

# Request For Proposal



Back Office Services  
NATIONAL UNIVERSITY ACADEMY  
HOME SCHOOL / INDEPENDENT STUDY ORANGE COUNTY  
PROPOSALS DUE BY: April 3, 2020

# Company Background

National University Academy Home School / Independent Study Orange County (“NUA HSISOC,” “NUA Home School / Independent Study Orange County,” “Charter School,” or “School”) operates as a public charter school for grades kindergarten through twelve that offers an innovative 21<sup>st</sup> Century Learning experience, focusing on the Home School model of instruction; based in Orange County, California and operating in the contiguous county’s of Orange County.

NUA was initially founded as an academic program under the National University Academy charter, authorized by Lakeside Union School District. In its inception, NUA began as an independent study program and has since evolved into an award winning school. NUA has been recognized at the state and national level with awards that include California Gold Ribbon School, Title I Academic Achievement Award School, and 21<sup>st</sup> Century Learning Exemplar School. NUA is accredited through WASC, is a member of CIF and also offers UC a-g approved courses.

The school is located in Mission Viejo and meets the educational needs of the communities in which we serve.

## **NUA HSISOC is an Independent Study School**

The Independent Study school format provides students with a resource center and online support, where students pursue a challenging program of studies in both rigorous core academic subjects and career- and technical based curriculum. NUA students will work in interactive and engaging research projects with an on-line curriculum where applicable. NUA graduates will be prepared to further their education at four-year colleges and universities, at the community college level, or career and technical programs. Students may also enroll in our GED preparation program based on their current needs and educational standing. Students receive a solid foundation in the core academic subjects through NUA’s independent study programs. A major learning component of this program is the opportunity for students to attain practical experience through internships and work experience at companies, corporations as well as in academic settings.

NUA HSISOC’s educational programs are based on the following elements of success:

- A vision, mission, and business operations plan that focuses on student learning.
- Academically rigorous, well-focused, basic core and accelerated subject curricula.
- Use a variety of effective instructional strategies to meet the varied learning styles of students.
- Incentives that increase and encourage collaboration among teachers for high student achievement.
- Professional development that puts skills into a context consistent with the overall school mission, professional learning communities.
- Autonomy allows NUA HSISOC to develop and implement a process of change tied to high standards and respond to technology innovations and community service.
- Community involvement in and support for school programs.
- Ongoing progress monitoring toward achieving both student and staff performance goals.
- An online community communication process detailing student and school performance.
- Collaboration with parents, community members, and other key stakeholders.
- Support systems in place to ensure the success of all students.
- An effective and efficient business process that ensures maximum utilization of private and public resources, both human and financial, to educate our students.

NUA HSISOC provides an education option that allows each student to: (1) achieve high academic standards; (2) develop and improve social skills by building self-esteem through achievement and discipline; and (3) work in an environment that promotes learning. NUA HSISOC endeavors to create a menu of learning opportunities for students that may include classroom study, field study and research, independent study, distance learning, work-based academic skills instruction, and other creative modes of instructional delivery developed by staff in partnership with the community. This flexibility allows staff members within the NUA HSISOC to meet students where they are academically. Students have the option to move ahead, or to spend more time on topics as needed.

# Project Overview

## **Vision**

“At NUA HSISOC, we strongly believe that all students are unique and capable learners who, through positive educational experiences, can reach their maximum potential and become successful global citizens.”

## **Mission**

National University Academy programs are dedicated to creating K-12 learning opportunities which are accessible, challenging, and relevant to a diverse population of K-12 students.

National University Academy Home School / Independent Study Orange County provides an innovative 21<sup>st</sup> Century Learning environment through comprehensive programs of academic and technical study. Our programs feature a unique combination of independent study with resource center and online support designed to prepare students for both college and careers.

At the center of National University Academy Home School / Independent Study Orange County’s educational philosophy and program are its core values. The Charter School’s **five core values** are aligned for our program as follows:

### **We believe in INNOVATION**

We intend to develop students who are innovative, creative, and critical problem solvers. We value exploration and the seeking of new possibilities for our school, community, and a 21st Century world. Top educators, corporate professionals, economists, and talent recruiters all reach the similar conclusion that high school graduates need to be innovative and creative critical thinkers in order to be prepared for a more complex life and work environment in the 21st century. Technological and societal trends are making homeschool a more viable and relevant option for many more families. Homeschooling allows students to explore interest based projects in depth and work with experts in specific fields that foster innovation and creativity. NUA HSISOC will create and nurture an environment that appreciates and thrives on risk taking and experimentation in order to innovatively and creatively problem solve. Students will learn to trust the NUA HSISOC environment that will focus on tenaciously persevering through trials and efforts, with a constant mindset of incremental feedback and growth through trial, error, mistakes, failures, and successes.

Graduates of NUA HSISOC understand that the road to possibilities are paved with dedication to hard work and continually seeking creative solutions based upon constant feedback. NUA HSISOC graduates will be well prepared for this world since the Charter School will develop strong core and content knowledge skills of students, with an emphasis on inquiry and real world problem solving, project based learning, and continual technology and design opportunities in order to utilize creative thinking in a wide range of applicable contexts. Homeschool students learn outside the wall of a classroom and are in the community being exposed to modern day dilemmas. In a society that is constantly evolving and changing, it is critical that students have the skills and abilities necessary to be flexible and adapt to changing environments. Students who are innovative and creative problem-solvers are needed who can assess situations and respond effectively to changing priorities and demands of the world around them.

### **We believe in OPPORTUNITY**

We aim to prepare students for a global society and labor force, one in which individual gifts, talents, and abilities are fostered and utilized in a collaborative group effort to achieve common goals. We believe individuals, students, parents, and schools succeed as a team when given the opportunity to do so. Having the ability to communicate and work productively, effectively, and efficiently with others, in the home and workplace, is absolutely critical in the 21st century. Therefore, NUA HSISOC's learning environment, teaching strategies, practices, and curriculum will focus on fostering students' abilities to communicate with others in a variety of environments, mediums and contexts, including multiple media and technologies. Our school will provide a unique opportunity for students through experiential learning opportunities that will engage students in the discernment of authentic project based learning as well as lead to deep reflective assessment and evaluation of their project's impact on their greater surroundings. Ultimately, our students will be active responsible citizens, fully participating in their community and the world around them.

NUA HSISOC's homeschool program creates many opportunities for students through its relationships with the community. Students are given opportunities to participate in at least 12 field trips per year, and given the flexibility of scheduling are able to engage with the local community on a regular basis. Students participate in the local community through several service learning projects organized by NUA HSISOC. Students have the option of taking enrichment classes at one of our three enrichment centers where they foster skills of collaboration, innovation, critical thinking and problem solving. NUA HSISOC works with several professionals in the community who are able to share their expertise and knowledge with the students through our vendor relationship. This relationship allows students specialized access to information and learning experiences that their parent and/or teacher don't have the skills to provide.

### **We believe in ACHIEVEMENT**

We are determined to ignite passion and personal motivation in students to succeed at their highest level, as a result of being a significant contribution to a greater good group or team. Student motivation, inspiration, and desire for learning will be cultivated through the engagement of personal interests, student choice, and the fostering of student's gifts and talents. NUA HSISOC's homeschool program gives students access to leaning strategies and programs that are individually suited to capitalize on each student's unique strengths and are designed to strengthen areas where students are weak. Learning takes place throughout the day as meaningful connections from learning are carried into day to day life. Continual differentiation of teaching and learning through multiple modalities and measures will be utilized through all aspects of our learning model. Students will be personally motivated, inspired, and engaged through the project based curriculum, blended learning, inquiry methodologies, and personal learning plans that are a self-monitoring of student goals, plans, strategies, progress, and outcomes.

Home School students meet with California credentialed teachers at least monthly to discuss progress toward standards and update learning goals. Students within the Home School program use a variety of assessments to track growth and achievement, from informal running records and math assessments with their teachers, to the more formal NWEA and writing assignments. Teachers, students, and parents work together to interpret results from each assessment and form student learning targets.

Using personal gifts and talents, students will be inspired through the development of learning projects in which they have the opportunity to design, implement, and evaluate their relevant project activity that is authentically addressing community needs. We will inspire students through projects that foster

student choices and guide students to show leadership and take ownership of and solve their own social and personal problems.

### **We believe in COLLABORATION**

NUA HSISOC utilizes cooperative and collaborative learning approaches, techniques, and experiences as a focus. Students will complete group and team products via integrated lessons and project based lessons. Students will learn shared responsibility for collaborative work as well as value individual contributions made by each team member. Students will work collaboratively with their advisory teacher and/or staff mentor in the formulation and progress-monitoring of their personal learning plans. This collaboration will also include working with their family as a team, in the development, implementation, progress monitoring, and evaluation of student personal learning plans. Families will also join the NUA HSISOC collaborative team through a multitude of family engagement opportunities.

Home School students collaborate with other students through a variety of activities, such as school-sponsored field trips, enrichment classes, student Showcase events, Junior Achievement Biz-Town, and group social events. Students collaborate with their NUA HSISOC teachers during monthly meetings to check progress and complete assessments. Home School staff members at NUA collaborate on a variety of program-specific professional development projects. These include weekly discussions on topics relevant to the Home School position, monthly conference calls, team teaching during enrichment classes, and collaborating on WASC accreditation and school award applications. Parents of Home School students provide input through perception surveys and LCAP development meetings. NUA HSISOC teachers and parents have a highly collaborative relationship in which the parent gives teachers input about student's strengths, weakness, interests and learning styles and the teacher gives professional guidance regarding standards, instructional strategies, curriculum and resources. Collaboration also occurs between NUA's service vendors who are professionals in a wide range of fields and support NUA HSISOC students with supplementary instruction in a variety of specific topics.

### **We believe in FLEXIBILITY**

We realize that learning is a lifelong process. We intend to cultivate an environment centered on a love of learning, growth, and continuous personal and professional improvement for students and staff. NUA HSISOC's objective is to create an on-going environment that fosters and instills an intrinsic motivation in all students and staff members to become lifelong learners. Ancient societies all over the globe have emphasized the need to learn from cradle to grave. In a society that is rapidly changing, it is imperative that individuals know and understand that learning is an integral part of life, as it has always been, but especially is the 21st century. NUA HSISOC intends to create the school community paradigm that learning is continuous and that it equates to growth, development, and improvement for all. With this paradigm at the foundation of all NUA HSISOC instructional practices and educational operations, the Charter School will engage the teaching and practice of gathering information from a variety of sources, as well as utilizing creative and divergent thinking and viewpoints to develop novel solutions. NUA HSISOC also realizes that reflective practice is at the heart of lifelong learning and continuous improvement. Therefore, reflection, feedback, data analysis, and incremental goal attainment will be at the foundation of the Charter School's 21st century skills attainment, college preparatory curriculum, project based lessons, blended learning projects, integrated curriculum, as well as all professional development implementations, school activities and operations.

NUA HSISOC's homeschool program allows for a tremendous amount of flexibility in many facets of student learning. NUA HSISOC offers curriculum choice to students which allows flexibility in selecting a curriculum that is in line with each student's learning style, interest and academic level. NUA HSISOC

students are also given the flexibility in where learning takes place ranging from a student's kitchen table to an exploratory field trip. Some students complete their learning while traveling abroad or at one of our local enrichment center. Learning expands beyond the four walls of a classroom. NUA HSISOC's homeschool program also gives students the flexibility to learn at the time of day that is best suited for them, and are able to take breaks when needed. The flexibility of our homeschool program allows some of our students the ability to pursue specific talents or interests that would not be possible with a rigid schedule. NUA HSISOC's individualized program allows students to develop academically at their own pace whether that be spending more time in an area of growth or advancing ahead when a child is excelling.

## Project Goals

The goals of this project include finding a provider that can provide:

- i. School budget development and forecasting
- ii. SACS reporting
- iii. Assist in preparing documents for the NUA HSISOC Board of Directors
- iv. Prepare reports for the NUA HSISOC authorizer
- v. Accounts payable support
- vi. Reconciliation of bank statements
- vii. Payroll
- viii. Benefits reporting
- ix. Human Resources support
- x. Assistance with school audits
- xi. Assistance with charter school compliance
- xii. Facilitation of open enrollment for staff benefits

To reach these goals, National University Academy HSISOC is now accepting bids in response to this Request for Proposal.

## Scope of Work

*We are looking for an organization that has the capacity to support a comprehensive offering of back office services that cover:*

*Finance*

*Accounting*

*Payroll*

*Reporting*

*Audits*

*Human Resources*

*Charter School Compliance*

## Target Deliverable Schedule

*Deliverables for the school will be directed by the NUA HSISOC Executive Director.*

*It is imperative that the vendor can meet monthly due dates well ahead of Board Meetings.*

*It is also imperative that the vendor meets reporting deadlines for the authorizer in accordance to public school accounting and within their established calendar.*

**Final Proposal Due: April 3, 2020**

## Existing Roadblocks Or Technical Issues

*The school currently has back office support services supported by two organizations.*

*Current services will need to be transitioned to the Board approved vendor.*

*We are looking for services to begin July 1, 2020.*

## Budget Constraints

*Proposals will be vetted by the Board, the finance team, Board President and Board CFO, in an effort to ensure the school can afford proposed services.*

## Evaluation Metrics

NUA HSISOC will evaluate bidders and proposals based on the following criteria:

- Previous experience/past performance history
- Charter school clients
- Projected costs.
- Experience and technical expertise.
- Responsiveness and answers to questions
  
- Be in good standing with the BBB

## Submission Requirements

Bidders must adhere to the following guidelines to be considered:

- Only bidders who meet all metrics in the evaluation section should submit a proposal.
- Proposals must be sent in by April 3, 2020. Bidders who are interested in submitting a proposal should inform Kimberleigh Kopp email: [kkopp@nu.edu](mailto:kkopp@nu.edu) no later than March 31, 2020.
- Include samples and references with your proposal.
- Proposals should not be more than 100 pages. Failure to comply to this guideline will result in an automatic rejection.

## What We're Looking For in Potential Vendors

*National University Academy HSISOC is looking for a vendor that:*

- *Is Responsive*
- *Has Accurate Reporting*
- *Meets Deadlines*
- *Is Knowledgeable*
- *Has a Positive Reputation in the Charter Community*

## Contact Information

For questions or concerns connected to this RFP, we can be reached at:

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