

## Notice of Request for Proposals

### Charter Management Organization Services RFP No. 63

Notice is hereby given that Opportunities for Learning – San Juan Capistrano Charter School (hereinafter referred to as “**OFL-CAPO**”) is requesting proposals for a provider of Charter Management Organization services (hereinafter referred to as “**Proposer[s]**”) to assist with OFL-CAPO’s operation of its charter school programs in San Juan Capistrano, California.

Proposers should not construe from this notice that OFL-CAPO intends to enter into a contract with the Proposer unless, in the opinion of OFL-CAPO, it is in the best interest of OFL-CAPO to do so. OFL-CAPO reserves the right to negotiate final contractual terms with the successful Proposer.

The Request for Proposal (RFP) documents are available at  
OFL-CAPO’s website at <https://ofl-sjc.org/notices/rfp/>

To request the RFP documents by e-mail or postal mail, please contact:

Angelica Lopez, Assistant Principal of Instructional Operations  
3501 Atlantic Ave, Long Beach, CA 90807  
[alopez@emsofl.com](mailto:alopez@emsofl.com)

OFL-CAPO will record and provide answers to any questions or requests for clarifying information about the RFP during the question and answer period.

OFL-CAPO will hold an **Optional Tour** of OFL-CAPO facilities on  
Thursday, April 11, 2019, and 9:00 a.m  
Location: 3501 Atlantic Ave, Long Beach, CA 90807

Proposers must submit written proposals via email or in a sealed package labeled:

**“Proposal – Charter Management Organization Services [RFP No. 63]”**

Addressed to:  
Angelica Lopez  
Opportunities for Learning - San Juan Capistrano  
3501 Atlantic Ave, Long Beach, CA 90807

OFL-CAPO will accept all proposals received on or before Friday, April 19, 2019. OFL-CAPO will not accept proposals that are received after the deadline.

OFL-CAPO reserves the right to reject any or all proposals, and to waive any errors or corrections in a proposal or in the proposal process. OFL-CAPO will award the contract based on a review and analysis of the proposals that determines which proposal best meets the needs of OFL-CAPO. Following the review and analysis of all responsive proposals, OFL-CAPO staff will make a recommendation to the OFL-CAPO Board of Directors at a duly noticed board meeting.

**REQUEST FOR PROPOSAL  
for  
CHARTER MANAGEMENT ORGANIZATION SERVICES**

---

**RFP No. 63  
CHARTER MANAGEMENT ORGANIZATION SERVICES**

by

Opportunities for Learning – San Juan Capistrano Charter School

ADDRESS ALL PROPOSALS TO:

Angelica Lopez  
Opportunities for Learning - San Juan Capistrano School  
3501 Atlantic Ave, Long Beach, CA 90807  
alopez@emsofl.com

# Request for Proposal

## Table of Contents

<b>INTRODUCTION/PURPOSE OF SOLICITATION</b>	4
<b>SCHEDULE OF EVENTS</b>	6
<b>GENERAL INSTRUCTIONS FOR PROPOSERS</b>	7
<b>PROPOSAL REQUIREMENTS</b>	9
<b>EVALUATION OF PROPOSALS</b>	11
<b>ATTACHMENTS</b>	
Attachment A Optional Tour	12
Attachment B Attachments Checklist	13
Attachment C Minimum Qualifications	14
Attachment D Proposal Questionnaire	15
Attachment E Proposer References	16
Attachment F Authorization Agreement	17
Attachment G Fee Proposal	18
<b>RFP EXHIBIT 1 - SCOPE OF WORK</b>	19

## **Introduction/Purpose of Solicitation**

The purpose of this Request for Proposal (RFP) is to enter into a contract with a provider of Facilities Services (collectively referred to herein as “Service Provider”) that will provide Opportunities for Learning – San Juan Capistrano (hereinafter referred to as “OFL-CAPO”) with assistance in the operation of its California public charter school located in San Juan Capistrano, California. The Service Provider will provide services to OFL-CAPO as described in the Scope of Work. The Charter School is currently operated by OFL-CAPO, a California limited liability company. However, in light of Education Code section 47604 as amended by Assembly Bill 406 (2018), operation of the Charter School will transition to OFL-San Juan Capistrano, Inc., a California nonprofit public benefit corporation, upon approval by the San Juan Capistrano Unified School District as the school’s charter authorizer. Any contract resulting from this RFP will need to be assigned from OFL-CAPO to OFL-CAPO, Inc. once the transition is approved and complete.

Through this RFP, OFL-CAPO seeks to promote maximum open and free competition consistent with applicable federal and state laws and standards. Outlined below are examples of basic competitive bidding standards OFL-CAPO will use in the issuance of this RFP:

- OFL-CAPO is soliciting competitive proposals in order to secure public objectives in the most effective manner and avoid the possibilities of fraud, collusion, etc.
- OFL-CAPO released this RFP to benefit OFL-CAPO and not the Proposers.
- Fulfillment of RFP specifications is based on full and fair competition and acceptance by OFL-CAPO of the Proposer who meets OFL-CAPO’s requirements, as determined by OFL-CAPO when evaluating proposals based on the criteria contained in the RFP.
- The RFP provides a basis for full and fair competition among Proposers to a common standard, free of restrictions that tend to stifle competition.

The above four points are for illustrative purposes only.

To respond to this RFP, interested Service Providers must present evidence of experience, ability, and financial standing necessary to meet the requirements stated in this RFP. OFL-CAPO will measure this evidence by scoring the proposals, using a point system that will rank each proposal from highest to lowest, to determine which proposals they will consider for the award of a contract.

To be competitive in this solicitation, the Proposer must:

- Carefully read the entire RFP, attachments, exhibit, and OFL-CAPO responses to questions before submitting a proposal.
- Ask appropriate questions or request clarification before the deadline in the RFP.
- Submit all required responses by the required deadlines.
- Follow all instructions and requirements of the RFP thoroughly and appropriately.

If a Proposer discovers any ambiguity, conflict, discrepancy, omission, or other errors in this RFP, the Proposer shall immediately notify OFL-CAPO of the error in writing and request clarification or a modification of the RFP. If the Proposer fails to notify OFL-CAPO of the error prior to the date for submission of proposals, and is awarded the contract, the Proposer shall not be entitled to additional compensation or time by reason of the error or its later correction.

### **Background Information**

OFL-CAPO proudly serves about 170 students and their families. OFL-CAPO is a year-round public charter school that serves 7<sup>th</sup> grade to 12<sup>th</sup> grade students.

At OFL-CAPO our mission is to create an educational choice for all students. Our staff connects with students to empower and inspire them to achieve their goals and make their dreams a reality. Our students enroll with us to meet various unique needs. Some students enroll to accelerate their progress toward their high school diploma so that they are able to graduate sooner than they might in traditional school. Others are falling behind in a traditional setting and are seeking academic recovery. Additionally, some students attend OFL-CAPO to eliminate some of the stressors associated with larger class sizes, increased student population and intimidating social demands of traditional high school settings. Our school offers both independent study courses and small group Instruction. Independent studies provides students with the space to work at their own pace and develop a heightened sense of accountability. Our small group instruction courses offers a classroom setting with fewer students than a traditional school, in order to maximize support for access to rigorous common core content. In our blended model of independent studies and small group instruction students are encouraged to take ownership of their education while still receiving the one on one support they need to successfully progress toward earning a high school diploma.

### ***Learning Center Location***

#### **San Juan Capistrano**

OFL- CAPO

31878 Del Obispo St. Suite 105

San Juan Capistrano, CA. 92675

**Schedule of Events  
for  
RFP No. 63**

- Release of RFP Monday, April 8, 2019
- Optional Tour Thursday, April 11, 2019
- Proposer Question Submission Deadline Friday, April 12, 2019
- OFL-CAPO Provides Answers Tuesday, April 16, 2019
- Deadline for Submission of Proposal Friday, April 19, 2019
- Proposals Evaluated Monday, April 22-Tuesday, April 23, 2019
- Board Meeting – Proposal Approval On or about Friday, May 10, 2019
- Anticipated Contract Award Date On or about Wednesday, May 22, 2019

OFL-CAPO will make every effort to adhere to the schedule. However, OFL-CAPO's management reserves the right to amend the schedule, as necessary, and will post a notice of said amendment at <https://ofl-sjc.org/notices/rfp/>

## General Instructions for Proposers

1. Prepare proposals simply and economically. Provide a straightforward concise description of the Proposer's capability to satisfy OFL-CAPO's requirements. Emphasis should be placed on completeness and clarity of content.
2. Submit proposals for the performance of all the services described within this RFP.
3. OFL-CAPO may reject a proposal if the proposal is conditional or incomplete, deemed non responsive, or if it contains any alterations of form or other irregularities of any kind. OFL-CAPO may reject any or all proposals or waive any immaterial deviation in a proposal. OFL-CAPO's waiver of an immaterial deviation shall in no way modify the RFP document or excuse the Proposer from full compliance with all other requirements if awarded the contract.
4. Proposers are responsible for the costs of developing proposals, and shall not charge OFL-CAPO for any preparation costs.
5. Proposers may modify their proposal after submission by withdrawing the original proposal and resubmitting a new proposal prior to the submission deadline.
6. Proposers may withdraw their proposal by submitting a written withdrawal request to OFL-CAPO, signed by the Proposer or their authorized agent, through the contact person named in the "Contact Information" provided on page 2 of this RFP. Thereafter, a Proposer may submit a new proposal prior to the proposal submission deadline. Proposers may not withdraw their proposal without cause after the proposal submission deadline.
7. OFL-CAPO may modify the RFP prior to the date given for submission of proposals by posting an addendum on <https://ofl-sjc.org/notices/rfp/> . OFL-CAPO will notify Proposers so they can obtain any addenda from OFL-CAPO's Website, or request it by email, postal mail, or fax.
8. OFL-CAPO reserves the right to reject all proposals for any reason and at OFL-CAPO's discretion. OFL-CAPO is not required to award a contract.
9. Any proposals and resulting contract(s) will be public documents reviewed by the OFL-CAPO Board of Directors at a public meeting. Proposers understand that such documents will not be kept confidential.
10. OFL-CAPO will not consider more than one proposal from an individual, firm, partnership, corporation, or association under the same or different names. Reasonable grounds for believing that any Proposer has submitted more than one proposal for work contemplated herein will cause OFL-CAPO to reject all proposals submitted by the Proposer. If there is reason to believe that collusion exists among the Proposers, OFL-CAPO will not consider any of the participants of such collusion in this or future solicitations.
11. OFL-CAPO will not consider a joint proposal submitted by two or more entities.
12. Additional charges for regular or express delivery, parcel post, packing, cartage, insurance, license fees, permits, or for any other purpose shall be included (and separately identified) in the proposal.

13. All proposals shall include the forms provided as attachments to this RFP. Proposers may copy these forms. A proposal is considered responsive if it follows the required format, includes all attachments, and meets all deadlines and other requirements outlined in this RFP.
14. OFL-CAPO shall not accept proposals after the submission deadline specified in the RFP and shall return the unopened late proposals to the respective Proposers.
15. Proposers are responsible for examining the entire RFP package, seeking clarification for any item or requirement that may not be clear to them, and checking all responses in their proposal for accuracy before submitting it.
16. Proposers may submit their questions regarding the information presented in this RFP to Angelica Lopez in writing by postal mail at 3501 Atlantic Ave, Long Beach, CA 90807, e-mail at alopez@emsofl.com, no later than 5pm on the date set forth above. OFL-CAPO will answer all questions received by the deadline in writing without exposing the query source. This will be the sole process for asking and answering questions regarding this RFP. Proposers may not contact OFL-CAPO employees directly to ask questions.
17. OFL-CAPO representatives reserve the right to inspect a Proposer's operations prior to any award of a contract.
18. OFL-CAPO reserves the right to negotiate the final terms and conditions of the contract, which may differ from those contained in the proposal, provided OFL-CAPO considers such negotiation to be in its best interest. OFL-CAPO may award the full contract to any one proposer, or may choose to split up the contract between multiple Proposers if in OFL-CAPO's best interest.
19. Interested Proposers are invited to inspect OFL-CAPO's premises prior to submitting a proposal in order to determine all requirements associated with the proposed contract. The inspection of premises will occur during the Optional Tour.
20. Proposers shall submit one paper copy and one copy in digital format (*e.g.*, email, CD, DVD, or flash drive.).
  - a. The paper copy must contain the original signature of the individual(s) authorized to bind the Proposer contractually and be labeled "Master Copy."
  - b. The Proposer must ensure the digital copy is complete and inclusive of all materials contained in the paper copy, including any required signatures. If there is an inconsistency between the paper and digital copies, the paper copy will take precedence.
  - c. The sealed proposal envelopes must be marked legibly with OFL-CAPO's RFP number and title, and OFL-CAPO's name and address, as shown in the following example:

**Proposal—Charter Management Organization Services [RFP No.63]**

*[Enter Service Provider Name Submitting RFP]*

for

Opportunities for Learning - San Juan Capistrano

Submitted to:

Angelica Lopez

3501 Atlantic Ave, Long Beach, CA 90807



## Proposal Requirements

To be eligible for evaluation, a proposal must adhere strictly to the format set forth below; failure to do so may result in disqualification. Proposers must complete, label, and separate each section, and number all pages. The content and sequence of the proposal will be as follows:

Section	Title
1.	Cover Letter
2.	Table of Contents
3.	Attachments Checklist
4.	Minimum Qualifications
5.	Proposal Questionnaire
6.	Proposer References
7.	Authorization Agreement.
8.	Fee Proposal

### 1. Cover Letter

Only the individual(s) authorized to bind the Proposer contractually may sign the cover letter, which shall be a part of the proposal package. OFL-CAPO may reject the proposal if the Proposer fails to include the following required information:

- Name and address of responding company
- Organizational structure of the responding company (*e.g.*, corporation, partnership, etc.)
- Proposer's Federal Employee Identification Number and Corporate Identification Number, if applicable
- Name, title phone number, fax number, and e-mail address of the representative who will be designated as the primary liaison to OFL-CAPO
- Name, title, phone number, and e-mail address of the representative(s) authorized to bind the Proposer in a contract if different from the primary liaison
- A statement expressing the Proposer's willingness to perform the services described in this RFP
- A statement expressing the Proposer's ability to perform the services required in the Scope of Work, including availability of staff and other required resources to meet all deliverables as described in this RFP
- A statement regarding the Proposer's proprietary information; if applicable, the Proposer must clearly mark in the upper right hand corner those pages to be considered proprietary (**Note:** the Proposer cannot consider the entire proposal to be proprietary; marking the proposal as proprietary does not mean that OFL-CAPO can keep it confidential, as OFL-CAPO must comply with the California Public Records Act)

- The following certification:

By signing this cover letter, I (we) certify that the information contained in this proposal is accurate and that all attachments required to be submitted as part of the proposal are certified to be true and binding upon our company.

## 2. **Table of Contents**

Immediately following the cover letter, include a comprehensive Table of Contents that lists all submitted proposal sections, subsections, attachments, and materials.

## 3. **Attachments Checklist**

The Proposer shall include all documents identified in the Attachments Checklist (Attachment B). OFL-CAPO may reject proposals that do not include the proper required attachments.

## 4. **Minimum Qualifications**

OFL-CAPO will only consider Proposers that **meet all minimum qualifications** (as listed on Attachment C).

## 5. **Proposal Questionnaire**

The Proposal Questionnaire (Attachment D) is intended to provide OFL-CAPO with specific information concerning the Proposer's capability to provide services as described in this RFP. Proposers should limit their responses to the number of pages noted in the questionnaire and answer each question in the same order.

## 6. **Proposer References**

Proposers must provide two references on the Proposer References form (Attachment E). OFL-CAPO reserves the right to contact any of the references listed, and retains the right to conduct reference checks with individuals and entities beyond those listed.

## 7. **Authorization Agreement**

The Proposer or their authorized representative must sign the Authorization Agreement (Attachment F) and return it with the proposal package.

## 8. **Fee Proposal**

The Proposer must complete the Fee Proposal (Attachment G) and return it with the proposal package.

## Evaluation of Proposals

Proposals will be opened on or after the date specified in the Schedule of Events. During the evaluation process, OFL-CAPO may ask Proposers to clarify information in the proposals, but Proposers may not change their proposals.

An error in the proposal may cause OFL-CAPO to reject that proposal; however, OFL-CAPO may, at its sole discretion, retain the proposal and make certain corrections. When determining if a correction will be made, OFL-CAPO will consider the conformance of the proposal to the format and content required by the RFP and that the Proposer's intent is clearly established based on review of the whole proposal.

OFL-CAPO will open proposals to determine if they contain all the required information in accordance with this RFP. OFL-CAPO will evaluate qualifying proposals using the following criteria:

CRITERIA	MAXIMUM POINTS
Administrative Requirements: did the Proposer include all required information in accordance with the General Instructions and Proposal Requirements?	5
Did the Proposer demonstrate experience with and an understanding of the charter management needs as described?	10
Based on the Proposal Questionnaire responses and the Cover Letter, did the Proposer demonstrate a complete understanding of OFL-CAPO's service requirements, as described in the RFP and the Scope of Work?	10
Does the Proposer have the requisite capability and experience, as measured by performance record, years in the industry, relevant charter school experience, number of other schools served, client retention and satisfaction, and references?	15
Cost	10
<b>TOTAL POINTS</b>	<b>50</b>

OFL-CAPO will score and rank selected proposals by assigning a score between zero and the maximum score to each proposal criterion. OFL-CAPO will recommend awarding the contract to the Proposer with the highest total proposal score.

## **Attachments**

Attachment A

## **Optional Tour**

The Optional Tour will include an escorted tour.

- The tour schedule includes the sites listed below.
- Prospective Proposers may not contact any sites or employees outside of the scheduled visit.
- OFL-CAPO requests that Proposers do not take pictures during the tour as OFL-CAPO has not obtained releases from parents, students, and employees.

### TOUR SCHEDULE

Tour begins April 11th at 9:00 AM  
3501 Atlantic Ave, Long Beach, CA 90807

OFL-CAPO thanks all Proposers for abiding by our request to keep the disruption caused by the visit to a minimum.

Attachment B

**Attachments Checklist**

---

Proposer Company Name

Please complete this checklist to confirm that the items listed below have been included in your proposal. Place a checkmark or “x” next to each item submitted to OFL-CAPO. For your proposal to be considered, all required attachments must be returned, including this checklist. Submit one copy of your proposal in a sealed package.

Section	Title
____ 1	Cover Letter
____ 2	Table of Contents
____ 3	Attachments Checklist
____ 4	Minimum Qualifications
____ 5	Proposal Questionnaire
____ 6	Proposer References
____ 7	Authorization Agreement
____ 8	Fee Proposal

Attachment C

**Minimum Qualifications**

A Proposer must meet all of the following minimum qualifications to OFL-CAPO's satisfaction to be given further consideration. Failure to satisfy any of the minimum qualifications may result in the immediate rejection of the proposal.

Both the Proposer's company and its key personnel currently meet all of the following minimum qualifications:

1. The Proposer has at least three years of experience with providing Charter Management Organization services.

Yes \_\_\_\_\_

No \_\_\_\_\_

2. The Proposer has knowledge and experience working with California charter schools.

Yes \_\_\_\_\_

No \_\_\_\_\_

3. The Proposer has professional references that demonstrate and evidence the ability to perform the required services.

Yes \_\_\_\_\_

No \_\_\_\_\_

4. The Proposer is licensed to do business in the state of California.

Yes \_\_\_\_\_

No \_\_\_\_\_

## Attachment D

### Proposal Questionnaire

This proposal questionnaire is intended to provide OFL-CAPO with specific information concerning the Proposer's capability to provide services as described in the RFP. Please be as concise as possible and limit your responses **to no more than two pages per question, unless instructed otherwise. Type each question in the same order as listed in the questionnaire.**

1. Provide a general description of your company's qualifications and experience relevant to the minimum qualifications in Attachment C, along with any necessary substantiating information. Limit your responses to information about your company's capabilities.
2. Provide a statement indicating the year your company was founded; what the primary business(es) of the company is(are); the length of time the company has been providing Charter Management Organizational services as described in this RFP. In addition, provide the duration and extent of experience the company has with providing any similar services.
3. Provide a general description of your company's experience with California charter schools.
4. Provide a general description of how your company will be able to provide the experience, ability, and financial standing necessary to meet the requirements set forth in this RFP.
5. Provide a complete list of organizations or schools that have discontinued or terminated your company's services in the last five years and the reason(s) why.
6. Provide an organization chart for your company, a description of the lines of communication, and the responsibilities at each company level.
7. Provide a complete balance sheet or annual report (verified by a certified public accountant) for the last three years of operation.
8. Provide a recommended transition plan that describes the steps the Proposer will take to begin providing the services described in this RFP.

Attachment E

**Proposer References**

List at least two references to which the Proposer has provided Charter Management Organization services within the past five year(s). Failure to complete and return this Attachment will cause your proposal to be rejected.

Reference 1		
Name of Reference		
Street Address		
City	State	Zip Code
Contact Person	Contact Title	Contact Phone Number
Brief Description of Services Provided		
Dates of Service		
Reference 2		
Name of Reference		
Street Address		
City	State	Zip Code
Contact Person	Contact Title	Contact Phone Number
Brief Description of Services Provided		
Dates of Service		
Reference 3 (optional)		
Name of Reference		
Street Address		
City	State	Zip Code
Contact Person	Contact Title	Contact Phone Number
Brief Description of Services Provided		
Dates of Service		



Attachment F

**Authorization Agreement**

Request for Proposal for Charter Management Organization Services  
RFP No. 63

We, [*Enter Company Name*], by our signature on this document certify the following:

1. That we will operate in accordance with all applicable California state and federal laws and regulations.
2. That the terms, conditions, warranties, and representations made within this RFP and our proposal shall be binding upon us and shall be considered a part of the contract as if incorporated therein.
3. That the proposal submitted is a firm and irrevocable offer good for one year.
4. That we have made examinations and verifications, and are fully conversant with all conditions under which services are to be performed for OFL-CAPO.
5. That negligence in the preparation or presentation of, errors in, or omissions from proposals shall not relieve us from fulfillment of any and all obligations and requirements in the resulting contract.

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Web Site Address: \_\_\_\_\_

Name of Authorized Representative: \_\_\_\_\_

Title of Authorized Representative: \_\_\_\_\_

\_\_\_\_\_  
Signature of Authorized Representative

Date Signed: \_\_\_\_\_

Attachment G

**Fee Proposal**

**COST BREAKDOWN**

**Proposer Instructions**

- Provide a breakdown of all costs included in the fixed price, including personnel costs.
- Clearly identify all costs**

<b>Item #</b>	<b>Description of Services</b>	<b>Annual Cost</b>
1.		\$
2.		\$
3.		\$
4.		\$
5.		\$
6.		\$
7.		\$
8.		\$
<b>GRAND TOTAL</b>		

## RFP EXHIBIT 1

- I. Board Relations
  - A. Acts as a liaison for the Board Relations team
  - B. Manages quarterly and monthly meetings.
  - C. Responsible for generating agendas, compiling and creating board package materials for each meeting.
  - D. Organize and maintain corporate documents and records
  - E. Maintain the yearly board calendar
  - F. Assist in reviewing, evaluating, and preparing various legal documents as needed for conformation and consistency.
  - G. Manage contracting efforts, pre- and post- board meeting and assists in contract development and review process.
  - H. Coordinate travel arrangements, itineraries, meetings, and events for the board members, Board Relations team, or executive team, as needed.
  - I. Work with various departments to pull legal and financial documents for meetings
  - J. Follow up on board action and questions
- II. Events
  - A. Graduation
    - 1. Venue selections
    - 2. Creating regional grad calendars per region/due dates
    - 3. Contracting/ordering all grad ceremony vendors/supplies
  - B. Staff
    - 1. Regional and School Awards
    - 2. Staff Appreciation
  - C. Student
    - 1. Field trips
    - 2. Regional Academic competitions
    - 3. Science Expo
- III. Curriculum
  - A. Curriculum Development
    - 1. Research educational trends to keep up to date on theory
    - 2. Develop all core and elective courses for HS and MS
    - 3. Use assessment and standards information to choose power standards
    - 4. Write learning targets and objectives for all power standards
    - 5. Vetting and adoption of textbooks and other related curricular materials
    - 6. Vetting and adoption of online curriculum and/or supplemental software
    - 7. Maintaining Curriculum website and associated resources
    - 8. Communicate with field to gather feedback about courses
  - B. Digital Curriculum
    - 1. Maintain online platform course files
    - 2. Act as customer service for online platform users
    - 3. Reporting compliance of online platform compliance to state entities/school boards
  - C. Independent Study Curriculum
    - 1. Build paper-based Student Activity Workbooks for independent study curriculum

2. Build corresponding formative and summative assessments for all paper-based independent study curriculum
- D. Direct Instruction Curriculum
  1. Build and maintain curriculum and assessments for Small Group Direct Instruction
  2. Create and source lesson plan resources
- E. Course Edits
  1. Collect and analyze course and assessment data to inform course corrections
  2. Edit courses/assessments for content and errors
  3. Update curriculum as new Ed Code laws are implemented
- F. Training
  1. Create training plan and resources for curriculum releases
  2. Facilitate training to staff on new and updated curriculum
- G. Specialist Team
  1. Manage the A-G UC approval process
  2. Manage the NCAA approval process
  3. Ensure district level curriculum compliance
  4. Communicate with field regarding new releases and updated curriculum
  5. Acts as the liaison with Purchasing to ensure
  6. Managing the curriculum requirements, tags, and additions within the SIS
- IV. Human Resources
  - A. Benefits
  - B. Employee Help Desk Responses
  - C. HRIS System Maintenance/Buildout
  - D. Compensation Analysis
  - E. Employee Events
  - F. Leave of Absence Administration
  - G. Employee Relations & Investigations
  - H. Human Resource Policy and Compliance ( EE Handbook)
  - I. Risk Management (GL Policies)
  - J. Employee Onboarding
  - K. Pre-Employment Screening
  - L. Credential Administration
  - M. Retirement Plan Administration
  - N. Job Description Administration
  - O. HR Compliance and Audits
  - P. Custodian Of Records
  - Q. HR Training & Development
  - R. Performance Reviews
  - S. Field Onsite HR Support
  - T. Safety Coordination and Training
  - U. HR Administration
- V. Accounting
  - A. Reporting
    1. Internal Reporting
    2. Annual Budgeting
    3. Monthly reforecast

4. Monthly Cash Forecasting
5. Revenue Calculation and understanding of Revenue Funding Formula
6. Interim External Reporting
- B. Communication
  1. Monthly Finance Meetings
  2. Financial Updates to Board of Directors
- C. Auditing
  1. Annual Financial Audits
  2. Annual Compliance Audits
  3. Cash Management
  4. Accounts Receivable
  5. Financial Controls
- D. Other Services
  1. Ad Hoc Analysis
  2. Taxes
  3. Hiring Accounting and Finance Staff
  4. Facilitating Training of accounting staff
  5. Grant Funds Management
  6. Expense Reports
- VI. Operational Leadership
  - A. Budgets
    1. Manage ADA
    2. FTE- Maintain the mandated FTE/PTR numbers.
    3. SB740 Budgets-Keep track of school budgets with principals.
  - B. Growth
    1. Projections
    2. Enrollment
    3. Summer School
    4. New site acquisition
    5. Revenue
  - C. Management and Learning Environment
    1. Principals- Oversee and support the principals
    2. Planning- Lead strategic planning for each principal
  - D. Academics
    1. LCAP- Ensure that all centers meet LCAP Goals
    2. SBAC- Ensure there is consistent growth and plan for SBAC
    3. Monthly Progression- Analyze monthly progression for each sub group
    4. Instruction-Plan for academic excellence based on student needs, LCAP, CSI.
  - E. Policies/ Procedures
    1. External Context and Policy
    2. Due Process
    3. Discipline
- VII. District Relations
  - A. Compliance/Oversight- Financial Crisis & Management Assistance Team ("FCMAT") oversight guidelines, charter petition and relevant policies.
  - B. Charter Renewals- Facilitate the writing of the charter renewal petitions.
  - C. School Board - Attend District Board Meetings representing the schools.
  - D. Material Revisions

- E. District Relations- Build and Foster relationships with School District Officials.
- VIII. Enrollment
  - A. Consulting Services
    - 1. Enrollment Processing
    - 2. Lead Generation
    - 3. Lead Outreach
  - B. Data/Tech Systems Support
    - 1. Customer Relations Manager (CRM)-Advise and train regarding the selection, maintenance, and use of the CRM.
    - 2. Social Media- Train and support regarding texting, email, and phone tools for student lead and community partner engagement.
    - 3. 800 Phone Numbers- Provide staff to handle the 800 phone numbers for all schools.
  - C. Management
    - 1. EOS Management and Oversight-Inform and advise the principal regarding performance of the EOS through regular meetings.Solicit input from the principal regarding enrollment and EOS performance.
    - 2. Short-Term Enrollment and Staff Management
- IX. Marketing
  - A. Recruitment and Management of Vendors
  - B. Advertising Design
  - C. Campaign Management
  - D. Websites & Social Media Management
  - E. Photography & Videography for schoolwide events (i.e. graduation)
  - F. Analytics
    - 1. Student Survey Data
    - 2. Market Analysis
  - G. Management of Press Releases
- X. Payroll
  - A. Bi-Weekly Payroll Processing
    - 1. Timekeeping
    - 2. Payroll Deductions
    - 3. Compensation Changes
  - B. Off-Cycle Payroll Processing
    - 1. Termination Checks
    - 2. Bonus/Incentive
  - C. Paycheck Handling
    - 1. Delivery
    - 2. Uncashed Items
    - 3. Stop Payments
  - D. Time Off Processing Request, Balance, Accrual Rate
  - E. Employee Contributions Posting/Funding
    - 1. 401(k), 403(b)
  - F. Annual Compliance Audit
    - 1. 401(k), 403(b)
    - 2. Worker's Compensation
    - 3. Payroll
  - G. Annual W-2 Processing
  - H. Quarterly and Annual Tax Filings
  - I. Verification of Employment

- J. Ad Hoc Analysis
- K. Ad Hoc Reporting
- L. Payroll System Maintenance/Buildout (Workday)
- M. Record-keeping
- XI. SPED (Instruction)
  - A. SELPA Representation, Management and Communication
  - B. CDE Special Education Unit
    - 1. Oversee Monitoring Activities: Performance Indicator Review (PIR), Disproportionality
    - 2. Liaison between CDE SpEd Unit and Charter Schools (e.g., LCAP, CSI, Charter Leaders)
    - 3. Coordination and guidance of compliance activities for CDE and SELPA
  - C. Special Education Policy
    - 1. Policy development and implementation
    - 2. Policy consultation for Charter School
  - D. Legal
    - 1. Consult with legal on practices, policies, and litigation
    - 2. Special Education litigation
    - 3. Special Education legal updates
  - E. Charter School Special Education Program
    - 1. Plan, organize, evaluate and direct Special Education programs
    - 2. Provide guidance and coaching to special education staff
  - F. Charter Development
    - 1. Charter applications, petitions, expansion
    - 2. Special Education law consultation in-state and out of-state
  - G. District Relations
    - 1. Authorizer Director of Special Education/Designee
    - 2. Relationships with local districts, school programs, etc.
    - 3. Contracts, MOU
  - H. Special Education related Services and Student Supports
    - 1. Coordinate services and contacts with 3rd party vendors.
    - 2. Collaborates with internal and external personnel
  - I. Curriculum and Assessment
  - J. Accountability
    - 1. Support State reporting for students with disabilities
- XII. Training
  - A. New Teacher Training
    - 1. Create, modify and facilitates new teacher training modules
    - 2. On-site support mentoring and training
    - 3. Train new teachers on all school used programs, processes, and policy
- XIII. Professional Development
  - A. Subject Matter Support
    - 1. Subject Matter PDs each semester for each subject
    - 2. Literacy PD
    - 3. Facilitate subject matter department head meetings
  - B. Data Management
    - 1. Monthly data digest
    - 2. Collect and analyze PD/coach effectiveness survey data
    - 3. Maintain use of mastery trackers

- C. Planning/Preparation
  - 1. Subject matter department meetings to evaluate needs
- D. Leadership Development
  - 1. Leadership Fellowship
  - 2. Data Dive Protocol
  - 3. Ongoing coach development
- E. Outside PD
  - 1. Find and inform staff of external PD opportunities
  - 2. Coordinate external PDs and their implementation
- F. Corporate Level PD
- G. School Level
  - 1. Maintain PD website of services for staff use
  - 2. Evaluate effectiveness of curriculum
  - 3. Create teacher/student resources for instruction
  - 4. Create and help to maintain teacher level data tracking documents that allow for mastery learning
- XIV. CALPADS state database
  - A. SSID (Student Statewide Identifier) Request file
  - B. Student Enrollment Report (SENR)
  - C. Student Information Report (SINF)
  - D. Student English Language Acquisition Report (SELA)
  - E. CASEMIS SPED reports
  - F. Submission and Certification.
  - G. California Basic Education Data System - CBEDS ORA
  - H. Immunization Reporting
  - I. School Accountability Report Card - SARC
  - J. Civil Rights Data Collection (CRDC)
  - K. Process Diploma Requests
  - L. Incident Reports
  - M. Foster and Homeless Youth Management
  - N. Standardized Testing Communication, Coordination and Management
- XV. Purchasing
  - A. Sourcing
  - B. Purchase Order (PO) Creation
  - C. Vendor Management
  - D. Inventory
  - E. Training
  - F. Printing Services
    - 1. DMV Certificates
    - 2. Diplomas
    - 3. Student IDs
- XVI. Quality Assurance
  - A. Define & Specify File Standards
  - B. Regular File Checks
  - C. District Reports
  - D. District Inquiries
  - E. Certification P1, P2, P-Annual Certification
  - F. Manage Outside Auditors
  - G. Monthly Audit Checks



- H. Archiving
- XVII. Facilities Operations
  - A. Facilities
    - 1. Liaison between Instruction and operational vendors
    - 2. Project manage large scale facilities projects
    - 3. Consult on facilities budgets
    - 4. Create facilities board packages
    - 5. Manage facilities related grants
  - B. Leases
    - 1. Negotiate lease terms on behalf of the schools
    - 2. Filter out viable new site locations
  - C. Budgeting
    - 1. Provide project budgets and make recommendations surrounding: construction and facilities project costs
    - 2. Clarify analysis of contractors and vendors regarding city ordinances and contractor requirements
  - D. Other
    - 1. Project manage the opening and closing of sites
    - 2. Design of all new sites and construction projects
    - 3. Final walkthroughs of all construction projects
    - 4. Liaison between instruction and departments/vendors
    - 5. Prepare facilities information for new site acquisitions
- XVIII. Business Management
  - A. Budget
    - 1. Facilitate the forecasting process
    - 2. Provide accurate analysis of the school budget, identifying trends and potential over/under-spends and provide detailed reports to Principals, Directors and Executive Leadership on a regularly scheduled basis.
    - 3. Interpret financial regulations and provide advice to school leadership on the effective use of financial systems and procedures
    - 4. Inform and monitor the cash flow of the schools in consideration of creditor and debtor policies and procedures, and advise management in their oversight of working cash balances, short-term investments, borrowings and debt payback.
  - B. School Staff Support
    - 1. Serve as a liaison between school leadership and accounting department to ensure all planned school operation and events are accounted for in school budgets.
    - 2. Communicate with school leaders to ensure knowledge of funding drivers is distributed to key stakeholders.
    - 3. Collaborate with Accountability Department to provide school leaders with important funding report dates to ensure appropriate school planning.
    - 4. Support school leadership in developing and implementing appropriate financial systems, supporting in all aspects of school related finances and ensuring the effective management of these systems and relevant administration, ensuring school operation compliance with accounting regulations.

5. Collaborate with school leadership to determine, implement, and manage school level budgets relating to student services such as office supplies, student activities, curriculum, and salary expenses.
6. Develop/update the school incentive program in collaboration with school leaders in an effort to increase performance in school initiatives, improvement plans, and key performance indicators.

C. Incentives

1. Manage cross-departmental collaboration in ensuring employee incentives are processed and meeting payout deadlines.

XIX. Summer School Programs

- A. Coordinate services with auxiliary departments to ensure summer staffing plans are executed, facility needs are fulfilled, marketing campaigns are developed, proper student registration is completed, student files meet quality assurance requirements, summer referrals are distributed to school districts, and curriculum, furniture, and technology orders are delivered.
- B. Obtain growth targets for district summer programs and internal summer sites.
- C. Work with school district liaisons to negotiate annual summer contracts
- D. Oversee hiring, training, and development of district summer support staff.
- E. Supervise support staff for external district summer programs.
- F. Assist in the planning and monitoring of Summer Program budgets.
- G. Work with the charter to build relationships with districts who do not send summer students to OFL
- H. Point of contact between all departments and charter school sites
- I. District Project Management
- J. Summer Quality Assurance Support
- K. College and Career Readiness Support
- L. WIOA
  1. Contract
  2. Instruction
- M. Dual Enrollment
  1. Relations
  2. Course Support
- N. CTE Program Management and Instruction
- O. Student Advisors liaison
- P. Alumni Services

XX. Accreditations

- A. WASC Accreditation
  1. Training & Monitoring
  2. Standardization, Collection, and Discrimination of Data
  3. Accreditation Process Assistance
  4. Maintain Accreditation
- B. AdvancED Accreditation
  1. Training & Monitoring
  2. Standardization, Collection, and Discrimination of Data

3. Accreditation Process Assistance
4. Accreditation Process Corporation
5. Maintain Accreditation