College Station Independent School District

Success...each life...each day...each hour

PURCHASING OFFICE
INTER-DEPARTMENTAL MEMO

DATE: July 12, 2021

TO: Amy Drozd, CFO

FROM: Carmella Shafer, Director of Purchasing

SUBJECT: PowerSchool Performance Matters Assessment Analytics Core+ and Professional Learning

The district is requesting to replace two separate software applications, Eduphoria's Aware and Schoology's AMP, currently used for continuous annually required professional development and student assessment management platform (AMP) with PowerSchool's Performance Matters Assessment Analytics Core+ and Professional Learning. PowerSchool's applications integrate seamlessly with our student system, eSchool, and our HR system, eFinance, and Talent ED.

PowerSchool Performance Matters Assessment Analytics Core+ supports the district-wide collaborative creation of question-based assessments and the distribution of those assessments to one or more course sections across our district or organization. Assessment Teams and their designated members can have different levels of collaborative contributions to building question banks and assessments. With Performance Matters Assessment Analytics Core+, we can supplement MAP testing areas to track mastery in all subject areas with in-district created benchmark assessments and unit assessments within teams and across campuses. This will allow us to track the data at the district level to help inform curricular decisions. The system also includes a Multi-Tiered System of Supports (MTSS) is a systemic, continuous-improvement framework in which data-based problem solving and decision-making is practiced across all levels of the educational system for supporting students. This system also integrates with our Schoology Learning Management System and will streamline the process of scanning scantron documents.

PowerSchool's Professional Learning centralizes the ability to support, manage, and track professional learning in a wide variety of formats, including an embedded video-based PD marketplace and multiple Learning Management System (LMS) integrations including Schoology. Evaluators can assign training based on employee performance or needs. Custom training sessions can be created and assigned or signed up for in PowerSchool PD.

In the first year of implementation, there will be an overlap of the applications as we plan for a smooth transition with our system use and provide user training and support. The purchase from PowerSchool will result in increased professional development opportunities as well as seamless integration with currently used applications for students and employees.

These online resources are available from PowerSchool Group LLC through the TIPS Contract 210101. All items on this contract have been competitively bid and awarded by the Cooperative's Board of Trustees based on state statutes.

It is the recommendation of Carmella Shafer, Director of Purchasing, and David Hutchison, Director of Technology that CSISD purchases these online resources for $131,089.50 for the 2021-2022 school year using ESSER III funds.

Carmella Shafer, Director of Purchasing   David Hutchison, Director of Technology

Carmella Shafer, RTSBA
Director for Purchasing
(979) 694-5617

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College Station, TX 77845
979-764-5400 -- www.csisd.org

Mike Martindale
Superintendent of Schools

PowerSchool
Powering Brighter Futures

Prepared By:	Lauren Shaw	Customer Contact:	Stephanie Ryon
Customer Name:	College Station Independent School District	Title:	Digital Learning Coordinator
Enrollment:	13,600	Address:	ATTN: TIPS 210101 1812 Welsh Ave
Contract Term:	36 Months	City:	College Station
Start Date:	1-AUG-2021	State/Province:	Texas
End Date:	31-JUL-2024	Zip Code:	77840
		Phone #:	(979) 695-7261

Product Description	Quantity	Unit	Extended Price
Initial Term 1-AUG-2021 - 31-JUL-2022			
License and Subscription Fees			
Unified Talent (TalentEd) Professional Learning	13,600.00	Students	USD 20,230.00
UT Professional Learning LMS Integration Schoology	1.00	Each	USD 0.00
PowerSchool Performance Matters Assessment Analytics Core+	13,600.00	Students	USD 58,752.00
PowerSchool Performance Matters One Time Discount	1.00	Each	USD -9,520.00
PowerSchool Performance Matters Grade Cam	13,600.00	Students	USD 13,600.00
PowerSchool Item Bank	13,600.00	Students	USD 19,040.00
PowerSchool Performance Matters Pre-Built Assessments	13,600.00	Students	USD 0.00
PowerSchool Performance Matters SEL Survey	13,600.00	Students	USD 0.00
	License and Subscription Totals:		**USD 102,102.00**
Professional Services and Setup Fees			
UT Professional Learning Implementation - Advanced	1.00	Each	USD 8,287.50
UT Professional Learning Educational Impact Consulting	8.00	Hours	USD 2,550.00
UT Professional Learning LMS Integration Schoology Setup	1.00	Each	USD 0.00
PowerSchool PM Assessment and Analytics Standard Deployment	1.00	Each	USD 10,800.00
PowerSchool PM Item Bank Consulting	1.00	Each	USD 1,200.00
	Professional Services and Setup Fee Totals:		**USD 22,837.50**
Training Services			
UT Professional Learning Training Remote	2.00	Day	USD 2,550.00
PowerSchool PM Per Person Per Day Training Remote	15.00	Each	USD 3,600.00
	Training Services Total:		**USD 6,150.00**

Quote Total

	Initial Term	1-AUG-2021 - 31-JUL-2022
	Payment Total	USD 131,089.50

Annual Ongoing Fees as of 1-AUG-2022 - Fees subject to an annual uplift, which will be reflected on renewal quote

Unified Talent (TalentEd) Professional Learning	13,600.00	Students	USD 20,230.00
UT Professional Learning LMS Integration Schoology	1.00	Each	USD 0.00
PowerSchool Performance Matters Assessment Analytics Core+	13,600.00	Students	USD 58,752.00
PowerSchool Performance Matters Grade Cam	13,600.00	Students	USD 13,600.00
PowerSchool Item Bank	13,600.00	Students	USD 19,040.00
PowerSchool Performance Matters Pre-Built Assessments	13,600.00	Students	USD 0.00
PowerSchool Performance Matters SEL Survey	13,600.00	Students	USD 0.00

Annual Ongoing Fees Total: **USD 111,622.00**

Fees charged in subsequent periods after the duration of this quote will be subject to an annual uplift. Customer understands the above Annual Ongoing Fees for the next subscription period do not include the annual uplift, which will be applied at the time of renewal. On-Going PowerSchool Subscription/Maintenance and Support fees are invoiced at the then current rates and enrollment per terms of the main agreement executed between PowerSchool and Customer ("Main Services Agreement"). Any applicable state sales tax has not been added to this quote. Subscription Start and End Dates shall be as set forth above, which may be delayed based upon the date that PowerSchool receives your purchase order. If this quote includes promotional pricing, such promotional pricing may not be valid for the entire duration of this quote. All invoices shall be sent to Customer upon or promptly after execution of this quote, unless otherwise set forth in the applicable statement of work or Main Services Agreement (e.g., services billed on time and material basis will be invoiced when such services are incurred). Payment shall be due to PowerSchool before or on the due date set forth on the applicable invoice. All purchase orders must contain the exact quote number stated within. Customer agrees that purchase orders are for confirming this order and its own internal purposes, and no other. Any credit provided by PowerSchool is nonrefundable and must be used within 12 months of issuance. Unused credits will be expired after 12 months. Treatment of purchase orders are governed as provided in the Main Services Agreement. By execution of this quote, or its incorporation, this and future purchases of subscriptions or services from PowerSchool are subject to and incorporate the terms and conditions found at: https://www.powerschool.com/msa/

THE PARTIES BELOW ACKNOWLEDGE THAT THEY HAVE READ THE AGREEMENT, UNDERSTAND IT AND AGREE TO BE BOUND BY ITS TERMS.

POWERSCHOOL GROUP LLC
Signature:

Printed Name: Eric Shander

Title: Chief Financial Officer

Date: 9-JUL-2021

College Station Independent School District
Signature:

Printed Name:

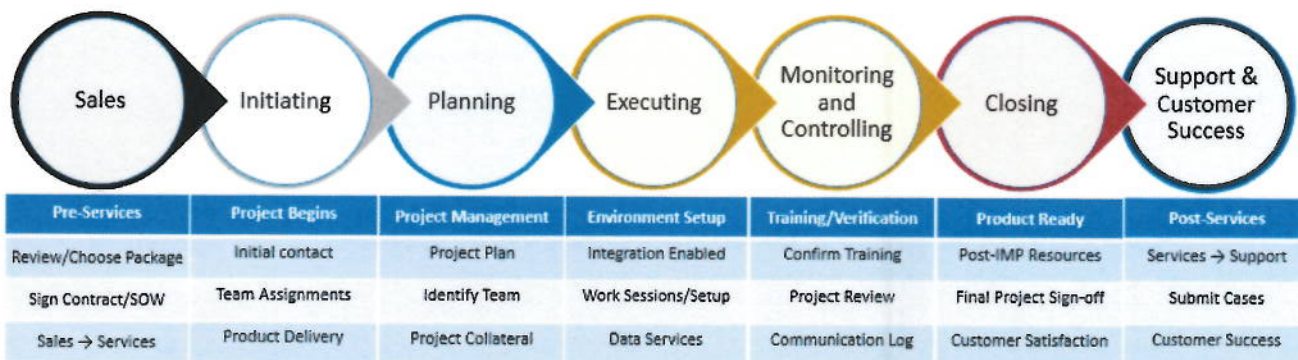Title:

Date:

Statement of Work

Purpose of Document

The purpose of this Statement of Work ("SOW") between PowerSchool Group LLC ("PowerSchool") and Customer ("You", "Your") is to outline the process, approach, and completion criteria for each step of the process to implement PowerSchool. This document covers the roles and responsibilities of the PowerSchool Project Manager, Implementation Specialist(s), and Customer in each step of the PowerSchool implementation process, serving as an outline of services PowerSchool is expected to deliver. This SOW calls out specific functional areas of PowerSchool that are covered for implementation services and level of coverage.

Successful implementation of new software requires proven project management and methodology. The timeline will be mutually adapted within a project management tool between PowerSchool and the Customer. PowerSchool provides a comprehensive package of services designed to ensure Your PowerSchool deployment project meets Your unique needs and expectations. Additional training, consulting and customization services can be purchased to help augment additional needs You may have with Your PowerSchool deployment. The delivery of Professional Services contained in this document will be provided remotely. If travel is required, all travel related expenses will be invoiced as incurred.

We will partner with You and be Your liaison to PowerSchool during the implementation. You will have a project team to help you, as a Customer, connect to other PowerSchool services and support, while also providing project planning, communication, project execution, and product specialist consulting. For a successful PowerSchool implementation, it is important that You understand the responsibilities, carve out the time required and keep on pace with the timeline. This will involve gathering information, helping Your team come to agreement on configuration and data standardization, your own product training and monitoring other staff assigned training for completion, adjusting desk level procedures, and planning for go live among several other tasks. The overall steps included in a project are outlined below.

This Statement of Work is subject to the terms and conditions of the current master agreement between the parties and any associated policies, pursuant to which PowerSchool has licensed the PowerSchool application to the Customer.

Sales	Initiating	Planning	Executing	Monitoring and Controlling	Closing	Support & Customer Success
Pre-Services	**Project Begins**	**Project Management**	**Environment Setup**	**Training/Verification**	**Product Ready**	**Post-Services**
Review/Choose Package	Initial contact	Project Plan	Integration Enabled	Confirm Training	Post-IMP Resources	Services → Support
Sign Contract/SOW	Team Assignments	Identify Team	Work Sessions/Setup	Project Review	Final Project Sign-off	Submit Cases
Sales → Services	Product Delivery	Project Collateral	Data Services	Communication Log	Customer Satisfaction	Customer Success

Released January 2021
Document Owner: PowerSchool Group LLC, Product Deployment Solutions

General Assumptions

1. Implementation services will be delivered remotely unless onsite services are purchased separately.

2. Client is to provide a data extract to PowerSchool in accordance with Tiered Service package selected.

3. Implementation timeline is stated within the Planning Phase, extending the timeline may require the customer to purchase additional services.

4. Implementation services are completed when delivered and the deliverable acceptance procedure is complete.

5. Services identified are for PowerSchool start-up and do not include customizations, including integration layouts, document templates, reports, etc. Additional services are available and can be purchased for items out of the scope of implementation (see Project Change Control and Escalation Change Procedure section of this document).

6. Customer will adhere to the active PowerSchool Cancellation Policy. "Services Cancellation: Licensee shall pay a cancellation charge equal to fifty percent (50%) of the services fee and any non-refundable expenses incurred by PowerSchool if Licensee cancels any scheduled professional services less than fourteen (14) days before the occurrence of any service dates that PowerSchool has scheduled at Licensee's request."

7. Customer must identify a designated Customer project lead before the project kick-off meeting. The Customer project lead will be responsible for delivering all sections of the "Customer Responsibilities" included in the SOW in a complete manner within the project timeline.

8. The designated Customer project lead should be an employee of the organization implementing PowerSchool. Customers that hire third-party organizations to act on the behalf of the Customer for implementation may be required to sign a waiver form provided by PowerSchool, indicating that the third-party organization is authorized to act on the Customer's behalf when interacting with PowerSchool. The Customer will be responsible for maintaining proper communication channels with third party organizations hired by the Customer.

9. All sign offs must be done by an employee and designated signatory of the Customer. Third party entities engaged by the Customer are not acceptable signatories for any project sign offs.

10. The PowerSchool Project Manager and/or Application Specialist will guide Customer to available procedures, guidelines, standards, reference materials and system/application documentation.

11. Implementation Services is assuming the product will be deployed as-is, items outside of Scope of Work must go through the change control procedures (see Project Change Control and Escalation Procedure in this document).

Deliverables Acceptance Procedure

Deliverables Acceptance

This Statement of Work outlines PowerSchool deliverables for each phase of the implementation project in the PowerSchool Objections and Completion Criteria sections. Each deliverable will be reviewed and accepted in accordance with the following procedure:

- Deliverable will be submitted or delivered to the Customer project lead or designated Customer team member. It is the Customer project lead's responsibility to review and accept deliverable as complete.

- Within six (6) business days of completion of the project the Customer project lead will either accept the final deliverables or provide the PowerSchool implementation specialist a written list of objections. If no response from the Customer project lead is received within six (6) business days, then the deliverables will be deemed accepted, unless the Customer requests an extension.

- The PowerSchool implementation specialist will consider the Customer's objections within the context of PowerSchool's obligations as stated within this Statement of Work. Revisions agreed to by PowerSchool will be applied at which time the deliverables will be reviewed within six (6) business days and the Customer project lead either will accept the deliverables or provide the PowerSchool implementation specialist a written list of objections. If no response is received within six (6) business days, then the deliverables will be deemed accepted, unless the Customer requests an extension.

- Customer objections that are not agreed to by PowerSchool will be managed in accordance with the Project Change Control Procedure described below. If resolution is required to a conflict arising from Customer's objection to a deliverable, the Customer and PowerSchool will follow the Escalation Procedure described below.

- All deliverables required to be delivered hereunder are considered to be owned by PowerSchool with unlimited internal use by the Customer, unless otherwise noted.

Project Change Control and Escalation Procedure

Project Change Control

The following process will be followed if additional services to this Statement of Work are required or desired.

- A Project Change Request (PCR) will be the vehicle for communicating change. The PCR must describe the change, rationale for the change and the effect the change will have on the project.

- The designated Customer project lead will review the proposed change and recommend it for further investigation or reject it. A PCR must be signed by the authorized Customer project lead to authorize quote for additional services. If the Customer accepts additional services and charges, a change to the original purchase order or new purchase order is required. Change to this Statement of Work through additional addendum will authorize additional scope and work.

- A written Change Authorization and/or PCR must be signed by authorized representatives from both parties to authorize implementation of the investigated changes. Until a change is agreed upon in writing, both parties will continue to act in accordance with the latest agreed version of the SOW.

Customer Escalation Procedure

The following procedure will be followed if resolution is required for a conflict arising during the

- **Level 1:** Customer project lead will notify PowerSchool Project Manager via email with details of escalation.

- **Level 2:** If the PowerSchool Project Manager cannot provide resolution or path to resolution five (5) business days from receipt of level 1 escalation email, the Customer project lead will notify PowerSchool manager via email to – pmoleadership@powerschool.com

- **Level 3:** If the concern remains unresolved after Level 2 intervention, resolution will be addressed in accordance with Project Change Control Procedure or termination of this SOW under the terms of the Contract.

During any resolution, PowerSchool agrees to provide services related to items not in dispute, to the extent practicable, pending resolution of the concern. The Customer agrees to pay invoices per the Contract, as rendered.

Professional Learning Advance Statement of Work

Initiating (Pre-requisites before Planning)

PowerSchool Responsibilities

- Send Welcome Email with Statement of Work
- Identify PowerSchool Project Team
  - Project Manager
  - Application Specialist
  - Educational Impact Consultant
- Send Customer access to the following:
  - Statement of Work
  - Intake Survey
  - Decision Documents
  - Import file layout and supporting documentation for HRIS and transcript imports
  - Authentication Discovery Documents

Customer Responsibilities

- Identify Customer Project Team
  - Project Manager
  - Subject Matter Expert(s)
  - IT | Data Lead Specialist
- Review and approve Statement of Work
- Complete Intake Survey
- Review authentication document and import file layout/guide
- Review Decision Documents

Completion Criteria

This activity will be considered complete when:

- Customer completes Intake Survey
- Customer signs off Statement of Work
- Project team identified
- Documents Delivered

Planning

PowerSchool Responsibilities

- Schedule and conduct a kickoff meeting
  - Advance Model is one hundred and twenty (120) calendar days from the date of the kick-off meeting
- Schedule the implementation and training resources based on project timeline and statement
- Update the Project Plan to include implementation timing and resources
- Schedule regular Working Sessions or Status Calls as needed

- Schedule and conduct an import discussion
  - Review file layout documents and examples and provide consultative services to guide customer on extracting data from their HRIS system to PowerSchool in the provided templates and format.
  - Make best practice recommendations on roles, resources, and views
- Schedule and conduct a decisions review discussion

Customer Responsibilities

- Attend Kick-off, Import and all subsequent meetings and training required
- Attend decisions review meeting and all subsequent meetings if schedule
- Complete the PowerSchool decision documents based on information gathered from key stakeholders, including:
  - Authentication
  - Import layout decisions (personnel and transcript)
  - Configuration Decisions
  - Provide Supporting documents (i.e. forms, handbooks)
  - Provide Workflows
- Manage business process change
- Plan for training and ensure users attend required training sessions
- Update the Project Plan to indicate client tasks completed

Completion Criteria

This activity will be considered complete when:

- The import and kickoff meeting are completed
- The configuration decision meeting is completed
- Customer completes decisions documents
- The Project Plan is updated based on discussed timelines
- Authentication document is completed and delivered

Authentication Services

As part of these services, PowerSchool will assist the customer to configure Single Sign On (SSO) for the PowerSchool product(s) undergoing implementation under the scope of this statement of work. Additionally, PowerSchool will assist with the enablement of the PowerSchool AppSwitcher for any other live PowerSchool product(s) (i.e. already implemented) where AppSwitcher is supported. This will be a one-time setup for which the PowerSchool implementation team will assist with the setup and configuration of the authentication services for live product(s), and the currently implemented product(s).

PowerSchool Responsibilities

- Update user accounts to ensure matching between systems
- Configure SSO
- Configure AppSwitcher with current and new PowerSchool products

Customer Responsibilities
- Identify and enable the Identity Provider (IDP) for setting up of SSO
- Test the setup of Authentication services and AppSwitcher

Completion Criteria
- Customer signs the final checklist that Authentication Services are complete

Executing

PowerSchool Responsibilities
- Production site set-up
- Schedule and conduct working sessions
- Configure the following System Settings:
  - Professional Development Management
  - Media Locker
  - Instructor Led & Self-Paced Courses
  - Professional Learning Communities
  - PD Playlists
  - Discussion Boards
  - SCORM Support
  - Course Completion Survey
  - External Credit Transcripts Request
  - System User Authentication
  - Single Sign On
  - Mobile App for Attendance
  - Nightly HRMS File Imports
  - Premium Library Access
  - Badging
  - External User Access/Guest Catalog
  - Course Approval (2 Levels)
  - PD Rubric Alignment
  - Embedded Growth Plan
  - Certification & Licensure Imports/Notifications

- Data Imports
  - Personnel Imports using the provided templates from District systems
  - Historical Transcript

Customer Responsibilities
- System Configuration
  - Attend working sessions and status meetings as scheduled.
  - Review and verify Configuration throughout the duration of the project and obtain concurrence from key stakeholders
  - Manage business process change throughout the project
  - Provide Customer deliverables in the agreed upon timeline to avoid impact on the project timeline
  - If deliverables are not provided in the agreed upon timeline, a revised timeline will be provided with new agreed upon deliverable dates and go live dates
- Data Imports
  - Attend data review call(s)
  - Evaluate the hierarchy and functional roles for staff
  - Align staff to the correct group and role utilizing best practice recommendations

- o Personnel Data:
  - o PowerSchool System of Record (SIS/ERP/BP) to Professional Learning
    - Attend and clarify questions for PowerSchool to facilitate the integration of data.
    - Install plug-ins where applicable
    - Validate data
  - o Third-Party System of Record to Professional Learning
    - Extract Personnel data from existing systems and provide in the requested format
- o Extract Transcript data from the legacy system and provide it in the requested format.
  - o *If historical data cannot be provided during the agreed timeline, the system will be configured to accept the data which can be imported at a later date.*
- o Extract Certification & Licensure data from the system of record system and provide it in the requested format.
  - o *If the data cannot be provided during the agreed timeline, the system will be configured to accept the data which can be imported at a later date.*
- o Responsible to review and confirm the accuracy of the imported data and obtain concurrence from key stakeholders
- o Responsible for the final verification and provides signoff data import is accurate and complete

Completion Criteria

This activity will be considered complete when:

- The system configuration is complete
- Personnel imports have been processed, validated and system is setup to import automated uploads when ready
- Historical Transcript importers are configured, and a sample file has been imported and reviewed
- Historical Certification & Licensure importers are configured, and a sample file has been imported and reviewed
- Customer provides system configuration completion acknowledgement
- Customer provides data import completion acknowledgement

Monitoring

PowerSchool Responsibilities

- Provide guidance for user acceptance testing and basic testing procedures
- Provide Overviews with Customer:
  - o PD Management System
  - o Instructor Led/Self-paced set-up
  - o Professional Learning Community
  - o Course Completion Survey
  - o Transcript Credit Request
  - o Discussion Boards
  - o SCORM support
  - o Course Search Set-up
  - o PD Playlists
  - o Mobile App for Attendance
  - o Badging
  - o Course Approval
  - o Certification & Licensure
  - o Embedded Growth Plan

Customer Responsibilities

- Attend all working sessions and complete/review configuration
- Attend all recorded training sessions including in package
- Complete User Acceptance Testing of the system configuration
- Log and Follow Up on Support Cases as needed
- Manage process change throughout the project
- Coordinate and host training session(s)
- Report critical issues to your implementation team
- Update the Project Plan to indicate client tasks completed

Completion Criteria

This activity will be considered complete when:

- Customer has attended all working sessions and other scheduled calls
- Customer has attended training included in package
- Customer has completed the User Acceptance Testing

Closing

PowerSchool Responsibilities

- Review and finalize any remaining project deliverables
- Introduce customer to support contact methods
- Provide introduction to Client Success Manager
- Submit Services to Support Survey
- Provide final project deliverables sign off to customer

Customer Responsibilities

- Review completed project deliverables
- Complete final project deliverables document signoff
- Understand that support will become primary contact for customer
- Complete final project signoff
- Complete Customer Satisfaction Survey

Completion Criteria

This activity will be considered complete when:

- Customer completes final project signoff

Performance Matters Assessment & Analytics
Standard Statement of Work

Initiating

PowerSchool Responsibilities

- Send Welcome Email and Intake Survey
- Identify PowerSchool Project Team
  - Project Manager
  - Application Specialist(s)
  - Education Impact Consultant (EIC)
- Schedule Session One: Kickoff Meeting
- Provision and configure production environment

Customer Responsibilities

- Complete Intake Survey
- Identify Customer Project Team
  - **Primary Contact:** this individual is the primary point of contact between PowerSchool and customer for the duration of the project; they will distribute tasks to the customer project team and will partner with PowerSchool to ensure the implementation remains on track and milestones are completed on time.
  - **Assessment & Curriculum Director:** this individual is a district-level administrator who is knowledgeable about curriculum and content; they will partner with PowerSchool to ensure that assessment and curriculum requirements are being met, and will provide insight into how Performance Matters can better meet those needs.
  - **Data Lead Specialist:** this individual is a data administrator, or anyone with administrative access to your SIS; they should also be familiar with exporting data files.
- Schedule Session One: Kickoff Meeting
- Identify assessment data measures that will be imported during implementation
- Identify methods for exporting and providing assessment data measures

Completion Criteria

This activity will be considered complete when:

- Intake Survey is completed
- Project Teams are identified
- Session One: Kickoff Meeting is scheduled

PowerSchool

Performance Matters Assessment & Analytics
Standard Statement of Work

Planning

PowerSchool Responsibilities

- Conduct Session One: Kickoff Meeting
- Provide best practice recommendations on roles, resources, and milestones
- Update the Project Plan to reflect anticipated implementation timeline and assigned resources
- Identify tentative dates for training
- Schedule regular project status update sessions

Customer Responsibilities

- Attend Session One: Kickoff Meeting
- Partner with PowerSchool resources to establish implementation timeline and business needs
- Partner with PowerSchool resources to establish tentative training dates
- Review provided PowerSchool documents post-Kickoff Meeting
- Manage business process change

Completion Criteria

This activity will be considered complete when:

- Session One: Kickoff Meeting is completed
- The Project Plan is revised and updated
- Authentication document is completed and delivered

PowerSchool

Performance Matters Assessment & Analytics
Standard Statement of Work

Authentication Services

As part of these services, PowerSchool will assist the customer to configure Single Sign On (SSO) for the PowerSchool product(s) undergoing implementation under the scope of this statement of work. Additionally, PowerSchool will assist with the enablement of the PowerSchool AppSwitcher for any other live PowerSchool product(s) (i.e. already implemented) where AppSwitcher is supported. This will be a one-time setup for which the PowerSchool implementation team will assist with the setup and configuration of the authentication services for live product(s), and the currently implemented product(s).

PowerSchool Responsibilities

- Update user accounts to ensure matching between systems
- Configure SSO
- Configure AppSwitcher with current and new PowerSchool products

Customer Responsibilities

- Identify and enable the Identity Provider (IDP) for setting up of SSO
- Test the setup of Authentication services and AppSwitcher

Completion Criteria

- Customer signs the final checklist that Authentication Services are complete

PowerSchool

Performance Matters Assessment & Analytics
Standard Statement of Work

Executing

During the Executing phase of the implementation project, PowerSchool will partner with the customer to configure and set up the solution, dictated by the package and services purchased:

Assessment & Analytics Standard Package | 12-Week Implementation
- Analytics (Baseball Card, Scoreboard, My Dashboard)
- Assessment (OLA, SIA)
- Comprehensive Data Imports
  - Core Files (student, teacher, course, schedule, school)
  - Grades, Attendance (daily and/or period), Discipline
- State assessment measures data imports (including up to three years of historical data)
- Partner assessment measures data imports
  - iReady
  - STAR
- Three supported third-party assessment measures data imports (including up to three years of historical data)
- Integrations (as applicable)
  - PowerSchool SIS Gradebook Writeback
  - eSchoolPLUS Teacher Access Center Writeback
  - Schoology
  - Kickboard
- Interventions & Early Warning System (EWS)
- Staff & Student SSO (SAML)
- Training: 5 participants, 3 days

Throughout the implementation project, PowerSchool will schedule and conduct regularly recurring working sessions, roughly following the below guidelines.

Please note: this is a tentative outline of each project session, and is subject to change based on timeline requirements):

PowerSchool

Performance Matters Assessment & Analytics
Standard Statement of Work

Session	Topics
Planning	
Session 1: Kickoff Meeting	
	Review Implementation Process, Deliverables, Expectations, Project Plan
	Capture answers to Discovery Questions
Executing	
Session 2: Core Data	
	Pull & Schedule Core Files (Student, Teacher, Course, Schedule, School)
	Pull & Schedule Grades, Attendance (daily and/or period), Discipline
	Review requirements and layouts for assessment files
Session 3: Assessment Data Review	
	Address outstanding questions related to core data imports
	Verify completion of core data import and signoff on each type
	Review color cuts for grades and assessment data requirements
	Review imported assessment data
Session 4: Settings and Permissions	
	Review imported assessment data and signoff on each assessment type
	Review and configure settings and permissions
Session 5: Student Login, Custom User Files	
	Review Student Login and Custom User files
	Review scanner setup (if applicable)
Session 6: Custom Filter, Student Portal	
	Discuss process for updating non-staff users
	Review Custom Filter File
	Review Student Portal
	Review and schedule training
Session 7: Early Warning System (EWS)	
	Review and configure EWS
	Confirm EWS configuration completed
Session 8: Project Review	
	Ensure any outstanding items are addressed
	Introduce project closure process and next steps
Monitoring	
Session 9: Admin Walkthrough	Review solution end-to-end
	Discuss next steps and roll-out plan
	Review and complete Confirmation of Deliverables document
Session 10: Transition to Support	
	Review methods for contacting Support
	Introduce next steps and complete implementation project

PowerSchool

Performance Matters Assessment & Analytics
Standard Statement of Work

PowerSchool Responsibilities

Project Management

- Schedule and conduct regularly recurring remote working sessions
- Maintain project plan with updated assignments and due dates
- Provide status updates and meeting notes to all project team members
- Ensure timely completion of milestones and maintain adherence to project timeline
- Partner with customer to coordinate training and product rollout

System Configuration & Data Imports

- Provision production site and configure features and permissions
- Collaborate with customer to pull and schedule core data and grades, attendance, and discipline
- Collaborate with customer to import and validate assessment data using provided templates
- Collaborate with customer to ensure solution is configured appropriately

Consulting

- Offer consultative services adhering to best practices
- Partner with customer to coordinate training and product rollout

Customer Responsibilities

- Participate in regularly recurring remote working sessions
- Track completion of assigned tasks and determined due dates in project plan
- Ensure timely completion of deliverables and milestones while maintaining adherence to project timeline
- Collaborate with PowerSchool to pull and schedule core data and grades, attendance, and discipline
- Extract assessment data from existing system(s) and provide in the requested format through SFTP account
- Collaborate with PowerSchool to import and validate assessment data using provided templates
- Review and verify accuracy of imported data
- Collaborate with PowerSchool to ensure solution is configured appropriately
- Manage customer process change throughout the project
- Review and verify solution configuration throughout the duration of the project
- Provide signoff on specified milestones to confirm completion throughout project
- Collaborate with PowerSchool for consultation and best practices

Performance Matters Assessment & Analytics
Standard Statement of Work

Completion Criteria

This activity will be considered complete when:

- Core data has been pulled, scheduled, and verified
- Assessment data has been imported and validated
- Consultation services have been provided to ensure best practices and effective adoption
- Customer has provided signoff on project milestones

Monitoring

PowerSchool Responsibilities

- Provide guidance for standard user acceptance testing procedures
- Collaborate with customer to schedule purchased training session(s)
- Collaborate with customer for consultation and best practices

Customer Responsibilities

- Complete standard user acceptance testing procedures
- Collaborate with PowerSchool to schedule purchased training session(s)
- Collaborate with PowerSchool for consultation and best practices
- Manage business process change throughout the project

Completion Criteria

This activity will be considered complete when:

- Customer has completed standard user acceptance testing
- Customer has scheduled and coordinated training sessions(s)

PowerSchool

Performance Matters Assessment & Analytics
Standard Statement of Work

Closing

PowerSchool Responsibilities

- Review and verify completed project deliverables to finalize completion of project scope
- Introduce customer to Support contact methods
- Provide Confirmation of Deliverables document to customer for approval
- Provide Customer Satisfaction Survey

Customer Responsibilities

- Review and verify completed project deliverables to finalize completion of project scope
- Review Support contact methods and understand that Support will the primary contact at project completion
- Review Confirmation of Deliverables document and provide approval
- Complete Customer Satisfaction Survey

Completion Criteria

This activity will be considered complete when:

- Customer provides approval of Confirmation of Deliverables document