PowerSchool
Powering Brighter Futures

PowerSchool Group LLC
150 Parkshore Dr., Folsom, CA 95630
Quote #: Q-801946 - 1
Quote Expiration Date: 15-NOV-2023

Sales Quote - This Is Not An Invoice

Prepared By:	Kimberley Smith	Customer Contact:	Wade Auman
Customer Name:	Montgomery County School District	Title:	Asst. Superintendent-Instruction/ Curriculum
Enrollment:	3,694	Address:	PO BOX 427
Contract Term:	36 Months	City:	TROY
Start Date:	2-OCT-2023	State/Province:	North Carolina
End Date:	1-OCT-2026	Zip Code:	273710427
		Country:	United States
		Phone #:	9105766511

Product Description	Quantity	Unit	Extended Price
Initial Term 2-OCT-2023 - 1-OCT-2024			
License and Subscription Fees			
PowerSchool Suite	1.00	Each	USD 66,087.27
Connected Intelligence One External Data Source	3,694.00	Students	USD 6,279.80
Connected Intelligence One External Data Source	3,694.00	Students	USD 7,388.00
Connected Intelligence One External Data Source	3,694.00	Students	USD 7,388.00
Connected Intelligence Data-as-a-Service	1.00	Each	USD 31,399.00

License and Subscription Totals: **USD 118,542.07**

PowerSchool Suite Contains: Analytics and Insights MTSS (3694.00 Students), Student Readiness Hosted Subscription (3694.00 Students), Records (3694.00 Students), Records Data Export Custom (1.00 Each), Records Data Import Custom (1.00 Each), HRMS Manager Portal (3694.00 Students), Sparkhire Video Interviewing (3694.00 Students), Platform Hosted (3694.00 Students), Student Analytics Hosted (3694.00 Students), Professional Learning (3694.00 Students), Professional Learning Annual Service (1.00 Year), Perform Classified (3694.00 Students)

Connected Intelligence Data-as-a-Service Contains: Connected Intelligence Data-as-a-Service (DAAS) (3694.00 Students), Connected Intelligence DAAS - SIS (3694.00 Students)

Professional Services and Setup Fees			
Analytics and Insights MTSS Deployment	3,694.00	Students	USD 2,125.00
Analytics and Insights Keys to Ownership	30.00	Hours	USD 6,120.00
Student Readiness Deployment	1.00	Each	USD 12,835.00
Connected Intelligence Custom Services Fixed Fee	1.00	Each	USD 9,562.50
Records Implementation - Comprehensive	1.00	Each	USD 8,143.00
Records Data Import Bulk File Tool	1.00	Each	USD 1,721.25
Records Data Export Setup	1.00	Each	USD 0.00
HRMS Manager Portal Deployment	1.00	Each	USD 242.25
Sparkhire Integration	1.00	Each	USD 1,436.50
Student Analytics PS SIS Hosted Deployment	1.00	Each	USD 6,600.00
Analytics and Insights Keys to Ownership	20.00	Hours	USD 4,800.00

Perform Implementation - Comprehensive	1.00	Each	USD 6,366.50
Professional Learning Implementation - Comprehensive	1.00	Each	USD 13,578.75

Professional Services and Setup Fee Totals: **USD 73,530.75**

Training Services

Analytics and Insights Training Remote	3.00	Hours	USD 828.75
Analytics and Insights Training Remote	3.00	Hours	USD 975.00
Perform Training Remote	2.00	Day	USD 4,080.00
Digital Readiness Review - Remote Days	2.00	Day	USD 0.00
Digital Readiness Review - Onsite Days	4.00	Day	USD 0.00

Training Services Total: **USD 5,883.75**

Subscription Period Total

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

Total Discount	**USD 50,066.53**
Initial Term	**2-OCT-2023 - 1-OCT-2024**
Amount To Be Invoiced	**USD 197,956.57**

Due Date	Payment Amount
2-OCT-2023	**USD 0.00**
11-DEC-2023	**USD 197,956.57**

Annual Ongoing Fees as of 2-OCT-2024 - Fees subject to an annual uplift, which will be reflected on renewal quote

PowerSchool Suite	1.00	Each	USD 66,087.27
Connected Intelligence One External Data Source	3,694.00	Students	USD 6,279.80
Connected Intelligence One External Data Source	3,694.00	Students	USD 7,388.00
Connected Intelligence One External Data Source	3,694.00	Students	USD 7,388.00
Connected Intelligence Data-as-a-Service	1.00	Each	USD 31,399.00

Annual Ongoing Fees Total: **USD 118,542.07**

Fees charged in subsequent periods after the duration of this quote will be subject to an annual uplift. Customer understands the above Annual Ongoing Fees for the next subscription period do not include the annual uplift, which will be applied at the time of renewal. On-Going PowerSchool Subscription/Maintenance and Support fees are invoiced at the then current rates and enrollment per terms of the main agreement executed between PowerSchool and Customer ("Main Services Agreement"). Any applicable state sales tax has not been added to this quote. Subscription Start and End Dates shall be as set forth above, which may be delayed based upon the date that PowerSchool receives your purchase order. If this quote includes promotional pricing, such promotional pricing may not be valid for the entire duration of this quote. All invoices shall be sent to Customer upon or promptly after execution of this quote, unless otherwise set forth in the applicable statement of work or Main Services Agreement (e.g., services billed on time and material basis will be invoiced when such services are incurred). Notwithstanding anything to the contrary in the Main Services Agreement, if Customer pays in advance for any professional services, all professional services must be scheduled and delivered within twelve (12) months of the applicable quote start date, unless otherwise agreed in writing by PowerSchool; any portion of any prepaid amount for professional services that has not been used by Customer toward professional services rendered within such twelve (12) month period will be forfeited. Payment shall be due to PowerSchool before or on the due date set forth on the applicable invoice. All purchase orders must

contain the exact quote number stated within. Customer agrees that purchase orders are for confirming this order and its own internal purposes, and no other. Any credit provided by PowerSchool is nonrefundable and must be used within 12 months of issuance. Unused credits will be expired after 12 months. Treatment of purchase orders are governed as provided in the Main Services Agreement. By execution of this quote, or its incorporation, this and future purchases of subscriptions or services from PowerSchool are subject to and incorporate the terms and conditions found at:
https://www.powerschool.com/MSA_Feb2022/

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

POWERSCHOOL GROUP LLC	Montgomery County School District
Signature:	Signature:
	
Printed Name: Eric Shander	Printed Name:
Title: Chief Financial Officer	Title:
Date: 19-OCT-2023	Date:

*****Sales Quote - This Is Not an Invoice*****

Statement of Work

Purpose of Document

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

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

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

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



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

Released January 2021
Revised July 2023

General Assumptions

1. Implementation services will be delivered remotely unless onsite services are purchased separately.
2. Client is to provide a data extract to PowerSchool in accordance with Tiered Service package selected (if needed).
3. Implementation timeline is stated within the Planning Phase, extending the timeline may require the customer to purchase additional services.
4. Implementation services are completed when delivered and the deliverable acceptance procedure is complete.
5. Additional services are available and can be purchased for items out of the scope of implementation (see Project Change Control and Escalation Change Procedure section of this document).
6. Customer will adhere to the active PowerSchool Cancellation Policy. "Services Cancellation: Licensee shall pay a cancellation charge equal to fifty percent (50%) of the services fee and any non-refundable expenses incurred by PowerSchool if Licensee cancels any scheduled professional services less than fourteen (14) days before the occurrence of any service dates that PowerSchool has scheduled at Licensee's request."
7. Customer must identify a designated Customer project lead before the project kick-off meeting. The Customer project lead will be responsible for delivering all sections of the "Customer Responsibilities" included in the SOW in a complete manner within the project timeline.
8. The designated Customer project lead should be an employee of the organization implementing PowerSchool. Customers that hire third-party organizations to act on the behalf of the Customer for implementation may be required to sign a waiver form provided by PowerSchool, indicating that the third-party organization is authorized to act on the Customer's behalf when interacting with PowerSchool. The Customer will be responsible for maintaining proper communication channels with third party organizations hired by the Customer.
9. All sign offs must be done by an employee and designated signatory of the Customer. Third party entities engaged by the Customer are not acceptable signatories for any project sign offs.
10. The PowerSchool Project Manager and/or Application Specialist will guide Customer to available procedures, guidelines, standards, reference materials and system/application documentation.
11. Implementation Services is assuming the product will be deployed as-is, items outside of Scope of Work must go through the change control procedures (see Project Change Control and Escalation Procedure in this document).

Deliverables Acceptance Procedure

Deliverables Acceptance

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

- Deliverable will be submitted or delivered to the Customer project lead or designated Customer team member. It is the Customer project lead's responsibility to review and accept deliverable as complete.
- Within six (6) business days of completion of the project the Customer project lead will either accept the final deliverables or provide the PowerSchool implementation specialist a written list of objections. If no response from the Customer project lead is received within six (6) business days, then the deliverables will be deemed accepted, unless the Customer requests an extension.
- The PowerSchool implementation specialist will consider the Customer's objections within the context of PowerSchool's obligations as stated within this Statement of Work. Revisions agreed to by PowerSchool will be applied at which time the deliverables will be reviewed within six (6) business days and the Customer project lead either will accept the deliverables or provide the PowerSchool implementation specialist a written list of objections. If no response is received within six (6) business days, then the deliverables will be deemed accepted, unless the Customer requests an extension.
- Customer objections that are not agreed to by PowerSchool will be managed in accordance with the Project Change Control Procedure described below. If resolution is required to a conflict arising from Customer's objection to a deliverable, the Customer and PowerSchool will follow the Escalation Procedure described below.
- All deliverables required to be delivered hereunder are considered to be owned by PowerSchool with unlimited internal use by the Customer, unless otherwise noted.

Project Change Control and Escalation Procedure

Project Change Control

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

- A Project Change Request (PCR) will be the vehicle for communicating change. The PCR must describe the change, rationale for the change and the effect the change will have on the project.
- The designated Customer project lead will review the proposed change and recommend it for further investigation or reject it. A PCR must be signed by the authorized Customer project lead to authorize quote for additional services. If the Customer accepts additional services and charges, a change to the original purchase order or new purchase order is required. Change to this Statement of Work through additional addendum will authorize additional scope and work.
- A written Change Authorization and/or PCR must be signed by authorized representatives from both parties to authorize implementation of the investigated changes. Until a change is agreed upon in writing, both parties will continue to act in accordance with the latest agreed version of the SOW.

Customer Escalation Procedure

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

- **Level 1:** Customer project lead will notify PowerSchool Project Manager via email with details of escalation.
- **Level 2:** If the PowerSchool Project Manager cannot provide resolution or path to resolution five (5) business days from receipt of level 1 escalation email, the Customer project lead will notify PowerSchool manager via email to – pmoleadership@powerschool.com
- **Level 3:** If the concern remains unresolved after Level 2 intervention, resolution will be addressed in accordance with Project Change Control Procedure or termination of this SOW under the terms of the Contract.

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

Professional Learning Managed Services Statement of Work

UNDERSTANDING OF OBJECTIVES

Our understanding of Customer objectives and desired outcome is the following:

- Provide additional support for Professional Learning or Perform Enterprise beyond what is provided in the given Implementation process for 12 months.

APPLICATIONS WITHIN SOLUTION

The applications provided in the client Solution are as follows

- Unified Talent
  - Professional Learning
  - Perform Enterprise

MANAGED SERVICES METHODOLOGY

PowerSchool's professional services methodology is based on similar and proven approaches used by the largest and most renowned systems integration firms. At the same time, it has been tailored to include the many unique organizational and architectural benefits of PowerSchool's products.

Managed Services provide a year-long as-needed approach to supporting successful first-year implementations, on-going consultative opportunities, additional ad-hoc training, and configuration changes or needs.

Managed Services Support – "Managed Services Support" describes the add-on subscription model that provides customers with a dedicated Application Specialist to answer questions regarding best-practices, configurations and ad hoc training needs for staff turnover, new modules, etc.

Post-Production Support - "Post-Production Support" describes the period after Professional Services following the Go-Live of the PowerSchool Solution. The purpose of post-production support is to assist the customer with stabilization in the initial adoption of the new production application with the Professional Services team to support. This is called Strategic Solutions Consulting. It is an additional service offered as part of implementation.

PowerSchool Responsibilities

- Schedule meetings
- Gather input from client to clarify additional needs
- Consult client on requests that are In Scope of this subscription and those that are Out of Scope
- Complete In-Scope requests within an agreed-upon timeframe
- Provide on-going communication on request progress and completion
- Provide guidance on when to use Support Portal

Customer Responsibilities

- Designate three (3) client contacts in charge of submitted requests and attending meetings
- Request meetings using the provided form
- Provide collateral, test accounts, and files as requested by the Application Specialist
- Review completed subscription deliverables
- Understanding the contents of this SOW

Professional Learning Managed Services Statement of Work

POST-PRODUCTION SUPPORT

For a release of the PowerSchool Solution, the Postproduction Consulting period will begin at Go-Live and conclude within the hours stated below or within 60 business days, unless otherwise stated.

The breakout of post-production support:

- **Professional Learning Comprehensive/Advanced Subscription**: All Comprehensive Implementations include a full year of Managed Services, allowing users to access Strategic Solution Consultants and Technical Consultants for questions, roll-out support, and assistance along the way. Up to three technical contacts from the district will be identified who have access to Managed Services and Support.
- **Professional Learning Guided/Standard Subscription**: No specific post-production hours have been set for the Professional Learning Standard Implementations through Services. However, up to three technical contacts from the district will be identified who have access to Support. The client can elect for post-production hours through Strategic Solutions Consulting packages or with the addition of the Manages Services package.

SUBSCRIPTION DELIVERY

The customer, or its designee, is responsible for managing Customer resources, organizational change management, data conversions and interfaces from legacy systems, and user acceptance testing. PowerSchool will provide technical and tactical support for live site customization and consultation.

SUBSCRIPTION GOVERNANCE

The first level of escalation within the Subscription governance structure is the Customer and PowerSchool Project manager(s). Any issues which cannot be resolved at this level will be escalated to the Steering Committee. The Steering Committee shall then act to resolve the problem in 48 hours.

The Steering Committee will be the highest escalation point and should be comprised as follows:

PowerSchool Representation

1. Vice President, PowerSchool Professional Services
2. Director, PowerSchool Professional Services
3. Project Manager, PowerSchool
4. Customer Success Manager, PowerSchool

Customer Representation

1. Senior Representative appointed by District
2. Senior Representative appointed by District
3. Customer appointed project team members

Go-Live

“Go-Live” refers to the system ready to be used in a Production environment. A single go-live event is in scope of implementation. Additional go-lives are not in scope and any functionality that is mutually agreed to be deferred from the single go-live is part of the Managed Services and will not have bearing on the Project Close date for Implementation.

Professional Learning Managed Services Statement of Work

PROFESSIONAL LEARNING MANAGED SERVICES SCOPE OF WORK

This section defines the scope of the Professional Services to be delivered by PowerSchool with support from Customer resources under this SOW.

If changes or expanded scope are necessary, the parties shall follow the Project Change Control Request ("PCR") Procedure in attached Appendix A. The investigation and implementation of changes may result in modifications to the Estimated Schedule, Fees, or other terms of this SOW.

PROFESSIONAL LEARNING

The following organizations are in scope:

- Client organization signing quote/SOW

The Subscription will be located at the following locations:

- Remote

All countries, divisions, user types, and product lines will leverage the same data structures, processes, approval workflows, and interfaces. No time has been budgeted to design or configure variations by these organizations. The estimated SOW fees assume one configuration across the entire organization.

No other countries, divisions, product lines, or users are in scope.

UNIFIED TALENT PROFESSIONAL LEARNING MANAGED SERVICES

Managed Services cover requests such as:

Request	Description
Data workshops/maintenance/updates Change files, update demographics, etc	Ability to get data, files, and imports updated and automated on-demand Single point of contact to troubleshoot and test new data, add users, train new data staff Help with eFP, B+ and SIS data transfer automation
Updating of any module set up during implementation Enable/Disable Modules	If client decided during implementation to not use certain functions, this allows changes or additions of modules, and provides training to key individuals
Help with Ad Hoc and Reporting set up	Reporting needs change regularly. Ad hoc reporting set up and training is the most often requested service
Consulting on Schoology/other integrations	Schoology, Canvas, Google Classroom, Perform, and Smartfind Express are set up by Professional Learning Application Specialists, so we have intimate knowledge of client set up and needs. We can provide them ongoing support with best practices, usage, and training
Changes in SSO – authentication/security	We can provide ongoing maintenance and answers around authentication, security, and guest access (if purchased)

Professional Learning Managed Services Statement of Work

SSC Consulting Office Hours	Purpose is to facilitate easy onboarding of district staff affected by the PD Admin updates Hands-on practice setting up the system and managing courses in Unified Talent Best practice suggestions for managing course content
Technical Consulting	Allows clients to access configuration and technical services, including best practices, reminders on functionality, and step-by-step guidance on system usage. Deeper dives into other less used features like staff dashboards, etc.
Retraining or training staff (turnover, new roles, etc.)	Provide scheduled sessions with client to review or retrain functions
Premium Library Consultation	Help clients with releasing courses, using Premium Library, discovering content, and increasing usage
Access to additional training material	PowerSchool will provide access to training material and help documents

The following System Settings for Professional Learning are In-Scope for Managed Service Support:

- PD Admin System
  - Instructor Led/Self-paced Courses-types
  - Professional Learning Community (PLCs) Course-types
  - PD Playlists
  - Course and Section Completion Surveys (2 built into system)
  - Course Transcript
  - Standard Course Certificate
  - Discussion Boards
  - Course Approval Workflows
  - Rubric Alignment
  - SCORM Supported Self-Paced Courses
- Course Search
- Mobile App for Attendance
- External Credit Request
- System Notifications
- Calendar and calendar link
- Ad Hoc and Super User Reporting
- District Branding Logo
- Site Layout
- Authentication (select option):
  - SAML or LDAP authentication protocols are supported
  - External User Access
- Imports and Data Migration:
  - *Customer is responsible for extracting and providing data files from any legacy system(s) in the provided formats*
    - HRIS Nightly File Import (Demographics, Site, Person)
    - SFTP Site set-up
    - Automated Import Set-up (customer is responsible for setting up data export to PowerSchool's SFTP)

Professional Learning Managed Services Statement of Work

PowerSchool Responsibilities

- Conduct meetings and working sessions with client
- Configure technical side of system
- Provide best practices and facilitate guided training during working sessions
- Enable client to manage the system independently

Customer Responsibilities

- Attend scheduled working sessions
- Complete configuration tasks when required
- Review and verify configuration

UNIFIED TALENT PROFESSIONAL LEARNING IN-SCOPE MODULES AND CONFIGURATIONS

PowerSchool will provide Managed Services for the Subscription 12-month period in the following areas:

Interface	Module	In-Scope	Details
Professional Learning Integrations	Perform integration	Yes	
	SFE integration	Yes	
	Schoology Learning	Yes	
	Canvas	Yes	Only supported if integration is already enabled
	Google Classroom	Yes	Only supported if integration is already enabled
	SafeSchools (Vector Solutions)	Yes	Only supported if integration is already enabled

Data Services	Description	In Scope	Details
Data Migrations	SFTP Folder with Data Import Tool connection	Yes	Dedicated, secure file for processing nightly file updates
	Nightly HRMS File Imports	Yes	Customer responsibility to extract and provide data to SFTP
	Historical Transcript Import	Yes	Only supported if import is already enabled
	Certification & Licensure Historical Data Import	Yes	Only supported if import is already enabled
	Set up file import from Records	Yes	
	Set up file import from EFP	Yes	
	Set up file import from SIS	Yes	

Professional Learning Managed Services Statement of Work

UNIFIED TALENT ADD-ON MODULES IN-SCOPE

PowerSchool will provide best practice recommendations towards interface development:

Add-On Modules	Module	In-Scope	Details
Modules	Badging/Micro-credentialing	Yes	
	Certification and Licensure Enabled	Yes	Only supported if import is already enabled
	Guest Access Set Up	Yes	Advanced/Comprehensive Implementation only
	Mentoring Module	Yes	Advanced/Comprehensive Implementation only
	Standard Course Completion Certificate	Yes	
	Premium Library Access	Yes	In Scope with subscription to Premium Library content

UNIFIED TALENT PROFESSIONAL LEARNING OUT-OF-SCOPE

The following items are considered out-of-scope of this subscription and will require a separate Scope of Work and Quote.

- Support related activities on non-PowerSchool third party products not outlined in this statement of work, including support on 3rd party integrations
- Compliance outside of the United States
- State compliance not outlined in Client's Contract statement of work
- Custom SQL, stored procedures requirements when Data Services is required
- Certain custom reports (determined by Technical Specialist)
- Enabling modules not outlined in this statement of work
- Strategic Solution Consultant Packages (these are available as an additional service)
- Support-ticket issues (Application Specialist will direct Client's Contract to Help Portal if determined it will lead to a quicker resolution).
- Implementation of new 3rd party integrations (Canvas, Google Classroom, Vector Solutions)
- Subscriptions not covered in Client's Contract

Professional Learning Managed Services Statement of Work

POWERSCHOOL ROLES AND RESPONSIBILITIES

The following PowerSchool resourcing roles sometimes also referred to as “Resources” will be assigned and/or allocated to the Subscription. This is subject to change based on further analysis and discovery through the Subscription stages. The Customer will be notified of any changes to these roles. For new implementations, the Subscription start date is the close date of implementation and not more than 8 months after the start date of implementation.

PowerSchool Staffing/Resource Roles	PowerSchool Responsibilities
Strategic Solutions Consultant	• Provides Support during designated weekly “Office Hours” per this Subscription
Application Specialist	• Provides subject matter expertise as required • Solution modeling and configuration • Assist with testing activities • Primary contact of Technical and System Analyst • Leads Technical design and integration design • Technical expert

Change Order Rates:

- All Change Orders to this SOW will follow the process outlined in the Change Control Procedure.

PowerSchool Analytics and Insights
Student Readiness Analytics Statement of Work
Single-District Deployment

Overview
This document serves as the Statement of Work (SOW) to define the scope of a PowerSchool Professional Services project. This SOW includes services for a single-district deployment of the following products, hosted in a PowerSchool cloud environment:

- PowerSchool Student Readiness Analytics (Qty 1)

All PowerSchool services for this SOW will be performed remotely.

Prerequisites
- Prior deployment of PowerSchool Student Analytics module.
- Customer must purchase a subscription to National Student Clearing House (NSC).

Services in Scope
Initiating & Planning
- Host a project kickoff meeting with Customer to introduce project teams, review the scope of this SOW, and align project dates and resources.

Executing
- Coordinate with PowerSchool SaaS operations team for deployment of the Student Readiness Analytics environment.
- Deployment of Student Readiness Analytics automated predictive engine.
- Deployment of standard Student Readiness Analytics dashboard content
    - Note: This SOW includes deployment of the standard dashboard content only. Customizations are not included in this SOW.
- NSC data extraction. NSC data will be extracted for loading to the Student Readiness Analytics platform using one of these methods:
    - Customer provides required API key to enable Student Readiness Analytics to extract data on Customer's behalf, or
    - Customer provides NSC file extracts in original file format.
    - Note: If NSC data cannot be provided, this content will be hidden
- Perform initial load of NSC data.
    - Note: Ongoing loading of NSC data into Student Readiness Analytics data warehouse will be performed by the client logging a support ticket post implementation.
- Perform data analysis and validation to confirm data mapping and data quality.
- Perform dashboard metric fitting to align the Customer's data with the standard dashboard content.

    Note: Fitting does not include changes to dashboard layouts, metrics, or adding / removing dashboard data elements, which could all be addressed separately via a dashboard customization.

PowerSchool

PowerSchool Analytics and Insights
Student Readiness Analytics Statement of Work
Single-District Deployment

Monitoring
- Perform final system QA
- User Training and Consultation:
    - Deliver standard instructor-led Student Readiness Analytics User Training
    - Deliver customized SME system roll-out and Adoption Consultation
    - Total hours included in this SOW for User Training and Adoption Consultation are specified on Customer's quote

Closing
- Perform Support handoff and project close

Ongoing Project Management
- Project Planning; Project Communication; Status Reporting; Resource Scheduling; Resource Management; Risk Management; Issue Management

Customer Responsibilities
- Assign a Project Manager to act as the single point of contact to PowerSchool for coordination of Customer resources and execution of this SOW. Assign additional technical and business stakeholders as required to complete the work and validate the solution.
- Purchase subscription for National Student Clearing House (NSC) data.
- Provide API key for extraction of NSC data or provide NSC file extract in original file format.
- Assist with validation of source system data and dashboard metrics.
- Participate in User training and consultation.
- Assist with final system QA and provide final system acceptance for go-live.

SOW Fees
This is a fixed-price SOW. Any services or deliverables not documented in this SOW can be addressed via a Project Change Request or a new SOW.

PowerSchool Student Analytics Statement of Work

PS SIS Single-District Deployment

Overview

This document serves as the Statement of Work (SOW) to define the scope of a PowerSchool Professional Services project. This SOW includes services for a single-district deployment of the following products, hosted in a PowerSchool cloud environment:

- PowerSchool Student Analytics (Qty 1)

All PowerSchool services for this SOW will be performed remotely.

Prerequisites

- Customer must be using PowerSchool SIS version 20.4.3 or higher in production, hosted in a PowerSchool cloud environment or accessible via a VPN service provided by PowerSchool.

Services in Scope

Initiating & Planning

- Host a project kickoff meeting with Customer to introduce project teams, review the scope of this SOW, and align project dates and resources.

Executing

- Coordinate with PowerSchool SaaS operations team for deployment of the Student Analytics – PS SIS Hosted environment:
    - Cloud environment provisioning
    - Student Analytics application installation
    - PowerSchool AppSwitcher SSO implementation and configuration
    - Standard user roles inherited from PowerSchool SIS
    - SFTP folder setup for file exchange
    - Deployment of the following standard Student Analytics connectors:
        - PowerSchool SIS 2.0
        - Schoology (optional – will be deployed if Customer is using Schoology in production at the time of this SOW implementation project)
        - Note: This SOW includes deployment of the standard connectors only. Customizations and data extensions are not included in this SOW.
    - Deployment of standard Student Analytics dashboard content.
        - Note: This SOW includes deployment of the standard dashboard content only. Customizations are not included in this SOW.
    - Entities and data from source systems will be limited to Student Analytics application requirements. Data domains for this implementation will include up to the following:
        - Students; Schools; Basic Staff; Enrollment; Attendance; Assessment; Discipline; Courses; Curriculum, Period, and Final Marks; Student Schedules; Basic Special Education
        - Staff Online Activity; Student Online Activity; Tech Access (Optional – If Schoology connector is implemented)

- US State & National Assessment data:
  - Customer will be introduced to the Assessment team and educated on the process of working with that team for initial and ongoing upload of standard supported US State and National assessment data, if applicable.
  - Loading of other assessment data beyond the standard supported assessments and formats can be performed by the Professional Services team and can be covered under a separate SOW or using KTO hours.
- Consulting
  - A Student Analytics – Strategic Solutions Consultant (SSC) will be assigned to assist Customer with understanding and adoption of their standard Student Analytics solution. SSC sessions with the Customer will include the following topics:
    - Post-kickoff system demo for Customer project team to educate on system functionality and capabilities, and to review SOW milestones
    - Review of Customer operations and expected use cases for Student Analytics
    - Post-implementation system walkthrough using live Customer data
    - Best practices for system use and adoption
    - Discussion of potential areas for future system expansion or customization

Monitoring

- Perform final system QA
- User Training:
  - Deliver standard instructor-led Student Analytics User Training
  - Total hours included in this SOW for User Training are specified on Customer's quote

Closing

- Perform Support handoff and project close

Ongoing Project Management

- Project Planning; Project Communication; Status Reporting; Resource Scheduling; Resource Management; Risk Management; Issue Management

Customer Responsibilities

- Assign a Project Manager to act as the single point of contact to PowerSchool for coordination of Customer resources and execution of this SOW. Assign additional technical and business stakeholders as required to complete the work and validate the solution.
- Provide access for PowerSchool to source systems to enable implementation and configuration of PowerSchool connector for extracting data from source systems to load into Student Analytics.
- Assist with validation of source system data and dashboard metrics.
- Validate AppSwitcher SSO between Student Analytics and PS SIS
- Validate user roles inherited from PS SIS

- Participate in Consulting.
- Participate in User Training.
- Assist with final system QA and provide final system acceptance for go-live.

SOW Fees

This is a fixed-price SOW. Any services or deliverables not documented in this SOW can be addressed via a Project Change Request or a new SOW.

PowerSchool Analytics and Insights
MTSS Statement of Work
MTSS Single-District Deployment

Overview

This document serves as the Statement of Work (SOW) to define the scope of a PowerSchool Professional Services project. This SOW includes services for a single-district deployment of the following products, hosted in a PowerSchool cloud environment:

- PowerSchool MTSS (Qty 1)

All PowerSchool services for this SOW will be performed remotely.

Prerequisites

- Implementation of the following product modules:
  - PowerSchool Student Analytics
- Defined Users, Groups, and Roles

Services in Scope

Activities and Deliverables

- The district is given the Roles/Permissions document and provided an opportunity to set their security for both Interventions and Student Plans
  - This is done in the Developer Tools, by using the Edit Rights function (gold lock icon)
- The district is walked through the Intervention Settings page, where they are informed about the following settings they can edit. This walkthrough explains the purpose of the fields, effects on reporting, and things to consider when customizing your values
  - Enrollment/Withdrawal reason
  - Levels
  - Types/Subtypes
  - Student Support Resources
  - Student Observation Labels
- A demo and basic training of Intervention Plans
- A demo and basic training of filling out Interventions
- A demo and basic training of Student Plans template builder
- A demo and basic training on how to create a Student Plan from a template

Ongoing Project Management

- Project Planning; Project Communication; Status Reporting; Resource Scheduling; Resource Management; Risk Management; Issue Management

PowerSchool Analytics and Insights
MTSS Statement of Work
MTSS Single-District Deployment

Customer Responsibilities

- Assign a Project Manager to act as the single point of contact to PowerSchool for coordination of Customer resources and execution of this SOW. Assign additional technical and business stakeholders as required to complete the work and validate the solution.
- Assist with final system QA and provide final system acceptance for go-live.

SOW Fees

This is a fixed-price SOW. Any services or deliverables not documented in this SOW can be addressed via a Project Change Request or a new SOW.

Professional Learning Comprehensive Statement of Work

UNDERSTANDING OF OBJECTIVES

Our understanding of Customer objectives and desired outcome is the following:

- Replace or initiate a professional learning management system to manage and track educator/staff growth and development opportunities and credits
- Create efficiencies through improved professional learning opportunity offerings and records
- Reduce manual processes and improve operational workflows

APPLICATIONS WITHIN SOLUTION

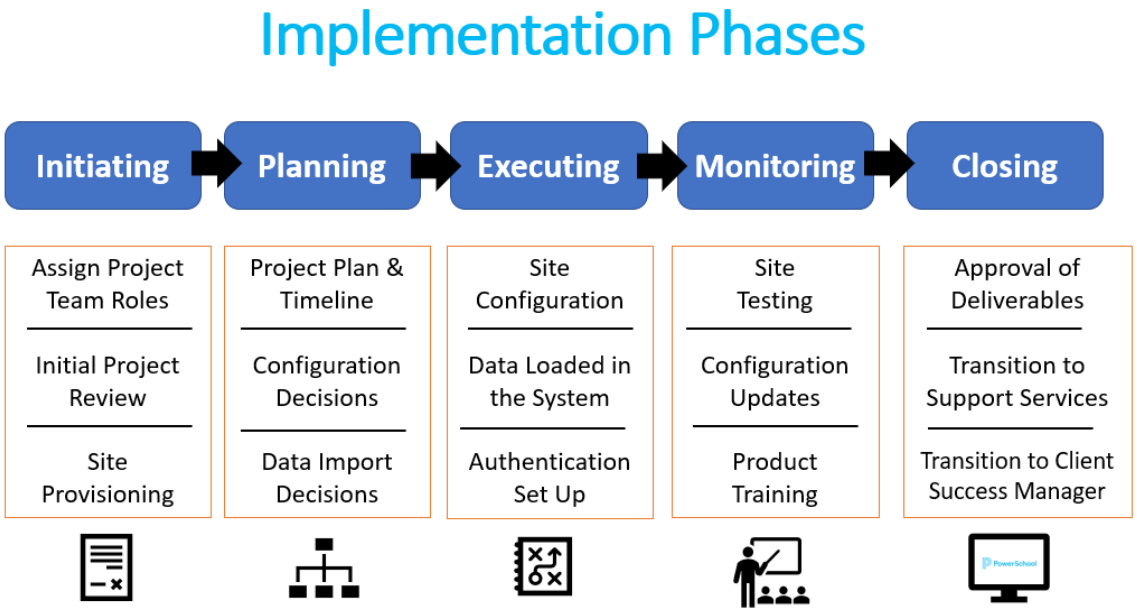
The applications provided in the client Solution are as follows

- Unified Talent
    - Professional Learning

IMPLEMENTATION METHODOLOGY

PowerSchool's professional services methodology is based on similar and proven approaches used by the largest and most renowned systems integration firms. At the same time, it has been tailored to include the many unique organizational and architectural benefits of PowerSchool's products.

The implementation approach uses a "partnership" model between PowerSchool and Customer such that the PowerSchool team primarily serves as an enabler, coach, and trainer for the client to implement the solution themselves. This client-enabled approach achieves a balance of speed and cost, while taking advantage of the available capacity of client staff.



The implementation phases and associated milestones are outlined below:

Initiating - The initiating phase is the beginning of the project. This phase will focus on the project kickoff, planning, governance, and provisioning of your PowerSchool applications. The foundation is laid for a successful project execution. The appointed PowerSchool project manager develops the project scope and project management guidelines, conducts the preliminary risk assessment, and clearly defines the partnership between PowerSchool and the customer. The project manager stays with the customer from project kick-off until the complete solution is delivered.

Planning - The planning phase is the process in which the project specifications are collected to create the master blueprint for the future phases of the project. This phase will begin with workshops on design, configuration, and resolution to design. The master blueprints of the implementation are established as the project map to build out the future phases.

Executing - The executing phase of the project is to configure customer specific configurations and integrations. Customer data will be loaded into the environment. The client team will be trained in the application and the system will be finalized for production readiness. The system is built and serves as the foundation for the final testing and data migration, if applicable.

Monitoring – The monitoring phase will provide a complete prototype solution that is ready to be deployed. PowerSchool utilizes a train-the-trainer methodology to facilitate transfer of knowledge of the application to the customer. PowerSchool will provide system testing and guided user acceptance testing during this phase of the implementation. The customer will dive into the production environment and a Strategic Solution Consultant can provide post-go-live support to ensure stabilization of the system.

Closing – In the closing phase the customer will be transitioned to the PowerSchool Support ecosystem which will include the support helpdesk, PowerSchool Community, and customer success manager. All project collateral will be reviewed for acceptance of project closure.

Post-Production Support - "Post-Production Support" describes the period and Professional Services following the Go-Live of the PowerSchool Solution. The purpose of post-production support is to assist the customer with stabilization in the initial adoption of the new production application with the Professional Services team to support. This is called Strategic Solutions Consulting. It is an additional service offered as part of implementation.

Professional Learning Comprehensive Statement of Work

PROJECT MANAGEMENT

Our implementation process is based on proven success, building on a collaborative relationship between our customer and our service teams. PowerSchool has been implementing educational technology systems for more than 20 years and has leveraged this experience to develop our current implementation process. Our process includes collaboratively working with the customer to establish a well-defined plan that will be used to lead the project through the implementation process, then monitor and control that plan through successful completion. This is completed with easy-to-understand, useful, and detailed tools that are based on the Project Management Institute (PMI) framework, providing you with proven project management techniques.

PROJECT PHASES

INITIATING (PRE-REQUISITES BEFORE PLANNING)

Our process begins with the Initiation Phase, during which we set the course for the project. The primary goals for this phase are to:

- Introduce your District Team to the PowerSchool implementation team
- Provide you with an overall understanding of our implementation methodology
- Define the project milestones and target timeline for the project

The phase concludes with the scheduling of the Customer Kick-Off Meeting. The table below outlines desired expectations from each team to ensure success.

POWERSCHOOL TEAM	DISTRICT TEAM
• An Internal Hand-Off Meeting will be held with your PowerSchool Account Executive and the Project Team to review the contract. • An Introduction Call, also called Pre-Planning, will be scheduled for team introductions and discussion of the project scope and timeline. (The call typically lasts 30 minutes.) • A Discovery Call is conducted to go introduce Client to key features and configuration points of the system and gather requirements. • The Customer Kick-Off Meeting will be scheduled to determine project timeline and go-live expectations, schedule future working sessions and provide a project overview. • Weekly Working Sessions will be established. The weekly joint meeting is typically scheduled for 60 minutes. • Environment setup and initial configurations will be completed by the Application Specialist.	• Identify your core team—We typically would like to have the following people involved in the Weekly Working Sessions: ○ *Project lead*—This person will be your main point of contact for the project and will coordinate your internal team members and deliverables. ○ *IT/Data support*—Several data imports will be completed throughout the course of the project, so it is critical to designate a resource who understands the data and is able to interface with your IT department and systems. ○ Additional team members—Include any additional team members who will make site configuration decisions and help us define how processes should be configured within your site. • Collaborate with our Project Manager—Work together to schedule joint team calls and Weekly Working Sessions and provide blackout dates of non-availability.

Professional Learning Comprehensive Statement of Work

The following documentation will be provided prior to or immediately following the Customer Kick-Off Meeting to support the efforts required during implementation:

- **Communication Plan**—Includes contact information for all team members as well as post-implementation support information
- **Authentication Document**—Supplies information related to authentication and captures the requirements that we will need to configure authentication for your site
- **System Requirements**—Outlines requirements for the PowerSchool system to work most effectively on your district's devices
- **Training Literature**—Gives an overview of all training courses and delivery options available to support a full system adoption

PowerSchool Responsibilities

- Send Welcome Email with Statement of Work
- Identify PowerSchool Project Team
    - Project Manager
    - Application Specialist(s)
    - Strategic Solution Consultant
    - Customer Education
- Schedule Pre-Planning Meeting
- Send Customer access to the following:
    - Project Plan
    - Project Dashboard
    - Deployment Checklist
    - Risk and Issues Log
    - Stakeholders
    - Communication Plan

Completion Criteria

This activity will be considered complete when:

- Customer has access to project plan and dashboard.
- Session schedule is completed

PLANNING

Team members will participate in Weekly Working Sessions to discuss data imports and configuration decisions, present configurations that have been completed, and capture any feedback. This phase includes multiple iterations. Target timelines for each iteration will be defined and deliverables will be expected from both teams to ensure a timely and successful implementation.

During this phase, we also define the training strategy to be executed once configuration and testing are complete. We will provide site access and basic documentation to give guidance as you begin to explore the site. Once all configurations are completed per your requirements, we will move into the Executing Phase.

PowerSchool Responsibilities

- Conduct a Discovery Call to determine immediate configuration decisions
- Conduct a kick-off meeting
- Provide introduction to site and test login credentials
- Explain the implementation process
- Schedule the PowerSchool implementation and training resources based on project timeline
- Update the Project Plan to include implementation timing and resources
- Schedule regular Status Calls as needed

Customer Responsibilities

- Attend kick-off meeting and all subsequent meetings and training required
- Utilize the online Project Plan and Agendas provided for the project to stay up to date
- Extract and convert required data from Customer legacy system to PowerSchool provided templates and format (Data conversion services are available for additional purchase)
- Plan for working sessions and ensure users attend required training sessions
- Update the Project Plan to indicate client tasks completed
- Manage customer business process change throughout the project

Completion Criteria

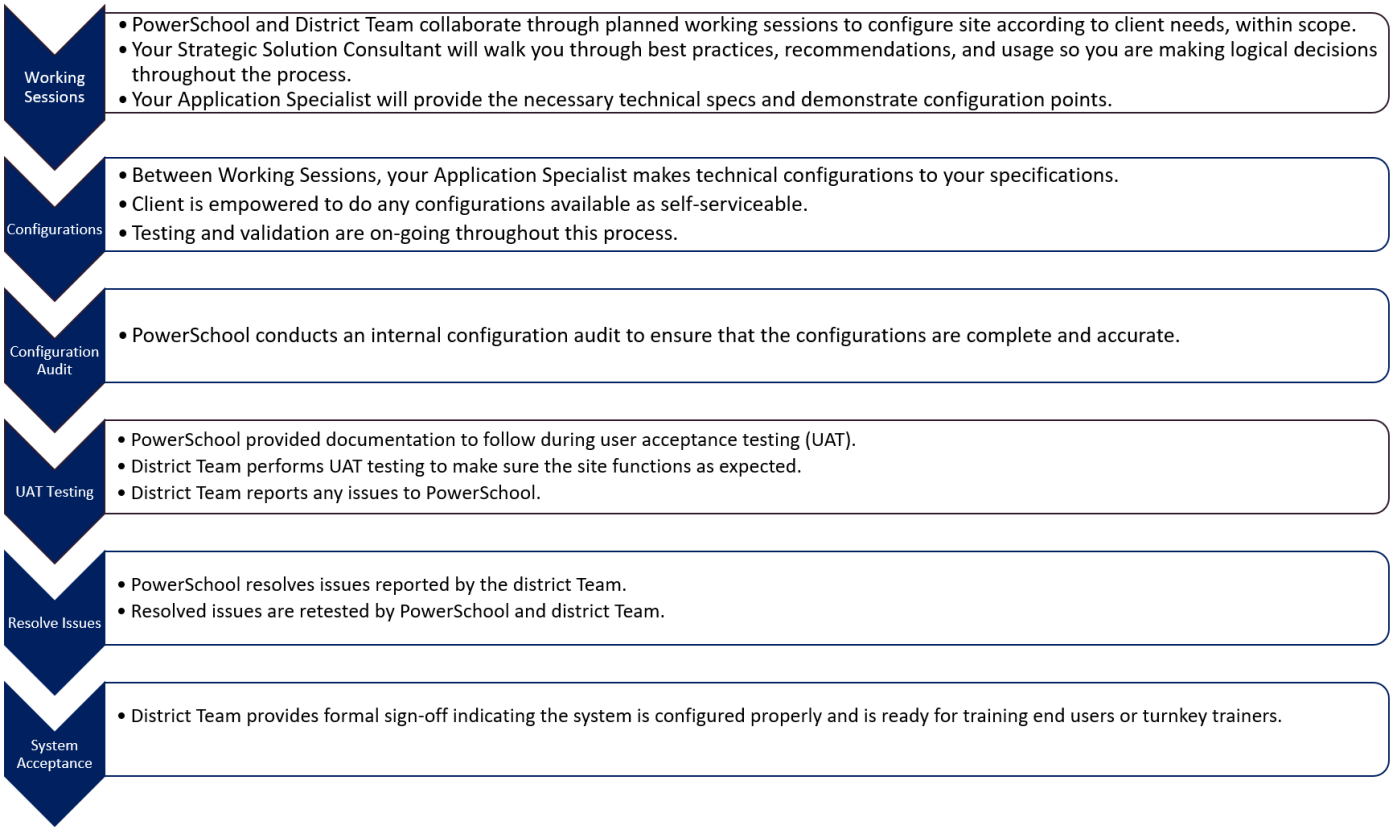
This activity will be considered complete when:

- Discovery call is completed
- The kick-off meeting is completed
- The Project Plan is updated based on discussed timelines
- Client successfully logs in to site
- Data call is complete
- Data templates are received and a timeframe to receive initial data files is set

Professional Learning Comprehensive Statement of Work

EXECUTING

During this Phase, your District's site will come to life. The site will go through the following review and testing process by both PowerSchool and your District Team. During this time, PowerSchool is prepared to quickly address any questions or issues that are identified. The goal of testing is to achieve final approval of the site's configuration by the District Team.



PowerSchool Responsibilities

- Production site set-up
- Schedule and install the Software, provide URL for login
- Provide Security Settings information:
    - Super user test account login information
    - Test user credentials and login information
- Schedule and conduct working sessions
- Configuration set up for the purchased Professional Learning package areas
- Provide PowerSchool deliverables in the agreed upon timeline to avoid impact on the project timeline
- Validate data format and coordinate data import as needed
- Review System Configuration and Data imports in Customer working sessions

Customer Responsibilities

System Configuration

- Attend working sessions and status meetings as scheduled.
- Review and verify Configuration throughout the duration of the project and obtain concurrence from key stakeholders
- Manage business process change throughout the project
- Provide Customer deliverables in the agreed upon timeline to avoid impact on the project timeline
- If deliverables are not provided in the agreed upon timeline, a revised timeline will be provided with new agreed upon deliverable dates and go live dates

Data imports

- Attend data review call(s)
- Evaluate the hierarchy and functional roles for staff
- Align staff to the correct group and role utilizing best practice recommendations
- Personnel Data:
    - Extract Personnel data from existing systems and provide in the requested format
    - Load files to SFTP for processing
- Extract Transcript data from the legacy system and provide it in the requested format.
    - *If historical data cannot be provided during the implementation timeline, the configuration will be considered complete after a successful test file. The Import Tool will be set to process the file once loaded to your dedicated SFTP server.*
- Review and confirm the accuracy of the imported data and obtain concurrence from key stakeholders
- Verify and provide signoff data import is accurate and complete

Completion Criteria

This activity will be considered complete when:

- The system configuration is complete based on Project Scope and master blueprint established during Planning Phase
- Personnel imports have been processed, validated and the system is set up to import automated uploads when ready
- Customer provides system configuration completion acknowledgment
- Customer provides data import completion acknowledgment by setting up automated file import for personnel and transcript data. Alternatively, Customer can indicate in an email that either (or both) of these options have been waived and will not be set up.

MONITORING

A Customer Education Specialist will consult with your District Team to develop training agendas that meet your specific needs and audience. Training is typically scheduled several weeks after User acceptance testing (UAT) testing to ensure final configuration changes are complete and the system is ready for Go Live. A detailed training plan is available within this proposal for additional information.

PowerSchool Responsibilities

- Conduct UAT session(s)
- Set up training sessions
- Set up Technical Consultants
- Validate all deliverables

Customer Responsibilities

- Participate in UAT
- Identify any areas that need to be addressed prior to Closing
- Complete action items and necessary district requirements
- Participate in training and ensure the right people are there

Completion Criteria

This activity will be considered complete when:

- Configuration points are complete and validated
- Training is scheduled
- UAT is completed

CLOSING

After configuration, testing, and training are complete, the production site is live and ready for roll-out. If a train-the-trainer model was implemented, Internal training and/or communication should be delivered so end users are clear about what is expected from them with respect to the new system. At this point, the project is transitioned to our Customer Success and Support teams for ongoing management of the live environment.

PowerSchool Responsibilities

- Review and finalize any remaining project deliverables
- Introduce customer to support contact methods and accessing Community
- Submit Services to Support Survey
- Provide final project sign off to customer

Customer Responsibilities

- Review completed project deliverables
- Understand that Support will become primary contact for customer
- Complete final project signoff

- Complete Customer Satisfaction Survey

Completion Criteria

This activity will be considered complete when:

- Customer completes final project signoff
- Review of completed project deliverables is conducted
- Complete final project signoff
- Complete Customer Satisfaction Survey

POST-PRODUCTION SUPPORT

For a release of the PowerSchool Solution, the Postproduction Consulting period will begin at Go-Live and conclude within the hours stated below or within 60 business days, unless otherwise stated.

The breakout of post-production support:

- **Professional Learning Advanced/Comprehensive Project**: All Advanced/Comprehensive Implementations include a full year of Managed Services, allowing users to access Strategic Solution Consultants and Technical Consultants for questions, roll-out and assistance along the way. For full Managed Services details, see the specific SOW. Up to three technical contacts from the district will be identified who have access to Managed Services and Support.
- **Professional Learning Standard Project**: No specific post-production hours have been set for the Professional Learning Standard Implementations through Services. However, up to three technical contacts from the district will be identified who have access to Support. The client can elect for post-production hours through Strategic Solutions Consulting packages or with the addition of the Manages Services package.

PROJECT DELIVERY

PowerSchool has staffed a Project manager to handle status reporting and management of PowerSchool resources. The customer, or its designee, is responsible for managing Customer resources, organizational change management, data conversions and interfaces from legacy systems, and user acceptance testing. If more time is required from the PowerSchool Project Manager, the parties will follow the Project Change Control procedure.

PROJECT GOVERNANCE

During the Planning stage for the Project, the Customer and PowerSchool Project Managers will establish appropriate governance to support effective and appropriate decision-making, sign off, and escalation procedures. Governance will include the following:

Regularly scheduled Project Status meetings. Both PowerSchool and Customer participants are required to attend.

Regularly scheduled (no more frequently than weekly) status reports provided by PowerSchool to Customer's Project management team.

Delivery assurance phase gate reviews conducted by PowerSchool. Known as "Go-No Go"

The first level of escalation within the Project governance structure is the Customer and PowerSchool Project managers. Any issues which cannot be resolved at this level will be escalated to the Steering Committee. The Steering Committee shall then act to resolve the problem in 48 hours.

The Steering Committee will be the highest escalation point and should be comprised as follows:

PowerSchool Representation

1. Vice President, PowerSchool Professional Services
2. Director, PowerSchool Professional Services
3. Project Manager, PowerSchool
4. Customer Success Manager, PowerSchool

Customer Representation

1. Senior Representative appointed by District
2. Senior Representative appointed by District
3. Customer appointed project team members

PROJECT PLANNING

PROJECT ADMINISTRATION

PowerSchool may utilize one or more of the following tools to support the implementation efforts. The tools are templatizes for fast and consistent implementation results. The client Project team may be granted access for the duration of the project to certain tools at the discretion of PowerSchool. PowerSchool tools are supported by a central PMO that will train and support the client team if needed.

TOOLS / PURPOSE

1. SmartSheets – Project management software used to manage comprehensive plans. Allows you to monitor and control progress and foresee and address potential challenges early.
2. Confluence - Collaborative Project Space that navigates team through methodology, templates, and Project artifact repository
3. JIRA – Issue Tracking Software that is integrated into Confluence and used to assign discrete, time- estimated pieces of build work and to document and triage defects. This is where all the user stories will be documented and tracked.
4. GitHub – A system for hosting version control code management and configuration repository prerequisite for Automated Deployment.

PROJECT PLAN

Project kick-off will be planned on a mutually agreed upon date, based on PowerSchool and Customer resource availability and completion by the Customer of the Pre-requisite deliverables. Adjustments to the Project Plan may occur during the Project and may require the Project PCR Procedure to be followed which may result in a Change Order.

Based upon the known requirements, estimates effort and scope, the following Project Plan is anticipated for the delivery of the solution. The Project Plan will be confirmed after the design phase.

For the avoidance of doubt, a day is eight (8) hours, Monday through Friday, on PowerSchool's standard business days. The timeline can vary based on several factors. Anticipated deviations from the Project Plan will be brought to the attention of the Customer and agreed with the Steering Committee in-line with the agreed Project governance.

Any changes in duration or delays to the go-live date will require the Project Change Control Procedure to be followed.

Go-Live

"Go-Live" refers to the system ready to be used in a Production environment. A single go-live event is in scope. Additional go-lives are not in scope and any functionality that is mutually agreed to be deferred from the single go-live is no longer part of the scope of this SOW.

Go-Live will occur after the migration of the PowerSchool Solution to the Production environment. Customers will be responsible for Go-Live planning with guidance from PowerSchool.

PowerSchool assumes that Customer's information technology policies, those that govern the deployment of Solutions to the Production environment and the Go-Live of new information technology, will not extend the Project Plan described herein via a delay in the deployment or Go-Live of the PowerSchool Solution.

Professional Learning Comprehensive Statement of Work

PROFESSIONAL LEARNING SCOPE – COMPREHENSIVE

This section defines the scope of the Professional Services to be delivered by PowerSchool with support from Customer resources under this SOW.

The scope and objectives will be confirmed during the Define and Design phases. If changes or expanded scope are necessary, the parties shall follow the Project Change Control Request ("PCR") Procedure in the attached Appendix A. The investigation and implementation of changes may result in modifications to the Estimated Schedule, Fees, or other terms of this SOW.

PROFESSIONAL LEARNING

The following organizations are in scope:

- Client organization signing quote/SOW

The Project will be located at the following locations:

- Remote

All countries, divisions, user types, and product lines will leverage the same data structures, processes, approval workflows, and interfaces. No time has been budgeted to design or configure variations by these organizations. The estimated SOW fees assume one configuration across the entire organization.

No other countries, divisions, product lines, or users are in scope.

AUTHENTICATION SERVICES

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

PowerSchool Responsibilities

- Guide district to import the correct user attributes to map SSO set up
- Configure SSO
    - Professional Learning supports LDAP and SAML protocols (Google, Azure, ADFS)
- Configure AppSwitcher with current and new PowerSchool products

Customer Responsibilities

- Identify and enable the Identity Provider (IDP) for setting up of SSO
- Set up the IDP app on the provider side
- Provide a test account for PowerSchool testing (this is required)
- Validate the setup of Authentication services and AppSwitcher before the close of implementation

Completion Criteria

- Customer signs the final checklist that Authentication Services are complete

UNIFIED TALENT PROFESSIONAL LEARNING IMPLEMENTATION

EXECUTING

PowerSchool Responsibilities

- Conduct meetings and working sessions with client
- Coordinate meetings between PowerSchool Implementation team members (Project Manager, Strategic Solutions Consultant and Technical Solution Specialist)
- Configure technical side of system
- Provide best practices and facilitate guided training during working sessions
- Enable client to manage the system independently after Go-Live

The following System Settings for Professional Learning are included:

- PD Admin System
  - Instructor Led/Self-paced Courses-types
  - Professional Learning Community (PLCs) Course-types
  - PD Playlists
  - Course and Section Completion Surveys (2 built into system)
  - Course Transcript
  - Standard Course Certificate
  - Discussion Boards
  - Course Approval Workflows
  - Rubric Alignment (2 Rubrics included plus self-service options)
  - SCORM Supported Self-Paced Courses
- Course Search
- Mobile App for Attendance
- External Credit Request (2 Approval Requests included plus unlimited self-service)
- Registration and Course Notifications
- Calendar and calendar link
- Ad Hoc and Super User Reporting
- District Branding Logo
- Site Layout
- Certification and Licensure Tracking Enabled

- Additional Applications/Add-ons included:
  - Mentoring Module
  - Perform Integration
  - SmartFind Express (SFE) Integration
  - Schoology Integration
  - External User / Guest Account Login
  - Badging/Micro-Credentialing
- Certification & Licensure module enabled
- Authentication (select option):
  - SAML or LDAP authentication protocols are supported
  - External User Access

- Imports and Data Migration:
  - *Customer is responsible for extracting and providing data files from any legacy system(s) in the provided formats*
    - HRIS Nightly File Import (Demographics, Site, Person)
    - Historical Transcript Import (one time)
    - SFTP Site set-up
    - Automated Import Set-up (customer is responsible for setting up data export to PowerSchool's SFTP)
    - Certification & Licensure data import (synced)

Customer Responsibilities

- System Configuration
- Complete configuration tasks (including but not limited to the list above)
- Review and verify configuration, complete signoff

Completion Criteria

This activity will be considered complete when:

- The system configuration is complete
- Personnel imports have been processed, validated and the system is set up to import automated uploads when ready
- Historical Transcript imports are configured, and a sample file has been imported and reviewed
- Customer provides system configuration completion acknowledgment
- Customer provides data import completion acknowledgment

MONITORING

PowerSchool Responsibilities

- Schedule and conduct a Project Close meeting
- Provide launch documentation

Customer Responsibilities

- Complete end-user testing within the software
- Log and Follow Up on Support Cases as needed
- Report critical issues to your implementation team
- Update the Project Plan to indicate client tasks completed
- Customer Education - Attend all Product Overviews and Training
  - Recorded Training
  - Purchased Training will be covered in a separate SOW and Project.

Completion Criteria

- This activity will be considered complete when:
  - Customer has attended Product Training Sessions
  - Customer has attended any additional training included in their package
  - Customer has completed the launch review meeting.

Professional Learning Comprehensive Statement of Work

UNIFIED TALENT PROFESSIONAL LEARNING INTERFACE SCOPE

PowerSchool will provide best practice recommendations for interface configuration. Specifically:

Interface	Module	In-Scope	Details
Professional Learning Integrations	Perform integration	Yes	
	SFE integration	Yes	
	Schoology Learning	Yes	
	Canvas	No	3rd party integration, add-on $2625
	Google Classroom	No	3rd party integration add-on $2625
	SafeSchools (Vector Solutions)	No	3rd party integration add-on $2625

PowerSchool will provide guidance around mapping to PowerSchool objects and third-party integrations.

Data Services	Description	In Scope	Details
Data Migrations	SFTP Folder with Data Import Tool connection	Yes	Dedicated, secure file for processing nightly file updates
	Nightly HRMS File Imports	Yes	Customer Responsibility to extract and provide data to SFTP
	Historical Transcript Import	Yes	Customer Responsibility to extract and provide data
	Certification & Licensure Historical Data Import	Yes – with Manage Services	Or else an additional purchase from data services - $1250
	Set up file import from Records	Yes – with Manage Services	Or else an additional purchase from data services - $1250
	Set up file import from EFP	Yes – with Manage Services	Or else an additional purchase from data services - $1250
	Set up file import from SIS	Yes – with Manage Services	Or else an additional purchase from data services - $1250

UNIFIED TALENT ADD-ON MODULE SCOPE

PowerSchool will provide best practice recommendations towards interface development:

Add-On Modules	Module	In-Scope	Exceptions
Modules	Badging/Micro-credentialing	Yes	
	Certification and Licensure Enabled	Yes	
	Certification and Licensure Data Import Set Up	Yes – with Manage Services	Or else an additional purchase from data services - $2250
	Guest Access Set Up	Yes	
	Standard Mentoring Module	Yes	
	Standard Course Completion Certificate	Yes	
	Premium Library Access	No	In Scope with subscription to Premium Library content

UNIFIED TALENT PROFESSIONAL LEARNING OUT OF SCOPE

The following items are considered out of scope for the implementation.

- Client changes of mind that require services after the Implementation close date*. This includes:
  - Changing demographics, person, or site file structures
  - Adding or changing transcript import file
  - Changing SSO
  - Adding any modules declined during implementation

  **These are included in the Managed Services Packages*
- Development of customer specific or custom training materials
- Support related activities on non-PowerSchool third party products not outlined in this statement of work, including support on 3rd party integrations
- Compliance outside of the United States
- State compliance not outlined in this statement of work
- Customization or scripting requirements
- Configurations not accessible from UI (stored procedures, custom reports, site layout)
- Enabling modules not outlined in this statement of work

UNIFIED TALENT PROFESSIONAL LEARNING CUSTOMIZATION SCOPE

The listing below defines any specific customizations to be included in the deliverable of the PowerSchool Solution.

No known product customizations have been identified during the creation of this statement of work.

New customizations identified during implementation and not outlined in this statement of work are subject to scope review and PowerSchool Change Control Request (Appendix A).

Product Tailoring	Module	In-Scope	Details
Customization			
	n/a	n/a	n/a

Professional Learning Comprehensive Statement of Work

RESOURCING, ROLES AND RESPONSIBILITIES

The responsibility for the execution of the Project will be shared by PowerSchool and Customer resources. PowerSchool and Customer assigned resources will be required to attend the Project kickoff meeting and perform agreed upon activities throughout the lifecycle of the Project.

CUSTOMER ROLES AND RESPONSIBILITIES

District Roles	Responsibilities	Estimated Effort (Hours Per Week)
District Lead	Act as primary point of contact for PowerSchool Project Manager Coordinate all Project activities and required Customer personnel	4-6 (All)
Systems Analyst	Assist in driving business requirement sessions with the Subject Matter Experts (SME)	4-6 (Design)
Subject Matter Expert (Administrative, Technical)	Provide administrative and technical expertise to the Project related to Customer's desired Solution processes; personnel that are familiar with Customer business processes, documents, approval processes, etc.	4-6 (All)
District Trainers	Attend PowerSchool 'Train the Trainer' training model Develop Customer training material Train Customer users on the day-to-day use of the configured Solution	8-10 (Monitor, Post-Live)
Business Transformation Leads	Manage all change management activities within the Customer organization related to the configured PowerSchool Solution	8-10 (Initiate, Design, Deploy)
Customer Functional Resources	Limited design of the PowerSchool Solution with guidance from PowerSchool Limited configuration of the PowerSchool Solution with guidance from PowerSchool Test the PowerSchool Solution	8-12 (Plan, Execute and Monitor)
Customer Technical Architect	Integration of PowerSchool with Customer systems Provides expertise in technical specifications for Customer's integrated systems Data mapping and data preparation	8-12 (Plan, Execute and Monitor)

Professional Learning Comprehensive Statement of Work

POWERSCHOOL ROLES AND RESPONSIBILITIES

The following PowerSchool resourcing roles sometimes also referred to as "Resources" will be assigned and/or allocated to the Project. This is subject to change based upon further analysis and discovery through the Project stages. The Customer will be notified of any changes to these roles. The Project is targeted to start within four (4) weeks of execution of this SOW.

PowerSchool Staffing/Resource Roles	PowerSchool Responsibilities
Project Manager	• Single Point of contact for project • Responsible for project forward direction • On Time, On Budget • Helps monitor and advise
Strategic Solutions Consultant	• Leads solution design • QA of designs and solution • Audits project to ensure adherence to implementation best practices and conformance to standard methodology
Application Specialist	• Provides subject matter expertise as required • Interpret business requirements • Lead functional solution designs • Solution modeling and configuration • Assist with testing activities • Primary contact of Technical and System Analyst • Leads Technical design and integration design • Technical expert
Trainer	• Trains district resources on use of the applications, and share strategies to transfer knowledge within district's organization • Professional Development facilitator • Solution training that supports ongoing educator growth

PowerSchool Employee Records Comprehensive Statement of Work

Initiating (Pre-requisites before Planning)

PowerSchool Responsibilities

- Deploy Records site
- Provide Login Credentials
- Send Welcome Email with Statement of Work
- Identify PowerSchool Project Team
  - Project Manager
  - Implementation Specialist(s)
  - Technical Specialist
  - Strategic Solutions Consultant
- Send Customer access to the following:
  - Project Plan

Customer Responsibilities

- Identify Customer Project Team
  - Project Manager
  - Subject Matter Expert(s)
  - IT Department (If SSO, integrations, exports, or imports are required)
- Review Statement of Work

Completion Criteria

This activity will be considered complete when:

- Customer signs the Statement of Work

Planning

PowerSchool Responsibilities

- Schedule and conduct a kick-off meeting
- Review the deliverables in the SOW and explain the implementation process
- Schedule the PowerSchool implementation and training resources based on project timeline
- Discuss the role and responsibilities of a technical resource during the project (when applicable)
- Discuss the role and responsibilities of the Strategic Solutions Consultant
- Update the Project Plan to include implementation timing and resources
- Schedule implementation calls for the duration of the project
- Email Business Operations team list of Technical Contacts

Customer Responsibilities

- Attend kick-off meeting and all subsequent meetings and training required
- Utilize the online Project Plan and trainings throughout the project to stay up to date
- Plan for training and ensure users attend required training sessions

- Update the Project Plan to indicate client tasks completed

Completion Criteria

This activity will be considered complete when:

- The kick-off meeting is completed
- The Project Plan is updated based on discussed timelines
- Implementation calls have been scheduled

Authentication Services, Importing, and Exporting

As part of these services, PowerSchool will assist the customer to configure Single Sign-On (SSO) using OIDC authentication for the PowerSchool Talent product(s) undergoing implementation. This will be a one-time setup for which the PowerSchool implementation team will assist with the configuration of authentication services for the live Talent product(s) along with the recently implemented Talent product(s). Additionally, PowerSchool will assist with the enablement of the PowerSchool AppSwitcher for use with more than one of the following applications: Applicant Tracking, Records, and Perform.

PowerSchool Responsibilities

- Update user accounts to enable access to the new Talent application
- Configure SSO using OIDC
- Configure AppSwitcher with HR Talent products
- Review Import/Export options for Records, including:
  - eFinance Plus and Business Plus (if applicable)
  - Data Exports
  - PDF Exports
  - Data Import Tool

Customer Responsibilities

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

Completion Criteria

- Customer signs the final checklist that Authentication and Import/Export Services have been completed

Executing

PowerSchool Responsibilities

- Provide system administrator training and best practices on the following System Settings:
  - Data Import Templates
    - Staff
    - Location
    - Job Types
    - Supervisor
  - Configure the Records System

- Building E-Forms (Ex: Employee Change Form)
- Uploading Library Resources (Ex: Uploading an Employee Handbook for review)
- Building Checklists
  Example:
  - New Hire Documents (Ex: Direct Deposit, Employee Information Sheet)
  - Benefits Documents (Ex: Benefit information or Benefit enrolment forms)
  - Employee Separation (Ex: FMLA or Retirement)
- Developing and Assigning Security Permissions and Groups
- Creating/Facilitating Workflows
- Using System Reports
- Managing/Editing System Notifications
- Managing Available Forms
- Scanning content into Records
- Using Contracts
- Staff Updates

- **Build System Content**
  - Create up to 15 Custom Forms
    - Including a maximum of two (2) "mixed" forms using the PDF Form Builder
  - Up to 5 Checklists
  - Create up to 5 Contracts
  - Edit system notifications for new Checklists
  - Configure up to 3 custom security levels
- A Strategic Solutions Consultant provides expertise and guidance for the effective enablement of the product being implemented and will engage with the client once all implementation deliverables have been completed.

Customer Responsibilities

- System Configuration
  - Attend training sessions
  - Complete configuration tasks (including but not limited to the list above)
  - Review and verify configuration, complete sign-off
  - Complete testing outside of meetings: Testing Onboarding Checklists, Test Available Forms and Contracts, Test Filing and Reporting

PowerSchool Employee Records Comprehensive Statement of Work

Completion Criteria

This activity will be considered complete when:

- The system has been configured
- Customer completes System Configuration Sign-off

Monitoring

PowerSchool Responsibilities

- Schedule and conduct a launch review meeting
- Provide launch documentation

Customer Responsibilities

- Attend all implementation calls and training
- Complete end-user testing within the software
- Report critical issues to your implementation team
- Update the Project Plan to indicate client tasks completed

Completion Criteria

This activity will be considered complete when:

- Customer has attended all implementation calls
- Customer has attended any additional training included in their package
- Customer has completed the launch review meeting

Closing

PowerSchool Responsibilities

- Review and finalize any remaining project deliverables
- Introduce customer to support contact methods and accessing PowerSchool Community
- Submit Services to Support Survey
- Provide final project sign-off to customer

Customer Responsibilities

- Review completed project deliverables
- Understand that PowerSchool Technical Support will become primary contact
- Complete final project sign-off
- Complete Customer Satisfaction Survey

Completion Criteria

This activity will be considered complete when:

- Customer completes final project sign-off

PowerSchool Perform Comprehensive Statement of Work

Initiating (Pre-requisites before Planning)

PowerSchool Responsibilities

- Deploy Perform site
- Provide Login Credentials
- Send Welcome Email with Statement of Work
- Identify PowerSchool Project Team
    - Project Manager
    - Technical Specialist
    - Implementation Specialist(s)
    - Education Impact Consultant
- Send Customer access to the following:
    - Project Plan

Customer Responsibilities

- Identify Customer Project Team
    - Project Manager
    - Subject Matter Expert(s)
- Review Statement of Work

Completion Criteria

This activity will be considered complete when:

- Customer signs the Statement of Work

Planning

PowerSchool Responsibilities

- Schedule and conduct a kick-off meeting
- Comprehensive Model is one hundred and five (105) calendar days from the date of the kick-off meeting
- Provide introduction to the Support site
- Review the deliverables in the SOW and explain the implementation process
- Schedule the PowerSchool implementation and training resources based on project timeline
- Discuss the role and responsibilities of a technical resource during the project
- Discuss the role and responsibilities of the Education Impact Consultant
- Update the Project Plan to include implementation timing and resources
- Schedule regular Status Calls as needed

PowerSchool Perform Comprehensive Statement of Work

Customer Responsibilities

- Attend kick-off meeting and all subsequent meetings and training required
- Utilize the online Project Plan and trainings throughout the project to stay up to date
- Plan for training and ensure users attend required training sessions
- Provide Example Evaluation Forms

Completion Criteria

This activity will be considered complete when:

- The kick-off meeting is completed
- The Project Plan is updated based on discussed timelines
- Example Evaluation Forms have been provided

Authentication Services

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

PowerSchool Responsibilities

- Update user accounts to ensure matching between systems
- Configure SSO using LDAP or SSO (if applicable)
- Configure AppSwitcher with current and new PowerSchool products (if applicable)

Customer Responsibilities

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

Completion Criteria

- Customer signs the final checklist that Authentication Services are complete

PowerSchool Perform Comprehensive Statement of Work Executing

PowerSchool Responsibilities

- Schedule and install the Software
- Provide Security Settings information.
- Create the following content in the Perform system
  - A maximum of 5 evaluation processes
  - One Action Plan
  - A maximum of 15 forms including walkthroughs/informal observations
  - Importing Users
  - A maximum of two rubrics
  - Edit any system notification emails
- Provide *system administrator training* and best practices on the following System Settings:
  - Data Import Templates
    - Locations
    - Users
    - Job Types
    - Supervisors
  - Creating Custom Forms – including but not limited to
    - Goal Setting
    - Observation
    - Walkthrough
    - Summative
  - Building Processes
  - Using Rubrics
  - Facilitating Workflows
  - Assigning and Managing Evaluators
  - Scripting Tool
  - Using System Reports
  - Perform Analytics
  - System Notifications
- Provide Evaluator Training (2 hours online unless additional on-site training purchased)
- If applicable, configure the App Switcher and SSO Authentication services
- The Education Impact Consultant provides expertise and guidance for the effective enablement of the product being implemented

PowerSchool Perform Comprehensive Statement of Work

Customer Responsibilities

- System Configuration
    - Provide sample content to project lead in a timely manner to allow for the building of content (allow a 3-week turnaround for any new content provided for build-out)
    - Complete remaining configuration tasks once Project Lead has completed contracted tasks (including but not limited to the list above)
    - Review and verify configuration, complete signoff

Completion Criteria

This activity will be considered complete when:

- The system has been installed
- Customer completes System Configuration Signoff

Monitoring

PowerSchool Responsibilities

- Schedule and conduct a launch review meeting
- Provide launch documentation

Customer Responsibilities

- Attend all Product Overviews and Training
- Complete end-user testing within the software
- Log and Follow Up on Support Cases as needed
- Report critical issues to your implementation team

Completion Criteria

This activity will be considered complete when:

- Customer has attended Product Overviews
- Customer has attended any additional training included in their package
- Customer has completed the launch review meeting

PowerSchool Perform Comprehensive Statement of Work

Closing

PowerSchool Responsibilities

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

Customer Responsibilities

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

Completion Criteria

This activity will be considered complete when:

- Customer completes final project signoff