

Sun Valley Academy



REQUEST FOR PROPOSALS (RFP) FOR STRATEGIC PLANNING SERVICES

September 9, 2021

CONTACT PERSON

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RFP Schedule

RFP Issued	September 9, 2021
Proposal Deadline	October 7, 2021
Proposals Reviewed and Evaluated by Selection Committee	Week of October 11, 2021
Consultant Interviews	Week of October 18, 2021
Select Consultant	Week of October 25, 2021
Notify Applicants of Decision	Week of October 25, 2021
Execute Contract	Week of November 8, 2021
Work Commences	November 2021 (exact date TBD)
Final Plan Delivered	March 2022 (exact date TBD)

Please note the schedule is tentative. All dates are subject to change.

INTRODUCTION

Sun Valley Academy (SVA) is requesting proposals from interested, qualified, and experienced professional strategic planning firms or individuals to provide strategic planning and facilitation services for the development of a three to five year strategic plan. All proposals should clearly define how they will work with Sun Valley Academy's executive leadership team to assist in a comprehensive, participatory planning process.

The primary deliverable of this contract and process will be a written organizational strategic plan document that presents the planning process, research, analysis, opportunities and strategies along with an implementation plan that will guide Sun Valley Academy for the next three to five years.

This RFP requests professional services of a consultant to facilitate the strategic planning process. Sun Valley Academy is aware that there are a variety of perspectives, models, and approaches available to develop a strategic planning document; therefore, the successful firm/expert should be able to discern which model or model(s) will best enable Sun Valley Academy to define, develop, and complete its organizational and programmatic goals, growth and expansion strategies, current contractual obligations, and other business and academic priorities.

Based on the proposals received, Sun Valley Academy will select individuals/firms to be interviewed. As a result of those interviews the top-rated consultant will be selected by the selection panel for this engagement.

Proposals must be responsive to Sun Valley Academy's request. Sun Valley Academy will determine the most responsive and responsible consultant providing the best service at the most reasonable cost. Cost alone shall not be the determinative factor. Sun Valley Academy reserves the right in its absolute discretion to make no award or contract.

SECTION I – BACKGROUND

Sun Valley Academy is a non-profit, public charter district serving grades K-8 in the Avondale and South Phoenix communities. Sun Valley Charter School opened in 2009 with seven teachers and 140 scholars in a storefront property. Over the following nine years, the Sun Valley scholar population grew, and in October 2018, Sun Valley Charter School became Sun Valley Academy (SVA) and moved to the South Mountain campus located on 27th Avenue and Baseline in Phoenix. Sun Valley currently serves nearly 800 students and has 77 employees.

Sun Valley Academy believes by collaborating and serving our surrounding community, including students, staff, parents and residents (regardless of whether those residents attend our school), we have discovered the balance between education and a nurturing,

supportive environment. As a district, we prescribe to teach students by providing them with basic needs, belonging, safety, love, and respect in order for them to become the best versions of themselves as global leaders of the future. The infusion of these ideals and best practices allows our schools to achieve our mission of developing productive members of our community by empowering every student, every day, through high standards and high achievement.

Sun Valley Academy is a Leader In Me school which helps students learn how to become self-reliant, take initiative, plan ahead, set and track goals, do their homework, prioritize their time, manage their emotions, be considerate of others, express their viewpoint persuasively, resolve conflicts, find creative solutions, value differences, and live a balanced life. Instead of focusing on academic measures alone, Leader in Me embodies a holistic approach to education, redefining how schools measure success.

Sun Valley Academy follows components of a traditional model by incorporating Spalding for English Language Arts and Saxon Math. Math is taught one grade level ahead for each grade. PowerSchool is a student information system used to track benchmark scores and overall student performance on standardized assessments.

Sun Valley Academy's Mission

Sun Valley Academy has made a commitment to providing each scholar with a quality education through high standards and high achievement. We foster a school culture in which teachers, scholars, and parents are active participants. Our pursuit of academic excellence is enhanced by family partnerships and the development of leadership skills. This dynamic combination motivates scholars to embrace life-long learning, and to become productive members of our community. Sun Valley Academy empowers every student, every day, through high standards and high achievement.

Sun Valley Academy's Vision

Sun Valley Academy is dedicated to being a school of distinction in education while investing in meaningful partnerships through teaching individuals to be lifelong learners with strong leadership skills.

Sun Valley Academy's Philosophy

At SVA we understand that your child's elementary years are the foundation for their future success. We believe in preparing students for this success through our unique blend of quality instruction, higher expectations, and students being actively engaged in their learning, leadership development, nurturing, and support.

SVA places a special emphasis on the school and family partnership. We believe that families and schools working together ensures that children reach their fullest potential.

SVA believes in building future leaders. Students will participate in leadership skill-building activities, presentations, and projects designed to foster strength of character, responsibility, and the desire to become positive contributors in our community.

Scholar Population

Sun Valley Academy serves nearly 800 students from diverse cultural and widely and socioeconomic backgrounds. Within this population:

- 8% receive special education services under an IEP
- 10% receive ELL services
- 56% qualify for free and reduced lunch

The ethnic and racial backgrounds of our student community are as follows:

- Hispanic: 55%
- Black: 28%
- White: 7%
- Multiracial: 6%
- American Indian/Alaska Native: 1%
- Asian: 1%
- Native Hawaiian/Other Pacific Islander: 1%
- Unspecified: 1%

SECTION II - PURPOSE

Sun Valley Academy is seeking a professionally qualified consultant/firm to work with its staff to create a strategic plan to address strategic issues through a comprehensive, data-driven and employee-engaged planning process. The strategic plan will outline the direction and vision for Sun Valley Academy for the next five years and should help the CEO and Board make decisions aligned with the organization's mission, vision, philosophy, and growth strategy.

SECTION III - SCOPE OF WORK AND DELIVERABLES

We expect the project to include:

1. Project Management and Facilitation
2. Design and execution of a strategic planning process that meets the criteria outlined in this RFP
3. Development of a three-five year strategic plan that includes a budget for implementation
4. Development and execution of a support structure for plan implementation

Deliverable Focus Points:

- Review current vision and mission statements
- Understand and respond to the current landscape with regards to charter schools in Arizona and preparing for the future trends in charter school education
- Current and future staffing needs
- Departmental roles and responsibilities
- Organizational structure
- Public relations and marketing of the organization as a whole
- Finance, operations, and structure
- Future growth and expansion opportunities
- Effective and efficient community and corporate engagement
- Marketing and recruitment strategies for enrollment
- Talent acquisition strategies for staff
- Value and effectively implement diversity, equity and inclusion strategies

The proposal should include:

1. A project plan that demonstrates a clear understanding of the work to be performed, estimated hours, and other information relevant to the project
2. Qualifications of all consulting staff who will be assisting with the project such as; education, position within consulting firm, years and type of experience.
3. List of client references
4. Time and cost projections

SECTION IV - PROJECT GOALS AND TARGET AUDIENCE

Sun Valley Academy envisions the scope of work to be completed in three stages. Work completed in each of the stages will be summarized in a report to the CEO and executive leadership team.

1. Stage 1- Pre-planning

This stage requires the consultant to research and report the following in preparation for the strategic planning session. Items to be considered:

- a. Review of organization's history and overall assessment through gap or SWOT analysis of the organization to evaluate opportunities or concern
- b. Benchmarking in alignment with the Charter School Association strategic plan along with strategic plans of other K-8 charter schools with a similar focus
- c. Interviews, surveys and focus group polling to receive partner and community input

- d. Development of a shared understanding of the current status of the Charter school system along with current federal and state guidelines and funding requirements.

2. Stage 2- Strategic Planning Creation

At this stage, the consultant helps Sun Valley Academy identify strategic goals and create an actionable strategic plan. The plan will include:

- a. An executive summary
- b. A comprehensive plan that identifies:
 - Shared Mission and Vision
 - SMART (specific, measurable, achievable, realistic, and time-limited) Goals
 - Objectives
 - Strategies
 - Tactics
 - Listing of responsible parties and roles
 - Measurable outcomes
 - Resource development strategies
 - Recommendations for enhancement of current financial, technological, and human capital.
 - Communication strategies

3. Stage 3- Implementation & Evaluation Follow-up

This stage requires the consultant to assist Sun Valley Academy by providing oversight of the implementation and evaluation process. This process should include:

- Follow-up sessions with Sun Valley Academy leadership to gauge the progress of the implementation at 3 and 6-month points after plan delivery
- Gathering of any measurable goals and objectives that would give indication of successful implementation

SECTION V - OWNERSHIP AND CONFIDENTIALITY

All intellectual property will become the property of Sun Valley Academy. All data remains the sole property of Sun Valley Academy. The consultant shall agree to keep information related to this process in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information that has been gathered on this project.

SECTION VI - PROPOSAL FORMAT

Please include the following information in your proposal:

1. **Title Page**
2. **Executive Summary**
3. **Methodology and Approach:** A description of the consultant/firm's approach to strategic planning consultation, including methodology perspective, or philosophy that guides your work with organizations in this undertaking
4. **Timeline:** Sample project timeline and project plan with major tasks and milestones including a list of project deliverables to be created with a detailed timeline for each deliverable and overall project completion
5. **Budget:** a detailed budget that outlines expenses
6. **Experience:** A summary of your strategic planning experience and identify specific K-8 charter and/or district public schools in which you have conducted strategic planning
7. **Expertise:** Identification of those on your team who will be involved with the project which should include their role, experience, and resumes.
8. **References:** Provide at least three client references and the years you worked on those projects.

The proposal must also include the following specific information:

General information

The proposal should provide the name of the consultant, title, address, phone number, email address, and website, if one exists. The name and email address for any team members assisting in the project should also be included.

Consultant Qualifications and Roles

The proposal must describe the consultant's qualifications such as work activities, expertise, knowledge, and experience. Experience should include examples of similar related work for a K-8 public school.

Some key qualifications that will be considered:

- Education (degree(s) and/or certificate(s))
- Experience successfully developing strategic plans
- Knowledge of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Experience in creating a neutral environment for obtaining input
- Experience in gathering and utilizing data to drive the strategic process

- Ability to constructively challenge key stakeholders
- Experience in inspiring others to thinking innovatively
- Project management experience
- Knowledge of Charter Schools, State and Federal Funding Requirements, and Arizona Department of Education

Work Plan

The proposal should include a detailed description of the activities to be conducted by the consultant to complete the work.

- Specific activities to be conducted at each stage
- Sample timeline for the activity at each stage
- List of milestones and deliverables tied to the activities
- Proposed payment schedule tied to project milestones and deliverables

References

Information regarding each reference should include the individual's name, address, phone number and email address.

Previous Work Product

The proposal should include at least one (1) sample of a previously completed strategic plan. Portions may be redacted to protect private information as needed.

SECTION VII – SCORING

Proposals will be reviewed and evaluated based on the following criteria:

1. Qualifications (35%)
2. Scope of Proposal (25%)
3. Work Plan (25%)
4. Budget (15%)

SECTION VIII – EVALUATION CRITERIA

In awarding a contract for consulting services to develop a three to five year strategic plan for the district, Sun Valley Academy will examine several factors and criteria will include:

Qualifications

- The consultant has the qualifications needed to successfully complete the scope of work
- The consultant has prior experience working on similar projects
- The consultant has background and experience in working with rural school districts

Scope of Proposal

- The proposal demonstrates an understanding of the project objectives and desired results
- The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan
- The proposal illustrates the consultant's ability to successfully execute the proposed approach
- The proposal includes an appropriate process to interact with the Board and community stakeholders

Work Plan

- The proposal adequately details project activities and milestones or deliverables associated with each stage of the scope of work
- The proposal includes a detailed timeline for each stage
- The work can be completed within the project timeline
- Availability for work to be conducted in late 2021/early 2022 with a strategic plan draft presented to the CEO and Governing Board no later than March 2022

Budget

- The proposal includes a detailed budget for each stage of the scope of work
- Proposed costs are reasonable
- Proposed schedule of payments corresponds appropriately with tasks, milestones or deliverables

SECTION IX - REFERENCE CHECKS

Information from references will be evaluated using the following criteria. The evaluation will be labeled as satisfactory or unsatisfactory.

- The reference would hire the consultant again
- The original scope of services was completed within the specified timeline
- Interim deadlines were met in a timely manner
- The consultant was responsive to the reference's needs
- The consultant anticipated problems and solved them quickly and effectively

- The original scope of services was completed within the project budget

SECTION X - PRESENTATION/INTERVIEW

Consultants may be asked to participate in an interview and/or provide a presentation to the CEO and/or Board in order to further gauge their fit and ability to work on this project. If needed, interviews will be scheduled to take place the week of October 18, 2021.

SECTION XI - PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION

Instructions for submission

1. Closing Submission Date

Proposals are due by 4 p.m. Arizona time on Thursday, October 7, 2021

2. Inquiries

Inquiries concerning this RFP should be directed to:

Jackie Johnson
Director of People and Culture
jajohnson@sunvalleyacademy.org

3. Conditions of Proposal

All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by Sun Valley Academy.

4. Submission Instructions

All proposals must be submitted by email to Jackie Johnson at jajohnson@sunvalleyacademy.org by 4:00 p.m. Arizona time on October 7, 2021.

All proposals received by the deadline will undergo a preliminary screening. Late or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the submission instructions in the RFP.

5. Reservation of Rights

Sun Valley Academy reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. Sun Valley Academy

may, at its sole and absolute discretion, select no provider for these services if, in its determination, no applicant is sufficiently responsive to the need. Sun Valley Academy reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. Sun Valley Academy reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of Sun Valley Academy. It does not commit Sun Valley Academy to award any grant.

6. Confidentiality

If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.

7. Ineligibility

Under the following conditions, an individual or entity is ineligible to be a regional center vendor, and therefore may not submit a proposal.

Conflict-of-Interest: Sun Valley Academy will determine, on a case-by-case basis in consultation with our legal consultant, whether an actual or potential conflict of interest exists with the Proposer that bars the Proposer's proposal from consideration.

8. Notification of Selection and Timeline

Sun Valley Academy will seat the RFP Selection Committee. The evaluation process will include individual committee member evaluation and rating of each proposal, followed by committee discussion and ranking of proposals. After preliminary rating and ranking of proposals, interviews may be scheduled with finalists, particularly if two or more proposals are closely rated and/or more information is needed. References will be contacted for all finalists.

The final recommendation of the RFP Selection Committee will be submitted to the Chief Executive Officer and is not subject to appeal. All applicants will receive written notification of Sun Valley Academy's decision regarding their proposal, and an announcement of the applicant awarded the project will be posted on the school web site, www.sunvalleyacademy.org.

Additional information may be required from the selected applicant prior to the awarding of the contract. Any information withheld or omitted, or failure to disclose any history of deficiencies or client abuse shall disqualify the applicant from award of the project and/or contract. Sun Valley Academy reserves the right not to select an applicant for project implementation if, in its determination, no qualified applicant has applied or is sufficiently responsive to the service need.

In the event that no proposal is selected, Sun Valley Academy may elect to either not develop the service pending further analysis of alternatives to meet the expressed need, or to issue a new RFP to attempt to expand the pool of potential respondents.