San Pasqual Union School District

05/10/2024

Prepared for:

Kristin DiNofia

San Pasqual Union School District

15305 Rockwood Rd, Escondido, California, 92027

Kristin DiNofia

CBO / Director of Finance

San Pasqual Union School District

Escondido, California

Dear Kristin DiNofia:

Thank you for requesting a proposal and pricing for Absence & Time Solution.

Frontline Education is the leading provider of school administration software, empowering strategic K-12 leaders with the right tools, data and insights to proactively manage human capital, business operations and special education.

Frontline has a proven 20-year track record of supporting districts with secure, reliable software built exclusively for K12 districts. More than 12,000 educational organizations, including over 80,000 schools and millions of educators, administrators and support personnel from all over the United States partner with Frontline.

This proposal contains descriptions of the applications within Absence & Time Solution and investment estimates including: annual subscription fees, one-time implementation fees, and administrator training with related terms and conditions.

We look forward to partnering with you to implement Absence & Time Solution in support of your district's strategic initiatives.

Sincerely,

Rachel McDermott

rmcdermott@frontlineed.com

REVIEW OF ABSENCE AND TIME

Frontline Absence & Time provides a unified solution for managing both absence and time, allowing districts to manage employee absences and quickly find qualified substitutes to support uninterrupted student learning, accurately track employee time to monitor labor costs and ensure compliance, gain real-time visibility into who is working in their schools, and benchmark employee absence data against national, state and regional KPIs.

Time & Attendance enables districts to effectively and accurately manage and report on employee time to improve accountability, save time, keep labor costs under control, gain real-time visibility into who is working in their schools and ensure compliance with labor laws.

Why Choose Frontline Education?

3 STATS TO CHOOSE FROM:

10,000+
CLIENTS SERVED

OR

8,000+
SCHOOL DISTRICTS SERVED

OR

60% OF
U.S. PUBLIC SCHOOL DISTRICTS SERVED

80,000 SCHOOLS TRUST FRONTLINE

OUR COMMITMENT

Purpose-Built for K12

Award-Winning Client Services

Industry-Leading Security

Commitment to Integrated Systems

Original K12 Research & Insights

Free Resources for Education Leaders

AWARDS

EDTECH BREAKTHROUGH AWARDS
Education Administration Solution Provider of the Year 2019

ED TECH DIGEST
Cool Tool Award
5Lab 2021

SUPES' CHOICE
HR/Finance Finalist
HRMS 2021

NEWSWEEK
Best Business Tools - HR: Time Tracking Software 2019

INVESTMENT SUMMARY

(Proposal pricing expires on 06/07/2024)

End User	Description	Start Date	End Date	Amount
San Pasqual Union School District	Frontline Implementation			$3,500.00
			INITIAL TERM TOTAL	$3,500.00

End User	Description	Start Date	End Date	Amount
San Pasqual Union School District	Time & Attendance, unlimited usage for internal employees	7/01/2024	6/30/2025	$6,000.00
			RECURRING TOTAL	$6,000.00

Frontline Education

Implementation Services

frontline
education™

Contents

Introduction

Frontline Education offers a complete customer experience, with professional resources to collaborate with your project team during the implementation. Frontline uses a three-part method to provide a lasting solution that helps Clients achieve their strategic objectives.

Implementation: Frontline will collaborate with the Client leadership and project personnel to grasp the strategic objectives of the project. Client will apply Frontline proven methods for carrying out the solution whenever feasible.

Learning & Capability Building: Frontline provides a mixed learning approach for clients. By combining independent learning and interactive working sessions, Frontline has an effective way of making sure the successful enablement of Clients.

Change Enablement: With all changes, it is necessary to manage that change effectively within your organization. Frontline offers a Change Management plan for their Clients to successfully communicate, manage, and monitor the adoption of the Frontline system.

Project Governance

Project Planning

Frontline understands that effective project planning lays the foundation for a successful implementation and is vital to reducing risk. We develop detailed project plans for every implementation that establish

objectives and outcomes with a clear schedule of deliverables for both Frontline and client stakeholders for each stage of the project.

Upon initiation of the project, Frontline will work with the Client project leaders and other key stakeholders to identify and document all key project components and project team members. As detailed below, various stakeholder and work groups will be established and will work collaboratively to refine and finalize project plans for each program component including all timelines and milestones.

Governance Objectives

A strong governance structure overlays roles and responsibilities to the project management plan, providing complete transparency regarding who will do what and when. Frontline has embedded procedures within our implementation methodology, so that defined controls alert the key stakeholders if problems arise or if scheduled targets are missed. Having this risk management capability, at the highest levels of the project, provides assurance that there is a system of checks and balances, and that the teams are meeting expectations.

Project Governance Methodology

Our team will provide ongoing monitor and control activities and deliverables for the duration of the project to keep the project on track. These activities provide a view into the health and progress of the project so that management can take effective, efficient, and timely actions when the project's performance deviates from the plan or when a proactive measure to manage risks is required.

Risk & Issue Management

The Risk and Issue Management Plan processes help to identify risks to the project, how those risks may be responded to and how mitigation plans can be outlined and controlled. Examples of risk include loss of a critical resource, technology changes, dependence on a third party, project sponsorship or management changes.

Project Team – Roles & Responsibilities

A strong Project Team will be integral to the successful management of this project. The team structure will align appropriate levels of Frontline managers and consultants to your management team and staff in a manner proven effective in other large-scale implementation projects.

Frontline's recommended team structure - outlined below - identifies the type of personnel that are commonly involved with the project. It should be anticipated that other personnel will be involved based on the client organizational structure and on an ad-hoc basis to provide specific insights, knowledge or support as the project moves through its different phases.

Frontline - Executive Sponsor

The Client will be assigned an Executive Sponsor – from the Frontline executive leadership team – to liaise with your senior leadership, act as project champion, and drive overall success of the program.

The Executive Sponsor will provide focus and oversight to the project while building the executive relationship between Client and Frontline and will participate in Executive Steering Committee meetings to review project progress, and significant risks and issues as needed.

Frontline - Project Manager

An implementation project management resource will be assigned to coordinate all planning, communication, scheduling, risks, project reporting and ensure project success.

- o Acting as the day-to-day point of contact for the Client project team to ensure on-time delivery of the Frontline project deliverables
- o Managing the implementation project plan and project dashboard for ongoing project status reporting, and conducting recurring Project Status Meetings
- o Partnering with Client project team to track risks, issues, action items, and key project decisions
- o Managing and tracking project scope change requests
- o Partnering with the Client project team to develop on the training schedule and change management plan

Frontline - Implementation Consultants

Implementation consultants will provide subject matter expertise and will serve as the primary point of contact for all functional and system configuration work, lead consulting and training activities, as well as become the primary means of support during the initial go-live period.

Implementation Consultants responsibilities include:

- o Partnering with Client in conducting Discovery and Requirements Gathering sessions
- o Conducting configuration, consulting, training, and work sessions as defined by the project plan
- o Review data templates with the client and explain expected data.
- o Partner with the client and provide consistent and timely validation of the data provided to ensure it meets the minimum requirements for import.
- o Provide data errors in an organized format, indicating which data points are non-compliant and require additional review/correction.
- o Online training and consultation will be provided to show the client how to maintain data on an ongoing basis after the initial import.
- o Partnering with the Client project team to perform unit testing and UAT as defined by the project plan
- o Providing support following go-live and transition to Frontline Support through the Support Handoff meeting

Frontline – Strategic Consultants

Strategic Consultants engage in multi-solution implementations. The Strategic Consultant will work with the Client to determine strategic goals for the Frontline solution, review current processes for redundancy and waste, and make strategic process driven recommendations to achieve overall district objectives.

Client - Executive Sponsor

The Executive Sponsor provides focus and oversight to the project while building the executive relationship between Client and Frontline, ideally Superintendent, Assistant Superintendent of HR, CFO, etc.
The Executive Sponsor will work with all relevant parties to expedite and resolve issues that require the highest executive level involvement, such as contract amendments and scope adjustments. The Executive Sponsor will serve as project champions to promote the visibility and credibility of the Program.

- o Provides leadership and promotes project goals within organization ensuring necessary resources are available

- o Participates in Executive Sponsor meetings with Frontline Executive Sponsor/Steering Committee to review project progress, and significant risks and issues as needed
- o Serves as a point of escalation beyond the Client Project Manager, if needed.
- o Promotes Organizational Change Management in support of project success

Client - Project Manager

The Client Project Manager will oversee the implementation and execution of all project-related activities, while ensuring the successful completion of each phase and related activities to reach the project milestones successfully.

Additional responsibilities include:
- o Acts as the primary project contact responsible for client-side communications, scheduling, deliverable tracking and advancing the project according to plan
- o Works collaboratively with Frontline Project Manager to ensure that the project remains on track and risks are identified and mitigated early
- o Ensures timely completion of Client project tasks and action items as identified by Project Plan
- o Partners with Frontline Project Manager and project teams to track risks, issues, action items, and key project decisions., and works collaboratively with the Frontline Program Director to mitigate risks and resolve issues
- o Partners with Frontline Project Manager on Project Change Management Plan, cascading project communications to the Executive Sponsor, Client project team and project stakeholders
- o Partners with Frontline Project Manager on training schedule, identifying attendees, availability, and attendance for training sessions

Client - Implementation Process Owners

Working closely with the Frontline Implementation Consultants, the business process experts will be responsible for the following:
- o Define organizational policies and answering policy-based questions and or clarifications
- o Understands business requirements and can provide guidance about the future direction of the business area
- o Responsible for identifying business impacts and deciding on configuration options in a timely manner
- o Provides and coordinates functional support after the project go-live

Client - Functional and Subject Matter Experts

Working closely with the Frontline Implementation Consultants the subject matter experts will be responsible for the following:
- o Provide specialist business process knowledge
- o Responsible for configuration decisions and execution of test scenarios
- o Ensure configuration and supports business impacts review
- o Responsible for data validation

Client - System Administrator(s)

Working closely with the Frontline Implementation Consultants the system administrators will be responsible for the following:
- o Responsible for day-to-day operations, upkeep of system, and user management.

- Create/edit/delete new records, packets, and forms
- Sending/tracking/completing forms
- It is necessary to include functional area system owners (e.g., recruiting, hiring and onboarding, compensation, time and attendance, etc.) who can define current policies, processes, and business needs
- Timely completion of project tasks and action items in support of the project plan and schedule
- Partners with IT Department and Frontline Consultant to verify data imports and data exchange
  - Provide named resource(s) responsible for data extraction.
  - Data must be provided using Frontline's standard templates.
  - The client will extract the data in the format requested, or work with their current vendor to extract the data.
  - If the client cannot generate the data based on the specification, there is no guarantee that Frontline Education staff will be able to import it.
  - It is the responsibility of the client to have reviewed the content of the data before sending to Frontline.
  - The district will work with Frontline Education to map any data that does not match a dropdown/look-up value in Frontline.
  - Any data transformation will be the responsibility of the client. This includes merging data sets, reformatting data, breaking apart or combining fields or removal of duplicate records.
  - Once the data has been imported, the client will review the data as it exists in the system for accuracy If any discrepancies are found between what was sent and what was imported, Frontline will research and provide resolution or feedback. Once the data imported is deemed accurate, the client will provide sign-off.

Client - IT Department

Working closely with the Frontline Team the Client technical team will system administrators will be responsible for the following:

- Maintain user access, security, and workflow
- Ensure Frontline Education domains/IP addresses have been incorporated into any firewalls and/or spam filters
- Responsible for updating whitelist from Frontline
- Provide technical support in instances where local network/technology configurations impact usage of our solutions
- Engage with 3rd party vendor and manage the relationship for data transfers
- Work with the 3rd party vendor directly to provide Frontline with clearly defined specifications for data files
- Act as "subject matter expert" for all data content questions from Frontline representatives.
- Coordinate testing of files with the 3rd party vendor.
- Provide any SFTP credential information back to the vendor or facilitate the transfer of the data directly to the vendor.
- Subject Matter Expert for the implementation – including requirements, testing and go-live Support (as needed)

Scope of Work

Overall System Configuration

System configuration is accomplished through a blended approach of pre-configuration, Frontline Education configuration services, and Client configuration activities.

The system is collaboratively designed and built out over the course of multiple configuration calls and follow up actions. Natural spaces are planned in the project cadence for review and acceptance of configuration for individual data elements and pieces of functionality. Reference materials with step-by-step walk throughs are provided to help validate system is functioning to accomplish desired goals. Final User Acceptance Testing materials are provided to help both the Frontline and Client project teams walk through and ensure integrity of system configuration as planned.

Frontline Solution	Configuration Scope	Client to Provide
Frontline Recruiting & Hiring	District Employer Info Page: Frontline will complete the pre-configured page Location List: Frontline will adjust best practices as needed User List: Frontline will configure (1) User List Groups: Frontline will configure up to (2) Groups Email Templates (Auto Replies): Frontline will provide (4) pre-configured and up to (3) custom Job Postings: Frontline will provide up to (3) Job Postings Campaign: Frontline will provide (1) Campaign Filters: Frontline will provide (28) pre-configured and up to (2) custom Filters Admin Views: Frontline will provide (5) pre-configured and up to (3) custom Application Pages: Frontline will provide (21) pre-configured and up to (2) custom Position Categories & Types: Populates from HRMS, Frontline will adjust as needed Position Lists: Frontline will provide (355) pre-configured separate position areas that fall in (38) categories under (3) areas, adjusted as needed Pipelines: Frontline will provide (1) pre-configured with (6) stages, up to (1) custom Forms: Frontline will provide (12) pre-configured, up to (2) additional with workflows Public Forms Library: Frontline will provide (338) pre-configured Forms Packet: Frontline will configure up to (1) Job Description Templates: Frontline will provide (73) pre-configured and up to (2) additional configured Applicant Certificate Types: Frontline will provide (134) pre-configured User Groups & Permissions: Frontline will configure up to (1) User Group & Permissions Cross Advertising: Frontline will (6) pre-configured EEO Reporting: Frontline has built in reporting functionality to aggregate applicant data anonymously based on position types and date range. Ad-hoc Reporting on applicant, job posting, or forms data to export into an Excel File Reports: All tables in Frontline are exportable (Excel or CSV). Data Imports: Frontline will complete (1) Initial data import for each conversion file listed below. After each data import, data must be	☐ Applicant and New Hire Forms and Packets ☐ Job Postings ☐ Client Specific Application Pages ☐ Establish and Implement End User Training Plan

maintained/updated/added manually in Frontline until the system is live (dual maintenance).
- o   Applicant position list: categories and types
- o   Job Posting location / department list
- o   Applicant certificate types
- o   User list

Data excluded:
- o   Historic data conversion, including inactive employees and past position assignments
- o   Loading of digital documents and files to employee records

Data Transfers: Data Transfer abilities exist within Frontline Education solutions and/or with our Featured Partners that are configured and setup as either a flat file transfer or an export/import into an applicable vendor system. Client can create a report and Frontline will assist with enabling (1) data transfer. Specific examples of configurable Data Transfer types include:
- o   Standard Data Transfer with Frontline Education Solutions' Absence and Substitute Management and Frontline Central.

Frontline Solution	Configuration Scope	Client to Provide
Frontline Recruiting & Hiring – Proactive Recruiting	District Employer Info Page: Registration information is pre-configured and Frontline will guild the Client to review and update the District Employer Page User List: Up to (5) users will be added by Frontline. Client can add additional users as needed Groups: (2) custom groups will be built by Frontline Email Templates (Auto Replies): (4) pre-configured and Frontline will provide guidance for adding (3) additional templates Job Postings: Postings occur from enabled Recruiting & Hiring integration Campaign: (1) custom email campaign will be built with the District Users during implementation. Guidance on email campaign functionality will be reviewed by Frontline with the Client. Filters: (28) pre-configured filters and (1) custom filter will be built by Frontline Admin Views: (5) pre-configured and (3) custom Admin Views will be built by Frontline	

Frontline Solution	Configuration Scope	Client to Provide
Frontline Time & Attendance	Job Type: Frontline will assist client on importing up to (500) job types. Position: Frontline will assist client on importing up to (500) positions. Staff Group: Frontline will assist client on configuring up to (5) employee staff groups. Accrual Profile: Frontline will assist client on configuring up to (4) unique leave accrual profiles. Pay Period: Frontline will assist in the creating of up to (4) pay periods. Account Allocation: Frontline will assist on the import of Accounts if required for payroll interfacing. Permissions: Frontline will configure all administrative users with best practice default permissions. Data Imports: (1) Initial data import to include data listed below. After each data	☐ User demographic data ☐ Employee FTEs ☐ Business & Pay rules and policies ☐ Timesheet approval workflow ☐ Master calendars ☐ Current timesheet examples

	import, data must be maintained/updated/added manually in Frontline until the system is live (dual maintenance).	
	o (1) import of Job Types	
	o (1) import Account Codes	
	o (1) import of Positions	
	o (1) import of User Settings to enroll new users and provide them with their position assignments	

Data excluded:
- o   Historic data conversion, including inactive employees, past position assignments and past timesheets.

Reporting: All tables in Frontline are exportable (Excel or CSV). (15) standard reports included. Client may create additional ad hoc reporting with "Report Writer" utility.

Data Transfer: Frontline will provide (1) external HRIS/Payroll extract report and (1) internal Data Transfer. Data Transfer abilities exist within Frontline Education solutions and/or with our Featured Partners that are configured and setup as either a flat file transfer or an export/import into an applicable vendor system. Specific examples of configurable Data Transfer types include:
- o   Standard integration with Frontline Education Solutions' Absence and Substitute Management and Frontline Central.
- o   (1) established HRIS/Payroll extract report for the purpose of interfacing data. An established interface is defined as an integration that is currently established with a vendor and/or requires no development resources.
- o   For a complete list of our vendor partners, please refer to: https://www.frontlineeducation.com/Partners/Find_a_Partner

Project Timelines

Based on Frontline experience with Implementing the solution, below is a high-level estimated project timeline and order of implementation. After the Kickoff call, the Frontline project team will work with the Client to finalize an agreed upon timeline and order of importance based on Client goals.

Client should be thinking about various scenarios that may impact the timeline and be prepared to share with the Frontline project team during Kickoff. Examples are:
- o   School vacation weeks – Client project staff unavailable to work on the project
- o   Planned leave of absences for Client project staff
- o   Availability of Client project staff during contract renewal season, back-to-school staffing season, etc....
- o   The availability of resources to work on each solution - is it possible to run them at the same time since there are different project leads for each implementation, or are there project leads who would handle more than one of the implementations

Frontline will kickoff the overall project within seven (7) business days of contract signature.

Phase	Projected Start Date	Projected End Date
Kickoff	Contract + 7	Contract +7
Strategic Goal Setting / Requirements	Kickoff +14	+3

Gathering		
Frontline Central Kickoff – Go Live	After completion of Goal Setting	8-10 weeks Discovery to Go-live
HRMS Kickoff – Go Live	After FC Go-live	6 months Discovery to Go-Live
Absence Management Kickoff – Go Live	After HRMS Go-live	6-8 weeks Discovery to Go-live
Time & Attendance Kickoff – Go Live	After Absence Go-live	10-14 weeks Discovery to Go-live
Recruiting & Hiring Kickoff – Go Live	After Time & Attendance Go-live	8-10 weeks Discovery to Go-live
Professional Growth Kickoff – Go Live	After T&A Go-live	6-8 weeks Discovery to Go-live
HCA Kickoff – Go Live	After solutions Go-live	1 week from Kickoff to Go-live
3rd Party Data Transfers	Handled within each solution	Complete within 120 days of Kickoff

Project Scope Changes - Change Orders

Frontline shall perform the services specified in this SOW. Any other services or changes identified by the parties will require a duly executed Change Order. If the parties mutually agree to change this SOW, then, Frontline will create a Change Order documenting the change in Statement of Work, additional (or exchanged) services to be delivered and resources required, any changes to the project plan and/or deliverable dates (if applicable), and additional estimated fees (if applicable).

Both parties must properly execute the Change Order before any resources will be assigned or any additional/changed services will be performed.

Change Orders may be executed based on substantial and material changes including, but not limited to, any of the following areas:
- o Request to delay the Planned Go Live, 30 days or more from the original date
- o Changes to the requirements once configuration has begun
- o Additional requirements identified after signoff on Discovery
- o Changes to decisions made by the Client that require rework or otherwise affect deliverables
- o Changes to client team leading to the need for a pause in implementation, additional training, rework and/or changes to requirements

Steps to the Change Order Process: Project Scope Change Request Form
- o Identify the change of scope
- o Document the change
- o Analysis of the change
- o Submission to Frontline and Client Executive Sponsors
- o Executive Sponsor review
- o Executive Sponsor approval / denial

Assumptions
- o Frontline Education and Client will provide consistent, named resources to fill project roles throughout project timeline.
- o Frontline Education have planned timelines based on presumed effort and availability of client resources. Time and effort will vary depending on actual availability and effort required to collect data and complete data entry and validation.
- o Frontline Education and Client will use a collaborative approach to ensure implementation success.

- Client will provide subject matter experts familiar with organizational policies and procedures throughout the project.
- Some dual entry will be required during the transition from Legacy system to Frontline system. The amount will depend on decisions made regarding the transition.
- Data will only be loaded once, and delta files will not be used to update existing data
- Client project team will complete online courses, attend instructor-led training, participate in project status calls, and complete project tasks as planned.

Completion Criteria

- Frontline will make deliverables available to the Client for review and acceptance in accordance with the Implementation Plan timeline.
- Client will provide an adequate number of resources to review Deliverables to confirm conformity in all material respects based on mutually agreed upon requirements and specifications
- Client will provide written notice of acceptance or rejection within ten (10) business days of delivery.
- Deliverables which are not rejected by the Client within the above time frame shall be deemed accepted.
- During final sign-off, Client will approve of the work completed and Frontline will make the Production Environment live.