B.3.2 Contracted Services

Synergy Public School will utilize external service providers for many areas of operation. Contracted service providers will be proposed and evaluated by the Executive Director of Business and Operations and approved by the Governing Board.

A. Contract Service Providers Needed:

Synergy Public School 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, Retirement
- Property/Liability Insurance: Property liability, educational liability, risk management and extra- curricular injury.
- Special Education: Special Education teacher (Year 1 & 2) School psychologist services, occupational therapy services, speech language services, physical therapy services.
- Legal: Business, tax, and regulatory issues. Certified Attorneys on staff.
- Auditing Services: Conduct all school audits
- 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: Synergy Public School 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, Synergy Public School will evaluate financial investments in outsourcing to ensure that the services are reflective of the price.
- Local or in-state vendor: Synergy Public School will attempt to outsource to qualified vendors that are local to stimulate business development within the community we serve. Synergy Public School will take cost effectiveness and competence into account when making this determination. Synergy Public School 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: $22,008 (Year 1), $23,108 (Year 2), and $25,265 (Year 3).
- 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: $9000 for Y1, $15,500 for Y2, and 21,000 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, psycho-educational 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; 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 Synergy Public School. CLG is committed to 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.

Auditing Services

BVB- Brett V. Backlund (CPA, PC) will provide auditing services for Synergy Public School. Mr. Backlund believes high quality of work, reliability and fairness are the foundations of the Firm's operating policy.

- Expertise: He has done between 400 - 500 charter school audits for clients with schools as small as 10 students and for schools with several campuses and a multi-million-dollar bond in place.
- Competence: Mr. Backlund's attention to detail includes a familiarity of the regulations and requirements that directly impact those organizations he serves, including Generally Accepted Accounting Principles (GAAP), the Uniform System of Financial Records (USFR), the Uniform System of Financial Records for Charter Schools (USFRCS), Arizona Department of Education guidelines, the Arizona Revised Statutes (A.R.S.) GASB, and other State and Federal compliance rules and regulations. He has audited various schools with similar missions to Synergy Public School.
- Price The cost for Mr. Backlund's services will be $8500 in year 2 and year 3. The source for this cost is a direct quote from Mr. Backlund.
- Local or in-state vendor: Gilbert, Arizona

Informational Technology Services

Network Technologies International will conduct technology services, including installation and set-up of student and staff computers, programming and technical repairs for an at-needed basis.

- Expertise: Informational Technology for school based systems in system set-up including network installation, software installation/support, and troubleshooting

for 11 years.

- Competence: References from other charters including CASA Academy.
- Price: Assumes 30 hours a year at $50/hour to maintain student and staff computers for years 1, 2 and 3.
- Local or in-state Vendor: Network Technologies International is located in Scottsdale, Arizona

Facility Services

Marsden, Inc. will likely provide maintenance services at Synergy Public School.

- 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 Synergy Public School, 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.

Synergy Public School 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 Synergy to ensure our students are fed.

C. Costs Associated with Contracted Services for Target Population

Based on conversations with similar sized operating charter schools, these figures are viable and adequate for the target population of Synergy. For those students who enroll we have anticipated needs of special education services. Food services follow a predictable pattern. Financial services are based on work performed, not per student.

Service Provider	Service	Year 1 Quote	Year 2 Quote	Year 3 Quote
Aspire Business Consultants	Accounting Financial Management	$22,008	$23,108	$25,265
Holmes/Murphy	Employee Insurance & Liability Benefits Broker	$59,400	$101,900	$136,200
Ridge Keller	Special Education Services	$17,176	$30,170	$40,070
Carter Law	Legal Counsel	$6,800	$6,800	$6,800
BVB Brett V. Backlund	Auditing Services		$8500	$8500
Network Technology International	Information Technology	$1,500	$1,500	$1,500
Mardsen Maintenance	Maintenance	$16,000	$32,000	$40,000
L&M Catering	Food Service	$5,000	$5,000	$5,000

D. Sources for Costs

Service Provider	Source
Aspire Business Consultants	Heather Jones
Holmes/Murphy	Eric Bolduc
Ridge Keller	Hilary Parker
Carter Law	Mackenzie Woods
BVB-Brett V. Backlund	Brett V. Backlund
Network Technology International	Stephan Dzur
Mardsen Maintenance	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.