



REQUEST FOR PROPOSALS ACADEMIC AND POLICY MONITORING FOR PORTFOLIO MANAGEMENT

Introduction

Hope Enterprise Corporation (HEC) is issuing a Request for Proposals (RFP) to solicit bids from qualified firms with experience in K-12 education accountability research and academic performance monitoring. Supported by four (4) federal grant awards, HEC provides credit enhancements to support facility loans to charter schools in underserved communities in Alabama, Arkansas, Louisiana, Mississippi, and Tennessee. Through this RFP, HEC seeks a qualified firm to support the data collection and analysis of academic, enrollment, and demographic data, as well as policy factors affecting its public charter school borrowers. HEC's portfolio currently includes 25 public charter schools.

Commitment to Fair and Competitive Procurement

Hope Enterprise Corporation is committed to full and open competition in the procurement of services in accordance with 2 CFR 200.319. No contractor involved in developing or drafting this RFP, specifications, requirements, or evaluation criteria shall be eligible to submit a proposal. This ensures that all potential bidders have an equal opportunity to compete and that no unfair competitive advantage exists. All procurement activities will be conducted in a manner that promotes transparency, fairness, and value for federal funds.

Posting Period

This RFP will be publicly posted and open for responses for a minimum period of 30 days to ensure full and fair competition in accordance with 40 CFR 33.301(b). Late submissions will not be accepted.

Scope of Work

The selected firm will need to have the skills and experience necessary to collect, interpret, and operationalize the following academic and descriptive information for HEC's federal grant reporting and portfolio management needs. The selected firm must complete all work described in this RFP using internal personnel. Subcontracting or outsourcing of any portion of the Scope of Work is not permitted under this contract. The resulting contract will have an initial term of one (1) year. HEC reserves the right to exercise up to four (4) additional one-year option periods, for a total possible contract term of five (5) years. Option years will be exercised at HOPE's sole discretion based on performance, continued need, and availability of funding.

Due to the delay in comprehensive accountability and performance data publication, each contract year will correspond with data collection and analysis for the most recently available data for each academic year. For example, the Year 1 contract for 2025-2026 will address academic data for the 2023–2024 school year. If renewed, the Year 2 contract for 2026-2027 will address data from the 2024–2025 school year, and so on. Below is an overview of the information that will need to be collected annually. Additional information may be requested based on changes in need.

1. Annual Charter School Data Collection Needs:

For each charter school in the loan portfolio, the selected firm will collect the following data elements:

- **Disaggregated enrollment data** for schools and districts
- **Disaggregated proficiency data** for schools and districts
- **College and career readiness data**, as available
- **State accountability results**
- **Overall growth rating**
- **State ranking based on proficiency**
- **Closure risk indicators**
- **Chronic Absenteeism**
- **Charter Maturity Date**
- **Free and reduced lunch percentages**
- **School-level proficiency rates** (proficient and advanced) in English Language Arts (ELA) and math
- **State-level proficiency rates**
- **Other academic or demographic data** as required by the U.S. Department of Education (USDOE) and/or by HEC.

HEC will provide the firm with a **reporting template**, though specific data elements may change annually based on evolving USDOE requirements and. The data must be collected and submitted annually on a schedule agreed upon by the selected firm and HEC.

2. Charter Authorizers and State-Level Funding Formula Updates:

The selected firm will provide HEC with a written report, organized by state, which includes qualitative information regarding state-level charter school policies and authorizers, including but not limited to:

- **State accountability systems**
- **State growth models**
- **State closure policies**
- **Authorizer information**
- **State funding formulas**
- **Anticipated changes to state education policies regarding charter schools**

Summary of Contract Deliverables

The selected firm will provide:

- A **schedule** by which each deliverable will be provided in Year 1.
- A fully updated **HOPE Charter School Portfolio Academic Workbook**.
- A **written report**, organized by state, summarizing key insights, risks, and policy trends, including an assessment of school closure risks, state and federal policy changes affecting charter school operations, enrollment stability, and any notable academic performance trends that could impact future lending decisions.

Proposal Evaluation Criteria & Weighted Scoring Matrix

Proposals will be evaluated based on the criteria listed below. Each proposal will be scored using a **weighted scoring matrix**, with points assigned based on demonstrated qualifications and proposed approach. HEC reserves the right to conduct interviews with top-ranked firms if needed to make a final selection.

Weighted Scoring Matrix			
Evaluation Criteria	(%)	Scoring Scale (1-5)	Scoring Description
Technical Approach & Methodology	35%	1 = Weak, 5 = Excellent	Proposal demonstrates a clear, effective approach for collecting and analyzing academic performance data, ensuring alignment with HEC’s needs.
Experience & Qualifications	25%	1 = Minimal experience, 5 = Extensive relevant experience	Experience in educational data analysis and accountability frameworks, particularly in charter school settings.
Staffing & Key Personnel	15%	1 = Unqualified staff, 5 = Highly qualified staff	Expertise and qualifications of key personnel assigned to the project.
Project Management & Reporting Approach	15%	1 = No clear plan, 5 = Strong plan with defined milestones	Clear project plan, reporting framework, timeline adherence, and communication strategy with HEC staff and stakeholders
Cost Proposal & Price Reasonableness	10%	1 = Unreasonably high or unclear justification, 5 = Competitive and well-justified	Competitive and reasonable pricing, with a detailed cost breakdown.

Each evaluator will assign a score (1-5) to each criterion. The score will be multiplied by the weight percentage, and the total weighted score will determine the top-ranking proposal.

Document Retention Policy

The selected firm must maintain all records related to work performed under this contract for a minimum of **three (3) years** from the date of final expenditure report submission. If litigation, claims, audits, or other official actions arise before the retention period expires, all records must be retained until all matters are fully resolved. The firm must ensure that records are properly organized and accessible for review by HEC, the U.S. Department of Education, or other authorized entities, as required by contract terms. These requirements align with HOPE's Procurement Policy and Procedures to ensure compliance with federal regulations.

Cost and Price Analysis

In compliance with **2 CFR 200.320(d)(5)**, HEC will conduct a **cost or price analysis** before awarding a contract to determine the reasonableness of the proposed pricing. Proposers must submit a **detailed cost breakdown**, including labor, overhead, materials, and any other costs associated with completing the scope of work. If only one bid is received, additional justification may be required to verify price reasonableness.

Project Timeline

Respondents must submit in their response to this proposal a schedule with deadlines for delivery of each of the final deliverables. The contract is expected to be awarded **21 business days** after the submission deadline. Work shall commence within **10 business days** of contract execution.

Submission Instructions

- **Format:** PDF, 12-point font, single-spaced.
- **Deadline for Submission: October 29th**
- **Submissions:** Submissions should be emailed to *charity.hallman@hope-ec.org* and *robert.taylor@hope-ec.org*. If respondents have not received confirmation of receipt within 2 business days of submission, please call (334)-912-9039.
- **Questions:** Respondents may submit written questions regarding this RFP to *charity.hallman@hope-ec.org* and *robert.taylor@hope-ec.org*. All questions must be received no later than the final submission deadline.

Final Selection & Award

HEC reserves the right to request interviews with top-ranked proposers before the final selection. The contract will be awarded to the firm whose proposal scores the highest based on the weighted scoring matrix and demonstrates the best overall value for the organization.