AIMS K-12 College Prep Charter District
Board Submission Cover Letter

Submitter Information

Full Name: Natalie Glass

Position/Title: Director of Schools

Department: AIMS College Prep High School

Date of Submission (MM/DD/YYYY): 02/20/2024

Item Details

Title of Item: Powerschool - Naviance Premium

Is this item a: ☑ New Submission

☐ Renewal

If Renewal: Please summarize any changes from the previous submission:

Approvals

Has this item been reviewed by:

☐ Superintendent

☐ Chief Business Officer (CBO) (If budget changes)

☐ Director of Compliance (If plan changes)

☐ Neither

Committee Review

Has this item been through the appropriate committee review process?

☐ Yes   ☐ No

If yes: Please specify which committee(s) and provide minutes or approval documentation:

If no: Explain why:

Deadline Information

Is there a submission deadline for this item?

☐ Yes   ☑ No

If yes: Please indicate the deadline date (MM/DD/YYYY):

Financial Information (if applicable):

Total Cost: $ 7304

Is this expenditure included in the annual budget?

☑ Yes   ☐ No

Please specify in which plan this expense is indicated:

☐ SPSA   ☐ LCAP   ☐ Other: A-G Grant

Invoice

Date	06/01/2023
Invoice#	**INV351529**
Terms	Net 30
Due Date	07/01/2023
Customer ID	10019306

Bill To
American Indian Community Charter School
171 12th Street
Oakland CA 94607
United States

Ship To
American Indian Community Charter School
3637 Magee Avenue
Oakland CA 94619
United States

VAT:

PO#	Quote#	Sales Rep
ex Q-750959	Q-750959	Ryan Puorro

Product Description	Qty	Unit	Tax	Unit Price	Extended Price
SW-NAV-S-NVPM: Naviance Premium	450	Students	$0.00	11.95	$5,377.05
SW-NAV-S-NVPMAS: Naviance Premium: Assessment	450	Students	$0.00	0.00	$0.00
PS-NAV-O-NVPSSD: Naviance Private School Deployment	1	Each	$0.00	976.00	$976.00
PS-NAV-O-NVTR: Naviance Training Remote	6	Hour	$0.00	260.00	$1,560.00
PS-NAV-O-NVRC: Naviance Remote Consulting	4	Hour	$0.00	192.00	$768.00
SW-NAV-O-NVOTD: Naviance One Time Discount	1	Each	$0.00	-1377.05	($1,377.05)

Subtotal	Tax Total	Total (USD)
$7,304.00	$0.00	$7,304.00

Amt. Due (USD)
$7,304.00

Pay Now

Thank you for your business

Licensee shall be subject to a monthly charge of 1.5% on all amounts not paid when due (18% annually) , or, if a lower maximum rate is established by law, then such lower maximum rate.

PowerSchool
Powering Brighter Futures

PowerSchool Group LLC
150 Parkshore Dr., Folsom, CA 95630
Quote #: Q-750959 - 2
Quote Expiration Date: 31-MAR-2023

Sales Quote - This Is Not An Invoice

Prepared By:	Susan Tresco	Customer Contact:	Donna Mobley
Customer Name:	American Indian Community Charter School	Title:	Dean of Academics
Enrollment:	450	Address:	171 12th Street
Contract Term:	40 Months	City:	Oakland
Start Date:	16-MAR-2023	State/Province:	California
End Date:	31-JUL-2026	Zip Code:	94607
		Country:	United States
		Phone #:	(510) 220-5044

Product Description	Quantity	Unit	Extended Price
Initial Term 16-MAR-2023 - 31-JUL-2024			
License and Subscription Fees			
Naviance Premium	450.00	Students	USD 5,508.20
Naviance Premium: Assessment	450.00	Students	USD 0.00
Naviance One Time Discount	1.00	Each	USD -1,508.20
	License and Subscription Totals:		**USD 4,000.00**
Professional Services and Setup Fees			
Naviance Private School Deployment	1.00	Each	USD 976.00
Naviance Remote Consulting	4.00	Hours	USD 768.00
	Professional Services and Setup Fee Totals:		**USD 1,744.00**
Training Services			
Naviance Training Remote	6.00	Hours	USD 1,560.00
	Training Services Total:		**USD 1,560.00**

Subscription Period Total

PowerSchool hereby agrees to allow the Customer to make the following non-standard payments for the current annual term:

Total Discount	**USD 2,334.20**
Initial Term	**16-MAR-2023 - 31-JUL-2024**
Amount To Be Invoiced	**USD 7,304.00**

Due Date	Payment Amount
1-MAR-2023	**USD 0.00**

1-JUL-2023	USD 7,304.00

Naviance Premium	450.00	Students	USD 4,000.00
Naviance Premium: Assessment	450.00	Students	USD 0.00

Annual Ongoing Fees Total: **USD 4,000.00**

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_Feb2022/

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: 2-MAR-2023

American Indian Community Charter School
Signature:
Maurice Williams
8B0D713501E6496...

Printed Name:
Maurice Williams

Title:
Head of School

Date:
27-Mar-2023

Sales Quote - This Is Not an Invoice
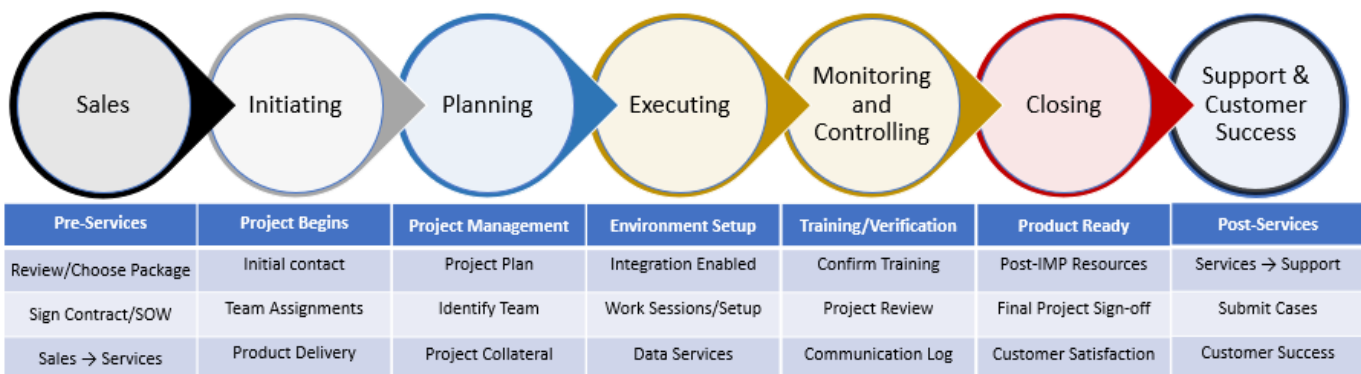
PowerSchool

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

This edition applies to the current PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates. The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

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 (if needed).
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. 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 project

- **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.

PowerSchool

Naviance Private Bundle Statement of Work
Initiating (Pre-requisites before Assess)

PowerSchool Responsibilities

- Provide Intake information and this Statement of Work.

Customer Responsibilities

- Complete intake information, review and return this Statement of Work.

Assess

Completion Criteria

This phase will be considered complete when pertinent core deliverables below are completed:

Project Phase: ASSESS: Tasks and Deliverables	Responsible Party
Establish goals, objectives, functionality, and timelines for implementation (provided via the project plan)	PowerSchool
Connect with customer education trainer for Professional Development scheduling	Customer
Schedule recurring status meetings (up to 4) and data integration meeting (1 hour)	PowerSchool

Assumptions

The implementation includes up to 4 client meetings with a PowerSchool Application Specialist, in addition to the Data Integration Meeting (1 hour).

The implementation includes up to 8 hours of PowerSchool consultation Services total, inclusive of client meetings above.

Import

Data imports are essential to the functionality of Naviance. Depending on how your district or school decides to manage imports, certain data types can be setup to automatically update while others may need to be manually updated. Data imports into Naviance can be completed using any combination of (1) integrations, (2) automated imports via SchoolSync, and/or (3) manual imports. Customer is only responsible for completing the steps for their chosen data integration option(s).

Completion Criteria

This phase will be considered complete when pertinent core deliverables below and user acceptance testing have both been completed.

Naviance Private Bundle Statement of Work

Project Phase: IMPORT: Tasks and Deliverables	Responsible Party
Define data to import	PowerSchool
Data Integration overview meeting (1 hour) to determine data integration strategy and next steps + up to 1 hour of additional support on data integration steps	PowerSchool
Complete necessary steps to integrate data and ensure student and necessary data is populated in Naviance	Customer

Authentication Services

As part of these services, PowerSchool will guide 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 enabling the PowerSchool AppSwitcher feature 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 AppSwitcher with current and new PowerSchool products

Customer Responsibilities

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

Completion Criteria

This phase will be considered complete when:

- Customer signs the final checklist that Authentication Services are complete

Configure

Completion Criteria

This phase will be considered complete when pertinent core deliverables below and user acceptance testing have both been completed.

PowerSchool

Naviance Private Bundle Statement of Work

Project Phase: CONFIGURE: Tasks and Responsibilities	Responsible Party
Configure Naviance Student	
- Review configuration options for Naviance Student	PowerSchool
- Update Naviance student permissions for students and parents	PowerSchool
- Create custom Welcome Messages	PowerSchool
- Determine any additional features to be activated based on school/district's specific goals	Customer
- Add school logo	Customer
- Add additional content (per site)	Customer
- Activate Naviance Student (per site)	Customer
- Review Naviance Student configuration completed by PowerSchool	Customer
Configure College Planning	
- Provide high level overview of College Planning Tools	PowerSchool
- Add colleges to quicklist	Customer
- Create or subscribe to college groups	Customer
- Set up Rep Visits (or add college visits manually)	Customer
- Create scholarship categories	Customer
- Import scholarships (or add scholarships manually)	Customer
Configure Naviance eDocs	
- Consult on counselor/staff college application management process using eDocs	PowerSchool
- Activate Naviance eDocs	Customer
- Update eDocs Settings (Common Application integration)	Customer
- Update staff permissions for eDocs	Customer
- Update transcript manager settings	Customer
- Update teacher recommendation manager settings	Customer
- Update student permissions for eDocs	Customer

Note: Any Training purchased alongside this Deployment will be made available during and after the deployment timeframe, and conducted by a PowerSchool Customed Education trainer

Deploy

Completion Criteria

This phase will be considered complete when pertinent core deliverables below and user acceptance testing have both been completed.

Naviance Private Bundle Statement of Work

Project Phase: DEPLOY: Tasks and Responsibilities	Responsible Party
Rollout Naviance eDocs	
- Introduce college application process and features to students	Customer

Note: Any Training purchased alongside this Deployment will be made available during and after the deployment timeframe, and conducted by a PowerSchool Customed Education trainer

Measure

Completion Criteria

This phase will be considered complete when pertinent core deliverables below are completed:

Project Phase: MEASURE: Tasks and Deliverables	Responsible Party
Finalize project QA	Customer
Conduct project wrap-up meeting and hand off to Support	PowerSchool

Assumptions

PowerSchool's Quality Assurance (QA) processes will focus on the technical aspects of the solution to ensure it is accessible, functional, and adheres to best practices. It is the Customer's responsibility to ensure all agreed-upon functionality is behaving as intended by the product's existing functionality.

Closing

PowerSchool Responsibilities

- Assist in identifying the Technical Contact who will be able to view all open Support cases for the school/district
- Transition the Customer to Support, providing instructions on methods of communication with Support.

Customer Responsibilities

- Request Technical Contact to be added (if necessary)
- Contact the Support Team with any post-project requests.

Completion Criteria

This activity will be considered complete when:

- The Customer has been introduced to Support and instructions for post-project support have been provided to the Customer.

PowerSchool

Naviance Private Bundle Statement of Work

Primary Customer Roles & Responsibilities in Project

Roles and Responsibilities
Project Lead: Main contact for the Naviance implementation project **Solution Design:** Responsible for contributing goals and requirements of Naviance product. **Data Integration Design:** Has knowledge of any data integrations required and command of providing data to Naviance and extracting data or reports provided by Naviance. **Administrative Tool Design:** Responsible for requesting any revisions to the administrative toolset. **Training Program Design**: Responsible for scheduling and facilitating training for appropriate users.

Project Timeline and Customer Expertise
The implementation timeline is four (4) consecutive weeks beginning with the Project Kickoff meeting. The Implementation process requires that the Customer be prepared to dedicate time and resources with the requisite expertise to prepare for end users to begin using the Naviance product. The Customer must: - Review and test all technical components to ensure they are built to agreed-upon specifications   - Review online materials to establish a baseline command of the tools required.   - Assign permissions to staff as needed.   The work conducted by the Customer must be planned throughout the implementation for deadlines to be met. The Customer may elect to expand their implementation team and delegate tasks accordingly. To ensure success, designate staff resources to the Implementation who possess: - An understanding of how the Customer intends to use Naviance   - Technical expertise commensurate with the Customer tasks defined throughout the SOW.   - The ability and access to extract, provide, receive, and interpret data.

Meetings
Your Naviance Application Specialist/Project Manager will schedule meetings during implementation. These calls will also be checkpoints at which to track progress and ensure deadlines are being met. They will also allow for consultation on any implementation steps assigned. It is critical that the Customer project team be prompt and prepared for each meeting in alignment with the Project Plan provided at the outset of the project. Cancellation within 24 hours or no showing to the meeting will result in a depletion of Services backlog the equivalent of half the billable time of the scheduled meeting.

PowerSchool

Naviance Remote Consulting Statement of Work

PowerSchool Responsibilities to Initiate Engagement:

- Provide Intake information and this Statement of Work.

Customer Responsibilities to Initiate Engagement:

- Reply to Intake survey, review and return this Statement of Work.

Timeframe

- This Statement of Work aligns with the active dates of your contract for Naviance Services.

Scope:

- Naviance Remote Consulting hours for an ongoing consultative engagement can be used for: data import/integration and set up questions, configuration assistance, deployment/rollout assistance for particular modules, consultation on best practices (e.g. what is the best way to do XYZ with Naviance), Q&A or consultation sessions with staff on specific processes or parts of the product, best practice webinars, and toolkits/resources.
- Naviance Remote Consulting cannot be used for functional training or support relating to product defects or issues.

Meetings:

- Meetings with your Naviance Application Specialist/Project Manager are intended to be a space to address questions, plan for future needs, and ensure your implementation is running smoothly. It is critical that the Customer project team be prompt and prepared for each meeting. Cancellation within 24 hours or no showing to the meeting will result in a depletion of Services backlog the equivalent of half the billable time of the scheduled meeting. Outside of scheduled meetings, the Naviance Services team adheres to a 24-hour service-level agreement (SLA) for responding to customer outreach. Naviance Support is available to both school and district users to respond to immediate technical needs or questions are they arise.

Change in Scope:

- Naviance Remote Consulting hours are designed and intended to be used flexibly by customers. If not otherwise known, our team will work with your team to determine a high-level plan upon project kick off for maximizing the Services you have purchased. Any requested deviation from the agreed-upon scope needs to be documented via email by the customer so the Application Specialist can adjust the above scope and provide an update on the hours remaining on the project to confirm sufficient hours remain to address additional needs as they may arise.