparing the response to the RFQ.

Fiscal Information: Currently the Academy does not have accounts setup. We anticipate that the selected Back Office provider will establish accounts accordingly.

Solicitation of Academy Employees: The Academy expressly prohibits vendors from making any offer of employment, equivalent offer or any other offering of value to any employee or representative of the Academy.

Lobbying: Respondents are hereby advised that lobbying is not permitted with any Academy personnel or Board members related to or involved with this RFQ. All oral or written inquiries must be directed through Karen Roland, BCA co-founder, Board Consultant, for submission the review committee which will be evaluating the Quotes received. Lobbying is defined as any action taken by an individual, firm, association, joint venture, partnership, syndicate, corporation, and all other groups who seek to influence the governmental decision of a Board member or Academy personnel on the award of this contract. Any respondent or any individuals that lobby on behalf of respondent may result in rejection or disqualification of said Quote.

Ownership of Work Products The Academy shall have ownership rights, including copyrights and patents, to all work products developed for the Academy by the vendor.

Key Events & Dates:

1/31/2024Request for Information posted on Academy's web site
and bid notices mailed to prospective bidders



2/29/2024 Quotes due by 5:00pm. Committee will evaluate and contact top bidders it wishes to negotiate with

3/15/2024 Recommendation will be made to Board of Directors

Inquiries / Information: Any questions by prospective bidders concerning requirements of this bid should be addressed to Karen Roland, Co-Founder, Board Consultant, contact information above.

Florida State Contracts: If a company currently holds a contract with the State of Florida, Department of Management Services, Division of Purchasing or the Florida Department of Education, to supply the products or services requested in this bid, the bidder shall quote not more than State contract price(s). Failure to comply with this request may result in disqualification. The Board reserves the right to reject bids and purchase from State contracts if to do so represents its best interest.

Basis of Award or Rejection of Bids: The Review Committee will recommend the lowest ranked bidder to the Board. The Review Committee shall be responsible for determining the acceptability of a bid. The Board reserves the right to reject any or all bids, either in part or in whole.

Contract Termination: The Academy's Board of Directors reserves the right to terminate a vendor's contract, without penalty. The Board Chair (or designee) will notify the vendor of the intent to terminate, in writing, at least (30) days prior to the effective date of the termination, and the contract will officially terminate at the end of the (30) day grace period. The vendor may request reconsideration of this decision in writing at any time during the 30 day grace period. The request must be addressed to the Board of Directors Chairperson who will initiate an internal review of the matter. If the vendor's input is required as part of the reconsideration process, the vendor will be notified when and where to appear. Requests for reconsideration received after the (30) day grace period will be denied.

BCA will reserve the right for immediate contract termination or suspension of service if a vendor's employee or agent misconduct affects the health, safety, or welfare of a student.



V. Evaluation Criteria:

The following factors will be considered in ranking the Quotes received:

Explanation of Criteria	Possible Points
Understanding of task and proposed plan	+ 0 to 10
Statement of Support – demonstrate the understanding and acceptance of the purpose, mission and vision of BCA	+ 0 to 10
Experience & qualifications of firm	
<i>Experience with Classical Charter Schools</i>	+ 0 to 5
<i>Experience/Support for Hillsdale College</i>	+ 0 to 5
<i>Experience with Charter Schools</i>	+ 0 to 5
<i>Experience with governmental entities</i>	+ 0 to 5
<i>Explanation of knowledge of Regulations</i>	+ 0 to 5
Experiences & qualifications of personnel	
<i>Primary Contact</i>	+0 to 15
<i>Accounting Team on Staff</i>	+0 to 10
<i>Missing Resumes</i>	-5 each (-20 max)
Ability to meet the “Scope of Work”	+0 to 46 <i>(one point for each item identified within the Scope of Work)</i>
Services above and beyond Scope of Work	+0 to 8
References	+0 to 5 for each positive reference <i>(max 20 points)</i>
Costs	+ 20 for lowest rate +15 for second lowest rate +10 for third lowest rate +0 all others