



Solicitation No.: #9-FORECAST-1025
 Solicitation Title: Financial Forecasting Model Services
 Evaluation Period: September 18, 2025 - September 25, 2025
 Final Version: September 29, 2025

Evaluation Criteria	Evaluation Criteria (Refer to Scoring Guide)	Weight [W]	Vendor 1 ActNova Actuarial and Management Consulting, LLC. (Total Average)	Vendor 2 DK Statistical Consulting, Inc. (Total Average)	Vendor 3 Frontline Technologies Group LLC dba Frontline Education (Total Average)	Vendor 4 MoakCasey, LLC. (Total Average)
Evaluation Criteria 1 Relevant Experience	Proven track record in developing multi-year financial models for charter schools with examples of similar projects completed.	25%	8.75	11.25	16.25	16.00
Evaluation Criteria 2 Timeline Commitment	Demonstrated ability to complete and deliver a fully functional forecasting model by December 2025.	20%	12.75	17.00	14.75	1.25
Evaluation Criteria 3 Technical & Scenario Modeling Expertise	Demonstrated proficiency in recognized forecasting platforms (Excel, Google Sheets, Power BI, etc.) with the ability to develop scenario plans (best-case, baseline, worst-case). Evidence of integrating complex funding assumptions, operational cost drivers, and capital planning needs into models.	25%	17.00	20.75	16.25	16.00
Evaluation Criteria 4 Intellectual Property Transfer	Clear confirmation that all deliverables, documentation, and tools will become the property of IDEA Public Schools upon project completion.	20%	12.25	19.50	12.00	11.75
Evaluation Criteria 5 Specialized Expertise	In-depth knowledge of Texas charter school funding structures, state and federal funding mechanisms, and related economic factors.	10%	5.00	6.00	8.50	10.00
		100%				
Grand Total Score			55.75	74.50	67.75	55.00

DK Statistical Consulting, LLC received the highest overall score of 74.5 points, demonstrating strong technical expertise in data modeling, Power BI integration, and Excel-based forecasting. The firm provided a detailed project plan, clear intellectual-property transfer terms, and a schedule aligning with IDEA's completion goal of December 2025.