

Financial Service RFP

Request for Proposal Financial Services

South Prep Scholars Academy
12065 SW 248th Street
Homestead, FL 33032

PROPOSAL SUBMISSION DEADLINE: 01/12/2026

QUESTION SUBMISSION DEADLINE: 01/05/2026

Questions may be submitted in written form to:

Contact Name: Ruben Diaz

Email Address: rdiaz@managementschoolsolutions.com

General Information: RFP for Financial Services

1.1 Statement of Purpose

South Prep Scholars Academy invites and welcomes proposals from qualified corporate financial services firms for the provision and management of financial services at 12065 SW 248th Street Homestead, FL 33032. Based on your previous work experience, your firm has been selected to receive this RFP and is invited to submit a proposal. Please take the time to carefully read and become familiar with the proposal requirements. All proposals submitted for consideration must be received by the time specified above under the “PROPOSAL SUBMISSION DEADLINE.”

BIDDERS SHOULD NOTE THAT ANY AND ALL WORK INTENDED TO BE SUBCONTRACTED AS PART OF THE BID SUBMITTAL MUST BE ACCOMPANIED BY BACKGROUND MATERIALS AND REFERENCES FOR PROPOSED SUBCONTRACTOR(S) – NO EXCEPTIONS.

1.2 Company Background

South Prep Scholars Academy, a Florida public charter school located in Homestead, FL, is seeking proposals from qualified firms to provide Financial Services, including accounting, budgeting, financial reporting, and overall fiscal oversight compliant with Florida Statutes and Charter School requirements.

The purpose of this RFP is to identify a provider with proven experience serving Florida charter schools and ensuring compliance with all state and federal regulations.

1.3 Scope of Work

The selected proposer must provide comprehensive financial management and support services including, but not limited to: Budgeting, Financial Reporting, and Compliance

2 Contract Terms & Conditions

This document is a request for proposal and not an offer to purchase. Nothing contained in this RFP creates a contractual relationship between South Prep Scholars Academy and any supplier. South Prep Scholars Academy makes no commitment in or by virtue of this RFP to purchase products or services from any supplier. Such commitment may be made only in and through a properly executed agreement.

3. Proposal Requirements

To be considered, respondents to this school financial services RFP must submit timely, written proposals that fully address all questions and requirements. It must include the following components:

Executive Summary: Provide a general overview of your proposal and how your company's approach is best suited to the needs and culture of South Prep Scholars Academy.

3.1 Company Overview: Describe your company history, mission and core values including years in business, locations, management bios and organization chart. You should include the following:

- a. Bidder's Name(s)
- b. Bidder's Address
- c. Bidder's Contact Information (and preferred method of communication)
- d. Legal Formation of Bidder (e.g. sole proprietorship, partnership, corporation)
- e. Date Bidder's Company was formed
- f. Description of Bidder's company in terms of size, range, and types of services offered and clientele
- g. Bidder's principal officers
- h. Bidder's Federal Employee Identification Number (FEIN)
- i. Evidence of legal authority to conduct business in Dade County, Florida (e.g. business license number)
- j. Evidence of established track record for providing services and/or deliverables that are the subject of this proposal
- k. Describe what differentiates you from your competitors and how that will impact the quality of your services to South Prep Scholars Academy
- l. Provide a detailed overview of the resources that will be deployed to support school financial services at South Prep Scholars Academy,

3.2 Offerings: Provide a description of your financial service plans.

3.3 Financial Summary: Provide a detailed 12-month operating budget for South Prep Scholars Academy

4. Evaluation & Awards Timeline
 - a. RFP Issue Date..... 01/05/2026
 - b. Facility Walk through.... 01/09/2026
 - c. Questions Submitted By....01/10/2026
 - d. Proposals Due.... 01/15/2026
 - e. Review of Submittals...01/29/2026
 - f. Notice of Award.... 01/30/2026
 - g. Selected Contractor Begins Operating.... 02/01/2026

5. Award Criteria

The School will award the contract to the proposer whose submission is determined, in the School's sole and absolute discretion, to be the most advantageous and responsive to the requested scope of services. The award will not be based solely on the lowest proposed fee, and the School reserves the right to consider a range of qualitative and quantitative factors.

In evaluating proposals, the School may consider, without limitation, in no specific order or weighting, the following criteria:

- a. Completeness, clarity, and overall quality of the proposal submission.
- b. Proposed fee structure and overall cost.
- c. Experience, expertise, and qualifications of the key personnel assigned to the engagement.
- d. Vendor's litigation history, complaint record, and overall professional reputation.
- e. Existence of any actual or potential conflicts of interest.

Contacts

5.1 Inquiries & Responses: All questions must be submitted to Ruben Diaz via email at rdiaz@managementschoolsolutions.com no later than 01/15/2026.

5.2 Site Visits On site visits may be scheduled by emailing Ruben Diaz at rdiaz@managementschoolsolutions.com no later than 01/09/2026.

5.3 Submissions Submit one (1) electronic copy of your proposal via e-mail to Ruben Diaz at rdiaz@managementschoolsolutions.com, and (1) physical copy to Ms. Dianet De Armas, at South Prep Scholars Academy (12065 SW 248th Street Homestead, FL 33032) no later than 01/15/20256.