

FIGURE 3.2

Checklist for Outsourcing Special Education Services

PART 1: SPECIAL EDUCATION SUPPORT REQUIREMENTS

<input type="checkbox"/> Identify the specific, individual needs of all students eligible for special education and related services.	Compare student needs for services to the capacity of the charter school to provide appropriate instruction and support. What areas of programming need to be addressed?
<input type="checkbox"/> Identify instructional or program needs that might be addressed in-house.	Consider different staffing patterns that might address unmet needs. Should you hire new staff? Are there current staff members who are capable of providing the services required and who might be reassigned?
<input type="checkbox"/> Identify instructional or program needs that might be addressed through the LEA.	If the charter school is part of a local education agency (LEA), what services are available from other partners within the LEA that might be tapped to respond to in-house programming needs?
<input type="checkbox"/> Identify needs unable to be met in-house or through the LEA, and identify outside vendors or agencies.	For the specific areas of instruction or programming that require support, research available providers within the community.
<input type="checkbox"/> Request preliminary estimates (e.g., costs, staffing, timelines) from potential vendors.	Compile information on costs and administrative work required in contracting with others. Develop a standard format for requests, to ensure comparison of similar activities. (For example, ask contractors to present a typical monthly bill of all the activities they are proposing, as opposed to comparing one's hourly bill with another's yearly bill.) Complete a cost analysis of all possible contractors, including indirect costs and administrative costs. Analyze the data to determine potential cost effectiveness; compare proposals of the different vendors to costs of possible internal services that the charter school can provide.
<input type="checkbox"/> Revisit in-house versus contracted solutions.	Continue to analyze services you are already providing through in-house staff or preexisting contracts. Which services are best provided in-house and which services are best provided by a contractor? When considering outsourcing activities currently provided in-house, what adverse effects (e.g., financial, morale) on staff would outsourcing create? What services should the school plan to provide in-house over the long term (e.g., high-incidence disabilities, community needs)?

FIGURE 3.2 (continued)

PART 2: CONTRACTING WITH PROVIDERS

<input type="checkbox"/> Develop a request for proposals (RFP).	The RFP should be based on in-house needs, not on the types of services contractors provide. The RFP should list the specifics of the services required, maintaining confidentiality of the students and families of the charter school. Have legal counsel review the RFP prior to sending to potential contractors.
<input type="checkbox"/> Evaluate proposals.	<p>Review the responses to the RFP: Does the contractor's proposal directly address and respond to the needs of the charter school?</p> <p>Conduct extensive and detailed background checks of all proposed contractors. Follow up with contractor references and others who can speak to the contractor's performance and credentials. Does this contractor really have the capacity to provide the service required? Has the contractor provided this particular service before? What do others say about the contractor's performance?</p> <p>Consider administrative costs and in-house staff requirements to manage the outside contract. Does one contractor require a lot more paperwork than another? Is there a request for a deposit or payment prior to providing services? Are there extensive billing requirements?</p> <p>Have legal counsel review and provide feedback on highly ranked proposals.</p>
<input type="checkbox"/> Develop a contract.	<p>Ensure that contracts include multiple opportunities to check on the contractor's performance, that quality control measures are built into the system, and that the contract allows the charter school to cancel without undue financial hardship.</p> <p>Does the contract incorporate cost thresholds? That is, will the contractor be able to adapt to changes in services requested? If the contractor does not reach the cost threshold, do they keep the money overage?</p> <p>Have legal counsel review both a draft and finalized contract prior to entering into the agreement.</p>

Note. There may be additional questions based upon the needs of an individual charter school; this checklist is intended to provide guidance in identifying primary considerations that should be addressed.