B.3.2 Contracted Services

Pensar Academy will utilize external service providers for many areas of operation. Contracted service providers will be proposed and evaluated by the Director of Operations and approved by the Governing Board.

a. Contract Service Providers Needed:

Pensar Academy will seek outside expertise for contracted services for:

- Financial Management: Accounting, form 990 tax preparation, compliance services, budget reports, payroll, accounts payable, monthly cash flow statements, Annual Financial Report (AFR), Certified Public Accountants on staff.
- Employee Benefits: Health insurance, dental insurance.
- Property/Liability Insurance: Property liability, educational liability, risk management, and extra-curricular injury.
- Special Education: School psychologist services, occupational therapy services, speech language services, physical therapy services.
- Legal: Business, tax, and regulatory issues. Certified Attorneys on staff.
- Informational Technology: Network installation, software installation/support, and troubleshooting.
- Facility Services: Facility maintenance (proactive and reactive) and cleaning.
- Food Services: Onsite meal delivery that aligns to the price and services allotted for in the National School Lunch Program and School Breakfast Program.

b. Contract Service Providers Professional Qualifications

All potential vendors for contracted services will be subject to a set of professional standards when determining hiring. The criteria are as follows:

- Expertise: Pensar Academy will seek to match needs with the specialty of potential vendors.
- Competence: The competence of a potential vendor will be judged by a combination of credentials (where applicable) and reference checks of credibility, including Better Business Bureau and Yelp.
- Price: In order to be solid stewards of public funds, Pensar Academy will evaluate financial investments in outsourcing to ensure that the services are reflective of the price.
- Local or in-state vendor: Pensar Academy will attempt to outsource to qualified vendors that are local to stimulate business development within the community we serve. Pensar Academy will take cost effectiveness and competence into account when making this determination.

Pensar Academy has competed market research and received bids on the contracted services needed and identified the following potential vendors:

Financial Management

Aspire Business Consultants, Inc. specializes in accounting and compliance services to Arizona charter schools and non-profit organizations.

- Expertise: accounting, form 990 tax preparation, compliance services, budget reports, payroll, accounts payable, monthly cash flow statements, Annual Financial Report (AFR).
- Competence: With a staff of Certified Public Accountants and an understanding of school finance, Aspire has a history of working with charter schools associated with New Schools for Phoenix.
- Price: Start-up Phase: $450/month. Annual full service: $17,200.
- Local or in-state vendor**:** Aspire is a local vendor out of Glendale, AZ.

Employee Benefits

Holmes Murphy, Inc. will likely provide our insurance brokerage.

- Expertise: Holmes Murphy has been in the insurance brokerage business for over 40 years providing service in health and dental insurance brokerage.
- Competence: Holmes Murphy is contracted with and referred by other charter schools in the Phoenix area: Create Academy, Skyline, CASA, and Empower College Prep.
- Price: $300 per FTE per month.
- Local or in-state vendor: Out of Iowa, have Scottsdale-based Office.

Property/Liability Insurance

Holmes Murphy, Inc. will likely provide our insurance brokerage.

- Expertise: Holmes Murphy has been in the insurance brokerage business for over 40 years providing insurance brokerage in the areas of property liability, educational liability, risk management, extra-curricular injury.
- Competence: Holmes Murphy is contracted with and referred by other charter schools in the Phoenix area: Create Academy, Skyline, CASA, and Empower College Prep.
- Price: $7000 for Y1, $9000 for Y2, and 10,000 for Y3.
- Local or in-state vendor: Out of Iowa, have Scottsdale-based Office.

Special Education Services

Ridge Zeller Therapies employs highly educated and highly experienced therapists from diverse backgrounds.

- Expertise: Ridge Zeller Therapy is a therapy-services group with a successful track record of providing comprehensive speech-language therapy, occupational therapy, physical therapy, psychoeducational services, team-based autism spectrum evaluations, feeding therapy, hearing screenings, and vision screenings.
  - Among their staff is a former K-12 principal whose specialty is in speech language pathology and special education.
  - Competence: Ridge Zeller staff is professional, licenses, and certified practitioners.
  - Price: Speech Therapy: $62/hour from Speech/Language Pathologist, $44/her for Speech/Language Pathology Assistant; Occupational Therapy: $74/hour; Physical Therapy: $74/hour. Psychologist: $74/hour.

- Local or in-state vendor: Phoenix, AZ based business.

Legal Services

Carter Law Group (CLG) will be the legal service employed at Pensar Academy. CLG is committed helping education leaders provide every child with a quality education.

- Expertise: representing charter schools with respect to business, tax, and regulatory issues, including structuring the expansion of charter networks.
- Competence: CLG has extensive experience working with Arizona Charter Schools and comes highly recommended from the Arizona Charter Schools Association, as well as SySTEM Phoenix, CASA Academy, and Western School of Science and Technology.
- $6800 for Year 1-Year 3 flat rate which includes 1 hour a month of consultation and non-profit processing and support. Includes an additional hour each month for contract review services.
- Local or in-state vendor: Phoenix based.

Informational Technology Services

David Levesque, a private contractor, will provide Pensar Academy with Informational Technology services, including phone service, internet set-up, and tech support.

- Expertise: Informational Technology for school based systems in system set-up including network installation, software installation/support, and troubleshooting.
- Competence: The Director of Operations has worked with Mr. Levesque as an IT consultant for over a year.
- Price: Assumes 30 hours in year 1 at a rate of $50 per hour to install a computer lab and maintain staff technology. Assumes 15 hours in year 2 at a rate of $50 per hour to maintain and fix school technology. Assumes 15 hours in year 3 at a rate of $50 per hour to maintain and fix school technology. Cost obtained from private contractor, David LeVesque.
- Local or in-state vendor: Mr. LeVesque is a local resident.

Facility Services

Marsden, Inc. will likely provide maintenance services at Pensar Academy.

- Expertise: Has been in operation for 63 years and 46 states. Provided services include facility maintenance (proactive and reactive) and cleaning.
- Competence: Recommended through Arizona Charter Academy as their preferred maintenance provider.
- Price: $16,000 for Y1, $32,000 for Y2, and $40,000 for Y3.
- Local or in-state vendor: Marsden is based out of St. Paul, MN. However, they hire locally and do not contract out to third party vendors.

Food Services

L&M Catering will likely provide food services for Pensar Academy, implementing the National School Lunch Program and National School Breakfast Program.

- Expertise: L&M Catering exists to fill the need for schools, businesses, camps and other groups that require onsite meals and snacks for their constituents.
- Competence: L&M Catering comes highly recommended from other charter schools, namely Create Academy and CASA Academy. All food service employees will hold appropriate food handling licenses.
- Price: $1.70 for breakfast, $2.70 lunch per meal.
- Local or in-state vendor: Local Vendor out of Scottsdale, AZ.

Pensar Academy assumes an annual overage fee for $5,000 for Food Services as a contingency for students who don't have completed paperwork, new students, or other situations that allow for Pensar to ensure our students are fed.

c. Contracted Service Providers Cost for Services

Service Provider	Service	Year 1 Quote	Year 2 Quote	Year 3 Quote
Aspire Business Consultants	Accounting Financial Management	17,200	17,200	17,200
Holmes/Murphy	Insurance/Benefits Broker	32,400	64,800	72,000
Ridge Zeller	Special Education Services	12,376	23,864	29,012
Carter Law Group	Legal Counsel	5,000	5,000	5,000
Dave LeVesque	Informational Technology	1,500	1,500	1,500
Marsden	Maintenance	16,000	32,000	40,000
L&M Catering	Food Service	5,000	5,000	5,000

d. Sources for Costs

Listed below are the clear and specific sources for each listed contracted service:

Service Provider	Source
Aspire Business Consultants	Heather Jones
Holmes Murphy	Eric Bolduc
Ridge Zeller	Hilary Parker
Carter Law Group	Mackenzie Woods
Informational Technology Services	David LeVesque
Marsden	Anthony Messner
L&M Catering	Leno Medina

e. Ensure costs are described

The costs are described in the Budget Assumptions and included in the Start-up and Three-Year Operational Budget as appropriate.