

CEDAR TREE ACADEMY PUBLIC CHARTER SCHOOL

REQUEST FOR PROPOSALS (RFP)

Financial Wellness & Student Loan Assistance Services

RFP Issue Date:

March 13, 2026

Proposal Due Date:

April 13, 2026 @ 4:00PM

Point of Contact:

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Cedar Tree Academy PCS

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Subject Line: RFP – Financial Wellness Services

1. INTRODUCTION

Cedar Tree Academy Public Charter School (PCS) is seeking proposals from qualified vendors to provide a comprehensive financial wellness platform for eligible employees. The selected vendor will deliver student loan repayment support, college planning tools, and broader financial wellness services that enhance employee financial stability and overall well-being.

2. OBJECTIVE

The objective of this RFP is to select a vendor that can provide student loan repayment optimization, federal loan forgiveness support including PSLF guidance, college savings tools, emergency savings solutions, retirement integration tools, and reporting capabilities.

3. SCOPE OF SERVICES

- Student loan repayment plan comparison and optimization tools.
- Federal income-driven repayment and PSLF guidance support.
- Employer-sponsored student loan repayment benefit administration (if applicable).
- College planning calculators and 529 savings education resources.
- Emergency savings solutions and budgeting tools.
- Retirement savings integration tools, including student loan retirement match capability if applicable.
- Secure cloud-based platform with mobile accessibility.

- Integration with HRIS, payroll, and benefits systems.
- Employer reporting dashboard with measurable outcomes.

4. VENDOR QUALIFICATIONS

- Demonstrated experience providing financial wellness and student loan solutions.
- Experience serving public sector, nonprofit, or educational institutions preferred.
- Strong cybersecurity and data protection protocols.
- Proven implementation and onboarding process.
- At least three comparable client references.

5. PROPOSAL REQUIREMENTS

- Company overview and relevant experience.
- Detailed description of services and platform capabilities.
- Implementation timeline.
- Pricing proposal with complete cost structure.
- Customer support model.
- Data security and compliance documentation.
- Reporting and performance metrics.
- References.

6. EVALUATION CRITERIA (100 Points Total)

1. Quality and Comprehensiveness of Services – 25 points
2. Experience and Qualifications – 20 points
3. Technology & Data Security – 15 points
4. Implementation & Customer Support – 15 points
5. Cost & Value – 20 points
6. References & Past Performance – 5 points

7. DC PUBLIC CHARTER SCHOOL PROCUREMENT COMPLIANCE

This procurement is conducted in accordance with applicable District of Columbia public charter school procurement requirements. Cedar Tree Academy PCS operates as an independent Local Education Agency (LEA) and adheres to federal and District procurement standards, including but not limited to 2 CFR §200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards), when applicable.

- All vendors must comply with applicable federal and District of Columbia laws and regulations.
- Vendors must not discriminate on the basis of race, color, national origin, sex, age, disability, religion, or any other protected category.
- If federal funds are used, vendors must comply with all federal grant requirements including conflict of interest provisions.

- Vendors may be required to provide proof of insurance, business licensure, and tax compliance.
- Cedar Tree Academy PCS reserves the right to cancel this RFP or reject any or all proposals in the best interest of the school.

8. SUBMISSION INSTRUCTIONS

Proposals must be submitted electronically in PDF format to lhenderson@cedartree-dc.org no later than the date specified above. Late submissions will not be considered.