



*Charter School Management Corporation  
Helping Charter Schools Succeed  
Corporate Headquarters  
40925 County Center Drive  
Temecula, CA 92591*

May 31, 2016

**Services Agreement for *Three Rivers Charter***

This Services Agreement (“Agreement”) for charter school business support services is between the Charter School Management Corporation (hereinafter referred to as “CSMC”) and *TRC* (hereinafter referred to as “Customer” or “you”). CSMC and *TRC* are each individually a “party” and sometimes referred to collectively as the “parties.”

The parties to this Agreement understand that this is an agreement whereby *TRC* desires to retain CSMC, because of CSMC’s expertise, prior experience and comprehensive service offerings, as they relate to *TRC* operation of one or more charter schools, and that CSMC desires to provide expertise for the benefit of *TRC* using its knowledge, skills, experience and abilities.



## CSMC Scope of Service Summary

### Summary of *Three Rivers Charter*

The following information regarding *TRC* operations, size and authorizing agency(ies) has been provided by *TRC*, and CSMC may rely on such information.

Number of schools = 1

Approximate number of students\* = 120

Authorizing agency or agencies = Fort Bragg Unified

### Summary of services offered within:

- Back-Office Services
- Charter Vision Access
- Fully Supported PowerSchool Services (as defined in Attachment A)
- CALPADS support (as defined in Attachment A)

### Contract Period:

The Contract Period shall be *July 1, 2016* through *June 30, 2018*

### Summary of Pricing:

Setup Fee = \$ 0

Ongoing Monthly Fee = \$ 4,000

\*The pricing set forth above is predicated on CSMC's understanding of TRC's support needs, based on TRC's representations. If TRC's number of students is appreciably different from this number, CSMC will adjust its fees accordingly. With that principle in mind, CSMC will use reasonable efforts to modify elements of its program to accommodate TRC's changing needs.



### CSMC Scope of Services

In order to support TRC, CSMC shall provide the following specific services (defined below as the “Services”):

#### 1) Fiscal

- a) **Bookkeeping Support** – Utilizing an enterprise-quality bookkeeping system from Sage, one of the country’s largest bookkeeping software companies, CSMC will provide a complete bookkeeping solution to TRC. Specifically, CSMC will:
  - i) **Chart of Accounts** – Create a Standard Account Code Structure (SACS) and Generally Accepted Accounting Principles (GAAP) compliant and TRC tailored Chart of Accounts.
  - ii) **General Ledger** – Create and maintain SACS and GAAP compliant General Ledger. CSMC will modify, revise, and incorporate more or less detail in account code structure as requested by TRC.
  - iii) **Accounts Receivable** – Monitor receipt of revenues tied to budget and expected entitlements. Includes all collection activities necessary to obtain past due funding.
  - iv) **Accounts Payable** – Process all vendor invoices and payments. Includes utilizing GAAP system for verification, approval, and payment. System includes utilization of AP batch approvals, and check register reviews. Includes preparation of all 1099’s.
  - v) **Fund / Restricted Accounts** – Track restricted revenues (e.g. Title I) and/or other revenues client requests in writing that CSMC separately track (e.g. parent fundraising) and corresponding expenditures via unique account coding to yield separate net income / loss per account.

#### 2) Payroll

- a) **Payroll setup** – Based upon the payroll information from TRC, CSMC will enter each full- and part-time employee into an enterprise-class payroll service, for purposes of calculating appropriate withholdings, taxes and other deductions. TRC will be responsible for paying the payroll service’s fees directly.
- b) **Payroll processing** – Includes updating, maintenance, and regular, emergency and special payroll entry, as requested by TRC. Payroll processing includes all of the following:
  - i. Complete STRS and PERS reporting through the County Office of Education.



Please note that some Counties or Districts charge a fee to charter schools to transmit STRS and PERS information to the STRS and PERS systems. If the county or district charges such a fee, TRC will be responsible for paying this fee directly.

- ii. Voluntary Deductions (e.g. 403(b))
  - iii. Distribution of pay warrants and direct deposit administration
  - iv. Distribution of W2's
  - v. Processing of Worker's Compensation
  - vi. Salary adjustments
  - vii. Verify Budget Numbers, Dates and Rates of Pay
  - viii. Prepare and Maintain Annual Calendars
  - ix. Process Exit Forms (resignations, terminations, etc.)
- c) **Insurance services and coordination** – CSMC will act as the bookkeeping liaison for workers compensation and Health and Welfare policies. CSMC will assist in the selection of insurance service providers (if requested by school), emphasizing selecting a provider that will provide high value support to the charter school.
- d) **Credential and TB Tracking** – If client makes a written request, CSMC will provide tuberculosis and credential checks and implement monitors and alerts to ensure teachers' credentials and TB clearances are up to date, valid, and provide notice when expired. Client must provide a desire for this service in a separate written request.

### 3) External Reporting

- a) **Preparation and data submittal of required budget reports in SACS format** – includes 1<sup>st</sup> Interim, 2<sup>nd</sup> Interim, next year proposed, and unaudited actual to district, county and state entities.
- b) **Attendance** – includes preparation and data submittal of Period 1 (P1), Period 2 (P2), and annual (P Final) attendance reports to district, county and state entities.
- c) **Audit** – CSMC will act as the lead point of contact with TRC's auditor and will work with the auditor through finalization of the audit report. Based on completion of consolidated financial statement audit, CSMC will coordinate the preparation and submission of Federal Form 990 and California Form 199 by applicable deadlines with external accounting firm.
- d) **Categorical program budgeting and oversight** – separate fund tracking for all



restricted or categorically relevant programs.

- e) **Consolidated Application** – If TRC wishes to apply, CSMC will complete Parts 1 and 2 of the No Child Left Behind Consolidated Application, which is used to apply for federal Title funds (e.g. Title I). Additionally, CSMC will provide assistance during the audit required by the Single Audit Act of 1984.
- f) **National School Lunch Program (NSLP)** – If your school participates in this program, CSMC will assist with NSLP bookkeeping, submission of monthly food program reimbursement forms and completion of required annual reports. If client wishes for CSMC to assist with NSLP, client must request so in writing and notify CSMC that client is in participation of the program.
- g) **CBEDS** – Assist schools in the completion of their School Information Form for Independently Reporting Charter Schools CBEDS annual survey.
- h) **General Reporting** – includes any necessary grant, award, program, state, county, and district report related to financial, or operating activity. This section does not apply to CALPADS data reporting.

#### 4) Internal Reporting and Budgeting

- a) **Budgeting/Cash Flow** – CSMC collaboratively with TRC shall develop and modify both current and future year budgets and pro forma cash flow models. All state mandated development and adoption timelines shall be incorporated into the planning process. At least one budget revision shall occur each year upon certification of the P1 report. Other modifications are to be performed as necessary or requested by TRC, including for strategic planning purposes. In today's challenging economic times, it is crucial that the budget is constantly reviewed and modified as needed; therefore, **there are no limits to the number of budget revisions that may be requested by TRC.** Cash flow timing and Budget to Actual reporting on a monthly basis shall be reported to TRC.
- b) **Internal Monthly Reporting** – Please note that CSMC's Charter Vision® web portal (described in item #5 below) provides anytime, anywhere client access to dozens of detailed financial reports. In addition to this, CSMC will create and send to TRC *monthly* reports including:
  - i) Budget to actual income statement
  - ii) Balance sheet
  - iii) Cash flow projections
  - iv) Fiscal analysis and commentary as applicable



- c) **Board Meeting Support** – CSMC’s School Business Manager will be available as requested for TRC’s board meetings to present financial reports and/or answer financial questions (by teleconference or in person). There is no limitation to the number of times TRC may request the School Business Manager’s attendance – on average, CSMC’s clients tend to request the School Business Manager’s presence every other month. Additionally, CSMC will provide your board of directors with training and access to our Charter Vision system. This will allow the board to retrieve financial statements and “board reports” 24 hours a day, 7 days a week.

#### 5) **Charter Vision®**

- a) Charter Vision is CSMC’s online, client-specific business information portal. Charter Vision has your school’s latest and detailed financial metrics and reports, upcoming deadlines, shared document templates, latest announcements, and upcoming deadlines. Access this portal anywhere, anytime. CSMC believes this is a great tool for increasing access and transparency to internal constituents. For instance, charter school board members can access the latest board and financial reports directly through Charter Vision. School may add as many licenses and grant access to an unlimited number of people at **no charge**.

#### 6) **Policies**

- a) **Fiscal/Operating Procedures** – With the collaboration of TRC, CSMC will assist in the development and maintenance of fiscal and operating procedures and control policies.
- b) **Safety Manual** – With the collaboration of TRC, CSMC will develop and maintain a complete and compliant Safety Manual.

#### 7) **Client Support**

- a) **Client Support** – At TRC’s written request, CSMC will provide assistance with funding, budgeting, strategy, fiscal control, or other operational/financial questions or issues.

#### 8) **Charter Development and GRANTS Administration**

- a) **Grants** – Track direct and allocate costs to grants.
- b) **Charter Renewal** – On a separate fee basis, CSMC will assist with a charter petition for renewal.



**9) Student Information System (SIS)**

**a) PowerSchool Premier** – PowerSchool is the market leader for SIS products. CSMC assists with the implementation, maintenance, troubleshooting, and updating. CSMC provides an ongoing program to assist you with your charter school operations. CSMC’s support will not only dramatically ease your implementation of PowerSchool, but lower your overall support and operational costs. CSMC’s support consists of but not limited to:

- i) Initial Product Roll out**
- ii) Initial Product Training**
- iii) On Going Maintenance & Support**
- iv) Access to CSMC Help Desk**

See Service level agreement (Attachment A) for specifics

**10) CALPADS State Reporting Services** – Full-Service CALPADS Support - CSMC and TRC agree to discuss specifics regarding CALPADS support and shall memorialize the specific level of service for such support in a separate agreement.

**Fees**

**One-Time Setup Fee – \$ 0**

This fee includes all of the activities necessary to get your information into the CSMC system to enable the above services. This includes such information as:

1. Exporting information from your current bookkeeping system (if you are an operating charter school) or gathering initial bookkeeping information (if you are a new school) into our enterprise-quality software system
2. Working with you to input all of your employees’ personal- and compensation-related information into our payroll system
3. Identifying all of the revenue programs your school is possibly eligible for, assisting you to make strategic decisions about which ones to pursue, and helping you to apply to any you might have missed to ensure your school receives as much revenue as possible
4. Projecting your cash flow needs for the upcoming contract period and helping you start identifying possible ways of surviving any gaps



5. Identifying which financial reports you would like to see on an ongoing basis to help you make the best strategic decisions and keep other stakeholders informed
6. Assessing your current operational and financial policies, comparing them to current best practices, and improving those that need to be updated
7. Ensure that you are comfortable with how CSMC will support you and answer any of your initial questions

### **Scope of Specific Services**

The specific services, work and tasks set forth above shall collectively be referred to as the “Services.” CSMC shall only be required to perform the Services, and shall not be required to perform any services, work or tasks other than the Services. If CSMC does perform services, work or tasks other than the Services, CSMC will not be required to do so in the future, and CSMC may with the consent of Customer seek reimbursement or payment from Customer for such services, work or tasks. Each agreement is different, and Customer acknowledges and agrees that the Services that CSMC is required to perform under this Agreement do not include all of the services CSMC has the ability to perform, and specifically does not include every service referred to or listed in CSMC’s website ([www.csmci.com](http://www.csmci.com)) or other materials.

### **Ongoing Fee for Services**

In addition to the One-Time Set-Up Fee, TRC shall pay to CSMC monthly installments of \$ 4,000 beginning in July 1, 2016. This fee shall cover payment to CSMC for the Services. TRC shall pay this ongoing fee for the Services until the expiration or termination of this Agreement, at which time TRC shall within 15 days pay CSMC any unpaid monthly fees for Services. TRC will promptly pay to CSMC the amounts set forth in this Agreement upon receipt of each monthly billing statement. Customer’s payment obligation is absolute, and Customer may not withhold or deduct payment for any reason.

### **Term of Agreement**

Setup will begin on or around July 1, 2016 and will last for all of that month.

The term of this Agreement and CSMC’s obligation to perform the Services will begin on July 1, 2016 (“Start Date”) and will be deemed automatically renewed on the annual anniversary of the Start Date, unless either party provides the other party with written notice 45 days in advance of the next anniversary of the Start Date of its intent to not renew this Agreement. If CSMC does not physically receive such a notice of non-





renewal prior to or on the 45<sup>th</sup> day before the next Start Date, then CSMC may rely on the automatic renewal of the term of this Agreement. However, in no event shall the term of this Agreement exceed the charter of TRC.

### **Parties – No Agency**

This Agreement is not intended to, and shall not be construed to create the relationship of agent, employee, partnership, or joint venture, or any other relationship other than independent contractor between CSMC and TRC. CSMC shall be free to provide similar services for other clients.

### **Communication Between the Parties**

TRC will direct all communication to the CSMC Account Manager and CSMC will direct all communication to TRC's designated primary contact, unless either party designates another representative and provides written notification of the change to the other party. CSMC agrees to keep all communication and work product with TRC confidential to the allowable extent of State and Federal Law.

### **Parties Are Sole Obligors**

This Agreement is entered into by the TRC for itself alone and not on behalf of, or as an agent for, any other entity, agency, school, or school district. Any obligation of the parties to this Agreement is and shall remain the sole responsibility of the parties. CSMC agrees that no employee, executive, shareholder or director of TRC shall be personally liable for payment or any breach of this Agreement, and that CSMC may only look to TRC for payment or performance of the obligations required under this Agreement. Likewise, TRC agrees that no employee, executive, shareholder or director of CSMC shall be personally liable for payment or any breach of this Agreement, and that TRC may only look to CSMC for payment or performance of the obligations required under this Agreement. In addition, CSMC will be providing Services only to Customer, and will not be required to perform work or services to any company or person affiliated with Customer.

### **Document Retention**

Customer agrees that it will be responsible for providing CSMC with all records pertinent to the Services, including information stored electronically such as e-mails and other computerized records. Customer agrees to retain, and not destroy, its records for the duration of any period mandated by applicable laws. CSMC shall retain its files for 3 years, after which time CSMC shall destroy its files unless Customer requests in writing that CSMC retain files for shorter or longer retention period.



### **No Guarantee – Limitation to Services and Exclusion of Liability for Other Work**

CSMC cannot guarantee that the Services it provides under this Agreement will yield the results sought by TRC. CSMC will use good faith efforts in providing Services to secure the reasonable objectives sought by TRC during CSMC's performance of its Services under this Agreement. TRC understands and agrees that it is retaining CSMC to perform only those Services listed above and defined in this Agreement as the Services. TRC agrees that CSMC will have no liability for, or indemnity obligations arising out of, CSMC's provision of any services, task or work not included within the definition of Services.

### **No Liability for Referral**

The Services which CSMC is required to perform under this Agreement do not include referring Customer to any other service provider, person or company. However, from time to time, customers sometimes seek a referral from CSMC. Customer acknowledges and agrees that if it seeks a referral from CSMC, Customer shall be responsible for interviewing, researching, and retaining any such service provider, person or company; and Customer shall rely on its own assessment in making any hiring decision. CSMC does not warrant or guarantee the services, work or results of any service provider, person or company which CSMC may refer to Customer.

### **CSMC's Right to Rely**

In performing the Services under this contract, CSMC has the right to rely upon the truthfulness, completeness and accuracy of the information and data provided to CSMC by TRC, its directors, officers, employees and agents. CSMC shall not be expected to, and TRC may not rely on CSMC to, disclose errors, fraudulent financial reporting, and misappropriation of assets, or illegal acts that may exist at one or more schools or offices operated by Customer. TRC understands and agrees that CSMC has no responsibility to identify and communicate deficiencies in TRC's internal controls as part of CSMC's provision of Services under this Agreement. In addition, TRC shall have the responsibility to promptly notify CSMC of any material change in TRC or TRC's operations that might impact CSMC's ability to provide the Services under this Agreement.

### **Assignment**

This Agreement is not assignable without the written consent of the parties hereto.

### **TRC's Direction - Indemnification**



TRC acknowledges that by providing the Services, CSMC performs an advisory and task-related function, and therefore provides the Services at the direction of TRC. TRC retains ultimate decision-making authority on the execution of agreements, transactions and payments, and the determination of rights, processes, controls and obligations rest entirely within the discretion and control TRC. To the extent that TRC properly directs CSMC, and to the extent that CSMC fails to properly perform the Services, CSMC shall indemnify and hold TRC and its officers and employees harmless from and shall defend at its own expense all claims, demands, or suits at law or equity arising in whole or in part, but only to the extent that they arise from CSMC's active negligence or express breach of its obligations under this Agreement. Nothing in this Agreement shall require CSMC to indemnify TRC against claims, demands or suits based upon intentional or negligent acts of TRC, its agents, officers or employees.

#### **Professional Services Exclusion**

Customer acknowledges and agrees that CSMC does not provide legal services or licensed accounting services, and that those and other licensed professional services are not included within the Services which CSMC is required to provide under this Agreement. Customer agrees to consult a lawyer and/or licensed accountant if Customer seeks legal or accounting advice, and shall not rely on CSMC for such advice, consultation or services.

#### **Charter Revocation, Notice to Cure, or Closure**

Unless included within the definition of Services for which CSMC is responsible under this Agreement, CSMC shall not be responsible to do any work or perform services related to any charter revocation, notice to cure or related notices; nor shall CSMC be responsible for doing any work or performing any services related to any closure of any school operated by Customer.

#### **Customer's Premises/Facilities**

Customer agrees that it, and not CSMC, is responsible for the physical premises and facilities Customer operates, including whether those premises/facilities comply with the American Disabilities Act and any other applicable statutes or regulations. Customer is responsible for complying with all applicable health and fire code requirements and zoning laws. Customer shall maintain all local approvals including applicable fire marshal clearances, certificates of occupancy, signed building permit inspections and approved zoning variances.

#### **Customer's Insurance Responsibility**



Customer represents and warrants that it has obtained property general liability insurance, workers' compensation insurance, automobile insurance (to the extent applicable), and insurance coverage for negligence, errors and omissions/educators legal liability, abuse and molestation, and employment practices liability.

### **No Employee Raiding**

Customer recognizes and acknowledges that CSMC expends considerable time and effort and incurs substantial expense in recruiting and retaining qualified personnel. Customer agrees to not hire as an employee or independent contractor, either directly or indirectly, any employee of CSMC during the term of this Agreement and for period of one hundred twenty (120) days after such person's termination of employment with CSMC. Customer agrees that a breach of the foregoing restriction would cause irreparable harm to CSMC's business and the damages therefrom would be difficult if not impossible to measure. Consequently, if Customer breaches this provision, Customer will pay to CSMC liquidated damages fixed at twenty-five percent (25%) of the CSMC employee's yearly compensation, or projected yearly compensation, at the time of any such breach.

### **Termination of Agreement**

TRC may terminate this Agreement without cause by providing written notice of cancellation to CSMC at least 30 days prior to cancellation. Within 15 days of transmittal of a cancellation notice, TRC shall pay to CSMC all unpaid fees and TRC shall reimburse CSMC for all costs incurred by TRC to provide the Services. The parties agree that those reimbursable costs would be difficult to calculate and therefore agree that if TRC terminates this Agreement without cause within the first year from the Start Date, TRC will pay to CSMC as liquidated damages fees equivalent to three months of the standard monthly fee for Services. If TRC terminates without cause in year two following the Start Date, the liquidated damages payable to TRC shall be two months of the fees for Services. TRC may terminate the Agreement without cause and without paying liquidated damages at any time following the second anniversary of the Start Date. CSMC may terminate this Agreement at any time without cause and without liability by providing TRC written notice of cancellation 30 days prior to termination. However, if TRC terminates this Agreement for cause (e.g., due to lack of payment), TRC need not provide advance notice of cancellation.

### **Sole and Entire Agreement**

This Agreement sets forth the full and complete agreement between the parties and fully supersedes any and all prior agreements or understandings between the parties hereto, whether oral or written, pertaining to the subject matter hereof. No verbal



modifications, additions, or deletions from this Agreement shall be permitted. All changes to this Agreement must be made in writing and signed by both parties.

**Governing Law, Arbitration and Time-Bar on Claims**

This Agreement shall be construed in accordance with the laws of the State of California. CSMC and TRC agree that any and all disputes or controversies of any nature relating to or arising at any time under this Agreement or otherwise in connection with the rights and obligations under this Agreement shall be resolved by binding arbitration, which shall constitute the sole forum for any disputes between the parties to this Agreement. This means by signing this Agreement, each party is waiving the right to take court action and is waiving the right to a jury. Each party also agrees to, and hereby does, waive any right to compel the other party to participate as a defendant, cross-defendant or in any other capacity in any court action, including any action for indemnity. Arbitration shall be governed by the JAMS Comprehensive Arbitration Rules and Procedures conducted in Orange County, California. The parties to this Agreement further agree that any arbitration demand must be filed with JAMS within 12 months from the time of any breach of this Agreement, and that any claim commenced or filed after that time shall be time-barred as a matter of law.

**Severability**

The provisions of this Agreement are severable, and if any part of it is found unenforceable, the other paragraphs shall remain fully valid and enforceable.



**Notice**

Any and all notices required under this Agreement shall be delivered by overnight mail by a nationally recognized carrier to the following addresses:

CSMC HEADQUARTERS  
Attn. Mr. Sandro Lanni  
40925 County Center Drive  
Suite 110  
Temecula, CA 92591

Three Rivers Charter  
Roger Coy  
1211 Del Mar Dr.  
Fort Bragg, CA 95437

**Signatures**

CSMC

Customer

\_\_\_\_\_  
Sandro Lanni, President  
CSMC

\_\_\_\_\_  
Roger Coy,  
Three Rivers Charter

Date: \_\_\_\_\_

Date: \_\_\_\_\_



# Attachment A

## CSMC Help Desk

### Service Level Agreement

Version	Date	Description	Author
3.0	1/20/2015	Service Level Agreement	Sarkis Gharibian

*(By signing below, all Approvers agree to all terms and conditions outlined in this agreement)*

Approver/Stakeholder	Role	Signed	Date
Roger Coy	Primary Point of Contact ("PPC")		
Sarkis Gharibian/CSMC	Director of Compliance & Student Data		



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## 1.0 Agreement Overview

### 1.1 Introduction

This document represents a Service Level Agreement (“SLA” or “Agreement”) between Charter School Management Corporation (“CSMC”) and “Customer” for the provisioning of services required to support one or more aspects of the school’s operational capabilities. This Agreement remains valid until superseded by a revised agreement mutually endorsed by the stakeholders. This Agreement outlines the parameters of all “Help Desk” services covered by CSMC.

### 1.2 Purpose

The purpose of this Agreement is to ensure that proper elements and commitments are in place to provide a consistent and high-quality service delivery to the Customer by CSMC. This document identifies the service goal needs of the Customer, identifies the various service components provided by CSMC, and serves to manage the expectations of both parties. Service level agreements help to avoid potential disputes and/or conflicts by providing a shared understanding of customer needs, CSMC capabilities, and anticipated support requirements.

### 1.3 Data Security

We believe that working with a large company such as CSMC is what sets us apart from a consultant. CSMC has been in business for over 13 years, has strict employee screening policies, and is completely insured.

Your PowerSchool instance and information is protected by the following precautions:

- Your PowerSchool instance is only accessed when directed by the school in effort to solve a ticket or to gather information for a state compliance reports.
- There is no information stored at CSMC (nothing is printed, all NSLP lunch forms, and medical records are stored at the school site with no access by CSMC).
- CSMC does not assign users to your PowerSchool instance unless directed by the schools Primary Point of Contact. All security rights in the system are assigned by the system administrator.
- When CSMC Help Desk employees are terminated or leave – all passwords are immediately changed and their access is eliminated from all areas.

CSMC takes the privacy of student data extremely seriously.

### 1.4 Goals & Objectives

The goal of this Agreement is to obtain a mutual understanding of the support services CSMC will offer the Customer. The objectives of this Agreement are to:

1. Provide clear guidance to the roles & responsibilities of both CSMC and the Customer in regards to the utilization of the Help Desk services.
2. Present clear, concise, and measurable descriptions of each service provision to the customer.
3. Describe “Best Practices” for utilizing CSMC Help Desk services.
4. Provide opportunities for feedback to the Customer and for the Customer to provide formal written feedback to CSMC.
5. Offer guidelines for data collection and population to successfully meet state reporting deadlines and requirements.



The CSMC Help Desk acts as a central point of contact for all issues related to student data support services (e.g. non-financial or legal) offered through CSMC including, but not limited to, student information systems, assessment systems, state reporting, and other items as specifically identified in this agreement. This agreement also includes provisions for resolution of disagreements specifically related to the Help Desk. Finally, this agreement also describes the costs for additional (“Extended Services”) that are offered on a per-item fee basis outside of the primary support contract, should the Customer desire to utilize these additional services.

Questions related to financial matters, legal issues, budgeting, accounts receivable and payable, human resources, etc. should NOT be directed to the CSMC Help Desk but should instead be directed toward either your CSMC Account Manager (AM), your CSMC School Business Manager (SBM), or directly to CSMC leadership. These matters are specifically NOT covered under this Help Desk Service Agreement.

All questions related to this Service Level Agreement should be directed to:

Sarkis Gharibian  
Director of Compliance & Student Data  
Charter School Management Corporation  
[sgharibian@csmci.com](mailto:sgharibian@csmci.com)

Questions related to other services NOT covered by this Service Level Agreement should be directed to:

Ryan Shook  
VP, Operations  
Charter School Management Corporation  
[rshook@csmci.com](mailto:rshook@csmci.com)



## 2.0 Customer Responsibilities

### 2.1 Data Integrity

#### **DATA INTEGRITY REMAINS THE LEGAL RESPONSIBILITY OF THE SCHOOL.**

CSMC is **not** responsible for data submitted after set deadlines, for inaccurate data posted to a school's student information system, or for missing data. Schools retain the legal responsibility for populating their data systems with accurate and up-to-date information. If CSMC is tasked to upload data to any system, it remains the sole responsibility of the school to validate and verify the accuracy of all data before and after each upload. Schools are responsible for populating their data systems with accurate data **IN ADVANCE** of known deadlines and recognize that incomplete and inaccurate data may adversely affect the School's ability to provide accurate state and attendance reports, and may negatively impact available funding. Schools are required to approve, certify, and sign off on all state reports prior to each certification.

### 2.2 CALPADS Student Data

Schools are required to enter into PowerSchool all of the State required information for each actively enrolled student. In order for CSMC to be able to provide CALPADS services and guarantee successful and timely submissions we ask that schools enter all of the required information upon entering a new student into PowerSchool.

CSMC, in partnership with Cherryland Software, developed a custom validation tool that is installed on all of our clients PowerSchool servers. The tool can be found under the "Special Functions" menu. This page must be routinely monitored by appropriate school personnel to ensure that there are no key pieces of data missing.

### 2.3 Authorized Technical Contacts

CSMC's number one priority is to protect the data of your school. In order to prevent unsolicited or unwarranted persons from contacting our Help Desk, we require schools to submit a list of Authorized Technical Contacts (ATC).

ATC's have unlimited Help Desk support via phone, email, and web portal. Each time an ATC contacts the Help Desk by phone they will be asked for a customer number and for their name for verification purposes. If the Help Desk receives a call from unauthorized school personnel they will be directed to contact their Primary Point of Contact. The Primary Point of Contact assigned in this Service Level Agreement can contact the Help Desk to add/remove ATC's at any given time.

### 2.4 Service Requests - Abandoned Tickets

Often times a CSMC representative will need to submit a follow up question to gather more information about an issue from an Authorized Technical Contact. If a response to a follow up is not received within 7 business days, the ticket will automatically be closed and considered resolved. The Authorized Technical Contact will still have the opportunity to re-open the ticket by simply replying to the closed ticket notification.

### 2.5 PowerSchool User Access

School personnel are responsible for managing PowerSchool administrator and teacher accounts. CSMC provides training on adding and deactivating staff members as well as cheat sheets and video tutorials on this very specific process. It is important that this is managed precisely to ensure that your PowerSchool database is



secure and only authorized staff members have access at all times. As staff members leave or are terminated their PowerSchool accounts should immediately be deactivated as a security measure.

## 2.6 Supplemental System Access

In order for CSMC to provide direct assistance with CALPADS, CBEDS, and the 20 Day Attendance Report we will need the appropriate login credentials. It is the schools responsibility to provide CSMC with the following:

- CALPADS User Account with full privileges
  - CSMC does NOT maintain the CALPADS LEA Administrator Account. The LEA Administrator account is the only account that has the ability to add additional users and is usually assigned to the school administrator. Since CALPADS passwords expire every 90 days it will be the schools responsibility to maintain their access after providing CSMC with their own account. If the LEA Administrator password expires, he/she will need to contact the CDE directly to have their password reset.
- LEA CBEDS Username and Password
- PENSEC Pin

Please note that without access the school holds responsibility for ensuring completion of each item above.

## 3.0 CSMC Scope of Service

CSMC's Help Desk offers a specific, but limited, array of support services for Schools. Our catalog of services includes essential services that are often too complex or costly for smaller schools, CMO's, or school districts to maintain in-house.

The following services are covered by this agreement:

### 3.1 Help Desk Support

#### **Email:**

Authorized Technical Contacts can send a detailed email to [helpdesk@csmci.com](mailto:helpdesk@csmci.com) explaining the issue(s) you are experiencing. The email will automatically be entered into our Help Desk ticketing system. When describing the issue, mention as much information as possible. Name of the report you are running, parameters you are setting, and screen shots will help us answer your questions quicker.

#### **Web Portal:**

Requests can be submitted by Authorized Technical Contacts online via the Help Desk Web Portal (<https://csmc.zendesk.com>). This method gives you the ability to track progress of all tickets submitted in one centralized location. You'll also have access to our online community forum filled with lots of helpful tips and videos.

#### **Telephone Support:**

Assistance is available from 8:00 AM to 5:00 PM (PST), Monday through Friday, except when CSMC is closed due to observed federal holidays, administrative closings, inclement weather, or security



concerns. Phone coverage may not be available at all times due to staffing limitations or select holidays. If the Help Desk receives a call from an unauthorized person they will be directed to contact the Primary Point of Contact to request authorization. The Primary Point of Contact can email the Help Desk to add/remove Authorized Technical Contacts at any time.

### 3.1.1 Help Desk Priorities & Response Time

The Help Desk will use the following guidelines in prioritizing requests and will strive to begin working on the problem within the target timeframe. Actual response times may be shorter or longer depending on the volume of requests at any one time. The priority given to an incident is determined by a combination of its impact and urgency. The definitions below are used to establish the priority.

Impact	Criteria	Target Response Time
Critical	A "Key Service" has failed or is degraded affecting 20 or more users, or is mission critical and there is no workaround available	One business Day
High	A "Key Service" has failed or is degraded Affects one to five individuals; no workaround available	Initial response within three working days
Moderate	A non-key service has failed or has degraded. Affects fewer than five people; workarounds available	Initial response within ten working days
Low	No affect on productivity, or unsupported software or services	Best effort as time allows

In addition to the impact level of an issue, CSMC also considers the Urgency of each request based upon the following three levels:

Urgency	Definition
High	Requires Immediate Attention
Medium	Requires resolution in near future
Low	Does not require significant urgency

As a result of evaluating the impact and urgency of each support ticket, we then categorize them on a one to five point scale, as indicated below:

Priority	High or Critical Impact	Medium Impact	Low Impact
High Urgency	1	2	3
Medium Urgency	2	3	4
Low Urgency	3	4	5

*Please note that Help Desk requests submitted via the phone are simply turned into written email tickets for tracking purposes. Submitting a written request eliminates the time required for a support staff member to write a new ticket, and may actually increase response time. Therefore, all Customers are STRONGLY encouraged to submit written help desk requests when appropriate.*

### 3.2 Remote Assistance

CSMC uses Remote Desktop, GoToMeeting, or GoToAssist as available and phone support to allow our support staff to access the Customer's computer screen to diagnose problems, provide one-on-one training, or for webinars.



### 3.3 Integration of Third Party Applications

CSMC will assist with the implementation and integration of third party applications that are PowerSchool compatible. CSMC cannot provide support for issues that may arise that are due to product defects or developed by user error. It will remain the responsibility of the School to communicate directly with the vendor to work those issues out. CSMC will work within the constraints of PowerSchool in ensuring that integration is setup as stated in the application setup guide.

### 3.4 On-Site Trainings

To ensure your school success, our contract includes (1) Administrator training and (1) Teacher training. For every subsequent year you will receive (1) Teacher training by request only.

#### Administrative Training Topics Covered:

- Finding your way around PowerSchool
  - Signing in, enrolling students, searching for students, conducting searches, changing demographic information, printing reports for individual students, searching for staff members, changing staff information, inactivating staff members, etc.
- California State Reporting Information
  - Entering required student demographic information, English learner and immigrant information, entering lunch eligibility program records and other program information, creating discipline records, utilizing the validation tool to prepare for submissions, etc.
- Running Reports out of PowerSchool
  - How to run daily, weekly, and monthly attendance reports, how to do a quick export of student data, how to search for perfect attendance, how to check for teacher attendance submission status, how to run gains and losses audit report, etc.
- Scheduling Students
  - How to view and modify an individual students schedule, how to drop a student from a class, how to add a student to a class, how to mass enroll students into classes, how to print student schedules, etc.

Typical attendees of the Administrative training include Administrators, Principal, Office Staff, Counselors, Registrars, Secretaries, Special Education Coordinators, and Lunch Staff.

#### Teacher Training Topics Covered:

- Logging in to take attendance vs. logging in to gradebook
- Taking attendance, viewing student pages, and printing reports
- Creating Assignments
- Entering Grades & Comments
- Linking Grades to Standards
- Creating Categories & Student Groups, etc.



All teachers **AND** at least one administrator should attend the Teacher training. It is very important that a school administrator be present at the teacher training. Often times, trainees are asked questions related to school policy that only an administrator can answer. Having an administrator on hand will help solve this problem and at the same time, set the tone for all staff attending.

Following the trainings, Authorized Technical Contacts at each school will have unlimited Help Desk support which includes remote assistance. If, however, an additional on-site training is preferred CSMC offers customized Administrative and Teacher trainings as an extended service (See Extended Services, pg 19-21).

### 3.5 Planned or Emergency On-Site Assistance

CSMC may be contracted for special on-site assistance during unique circumstances or events. Please note: additional hourly or daily rates may apply.

### 3.6 PowerSchool Student Information System (SIS)

CSMC's PowerSchool Support is defined by three phases; (1) Initial Product Implementation, (2) Ongoing Support, and (3) "Extended Services (Fee-Based)". Each category is described in greater detail below.

#### Initial Product Implementation (IPI):

Initial Product Implementation services include all of the basic elements required to get a PowerSchool instance started and maintained throughout the year. This type of support is always offered to schools in their first year of operation. IPI includes both district and school level setups.

District Setup will include the following items – as required:

- Calendar Membership Types
- Citizenship Codes
- District Info
- Districts of Residence
- Entry Codes
- Ethnicity Codes
- Exit Codes
- Fee Categories
- Log Types/Sub Types
- Special Programs
- Schools/School Info
- Grade Scales
- GPA Calculations (non-custom)
- Test Scores
- Miscellaneous
- District settings required by state
- Log Entry Fields

School(s) Setup will include the following items – as required:

- Attendance Codes
- Attendance Code Categories
- Attendance Conversions
- Class Rank
- Current Grade Display
- Final Grade Setup
- Full-Time Equivalencies
- Preferences
- Bell Schedules
- Calendar Setup
- Activities
- Balance Alert
- Fee Types
- Miscellaneous
- Sub Login Settings
- School settings as required by state
- GPA Student Screens
- Honor Roll
- Final Grade Entry Options
- Days
- Graduation Sets
- Next School
- Periods
- Rooms
- Years & Terms



### Ongoing Support

Ongoing PowerSchool support includes all elements covered in the Initial Product Implementation and includes a comprehensive checklist and system scan to ensure state reporting compatibility. Ongoing support is typically provided to schools that have already implemented PowerSchool and are looking to maximize their usage of the system.

### Extended Services

(See Extended Services, pg 19-21).

## 3.7 PowerSchool Server Hosting

Server management plays an important role in smooth operation of your PowerSchool instance. It helps in scalability, performance, and capacity of your site. The three most common options for hosting your PowerSchool server are; (1) Self-Hosting, (2) Pearson Hosting, and (3) CSMC Hosting.

**Self-Hosting:** PowerSchool 7 supports a Windows configuration using 64-bit hardware with a Windows Server 2008 R2 64-bit Standard Edition operating system. As a self-hosted school, you are responsible for all PowerSchool and state reporting version upgrades, ensuring your hardware meets the stated minimum requirements by Pearson, monitoring system stability and security, and performing routine maintenance.

**Pearson Hosting:** If your PowerSchool instance is hosted through Pearson's Hosting Service they will provide regular upgrades for your PowerSchool server as well as state reporting updates. All PowerSchool installations are hosted on a secure, off-site storage facility that is backed up nightly. Each data backup is stored for up to 7 days to protect you from the possibility of data loss.

**CSMC Hosting:** CSMC will host your data on our secure, top of the line servers which includes daily backups of your data, regular software and server maintenance, and upgrades to the latest version of PowerSchool and state reporting. CSMC will restore or migrate your data up to four times per year up to 7 days after a data loss event. Whether it is hardware failure, human error, or the need to refresh a non-production instance, we can restore or migrate your data fast and effectively.

## 3.8 SIS Conversions

CSMC will provide the Primary Point of Contact or the schools conversion project leader with import templates to complete for various tables within the PowerSchool database. The school is responsible for extracting the required data from their old Student Information System (SIS) and onto the provided templates. The integrity of the data will always remain a school responsibility so it is recommended to verify the data. Files must be saved in either CSV or XLS format and emailed to the Help Desk. CSMC will review and format as needed prior to importing into PowerSchool.

Most Common Imports:

- Students
- Staff
- Courses
- Sections
- Historical Grades

It is important to keep in mind that not all student information systems are built equal and that data conversion projects usually take 3-4 months depending on the amount of data being converted. Please take this into





consideration when deciding on when to terminate your contract with your previous student information system. CSMC's priority is to ensure that your school is ready to operate before your first day of school.

CSMC can only work within the constraints of PowerSchool. If, for example, your previous student information system had features that do not exist in PowerSchool we will first look for the best cost-effective resolutions to meet your school's needs. If none are available, you have the opportunity to consider our extended services in HTML/Page Development (See page 19-21).

### 3.9 CALPADS

There are over 100 data entry points within PowerSchool that are required for the various submission phases of CALPADS. CSMC will install a custom CALPADS validation tool within your PowerSchool server that makes it incredibly simple for office staff to locate errors, make corrections, and assess overall CALPADS readiness all on one screen. CSMC assists you through the entire CALPADS process from extracting your files, uploading your data, and correcting all certification errors for you.

CALPADS Services Offered:

- Preparation of all four Fall 1 extracts per school (SENR, SINF, SELA, SPRG) for import to CALPADS.
- Preparation of all four applicable Fall 2 extracts per school (SDEM, SASS, CRSE, SCSE) for import to CALPADS.
- Preparation of all five applicable EOY extracts per school (CRSC, SCSC, SDIS, SWAV, SCTE).
- Install CSMC custom CALPADS Validation Tool onto your PowerSchool server.
- Correct all submission errors and post each extract per submission cycle.
- Correct all fatal certification errors to ensure certification for Fall 1, Fall 2, and EOY.
- Provide Primary Point of Contact with Direct Certification Report.
- Provide Primary Point of Contact with CALPADS ODS Foster Youth Report.
- Communicate with school and neighboring districts in resolving Concurrent Enrollments, Multiple Identifiers, and Exit Reason Discrepancies to ensure certification.
- Create new SSID's and exit transferred students on CALPADS on a weekly basis.
- Provide Primary Point of Contact with all aggregate reports and a sign off sheet with each of the three submissions.
- Work with Primary Point of Contact before and during amendment window in correcting any data entry errors.
- Test Operation Management System (TOMS) Integration and Monitoring
- Configure Student Test Registration TOMS
- Demographic Data Corrections for Accountability Reports
- CBEDS Submission

### 3.10 Attendance Reporting (P-1, P-2, P-Annual)

CSMC will provide direct assistance to back office clients with P Reports. The school is responsible for communicating the district deadlines and report parameters. CSMC will provide the school with the P reports for verification prior to submitting it to the authorizing offices. The client is responsible for entering student



attendance and the student data required for accurate reporting, such as: entry date, exit date, class enrollment, grade level, special program enrollments and district of residence for each student.

### **3.11 Charter 20 Day Report**

CSMC will provide back office clients direct support with the completion and submission of the 20 Day Advance Apportionment report. CSMC will provide the client with the report prior to submitting it to the state via the online portal. It is the client's responsibility to provide CSMC with the log in credentials and deadlines set by the authorizing office. The client is responsible for entering student attendance and populating the student data required for accurate reporting such as: entry date, exit date, class enrollment, EL classification and for identifying the students that are "economically disadvantaged".

### **3.12 Local Data Requests**

Local county or district offices may request student data from time to time and the complexity of the requests often vary from a simple export of student demographics to cross table comparison reports. CSMC will always provide you with extracts of what is available in your PowerSchool server, however, some requests may involve merging data from multiple systems into one cumulative summary report. In these cases, CSMC will extrapolate and provide you with the PowerSchool information you need in a workable format. The school will remain responsible for merging the data from the other systems and submitting the report to the requester. Due to the time consuming nature of completing such data merge projects CSMC can provide assistance in performing vlookups, pivot tables, and charts as an extended service (See Extended Services, pg 19-21).

### **3.13 Pre-ID Label Files (CELDT, CAHSEE, STAR)**

CSMC provides assistance in creating a Pre-ID template using the data that is entered on PowerSchool and uploading the data to the Pre-ID vendor portal. The School is responsible for purchasing test materials/labels and for ensuring the data on PowerSchool is accurate. The School is also responsible for submitting a ticket for any Pre-ID requests 3 weeks in advance in order to allow enough time to extract, format, review, submit, and clear validation errors prior to the submission deadline. See steps below.

A. School is responsible for material orders and Pre-ID purchase order numbers. Customer is required to provide Pre-ID purchase order number and login credentials to CSMC before Pre-ID files can be uploaded to the corresponding Pre-ID vendor portal.

B. School is responsible for indicating the test and test criteria options for each student on PowerSchool or on an import template provided by CSMC.

C. CSMC will run the validation reports in PowerSchool for state Pre-ID files and provide them to the school for review/corrections. School is responsible for populating and clearing any validation errors due to missing data in PowerSchool.

E. CSMC will export the Pre-ID information from PowerSchool and format the file according to the state test (CELDT, CST, CAHSEE) Pre-ID template.

F. School is responsible for the review and approval of the student demographic data contained in the Pre-ID file template. The school must confirm that the data is ready for submission, prior to file upload.

G. CSMC will upload files to the corresponding vendor portal. CSMC will assist with clearing errors on the vendor portal with the data that is available in PowerSchool. Any errors caused by missing information need to be cleared by the School.



H. CSMC will provide the school with a confirmation when the file upload process is complete.

J. School is responsible to submit a ticket for any Pre-ID request 3 weeks in advance in order to allow enough time to extract, format, review, submit, and clear validation errors prior to the submission deadline.

### 3.14 OARS (Online Assessment Reporting System)

CSMC supports the implementation, training, and usage of OARS (Online Assessment Reporting System) to all clients who decide to purchase the product. OARS is a web-based data management system that facilitates the collection, reporting, and analysis of local, district and state assessment information.

CSMC's OARS Support Services Include:

#### Implementation:

- Kick Off Meeting – The goal of this meeting is to provide the School with an understanding of the roles, responsibilities of the School/CSMC, and a general timeline.
- Planning – A CSMC Support Specialist will contact the school project manager assigned by the school to discuss and review the configuration, data collection, training plans/project calendar.
- Training – CSMC will provide an on-site teacher training (2 hours).

Monitoring – CSMC's Support Specialist will be monitor your student data roster updates.

- Roster Data for PowerSchool Servers with 1 School – CSMC will update roster data daily for PowerSchool servers with 1 School.
- Roster Data for PowerSchool Servers with more than 1 school – CSMC will update roster data once a week.
- Roster Data Requiring Manual Data Correction – CSMC will update roster data monthly for schools who adopt a custom data template requiring manual work e.g. filtering roster data by semester.

Account Management – CSMC will initially create the teacher accounts and the provide log in information. CSMC will also create the account for the designated school lead for OARS, and provide guidance and training in creating any non-teacher accounts.

State Test Data Uploads – CSMC will upload 3 years' worth of CAHSEE, CST, and CELDT at no charge for independently testing Schools.

- Schools that test within their district, non-independently testing schools, are responsible for providing CSMC with test data files in ORIGINAL EST and EDS format, usually .TXT or .CSV. If the files are not provided in original format or test data files student numbers do not match that of PowerSchool CSMC will assist you through Extended Services (See Extended Services, pg 19-21).
- State Assessment Number and Local IDs – If the state assessment student numbers and local student ID numbers do not match then your OARS assessment system will be set up with SSID rather than the SIS student number. The disadvantage of using the SSID in OARS is that sometimes students are assigned a local ID before they are assigned a SSID. In this situation, we recommend that the SSID is used for student because the local IDs do not match your SIS which in turn will require manually adding the SIS student number to the state assessment result in OARS.



OARS Roll Over – CSMC will perform the OARS roll over process at the end of each academic year once the school has finalized student schedules. Roll over is dependent on student schedules therefore if student schedules are not finalized CSMC cannot proceed with the OARS roll over process.

Ongoing Support - All OARS tickets should be streamlined through our CSMC Help Desk. If, for any reason, we cannot solve an issue we will contact OARS directly. While we strive to respond to ticket request as soon as possible, at times it may take 24 – 48 hours to solve a ticket. We will do our best to complete ticket request much sooner and will send you confirmation right away. Thank you for your help and cooperation.

**Important:**

- OARS Setup is dependent on a finalized master schedule on PowerSchool. If students are not scheduled in PowerSchool, CSMC cannot launch your OARS assessment system. CSMC is not responsible for school student scheduling.
- Once the final schedule on PowerSchool is completed, it will take 3-5 business days to launch the OARS site for your school.

Technical Requirements – CSMC will ship a supported OARS brother scanner for the school IT department to set up. The scanner will also require the SCANOARS software that will need to be installed on the computer connected to the scanner. See requirements below.

SCANOARS software – ScanOARS system requirements is the responsibility of the school:

- Windows XP, Windows Vista, or Windows 7
- 2 Ghz processor (or faster)
- 2 GB available memory
- Network ports 80 and 443 open and available
- For optimal performance, ensure secure.oarsaccess.net is whitelisted in your filtering software (if applicable)

## 4.0 General Assumptions

The commitments in this agreement are based upon the following assumptions:

1. Scheduled holidays will be included in the Service Level Agreement in which the Help Desk will be unavailable or will operate in a reduced capacity (e.g. no phone support).
2. Periodic database and application maintenance will occur throughout the year both during “off-hours” (e.g. 12 am to 5 am) and occasionally during normal operational hours.
3. All planned service or software outages will be communicated via email to the school.
4. Changes in Customer’s staffing will be communicated immediately to CSMC so that at least one Primary Point of Contact is maintained at all times.
5. **The initial setup of your School will take several days of work on the part of the school leadership.** Adequate time should be set aside to review the documents provided, complete the worksheets, and submit the information to CSMC well in advance of the first day of school. Customer should expect a considerable amount of “back-and-forth” until the systems are set up properly.



6. Implementation services will be delivered remotely as a standard. Any travel costs related to implementation project will be invoiced and paid by customer.
7. Direct services related to CSMC financial services (e.g. Payroll, accounts receivable/payable, Human Resources, etc.) are explicitly NOT covered by this Help Desk Service Level Agreement.
8. Customer must identify a **Primary Point of Contact (“PPC”)**. This person will be CSMC’s primary contact, available throughout the contract term, to assist in any implementation tasks required for the setup and maintenance of each system.
9. Customer will provide data and information requested in a timely and efficient manner and work cooperatively with CSMC during setup and configuration of all schools.
10. Customer should expect to spend several hours each day maintaining the basics of PowerSchool at the school level (e.g. taking attendance, lunch counts, updating student and parent data, etc.). In no way does CSMC replace the need for on-site, daily support for PowerSchool and the need for a single Primary Point of Contact (e.g. your office manager).
11. Customer’s Primary Point of Contact should have adequate (e.g. beyond basic) technical skills. For instance, they should be able to email files, convert files from Excel to .txt files, be able to retain usernames and passwords for sites, bookmark web pages, use Microsoft Excel/Word, and be able to routinely conduct basic computer tasks.
12. Customer will provide or have available a working land-line telephone with conference calling (e.g. speakerphone) capabilities for training sessions and webinars.

## 5.0 Limitations & Exclusions

**This SLA and any applicable Service Levels do not apply to any performance or availability issues:**

- Due to factors outside CSMC’s reasonable control
- Due to missing and/or incorrect content in the Customer’s student information or student assessment systems
- Due to interdependencies
- Due to resource constraints and/or school priorities
- Due to a payment or service ‘Hold’

## 6.0 Critical Success Factors

### 6.1 Changing Needs

At CSMC we know that our success in resolving support issues directly impacts your success and vice-a-versa; if your school is successful we hope to be retained as your back-office support provider. As a result, we approach each problem as an opportunity to support your school and make you successful. We have a very strong track record of success but cannot resolve 100% of all issues that come across our Help Desk. Some problems may fall out of the scope of this Service Level Agreement or outside the scope of our internal expertise. We will, however, endeavor to resolve each issue that comes before us as time and resources allow.



## 6.2 Setting Client Expectations

We also know from experience that Customers who were led to believe that the Help Desk was going to provide direct services that actually fall outside of the scope of our Service Level Agreement will leave disappointed. Therefore it is imperative that Customer's leadership team and specifically the Primary Point of Contact understand, acknowledge, and agree to the provisions of this document.

## 6.3 Cost Effective Operations

From time to time the Help Desk personnel may "push-back" with suggestions on less expensive or in-house solutions to Customer's requests for fee-based "Extended Services" in order to maintain a cost-effective program. Extended services exist because the need is there, but also represent internal costs to the Help Desk that we must cover through additional charges.

## 6.4 Safeguarding Confidentiality of Data

Unauthorized access by an outside hacker or a disgruntled employee can cause serious damage or destruction to confidential student data and turn out to be a huge headache. Our Authorized Technical Contact policy is the best countermeasure to safeguard your data. We hope that you view this policy as a means to better protect your school from data loss and/or unsolicited manipulation of your schools configuration. The last thing we want to happen is for the wrong person to gain access to your schools confidential data. Such a policy is imperative to prevent unwarranted access to your PowerSchool server and modification to system settings without prior administrative approval.

# 7.0 Complaint Escalation & Resolution Procedures

## Registering a formal complaint.

All complaints relating to the operation of the Help Desk service, including:

- Expected level of support
- Actual support offered and delivered
- Personnel responsible for providing or administering support
- Any other issue relating to this document of the relationship between CSMC and Customer

Received by either party will be forwarded in writing and distributed concurrently to the signatories of this document. The intent is to ensure thorough, timely and open resolution of all such problems.

# 8.0 Procedure for Requesting Exceptions to Standards or Policies

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

## 8.1.1 A Project Change Request (PCR)

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.



8.1.2 CSMC will review the proposed change and recommend it for implementation or reject it. A PCR must be signed by the authorized Customer to authorize the 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.

## 9.0 Critical Reporting Deadlines

### SEPTEMBER

- Charter 20 Day<sup>1</sup>

### OCTOBER

- Charter 20 Day<sup>1</sup> (continued)
- First Wednesday of October: Census Date
- Last day of October: CBEDS Deadline

### DECEMBER

- Mid-December: CALPADS Fall 1 Submission Deadline
- P1 Report Due<sup>1</sup>

### FEBRUARY

- Late-February: CALPADS Fall 2 Submission Deadline
- Early February: CALPADS Fall 1 Amendment Window Deadline

### MARCH

- Late-March: CALPADS Fall 2 Amendment Window Deadline

### APRIL

- P2 Report Due<sup>1</sup>

### JUNE

- P-Annual Report Due<sup>1</sup>

### JULY

- Mid-July: CALPADS EOY Submission Deadline



## 10.0 Unsupported Tasks

- 1) CSMC does not evaluate the performance of school personnel.
- 2) CSMC does not grade student work, or evaluate student performance, etc.
- 3) CSMC does not take student attendance.
- 4) CSMC does not monitor the lunch process (e.g. who has paid, not paid, eligible for free/reduced, etc.).
- 5) CSMC does not offer project management for IT tasks that fall outside the items specifically identified in this service level agreement.
- 6) CSMC does not provide copy (e.g. written documents) for school web sites.
- 7) Direct mobile application support for parents (e.g. iPhone app, iPad app). While CSMC can perform the initial set-up /access to these services, we do not offer direct support for parents or students in using these mobiles services for PowerSchool.
- 8) CSMC does not complete data entry tasks (See Extended Services, pg 19-21).
- 9) Direct mobile application support for parents (e.g. iPhone app, iPad app). While CSMC can perform the initial set-up /access to these services, we do not offer direct support for parents or students in using these mobiles services for PowerSchool.
- 10) Student/Course Scheduling. **CSMC does not provide direct services for determining the course and section offerings, teacher qualifications, and appropriate placement of students.** This is an activity reserved for School Leadership and Certificated/Credentialed teachers and administrators.

If, however, a school provides us a list of students associated with a specific section (a course with a teacher that meets at a pre-defined period), we can “mass enroll” those students into their appropriate sections. Submission of this data MUST CONFORM to our submission requirements and we must have the information at least 3 business days prior to its deadline. Again, CSMC does not determine course schedules. We will only enroll students when provided a list of those students and a specific section in which to enroll them.





## 11.0 Extended Services

### A. Custom PowerSchool HTML Page Development - \$95/hour

PowerSchool pages, by default, come a certain way. If you'd like to customize certain pages within PowerSchool to meet your needs we can do so for an hourly rate. Requests for customization will be evaluated to ensure that it falls within the constraints of PowerSchool.

### B. Custom Common Core/Standards Based Report Cards

#### **Option A:** CSMC Provided Standards and CSMC Provided Report Card Template

Setup Fee: \$100.00

Price per Grade Level: \$300.00

#### CSMC Provided Standards

CSMC will provide a complete list of common core standards and you will have the option to associate applicable standards to courses of your choice. Limitations include not being able to remove any parent standards or add any standards outside of the original list provided.

#### CSMC Provided Report Card Templates

CSMC provided report card templates cannot be edited other than the school name, address, reporting terms, logo, and title. Any additional modifications will require the purchase of School Provided Custom Report Card Templates.

#### **Option B:** School Provided Standards & Report Card Template

Setup Fee: \$100.00

Price per Grade Level: \$450.00

#### School Provided Standards

CSMC will provide an import spreadsheet and a guide. CSMC will offer guidance and support but the customer is ultimately responsible for the completion of the import spreadsheet.

#### School Provided Custom Report Card Templates

The customer is responsible for the formatting, design, and layout of each report card template. The customer must provide a FINAL "print-ready" PDF or JPEG document for each unique page. CSMC will not make any edits to the templates provided and will begin work immediately upon receiving the templates. Any requested changes to the template after the project begins will be subject to modification fees at an hourly rate of \$150/hr billed in addition to the overall cost of the report card project.

#### Turnaround Time

The standard turnaround time for any report card project is 4-6 weeks upon receipt of a signed "Report Card Service Agreement" and final print ready custom report card templates. Changes or delays in getting CSMC the custom report card templates will further postpone the completion of this project. Your timeliness is greatly appreciated.

#### Rush Service

Customers may have the option to request a "rush service" for a 2-3 week turnaround for an additional fee of \$500.00. Please inquire about "rush service" availability. We will do our best to approve this option if requested however we do reserve the right to deny a "rush service" request.



### **C. Data Entry Services \$95/hour**

CSMC can assist with certain data entry tasks on an as needed basis for an hourly fee of \$95 which varies depending on the scope of the data entry project.

- Historical Grades
- Historical Attendance
- Fees
- Immunizations
- Test Scores
- Local Data Requests

### **D. On-Site Training**

CSMC offers customized trainings geared towards specific PowerSchool functions at an hourly rate of \$95/hr plus all travel expenses.

### **F. Student Scheduling \$95/hour**

CSMC has the ability to implement your master schedule and schedule your students into PowerSchool. However, we are dependent on the items below.

- Finalized Full Year Master Schedule (Teacher list, section list, bell schedule, course list)
- Method of scheduling (ex. Student groups, student lists)

### **G. PowerScheduler Load Process (\$2500)**

PowerScheduler is a powerful tool that can schedule the majority of your students. Based on your finalized master schedule, a successful run of this feature can schedule 70%-90% of your students.

Using this feature requires at least one project manager to continually enter, manage and maintain the data in PowerScheduler at least 2-3 months before the end of your current school year.

CSMC will provide the school assigned project manager(s) the resources and (1) full day on-site training in achieving the highest percentage possible of students being scheduled while mitigating the need to manual scheduling your students to a minimum. CSMC will also provide continued support and guidance via the Help Desk.

Currently we do not offer support services for the PowerScheduler Build Process and for schools with less than 500 students.

### **H. Custom Reports for PowerSchool - \$95/hour**

Having trouble finding the perfect report in PowerSchool that fits your school's needs? We can help build the reports that you need to be successful with running your school! PowerSchool stores a wide variety of data related to your school. Figuring out where all of your data is stored and retrieving it into a custom report can be very difficult for the typical school staff member.

Here are few examples of the custom reports that we can build for your PowerSchool server:



- Progress Reports
- Transcripts
- Object Reports
- Reporting Engine reports
- Reports that run on an automated schedule (hourly, daily, weekly)
- ...or anything you can imagine!

### **I. Extended Services Billing**

Help Desk Extended Services are invoiced upon completion of each deliverable on the last day of the month it was completed. All Extended Service invoices shall be paid immediately upon receipt of the invoice. (The terms are NOT Net 30).