

THE CHARTER INSTITUTE AT ERSKINE

1201 Mail St, Suite 300, Columbia, SC 29201



REQUEST FOR PROPOSAL

Data Analytics Services

For the Fiscal Year 2021-2022

PROPOSALS TO BE RECEIVED BY:

DATE: 11/19/2021

TIME: 5: 00 PM

EMAIL: vrudrapati@erskinecharters.org

PROPOSER INFORMATION

Vendor Name: _____

Mailing Address: _____

City, State, Zip Code: _____

Federal ID or Social Security Number: _____

Contact Person: _____

Email Address: _____

Telephone Number: _____

Toll-Free Telephone Number: _____

Fax Number: _____

I certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services, materials, supplies, or equipment, and is in all respect fair and without collusion and fraud. I agree to abide by all conditions of this proposal and certify that I am authorized to sign this proposal for the Bidder.

Authorized Signature: _____

Name (type or print): _____ Title: _____

PURPOSE OF THE REQUEST FOR PROPOSAL

The Charter Institute at Erskine is seeking an individual or a firm to provide additional support to existing data visualization capabilities to accommodate for growing needs of schools in the Institute portfolio and be more proactive with data-driven decision making. COVID has created an unprecedented need for a continual accountability system through an academic year and closing the achievement gap by giving formative data to adapt classroom strategies. As part of this endeavor, The Charter Institute at Erskine has created a systemic data culture through analytic sessions and Tableau capabilities among its schools and needs further support in expanding the scope of work. To fulfill this responsibility, we are presenting this request for proposal for your consideration and response.

INSTRUCTIONS AND INFORMATION TO PROPOSERS

Please submit a comprehensive proposal through a resume reflecting data analysis and Tableau experience for strategic problem solving or a work sample or both by 5:00 pm, November 19, 2021.

Proposals are due by 5:00 pm, November 19, 2021.

Award: These services are exempt from the competitive sealed bidding or proposal requirements of the Institute's Procurement Policy. The project will be awarded based upon the proposal that the Director of the Institute determine best suits the needs of the Institute.

Termination: Subject to the provisions below, the contract may be terminated for any reason by the Director with a thirty (30) day advance notice in writing to the individual or firm.

Termination for Convenience: In the event that this contract is terminated or cancelled upon request, and for the convenience of the Institute without the required thirty (30) days advance written notice, the Institute may negotiate reasonable termination costs, if applicable.

Termination for Cause: Termination by the Institute for cause, default, or negligence on the part of the firm shall be excluded from the foregoing provision. Termination costs, if any, shall not apply. The thirty (30) days advance notice requirement will be waived and the default provision in this bid shall apply.

Term/Option to Extend: The initial contract period shall be Wednesday, December 1, 2021, through Thursday, June 30, 2022.

In case of duplicate, similar, or equal proposals, the decision of the Charter Institute at Erskine will be final.

General Requirements

The following information should be used to determine the scope of this project and provide pricing for this engagement. Further details can be provided upon request.

The Charter Institute at Erskine is seeking an experienced individual or firm with noted capabilities in the data science and visualization space to clean, transform, unify data sources with a sustainability perspective, design and build strategic dashboards to communicate information with all stakeholders (within the school, school boards, general audience) and build on the concepts of good data governance. This information can be any or all the following - student academics, demographics, discipline, incident, school information, fiscal health, grant management and other students. The individual or firm should have worked previously with different databases – SQL, Oracle, Excel etc., to build a data pipeline from the above information for designing dashboards in Tableau. Proven ability to use multiple datapoints to build a coherent story for identifying existing or potential bottlenecks in a process is required.

Description of the Institute

The Charter Institute at Erskine was started in 2018 to level the playing field in K-12 education by providing equitable learning opportunities through high quality charter schools in the state of South Carolina. The mission of the Charter Institute at Erskine is to authorize high-quality charter schools that elevate educational opportunities through innovation and creativity. The Institute has 26 schools and about 25,000 students in the portfolio spanning the entire state of South Carolina. The Institute office is in 1201 Main Street, Suite 300, Columbia, SC.

Requirements

All proposal and report should be address to the Director of the Institute.

Information like identifying the team that will be assigned to the account and describe how you plan to interact with us and any third-party providers that may provide services to the Institute.

Describe the pricing model(s) that you typically employ for your standard services.

Please indicate the charges associated with providing services directly or through a third party and the key driver of each cost and whether it is included in a standard per-unit cost vs. charged on an ad hoc or mark-up basis.

Do you offer service bundles and if so, describe the effect of this bundling on pricing?

Time Considerations

All proposals must be submitted to Charter Institute at Erskine no later than 5:00 pm, November 19, 2021.

The Institute may elect to interview representatives from selected firms.

The contract should be awarded no later than December 2021.

Proposal Packet

In setting forth its qualifications, each firm submitting a proposal shall:

Provide the name of the firm, how long the firm has been in business, the length of its experience as well as a brief description of its business activities and history.

Identify the specific contacts who will be involved in this engagement, the experience each possess, and the location of the office from which they work and provide a detailed biography and/or resume outlining the experience and credentials.

Provide the name and title of person(s) submitting the proposal, the firm's main office address, and primary and secondary points of contact and their telephone and fax numbers (including area codes).

Detail the experience the firm and its staff have in working with school districts and public sector clients; describing how needs specific to the school district/public sector were met and highlighting any experience specific to school districts.

Detail the experience the firm and its staff have with charter schools and charter school authorization.

Provide client references, including contact names, addresses and telephone/cell phone numbers.

Clearly describe the scope of the required services to be provided.

Provide a compensation breakdown. The breakdown should include the estimated total hours, out of pocket cost, all-inclusive fees, hourly rate for each staff member and fees for subsequent years with amounts that firmly will not exceed.

And provide any additional information that you feel would distinguish your firm in its service to the Institute.

Communications and Response

Vamshi Rudrapati is the Director and the designated Institute representative for this initiative. For any information relative to this RFP, please direct all inquiries to:

Vamshi Rudrapati
 Charter Institute at Erskine
vrudrapati@erskinecharters.org
 (803) 849-2406

Cost

Estimate the total hours, the estimated out-of-pocket costs, and the resulting all-inclusive maximum fee for which the requested work will be done. State the hourly rate to be charged for each staff classification. Fees for subsequent years should be included with a firm not-to-exceed amount.

List the average hourly rate of the firm. Adjustments may be negotiated for changes in South Carolina or federal requirements or for services in addition to the base audit. These adjustments will be billed at the average hourly rate proposed by the firm. The Director will approve these prior to the performing of services.

Notification of Intent to Respond and Clarification Questions

Please indicate your intention to respond, by email, to the above email address by the *Intent to Respond and Questions Due* date outlined in the *Key Dates* table below. In addition, please provide the contact details of the individual responsible for coordinating your RFP response. At the same time, we ask that you submit any clarification questions regarding the RFP. Answers will be provided to all respondents by the *Answers Provided* date.

Response Delivery Instructions

Please submit an electronic copy of your proposal to the email address indicated in the *Communications and Response* section above. All responses must be received on or before close of business (5:00 pm ET) on the *Proposals Due* date indicated in the *Key Dates* table below.

Key Dates

Event	RFP Issued	Intent to Respond and Questions Due	Answers Provided	Proposals Due
Date	11/12/2021	11/19/2021	11/19/2021	11/19/2021
Time	5:00PM	12:00PM	12:00PM	5:00PM

No Obligation

The submission of a proposal shall not in any manner oblige the Institute to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.

Agreement of Non-Disclosure

This document is considered to be proprietary and shall not be disclosed to any other party. It is designed, developed, and submitted to potential partners of the Institute solely for the benefit of the Institute.

No Guarantee

The Institute makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.

Additional Information

Provide answers to the following questions.

What are the advantages of using your accounting firm?

What is the range of management and other consulting services you can offer without affecting your independence?

What type of support services (newsletter, industry programs, etc.) and informative consultation can your firm provide us?

Does your firm have a record of substandard work? Provide information on the circumstances and status of any disciplinary action taken or pending against the firm during the past three (3) years with state regulatory bodies or professional organizations.

All offertories must visibly mark as "Confidential" each part of their proposal, which they consider containing proprietary information.