



**REQUEST FOR PROPOSAL (RFP)**  
**FOR**  
**STRATEGIC ASSESSMENT & PLANNING**  
**SERVICES**  
**AT**  
**CREATIVE MINDS INTERNATIONAL**  
**PUBLIC CHARTER SCHOOL**  
**DUE 12:00 PM ON SEPT. 25, 2019**

## Overview of School

Creative Minds International Public Charter School (CMI) serves about 530 District of Columbia students from Pre-K through 8<sup>th</sup> grade. We are located in the historic Sherman building on the Armed Forces Retirement Home (AFRH) property (3700 N Capitol Street NW, Washington DC 20011).

1. CMI's mission is to offer early childhood, elementary, and middle school DC Public School students a highly engaging, rigorous, international, and inclusive education plan that provides them with the knowledge and skills required for successful participation in a global society through a project and arts-based international curriculum to foster creativity, self-motivation, social and emotional development, and academic excellence.
2. Since its opening in 2012-2013, CMI has provided an innovative model of education for DC students and families. Among other things, CMI's model incorporates an international curriculum (International Primary Curriculum for the lower school and International Middle Years Curriculum for the middle school), inclusion and individualized education planning, arts-infused programming, project-based learning, and innovative socio-emotional learning supports through the Greenspan Floortime Approach.
3. Due to interest in its innovative model and above average academic results, CMI has recently experienced significant growth in middle year grade levels and student enrollment. This rapid growth has led to issues with coherence of the model, difficulties with coherent and consistent communication with stakeholders, significant amounts of unenrollment before the middle school grades, staff and leadership turnover (especially at middle school level), the departure of the founding Executive Director at the end of school year 2018-2019 and the appointment of an Interim Executive Director for 2019-2020 school year.
4. CMI is at a transition point in its history with the departure of its founding executive director and the launch of an international search for a replacement to be conducted during the school year with the hope of naming somebody in early 2020. The search for the permanent executive director will coincide and be informed by this project.
5. CMI's Board of Directors is interested in developing a compelling mission and vision, coherent educational model, improving culture, making critical path decisions about programming, as well as developing clear expectations and processes to accomplish this newly refreshed vision. The ultimate goal is to ensure the school's viability and to become an even higher performing educational program.

## Intent and Definitions

1. The goal of this RFP is to solicit professional and competent strategic assessment and planning services. Specifically, we are looking for a School-wide Organizational Assessment and a Three-Year Strategic Plan.
2. The term "CMI" refers to Creative Minds International Public Charter School.
3. The term "contractor", "consultant" or "bidder" means the responsible bidder.

4. The term “successful contractor” or “successful bidder” refers to the bidder awarded the contract.

## Scope of Work

1. **School-wide Organizational Assessment:** This includes but is not limited to the following:
  - *Comprehensive analysis of the school and organization.*
  - *Culture Assessment* to ensure our staffing model and pedagogical practices align with our mission, philosophy and provide for racial and educational equity;
  - *Foundational Assessment* to ensure effectiveness and optimize efficiency in all departments including but not limited to administration, operations, teaching staff, educational supports, special education and related services, facilities utilization;
  - *Financial Assessment* to ensure that our model is sustainable;
  - *Market and Enrollment Analysis* of the District of Columbia trends in PK3-8<sup>th</sup> grade education to define our niche and ensure sustainability of CMI.
  - *Viability Study* to evaluate strengths and weaknesses of the current educational model;
  - *Assessment* of educational and staffing models appealing to our target student population and provide high-quality education that is pedagogically and academically appropriate to prepare students for high school and beyond;
  - *In-depth Analysis* of a viable model that considers factors such as education quality, curriculum, pedagogy, socio-emotional learning programming, equity, financial viability, intended niche, sustainability, etc.;
  - *Framework* for a long-term, sustainable model of high-quality school.
  - *Deliverable for the Assessment* is expected to be an inward facing document that identifies strengths and challenges and makes concrete suggestions to address challenges.
2. **Three-year Strategic Plan:** This includes but is not limited to the following:
  - *Clarification and/or refinement of a compelling mission and vision statement*
  - *Engagement of diverse stakeholders* through-out the strategic planning process to help establish ownership and shared accountability.
  - *Development of effective lines of communication to all stakeholders*
  - *Strategic organizational goals* that should be obtained in three-years
  - *Well-defined framework* with clear objectives and benchmarks to assess progress towards strategic goals
  - *Resource allocation recommendations* to support implementation of strategic plan and its goals
  - *Evaluation Metrics* that are measurable and quantifiable
  - *First deliverable for the Strategic Planning Process* is expected to be a document that can be shared internally and adapted to be communicated externally as well.
  - *Second deliverable* is a one-year tactical level plan that provides priorities and directions for the first year of the strategic plan and empowers the incoming Executive Director to be successful.

## Consultant Qualifications and Requirements

### 1. Qualifications

- Demonstrated educational expertise in particular innovative educational design
- Understanding of DC educational landscape
- Expertise in facilitating and engaging diverse groups of stakeholders
- Expert level analytic abilities
- Experience in building coherence, focus and prioritization from diverse data sets and competing interests
- Experience in change management processes and procedures
- Experience working with non-profits, especially charter schools
- Proven track record of devising strategic plans that produced real results

### 2. Requirements

- Be licensed to do business in the District of Columbia. The amount of the bid shall not exceed the license limit;
- Capable of providing qualified staff;
- Willingness to share data, observations and information with other organizations to maximize efficiencies and transparency.
- Willingness to coordinate scheduling and discovery activities with other organizations to maximize efficiencies and transparency
- Have sufficient liability insurance;
- Finalists will be required to give an oral presentation to Board of Directors prior to final selection and awarding of contract.
- Three references

## Bid Details and Submissions

### 1. Bids must include the following:

- Detailed proposal to realize the goals of this RFP
- Overview of services provided
- Timeline of when each component in the scope of work will be delivered
- Clear pricing structure and payment schedule.
- Any exclusions should be clearly stated along with a proposed rate to add such exclusions. Note that additional administrative time, travel time to CMI, etc. are not billable expenses;
- Whether your company is a small business, based in DC, or a Certified Business Enterprise;
- Three references;
- Proof of liability insurance.
- Proposal must be signed by an officer of the contractor who is legally authorized agent to enter into a contract.

### 2. Submissions:

- All questions should be submitted to Heather Hesslink at [heather.hesslink@creativemindspcs.org](mailto:heather.hesslink@creativemindspcs.org).
- All bid proposals will be accepted until **12:00 PM on September 25**.

- Interested vendors will respond to the advertised Notice of RFP via email at [heather.hesslink@creativemindspcs.org](mailto:heather.hesslink@creativemindspcs.org).
- Complete RFP details can be found at [www.creativemindspcs.org](http://www.creativemindspcs.org).
- Any proposal received after **12:01 PM on September 25** is deemed non-responsive and will not be considered.
- Proposals will not be accepted by oral communications, telephone, telegraphic transmission, or fax.
- All costs attributable to the preparation of a proposal or any presentation required to supplement or clarify the proposal are borne by the contractor.
- CMI will rank the proposals in terms of meeting the requirements of this RFP. Additional information may be sought from contractor during the evaluation period.
- All proposals will remain valid for a minimum period of 45 days subsequent to the RFP closing date.

#### Reservation of Rights

1. Any proposal not providing the required information or not conforming to the format specified in this RFP may be disqualified.
2. CMI reserves the right at its sole and absolute discretion (for this provision and all other provisions contained in this RFP), to:
  - Accept or reject, in whole or in part, any or all proposals with or without cause;
  - Waive any irregularity or informality in the RFP process or any proposal;
  - Make corrections or amendments due to errors identified in proposals by CMI or the bidder;
  - Modify and/or amend the final contract in negotiation with the contractor;
  - Select one or more bidders to perform the services;
  - Only make renewals via written agreement between CMI and the vendor.

#### Document Interpretation

1. In the event of any conflict of interpretation of any part of this overall document, the interpretation shall be governed by the laws of District of Columbia.

#### Hold Harmless Agreement

1. The successful bidder(s), its agents, employees (paid or volunteer), directors and/or assigns shall indemnify, hold harmless, and defend CMI, its directors, officers, and employees (paid or volunteer) from and against any and all claims, demands, causes of action of whatever kind or nature arising out of error, omission, misrepresentation, negligent act, conduct or misconduct of the bidder and its agents, employees (paid or volunteer), directors and/or assigns in the indemnification shall also include reasonable attorneys' fees, court costs, and expenses.

#### Inspections

1. CMI reserves the right to inspect any item(s) or service location for compliance with specifications, requirements, and the needs of CMI. If a bidder cannot furnish a sample of the proposed item, where applicable, for review, or fails to satisfactorily show an ability to perform, CMI can reject the proposal as inadequate.

#### Invoice and Payments

1. The bidder(s) who is awarded the contract is required to send all invoices to [invoice@creativemindspcs.anybill.com](mailto:invoice@creativemindspcs.anybill.com).
2. Invoices shall be provided within 30 days of providing goods and/or services to CMI or according to the terms in the executed contract.
3. CMI will pay invoices on net-30 days.
4. CMI is exempt from federal, state and local taxes. In the event that taxes are imposed on the goods or services purchased, CMI will not be responsible for payment of the taxes. The bidder awarded the contract shall absorb the taxes entirely. Certificates of exemption will be furnished upon written request to CMI.

#### Transition

1. If an executed contract with the bidder terminates for any reason, CMI reserves the right to have a transition period to a new provider. During this transition period, CMI will pay for these goods and/or services to the provider at the negotiated rate(s) in existence at that time. CMI further reserves the right to establish the length of the transition period and communicate this transition period to the provider; however, such transition period shall not exceed 120 days.

#### Warranties and Associations

1. Bidder(s) shall furnish all data pertinent to warranties or guarantees that may apply to items in the proposal. Bidder(s) may not limit or exclude any implied warranties.
2. Bidder(s) may not use the CMI official logo(s), or any phrase associated with CMI, without written permission from CMI.

#### Exceptions, Alternations, Additions, or Modifications

1. If any exceptions, alterations, additions, or modifications are submitted by the bidder to any portion of this RFP, the bidder must clearly indicate the exceptions, alterations, additions and modifications and include a full explanation as a separate attachment to the proposal. The failure to identify exceptions, alterations, or modifications will constitute acceptance by the bidder of the RFP as proposed by CMI. CMI reserves the right to reject a proposal containing exceptions, alterations, additions, or modifications.

#### Proposal Preparation Costs and Document Retention

1. All costs related to the preparation and submission of this proposal shall be paid by the bidder. Issuance of this RFP does not commit CMI, in any way, to pay any costs in the

preparation and submission of the proposal, nor does the issuance of the RFP obligate CMI to award a contract or purchase any goods and services stated in the RFP.

2. All proposed materials and supporting documentation that are submitted in response to this proposal become permanent property of CMI.

#### Evaluation and Award

1. This RFP in no manner obligates CMI to the eventual rental, lease, and purchase, etc. of any equipment or service described, implied or which may be proposed, until confirmed by a written contract. Progress toward this end is solely at the discretion of CMI and may be terminated at any time prior to the signing of the contract. CMI may initiate discussions with supplier personnel authorized to contractually obligate the supplier. Discussions will develop into negotiating sessions with the successful bidder(s).
2. If CMI is unable to agree to contract terms, CMI reserves the right to terminate contract negotiations with a bidder and initiate negotiations with another bidder. CMI reserves the right to select services and products from any number of bidders if in its sole discretion, it is in the best interest of CMI to do so. Evaluation will consider the proposal(s) best meeting the needs and requirements of CMI and such evaluation and determination of best value shall be solely at the discretion of CMI.
3. Purchase price is not the only criteria that will be used in the evaluation process. Additional factors include:
  - Experience
  - Quality of proposal
  - Proposed plan for services and timeline
  - References
  - Company mission, DC based business, and minority-owned business

#### Non-performance by bidder/contractor

1. Performance, before and during the contract term, will be a major consideration of current contract award, renewals, and future award considerations. Failure to perform, in any sense relative to this contract, may result in the probation and/or termination of this agreement by CMI on the basis of nonperformance.
2. Nonperformance shall be determined as follows:
  - Failure to meet and maintain all qualifications required in this RFP.
  - Failure to keep and maintain all required insurance coverage.
  - Failure to meet required operating performance standards in the time period required and consistent with workmanlike and professional manner. Workmanlike manner means work that is "completed in a skillful manner and is non-defective."
  - Failure to rectify deficiencies within thirty (30) days of written notification of such deficiency, or such shorter period of time as set forth in the Contract Documents.

#### Licensing and Insurance

1. All bidders must supply evidence of appropriate licenses and certifications that apply to this contract and the ability to conduct business in Washington DC.

2. All bidders must provide evidence of insurance or insurability. Contractor shall maintain at its own expense throughout the life of this Agreement, the following insurance with insurers reasonably acceptable to CMI. The successful bidder must provide written notice to CMI at least thirty (30) days prior to the cancellation, non-renewal, or material modification of any policies as evidenced by return receipt of United States certified mail.
  - Workers' Compensation Insurance in the greater sum of (1) the insurance currently maintained by the Contractor, (2) any amounts and scope required by statute or other governing law, or (3) the following: (i) bodily injury by accident - \$100,000 each accident; (ii) bodily injury by disease - \$500,000 policy limit; or bodily injury by disease - \$100,000 each employee.
  - Commercial General Liability Insurance on an occurrence basis in an amount equal to the greater of (1) the insurance currently maintained by the Contractor or (2) \$2,000,000 each occurrence; and such insurance shall include the following coverage; (i) completed operations coverage, (ii) contractual liability coverage, (iii) personal injury coverage, (iv) an endorsement naming CMI, as an additional insured, and (v) an endorsement providing that such insurance as is afforded under Contractor's policy is primary insurance in respect to the additional insureds. NOTE: The additional insured endorsement required herein shall be an ISO Form B (CG 2010 85) or equivalent.
  - Professional insurance (Errors and Omissions) in the same amount as the Commercial General Liability Insurance stated in (B)
2. No endorsement limiting or excluding a required coverage is permitted. In addition to securing the above insurance policies, Contractor shall also require all of its subcontractors to maintain the same types of insurance required of Contractor under this Contract, and, in connection with the subcontractors' commercial general liability insurance policies, Contractor shall also require its subcontractors to provide endorsements (i) naming CMI as an additional insured, and (ii) providing that such insurance as is afforded under the subcontractor's policy is primary insurance as it pertains to the additional insured.

3.

#### Conflict of Interest

1. The prospective bidder, its agents, employees, directors and/or assigns, shall disclose any financial, business or other relationship with CMI that may have an impact upon the outcome of this contract or potential future of the CMI projects resulting from this effort. The prospective bidder, its agents, employees, directors and/or assigns shall also list current clients who may have a financial interest in the outcome of this contract or CMI projects that will follow. In particular, the prospective bidder its agents, employees, directors and/or assigns shall disclose any financial interest or relationship with any company that might submit a bid on the CMI projects.

#### Non-discrimination

1. The selected bidder(s) shall comply, and shall require its agents, employees, directors and/or assigns to comply, with all applicable federal, state, and local laws, ordinances,

rules, and regulations in regard to nondiscrimination in employment because of race, creed, color, ancestry, national origin, religion, sex, marital status, age, medical condition, pregnancy, disability, or any other prohibited basis.