Sarasota County Schools

Administrative Systems Upgrade Project

Statement of Work Attachment A to the Master License Agreement

Version 1.7
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Contents

Proprietary Statement

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General

This Statement of Work describes the specific tasks associated with the Fixed Fee Services identified in the Product Order Form to which this Attachment A is appended.

Certain of the services described in this Statement of Work require that the parties develop and agree upon certain written documents and plans. In each such instance, once the parties have agreed upon the form and content of the written document/plan in question, each will approve the document/plan in writing prior to undertaking their respective performance obligations under the document/plan in question. Once the document/plan in question has been agreed upon by the parties in writing, any changes to the document/plan will require written approval of both parties. Neither party will unreasonably withhold or delay any such approval.

Licensee is responsible for taking the Baseline Component Systems into a live production environment and will make the determination as to the appropriate timeframe for this undertaking. While CrossPointe.net will provide production assistance to the extent specified in this Statement of Work, CrossPointe.net's project responsibilities under this Attachment A are considered complete when CrossPointe.net has completed its responsibilities as provided for in this Statement of Work.

In each instance, the fee for each Fixed Fee Services item identified in this Statement of Work is based upon the assumption that CrossPointe.net's responsibilities for such Services will conclude at the expiration of the services period provided for in the Product Order Form for that Fixed Fee Services item unless an extension is agreed upon via the procedures outlined in section 8. Change Management of the Assumptions in this document. Licensee agrees to use diligent efforts, and provide the cooperation and assistance reasonably requested by CrossPointe.net, to enable CrossPointe.net to render the services and complete its responsibilities within each respective services period.

Certain Responsibilities of Licensee. In addition to the responsibilities of each party otherwise provided for in this Statement of Work or the related planning documents, Licensee agrees to provide the following in connection with the CrossPointe.net services described in the project plan and this Statement of Work:

- o Licensee will provide a point-of-contact who will work directly with the CrossPointe.net Project Manager to assist and coordinate activities related to this engagement, such as meetings, interviews, and verification of deliverables
- o Licensee will provide access to key individuals or groups for information-gathering purposes and interviews in relation to the performance of this service
- o Licensee will install and provide CrossPointe.net with access to all necessary hardware, software and peripherals. The Licensee's point-of-contact will work directly with the CrossPointe.net personnel to assist and coordinate CrossPointe.net's access to such Licensee systems
- o Licensee agrees to provide full cooperation and assistance to CrossPointe.net as reasonably requested by CrossPointe.net and as specified in the project plan and other project documents
- o Licensee will provide access (where available) to procedures documents, published strategy and tactical documents, process requirement documents, etc. for information-gathering purposes in relation to the performance of

CrossPointe.net's services, and to the administrative systems and information in relation to the performance of CrossPointe.net's services

Executive Summary

This proposal outlines the methodology CrossPointe.net will utilize for this engagement, the scope of the project, and a description of the project deliverables and responsibilities for all parties.

Project Approach
Our project approach is practical and disciplined, incorporating Sarasota County School's input throughout the entire life cycle on priorities, scope, findings, recommendations, and, most of all, expected deliverables. We will leverage best practices while adopting them to Sarasota County Schools' needs and culture.

The goal is to insure that Sarasota County Schools receives value and its expectations are exceeded from its investment of time and money.

We leverage our Client Engagement Process, which provides the foundation for all project communications. Those components include:

- A Review of tasks, responsibilities, and expected Deliverables before each phase
- Weekly Project Update Meetings with Project Stake Holders
- Meeting Recaps
- On-time / On-budget Reviews
- Identification of Project Concerns, Risks, and Issues
- Obtaining Sarasota County Schools Feedback, and Taking Appropriate Actions
- Measures of Success (as Establish in Kickoff Meeting - see Appendix A)
- Escalation Process

Overview of Project Schedule
The project is scheduled to begin on December 10th, 2008 and end on July 1st, 2011 at which time Sarasota County Schools will be completely migrated to their new environment and will have been supported in this environment for 1 year.

The implementation of the Financial, Human Resources, and Payroll systems are set to start almost immediately after ratification of the contract. The project is targeting a 'live' date of July 1st, 2009 for the primary functions in these areas. The implementation of additional functionality and fine tuning of processes will continue for approximately another year.

Initial steps for a phased-in Student Information System implementation will start in late 2008 with the first phases of on-line grade book and attendance processing going live in late 2009. The additional phases of grade book will continue gradually with the primary SIS administrative functions ready to go 'live' in spring of 2010. Again, additional functionality and fine tuning of processes will continue until spring of 2011.

Roles and Responsibilities

Action	Role
Fit/Gap Analysis	CrossPointe.net and District lead staff review software and reports any gaps in the system CrossPointe.net and the District will make determinations as to how to address the gaps
Custom Specifications - Interfaces & Reports	CrossPointe.net and District draft specifications for changes, interfaces, and custom reports
Initial Data Conversion	District provided a copy of the current CrossPointe system database to CrossPointe.net CrossPointe.net uses conversion routines to populate SQL Server database
Software Installation	District procures and sets up servers CrossPointe.net remotely certifies server set up CrossPointe.net loads software District receives training on SQL server District tests software
Application Education	CrossPointe.net shows district key personnel the complete capabilities of the software
Setup and Configure	CrossPointe.net meets with district key personnel CrossPointe.net configures software CrossPointe.net develops workflow processes CrossPointe.net develops process based user documentation
Training (Tech)	District has technical staff members available for initial training
User Acceptance Testing	Crosspointe.net trains key district staff on configured software and provides controlled testing environment and processes
Second Data Conversion	CrossPointe.net applies all changes from initial conversion
District End-User Training	CrossPointe.net to train end users
Go Live	Operations commence across district and old system is terminated
In-use Analysis and Feedback	District lead staff users funnel comments to project managers and thus to CrossPointe.net. Committee makes determination of best path for resolution
Fine-tuning and Long-term Support	Corrections or further customization done as above. District accepts module for production use

Throughout the implementation process, CrossPointe.net will require assistance from the district in the Fit/Gap task, checking and verifying reports, and testing the application after the conversions. The district will be responsible for supplying data in pre-defined formats to match the data layouts in CrossPointe.net. CrossPointe.net would perform the conversion of data; however, validation and testing must be completed by the district.

Program Director Services

CrossPointe.net's Program Director will work with Licensee in an effort to implement the CrossPointe.net Baseline Component Systems in a manner consistent with the objectives established by the parties in the written Project Plan. The CrossPointe.net Program Director helps to facilitate the implementation of the CrossPointe.net Baseline Component Systems in a manner consistent with Licensee's business practices.

Throughout the project phases, key project metrics are tracked, measured, and evaluated at regular intervals for quality assurance. Significant deviations from project management processes and project expectations are investigated and documented and corrective action is planned and taken.

CrossPointe.net Program Director Services provide support at the executive level for the parties' respective Project Managers, in an effort to facilitate the provision of assistance as reasonably required for implementation of the CrossPointe.net Baseline Component Systems. To that end, the CrossPointe.net Program Director will validate that the project scope addresses Licensee's requirements by analyzing project implementation activities. Important implementation success factors, such as key milestones and deliverables, are monitored to keep the implementation on schedule. The Program Director will make necessary recommendations and advise Licensee's executive sponsor and project teams.

The CrossPointe.net Program Director will coordinate all phases of the engagement and have direct oversight over the CrossPointe.net Project Manager. The CrossPointe.net Program Director serves as the liaison between Licensee and CrossPointe.net as well as manages and assesses Licensee's issues, concerns, and outstanding commitments for the engagement. The CrossPointe.net Program Director is responsible for establishing and managing expectations, performing contingency management, as required, and addressing contract management issues with Licensee. Other activities include:

Four engagement visits per "Project Year" (that is, each one year period commencing on the Effective Date or the anniversary thereof) during the implementation period, broken down to include the activities in following bullets:
- o Oversee development and execution of overall communication strategy detailing audience, frequency, media, and content
- o Prepare a monthly engagement progress report on the engagement to the Steering Committee
- o Participate in Licensee Steering Committee meetings and other appropriate executive meetings;
- o Facilitate key quality assurance, milestone, deliverable, and financial reviews
- o Establish and manage adherence to overall project governance and control strategies. At project start up, attend kick off (2 days), planning meeting (2 days), and project organization (1 week per project.)
- o Perform quarterly scope reviews: 1/2 day prep, 1/2 day meeting
- o Provide problem resolution: 4 hours per month per implementation

Project Management Services (Full-Time Designated Project Manager)

CrossPointe.net will provide Licensee with a full-time designee Project Manager during the period specified in Product Order Form. A "full-time designee" is a designated CrossPointe.net employee (or his/her replacement, in the event of such person's death, disability, or other unavailability to serve in such designated position) provided by CrossPointe.net to provide project management services to Licensee on a full-time basis during normal business hours (exclusive of CrossPointe.net training time, administrative time, sick time, and vacation time), including the provision of such services both on-site at Licensee's facility, and on a remote basis, as reasonably determined by CrossPointe.net in consultation with Licensee.

Through such resource, CrossPointe.net will provide project management services to Licensee as follows:

o CrossPointe.net Project Services and Licensee will co-develop project-related documents including Project Definition, Configuration Management Plan, Communication Plan, Training Plan, and the Quality Assurance Plan using CrossPointe.net-supplied templates for these named documents

o CrossPointe.net and designated Licensee representatives will co-develop the document referred to as the "Prioritized Services Requirements," which will describe a targeted schedule of tasks to be performed by CrossPointe.net and the order in which CrossPointe.net intends to perform such tasks, as well as the technical requirements and the facilities and equipment that are needed for the project

o CrossPointe.net and Licensee will jointly maintain and update, as reasonably needed, the Project Definition, Configuration Management, Communication Plan, Training Plan, and other relevant project-related documents

o CrossPointe.net Project Services will co-develop the Project Schedule and Education Plan using CrossPointe.net-supplied templates

o The CrossPointe.net Project Manager will:
  o Participate in the co-development co-maintenance of project-related documents
  o Perform project tracking of CrossPointe.net delivered services
  o Assess the status of the project and assess and identify significant risks to its completion
  o Identify and report issues that may potentially impact the project
  o Review all planning documents which are CrossPointe.net's responsibilities as outlined above
  o Write a monthly project status report.

As part of CrossPointe.net Project Management Services, the assigned CrossPointe.net Project Manager will conduct periodic project assessments. The frequency of these reviews will be jointly determined by Licensee and CrossPointe.net. If not otherwise defined, these reviews will take place at six (6) month intervals. These reviews will

assess project performance and compliance to the project processes defined and agreed to as part of the Project Definition.

Installation Services

CrossPointe.net takes a hands-on approach to installing, configuring, and implementing the software. This process goes far beyond just training the district personnel on how to run the software. Subject matter experts work closely with district personnel to ensure that finished product meets the daily business needs of the district by working through a series of configuration, testing, and approval steps. These steps develop a mutual understanding of the capabilities of the software, the desired business practices, and need for the district to be self-sufficient after the implementation is complete.

Software Installation

In order to get the implementation started, CrossPointe.net's technical team is charged with the process of preparing the district's hardware and software environments for receiving the CrossPointe.net installation. The district has been provided with a proposed hardware configuration and any additional software requirements prior to contract signing. The CrossPointe.net technicians will validate the configuration, analyze network bandwidth, and configure the Microsoft .net application, SQL database, and SQL reporting software and services needed to support the CrossPointe.net applications.

Gap Analysis

Not every district's business processes are the same as another's. As an initial step during the installation, CrossPointe.net Consultants meet with the district's key departmental personnel to understand the ins and outs of the daily processing of the district's information. During these discussions the CrossPointe.net Consultants note any areas where the CrossPointe.net software does not completely support the district's requirements for processing, interfaces, and local data elements, as well as departmental and governmental reporting requirements. Also during these discussions the district is queried as to any current processes which need to be reviewed as part of the implementation process. The result is a Gap Analysis document which clearly identifies any unique requirements and/or deficiencies that need to be addressed as part of the implementation.

Gap Review

As a follow-up to the Gap Analysis, the CrossPointe.net Consultant and district staff reconvene to review the Gap Analysis document and make determinations as to the next steps for each of the identified items. In most cases the items fall into four major categories each with their own resolution path:

o Process Change – There may be optional processing paths that are available within the delivered software that still meets the district's needs and requirements. The CrossPointe.net Consultants will outline the process change and discuss the pros and cons with the district personnel to determine if this change will be effective

o Baseline Code Change – Should the requirement go beyond just a processing need, CrossPointe.net will review the requirement to determine if a change to the Baseline CrossPoint.net product would benefit CrossPointe.net user population as a whole. If so, CrossPointe.net may make the determination to update the software to support the needed requirement and make it part of the product going forward

- o Custom Code Change – Should CrossPointe.net determine that making a change to the Baseline CrosssPointe.net product would not benefit a significant number of districts, CrossPointe.net may offer to develop district specific customizations to address the requirement. These customizations are usually developed and maintained at an additional cost based on the complexity of the requirement and are billed to the client under a separate contract

- o Interface to Third-Party Application – Should CrossPointe.net Consultants determine that the requirement is beyond the processing scope of the CrossPointe.net solution set, they may recommend addressing the requirement via a third-party software application. As part of this recommendation, the Consultants will determine the interfaces required to communicate with the recommended application. The district in this case will assume the cost associated with the acquisition and implementation of third-party software

The district's representatives will be asked to sign-off on acceptance of the Gap Analysis Document at the completion of the review process.

The accepted Gap Analysis Documents for Sarasota County Schools are attachments to this agreement and are labeled as follows:
- Sarasota Student Information System Upgrade Gap Analysis – Attachment B
- Sarasota Gradebook & Parent Portal Upgrade Gap Analysis – Attachment C
- Sarasota Human Resources / Payroll System Upgrade Gap Analysis – Attachment D
- Sarasota Finance System Upgrade Gap Analysis – Attachment E

Functionality of existing TERMS application or equivalent will be included as part of baseline features of the CrossPointe .net software solution.

Items identified as "Sarasota Specific Customization" in all Sarasota Gap Analysis documents will be provided to Sarasota County Schools at no additional cost.

Items identified as Future Considerations in all Gap Analysis Attachments are not included in this agreement and may be considered for inclusion in future software releases by CrossPointe.

System Configuration
Once the resolutions on the gap items are determined, the CrossPointe.net Consultants will begin working with the district's subject matter experts (SME) to determine the configuration of the CrossPointe.net system. For each component of the CrossPointe.net software that the district chooses to implement, the CrossPointe.net Consultant will provide Application Education to the district's SMEs. At completion of Application Education for this component, discussions will be held to determine how the district wishes to have the software configured to support current or future business practices. Based on these discussions, CrossPointe.net will configure the software to reflect the way the district wants to conduct business.

Workflow Development

Throughout CrossPointe.net's systems, there are opportunities to implement workflow processing for the flow of key pieces of information between individuals and/or departments. As part of the system configuration sessions, the business rules for defining these flows will be defined and recorded. The CrossPointe.net Consultant will use this information to configure the workflow engine to route the information based on the district's rules.

Interface Development

A key component to any implementation is to ensure that information flows between the CrossPointe.net system and the district's other software systems. These interfaces will be defined jointly by CrossPointe and Sarasota County Schools and a determination will be made as to which of these will be required for implementation and developed by the CrossPointe.net implementation team. It is during this phase that these interfaces are created.

Test Script Development

In preparation for User Acceptance Testing the CrossPointe.net Consultants will develop testing scripts that guide the district's testers through testing and verifying that the configuration and conversion supports the district's practices. As part of the script development, a determination will be made as to the district's requirements for documenting and verifying that each component is accurately tested and verified. The district's representatives will be asked to sign-off on acceptance of the test scripts and testing documentation processes at the conclusion of this phase.

Report Development

Every district has, over time, developed those key reports that are critical to the daily function of each area. During the gap analysis process these reports are identified, defined, and a determination is made as to which of these will be developed by the CrossPointe.net implementation team. It is during this phase that these reports are created.

User Acceptance Testing Support

Once the CrossPointe.net system is configured, data converted, and workflows and reports are developed, individuals from the district are asked to perform controlled testing of the district's business processes. Prior to performing the testing, the testers are provided with training on how to use CrossPointe.net to perform the processes being tested. These individuals are also trained on the requirements and procedures being used to document the testing results. Based on the testing results, the implementation team will determine the need for any configuration, conversion, or documentation changes. If changes are significant, a determination will be made if the testing process will need to be repeated. The district's representatives will be asked to sign-off on acceptance of the configured system for the areas tested at conclusion of this process.

Interface Testing Support

Once the interfaces have been developed, CrossPointe.net Consultants will work with the district's IT staff and SMEs to verify that each interface is performing as defined. The district's representatives will be asked to sign-off on acceptance of each interface upon conclusion of testing.

Go-Live Support

CrossPointe.net uses a phased-in go-live process where key processes are rolled out at different points during the implementation. The CrossPointe.net Consultant will provide on-site support to the district personnel just prior to, during, and immediately after the roll out of each of these key processes. The district's representatives will be asked to sign-off on acceptance of the delivered CrossPonte.net key process.

Post-Implementation Review

Approximately two months after each phased go-live, the CrossPointe.net Consultant and district personnel will perform a review of the processes implemented. During this review, any changes to the system configuration, documentation, or workflow are identified and documented. As part of the documentation of the change, the team will record the impact of each change and the proper procedure for making, testing, and timing of the roll-out.

Post-Implementation Support

Along with proving support to those items identified during the Post-Implementation Reviews, the CrossPointe.net Consultants will provide on-site support for other key processing dates for the district which occur during the contracted services period. Examples of these would be: Fiscal Year End, Human Resources Open Enrollment, Student Scheduling, Academic End of Year, etc. The CrossPointe.net Consultant will meet with the district's SME to review the processing requirements and preparation needed prior to the date. During the key dates, the CrossPointe.net Consultant will be on-site to provide any needed support to the district's users.

Security

The **CrossPointe.net** Application Suite, including the **CrossPointe.net SIS** application has been designed from the outset as a 'roles based' application. By adopting this approach, user access and data security can be controlled down to the field level. This provides a mechanism where the District School Board of Sarasota County 'Security Manager' can easily enroll users and be assured that the only application components and information accessed is consistent with the individual's job functions. Application suite security is currently provided as role-based security and policies architecture from the application layer to the Active Directory layer making extensive use of Active Directory. Current and future restrictions are accomplished through either the Active Directory or the CrossPointe application user profile. The user security profile includes application, menu, screen, record access and query access. The security profile is defined based on access authority.

System Maintenance

As described in numerous sections throughout this document, CrossPointe.net's design philosophy aligns the key elements of our system's architecture with the specific technology framework concerns of a K-12 School District – security, portability, interoperability/integration with legacy systems, scalable solutions, built on a Standards-based Technology Platform.

Our design and development methodology focuses on developing and releasing new products and features that anticipate the operational and information management needs of K-12 School Districts. The development organization is organized along product lines with each product unit having responsibility for new product and release

development (that occurs typically on a 12 to 18 month cycle) and sustainment development with maintenance/minor functionality releases occurring twice a year.

CrossPointe.net's product and release planning does not happen in a vacuum. CrossPointe.net has three separate avenues for our customers to impact the content of future releases: 1) CrossPointe.net utilizes the 'CrossPointe Users Group' which now meets twice a year as an input and communication vehicle for release planning and customer satisfaction reviews; 2) CrossPointe.net also utilizes operation specific (HR, Finance, Warehouse, and SIS) advisory panels that meet on a quarterly basis to provide product input; and 3) CrossPointe.net also utilizes a web-based support system as our CRM and customer support/defect tracking portal. At the start of all major and minor development initiatives, the Customer support database is reviewed and specific enhancement requests evaluated for inclusion in the upcoming planned release.

All customers on maintenance agreements are entitled to all product enhancements to those products covered under their maintenance agreement. There are no additional costs for the CrossPointe.net application software.

Maintenance Updates and Major Upgrades

A maintenance update is a revision that encapsulates software bug fixes and often includes small functional enhancements. Maintenance updates are typically signified by minor version number increments. For example, a maintenance update from version 1.0 would be 1.01, 1.02, etc.

A major upgrade is a revision that involves extensive engineering work to provide significant enhancements to the product and is often accompanied with new documentation.

Release Timeline

As a component of the maintenance and support fees paid to CrossPointe.net, CrossPointe.net provides updates twice a year with one release in the June timeframe and a second in the December timeframe. Each general release synchronizes the entire CrossPointe.net application suite, delivering new features and bug fixes for existing products and, when available, new products. Major software enhancements are available every 12 to 18 months.

A twice-yearly release delivery model offers a number of benefits:

- Rapid response to your requests for specific features due to more frequent releases

- High quality and improved backward compatibility, resulting from incremental development of new features to reduce the risk of introducing incompatibilities, combined with faster delivery of bug fixes

- Easy and efficient upgrades, since the predictable schedule enables you to plan how and when to evaluate, test, and install new releases for your district

Installation of Updates

The CrossPointe.net Project Manager and Account Executive will work with Sarasota County on an ongoing basis to schedule these upgrades on a non-interference basis.

State Reporting

Crosspointe has always delivered DOE changes prior to the survey dates as outlined by FL DOE. Due to the different timeframes that the DOE releases these updates for inclusion in a particular survery period, defintive delivery dates from Crosspointe is impossible to document here. CrossPointe is committed to providing Sarasota with as much time as possible to review implemented changes prior to survery submission.

Data Conversion Services

CrossPointe.net appreciates the difficulty involved in converting a growing school district from the CrossPointe (TERMS) application suite to CrossPointe.net's application suite. CrossPointe.net is in a unique position given that the district currently utilizes an older version of CrossPointe.net's applications. CrossPointe.net's staff has years of experience in converting large school districts (greater than 100,000 students) to CrossPointe.net's products including the training of all key stakeholders. The CrossPointe.net team consists of K-12 professionals with significant experience in, and understanding of, large school systems and their unique requirements.

CrossPointe.net understands the district may have developed custom tables and fields into the CrossPointe.net database, and, therefore, the CrossPointe.net conversion team will data "map" all information from district's existing systems into the appropriate locations in the CrossPointe.net database. This will be a cooperative effort between CrossPointe.net and the district in that CrossPointe.net will convert and scrub the data but it will be the responsibility of the district staff to validate the accuracy of the converted data. Although electronic conversion of district supplied data is the norm, there are also some data elements where it is more cost effective to 'hand convert' (hand key) the data. Sarasota County Schools and CrossPointe will jointly determine the most efficient, cost effective manner in which to convert data.

Typical examples of Student System data elements that can be converted are:
  o Basic Student Records (Demographics)
  o Course Records
  o Teacher Records
  o Special Programs Data
  o Scheduling Information
  o Calendars
  o Bell Schedules
  o Grade Levels
  o Homerooms / Teams
  o Enrollment / Scheduling Information
  o Attendance
  o Grades
  o Discipline
  o Health
  o Testing
  o Transportation

Data Conversion Plan Overview

The Data Conversion Plan will consist of a seven step process to convert legacy information to the new CrossPointe.net platform. The seven steps, depicted in the diagram below (see Figure I-1), represent the automated and manual procedures necessary to successfully convert data from the legacy application to the new CrossPointe.net platform.

Step One, Data Quality Discovery, describes the process by which the district will stage the district data for the Record Extraction step

Steps Two through Four, represent an iterative process by which the team performs data cleansing activities based upon reporting provided during the Data Cleansing step

Step Five, represents the Record Transformation step by which approved data transformation rules are applied in preparation for the loading of System tables

Step Six, loading the data to System tables

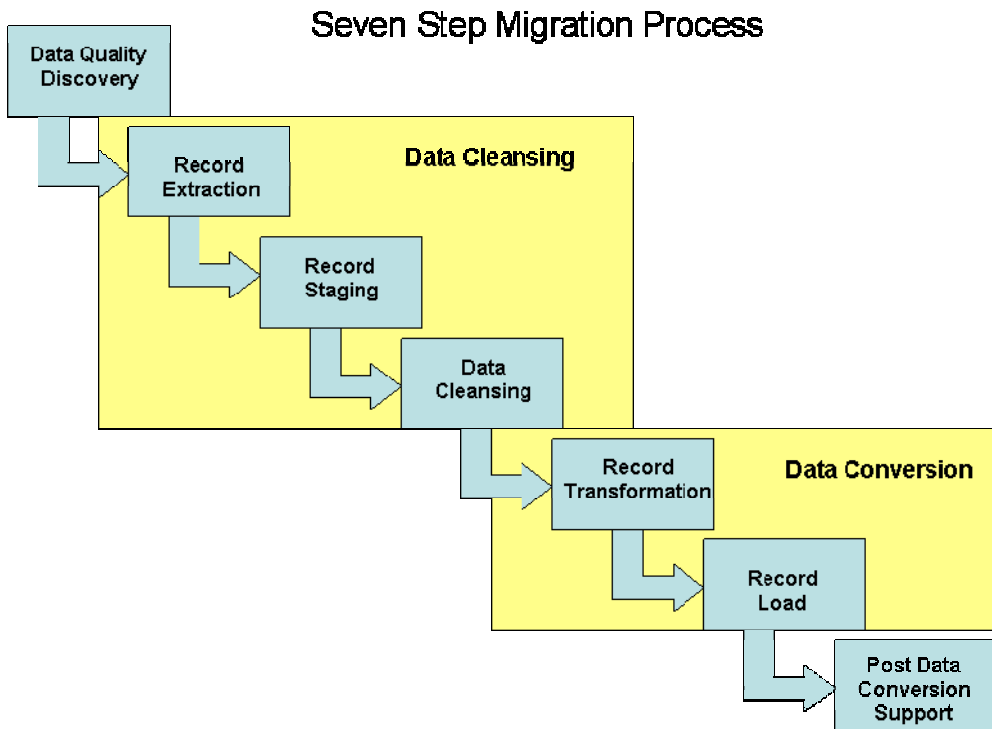Step Seven, Post Data Migration Support

Figure I-1 Seven Step Data Conversion / Migration process

Data Conversion Plan Implementation

Based on years of experience, CrossPointe.net has a proven methodology for implementation of systems. Each implementation follows the same general path, which we have listed below. What varies with each customer is the schedule, the amount of effort for each individual task, and the impact on the overall project of customization related to data conversion and software functions.

Initial Conversion: We have found it advantageous to do an initial standard data conversion of 5 years of data for Finance, HR, and Student. This gives you a chance to look at your basic data through CrossPointe.net. The ability to see your data through the system reduces the learning curve and enables the transition team to better analyze the system for missing required fields, reports, or functionality. CrossPointe.net staff using proven routines will convert the data from our CrossPointe (TERMS) system to the .NET SQL Server database.   This process results in a quick and accurate initial conversion.   There is little work required by the district staff. A download of student files are sent to our office; and our staff does the conversion.

Initial Training: After the Initial conversion is complete, we will install the converted data and setup access to CrossPointe.net on your network. This is your first chance to explore the application at your site with your data.

Technical Production Environment Training: After everything is up and running, the training can start. This targets the technical staff, and will include a review of all issues regarding the coming steps in data conversion. This training will empower the technical staff on the SQL-Server production environment. This will include training on the CrossPoint.net database as well as the intermediate tables. The Technical training provides the District with the ability to learn the database layout.

Intermediate Conversion: The intermediate conversion is done to refresh the database with the district defined custom fields that have been mapped from the TERMS system to CrossPointe.net. Also, any errors found in the initial conversion are cleaned up and the system is readied for additional training and final testing. The intermediate conversion is intended to test the programs that will be used for the final conversion. This conversion will convert all fields of data for as many years as needed.

System can be reviewed by select school members as part of the User Acceptance Testing

Final Conversion: The final conversion will need to be executed as fast as possible so quality automated conversion programs are key. All transactions will have to be frozen while this final conversion is taking place. If this is not possible, then all transactions will have to be tracked after the snapshot of data is taken. These transactions will have to be done again when the data is all converted.

A final Conversion date can be changed to meet the needs of the district. The district may find it advantageous to go live after school has been in session and the first grading period is completed. This takes pressure off of the schools and allows them to get into the school year before they have to change systems. However, should the district select the live date, CrossPointe.net will assure the system will be ready.

Training & Documentation Services

CrossPointe.net utilizes a 'Just in Time' 'Doer, Driver, Advisor' training for all district SME's (Subject Matter Experts) that will be utilizing the system. CrossPointe.net's proven training approach revolves around the concept that knowledge retention is far greater when training occurs during system setup in context with the user's daily functions. This training prior to 'Go Live', CrossPointe.net aids in the shift of ownership of the system to support personnel that will be responsible for the overall daily usage of the system.

CrossPointe.net trainers will conduct all training onsite at the district. The meeting facility needs to be large enough to accommodate the Consultants and the school district personnel as well as be setup for computer classroom training. CrossPointe.net suggests the development of a 10 station Training Lab that can be utilized for district SME 'Doer, Driver, Advisor' training during initial system implementation and setup. This lab should then be expanded to 20 stations prior to system 'Go Live' for training of functional end users.

The CrossPointe.net system will be initiated with a 'Test Area/Training database' for initial Application Education. Ultimately, as the district data is converted to the CrossPointe.net system, subsequent training will utilize of a test set of district data that will be refreshed on a pre-scheduled basis.

Training

System Administration Training
Supporting an information resource that is available on-line, interactively, both through your internal network and the Internet, requires a deep understanding of the internal workings of the software. CrossPointe.net provides the district's technical personnel with the training needed to manage the CrossPointe.net applications to work in conjunction with your own system and network security programs. Also included in this series of courses are training on the core district definitions and managing help data.

Technical Training
CrossPointe.net is built from industry-standard components using accepted development tools. One aspect of training will be ensuring that the district staff is familiar with these tools. In particular, it will be essential for the district staff to be well versed in SQL and the operations of the SQL Server database platform. Through the installation and on-site tuning of CrossPointe.net, our staff will instill the knowledge required to maintain and update the software and the database. Formal training sessions will be scheduled for areas specific to CrossPointe.net, including table structure, querying and reporting, and software upgrade procedures. Appropriate reference materials will accompany these sessions.

Application Education
The key to a successful implementation is the sharing of information that results in the melding of our applications and your processes. CrossPointe.net's subject experts provide the district's subject experts with detailed training of the application's capabilities in a specific processing area, which is followed by detailed discussions of the district's processes and industry best practices in this area. The result is the determination of the system configuration that takes advantage of the application's capabilities.

Tester Training

Validating the conversion and configuration of a new application requires that individuals who know the district's information perform detailed, documented tests. In order to guarantee that the testing is performed properly, CrossPointe.net provides the testers with training on the district configured application and the methodology of performing and documenting the testing based on the district's requirements.

End-User Training

Subject experts, at an appropriate time prior to the 'Go Live' data for a given module, will train end users. End-user training typically consists of two elements: a) System familiarization and navigation concepts, b) Data entry and access for each group's area of interest. In our experience, end user training is most effective when done shortly before the 'Go Live' date. If done earlier, it may require refresher training closer to that date. All end-user training will be provided on-site. In addition CrossPointe.net will provide Web-accessible training videos for the instruction of teachers on usage of the Gradebook product.

Documentation

Technical Documentation

CrossPointe.net maintains various technical documents, including: application architecture, database design, and system installation procedures. CrossPointe.net continues to update and enhance technical diagrams as the technology platform evolves.

Our approach on technical documentation starts from technologies used, developing standards for the project/product, development of implementation guidelines, development of processes, and finally implementation process documentation.

End-User Documentation

CrossPointe.net will develop process based end-user documentation manuals that cover the implemented functional areas of CrossPointe.net. This documentation is developed as part of the implementation phase and includes both visual and written descriptions of the workflow processes implemented by the district.

On-line Documentation

On-line documentation in terms of content is identical to user documentation which will be in the format of an online Wiki where users can drive future changes to the documentation.

Training Manuals

Training documentation is targeted for the learning of a specific end-user task and function as uniquely defined by the district. These documents help existing users learn the application, as well as aid in the repeatable training of future new hires by District personnel.

Finance Subject Matter Expert Services

CrossPointe.net will provide Licensee with Finance Subject Matter Experts during the period specified in the Product Order Form. A "SME designee" is a designated CrossPointe.net employee (or his/her replacement, in the event of such person's death, disability, or other unavailability to serve in such designated position) provided by CrossPointe.net to provide finance implementation support services to Licensee on an as needed basis during normal business hours, including the provision of such services both on-site at Licensee's facility, and on a remote basis, as reasonably determined by CrossPointe.net in consultation with Licensee.

Through such resources, CrossPointe.net will provide finance implementation support services to Licensee as follows:

- Subject Matter Expert will be first source of information about the system functionality and business practices of the CrossPointe.net Finance system and will work closely with the key Business/Finance personnel at Licensee
- Manage the Fit/Gap analysis and development of the Gap document
- Participate in review of the Gap document with Licensee
- Manage development of specification of customer changes
- Participate in review of the customer change specifications with Licensee to secure sign off
- Manage the development of customer changes
- Participate in preparation of an installation/implementation schedule
- Work with Licensee to define and implement required account structure for the institution
- Work with Licensee to set up Shared Options and Global Controls for the institution
- Manage the development of data conversion routines
- Manage the conversion of data
- Participate in the review of the converted data with Licensee
- Manage the development of the Testing scripts
- Participate in the review of the Testing scripts with Licensee
- Participate in development of the acceptance process and review it with Licensee
- Manage preparation of the Training agenda for the various modules
- Participate in project tracking of CrossPointe.net delivered services
- Participate in assessing the status of the project and assess and identify significant risks to its completion
- Write a monthly project status report for the Finance system

As part of CrossPointe.net Subject Matter Expert Services, the assigned CrossPointe.net SME will conduct a periodic review with the key Business/Finance personnel from Licensee.

The frequency of these reviews will be jointly determined by Licensee and CrossPointe.net. If not otherwise defined, these reviews will take place at least once a month. These reviews will always have a predefined and agreed Agenda and the discussions will be documented.

Finance Implementation Services

The CrossPoine.net Financial System will be implemented in 1 phase.

Phase I

o Chart of Accounts	o General Ledger
o Budgeting	o Purchasing
o Accounts Payable	o Accounts Receivable
o Cash Management	o Warehouse
o Student Activity/Internal Accounts	o Cost Report
o Asset Management	o

Finance Installation Services

The CrossPointe.net Finance Consultants will provide the services described in the Installation Services section of this document. See Page 10.

Finance Data Conversion Services

The CrossPointe.net Finance technical Consultants will provide the services described in the Data Conversion Services section of this document. See Page 13.

Finance Training & Documentation Services
The CrossPointe.net Finance Consultants and Documentation Specialists will perform the services defined in the Training & Documentation Services section of this document. The specific Application Education topics and recommended audiences are defined below:

Finance Application Education
o Financial Management Series Overview
   This course introduces the Financial Records series and its component parts. Emphasis is placed on analyzing the features and facilities of the series as well as its interactions with other series in the CrossPointe.net solution. Review of system design and global features and functions; menus and online navigation; common attributes of data entry and search screens.
   Audience: Planners and decision makers

o Accounting Definitions
   Planning on processing payrolls, paying vendors, or producing financial reports? If so, you will need to tell the CrossPointe.net system how you would like it to manage your "books". In this course you will learn how to define and populate charts of accounts and the ways in which these definitions control financial and other transactions. Audience: Planners and financial decision-makers

o Finance System Access (User) Security
   This course introduces features and capabilities of user security in CrossPointe.net.

   The first part of the course will focus on system and menu access. The course will demonstrate how to set up a user security group with specified system access and how individual users are authorized (linked) with one or multiple security groups. Security to run reports and processes will also be demonstrated.

   The second part of the course will address the financial data security. The course will demonstrate how a user can be restricted to use a specified set of accounts only. Cost Center based data security will also be reviewed.
   Audience: Financial Implementation Team and IT staff

o Shared Options and Controls
   This course examines the actual facilities used to implement the district's decisions on how the system will be deployed in your district.
   Audience: Financial Implementation Team and IT staff

o Workflow
   This course will introduce the comprehensive and flexible workflow capabilities offered in the CrossPointe.net system. We will review various options available for setting up approval queues for various financial documents. The course will take you though how to setup initial approval queues and its subsequent maintenance. Emphasis will be placed on special requirements like Bypass/Substitute approvers, Dollar value based approval, etc.
   Audience: Financial Implementation Team and IT staff

- o Defining a New Year
  This course provides instruction for members of a district to set up the Finance series for first-time usage.
  Audience: Financial Implementation Team, key accounting personnel, IT staff

- o Budget Preparation
  Learn how to proceed through the budget development steps with the CrossPointe.net Financial Records series. This course will take you through the steps needed during the budget development period to produce a tentative Chart of Accounts and to develop estimated plans for revenues and expenditures.
  Audience: Budget department personnel, Budget Developers, System Administrator

- o Budget Management
  This course is designed to introduce the tools available for Budget Administration. Learn how to prepare budget amendments, alternate budgets, and the various ways to view budget information online and in printed reports.
  Audience: Budget department, Budget Developers, Supervisors and Principals with budget authority.

- o Vendor Data Maintenance
  Learn how to maintain vendor data in the system. The course will focus on how multiple order and remittance addresses can be maintained for a single vendor. W9 and 1099 related vendor data processing will be reviewed.
  Audience: Purchasing and Accounts Payable departments

- o Requisition Processing
  This course will take you through the steps necessary to create, post, and manage requisitions for your school and/or department. This course will also demonstrate ordering of books from the Florida Book Store.
  Audience: Purchasing personnel from all departments and schools

- o Requisition Approval
  This course will provide the steps for requisition review for approval and/or rejection at all levels of district approval. Learn how to access the requisitions you need to review and how to transmit notes and indicate if approved.
  Audience: Purchasing personnel, Supervisors, Principals, and any employee with requisition review authority.

- o Purchase Order Processing
  This course will take you through the steps necessary to process Purchase Orders. Learn how to create on-demand POs, roll approved requisitions to purchase orders, print, close, and reopen purchase orders.
  Audience: Purchasing department

- o Posting and Tracking Receipts
  This course introduces the concepts and tools for receiving, posting, and verifying merchandise shipments.
  Audience: All personnel receiving merchandise, Purchasing department, Accounts Payable department.

- o Invoice and Payment Processing
  Learn how to query the invoice file, enter an invoice into the system, and post and print invoices awaiting district payment. This course will take you through the steps necessary to print Checks or generate Electronic Fund Transfers (EFTs) in the CrossPointe.net system. Learn the posting of cash disbursements and the posting of accounts payable.
  Audience: Accounts Payable personnel

- o Accounts Receivable
  Learn how to enter various types of customer invoices. The course will take you through the steps to print customer invoices and generate customer statement.
  Audience: Accounting personnel and all District personnel responsible for entering customer invoices.

- o Revenue and Receipt Processing
  Learn how to record cash received, post in a bank activity file, post to the district's Revenue ledger, and print receipts. Voiding of a check or EFT will be demonstrated. The steps for month end cash reconciliation will be reviewed.
  Audience: Accounting personnel and all District personnel responsible for receiving funds for the district.

- o Journal Entries and Account Management
  This course will take you through the steps necessary for entry and posting of any financial transaction in the CrossPointe.net system. The entry of Journal Entries will be demonstrated.
  Audience: Finance department personnel

- o Financial Reporting
  Learn how to produce specific financial reports necessary for local, state, and federal reporting.
  Audience: Key Accounting personnel, Department heads, school administrators

- o Bid Tracking
  This course will show you how to record data for an approved bid in CrossPointe.net. We will demonstrate how to use a bid for ordering goods and reporting orders against a bid.
  Audience: Purchasing personnel

- o Asset Management
  This course will focus on Fixed Asset record creation and maintenance (including creation of records through the Receiving screen), change tracking and retirements, dual account tracking feature (Acquisition and Balance Sheet accounts), depreciation processing and reporting.
  Audience: Purchasing and Fixed Assets personnel

- o Text Book Inventory
  This course will focus on the Text book Inventory maintenance; interface with Florida Book Store, transfer of books across schools will be shown.
  Audience: Text book and Purchasing departments

o Warehouse
  This course will show Catalog maintenance, entering warehouse orders and approval, posting of deliveries to schools, pick list processing, posting receipts and warehouse adjustments.
  Audience: Purchasing and Warehouse personnel, School personnel ordering from warehouse.

o Student Activity (Internal) Accounts
  This course will take you through the steps necessary to process transactions for student activity accounts. Orders, setting up of accounts, entering of invoices and printing of checks, posting receipts and cash reconciliation will be demonstrated.
  Audience: Key Accounting personnel, School Book Keepers

o Reports and Processes
  This course will demonstrate how to start a report or process, monitor its progress, review outputs, and print reports in CrossPointe.net.
  Audience: All personnel running reports.

o Periodic Processing
  This course will show the user how to produce the monthly and quarterly reports for the district (i.e. Trial Balance, Statement of Revenue and Expenses, etc.)
  Audience: Key Accounting personnel, System Administrators

o Closing a Fiscal Year
  Learn each step of fiscal year-end processing and its appropriate sequence.
  Audience: Key Accounting personnel, System Administrators, Department heads, School Administrators, Purchasing personnel

o User Driven Reporting (UDR)
  The course will discuss the various data models available in the CrossPointe.net Finance Series and how to use a data model to build your own reports. We will demonstrate building reports of different types and show how to publish a report to make it a part of CrossPointe.net. Distribution of user developed reports to end users will be demonstrated.
  Audience: All personnel running reports.

Human Resources / Payroll Subject Matter Expert Services

CrossPointe.net will provide Licensee with HR/Payroll Subject Matter Experts during the period specified in the Product Order Form. A "SME designee" is a designated CrossPointe.net employee (or his/her replacement, in the event of such person's death, disability, or other unavailability to serve in such designated position) provided by CrossPointe.net to provide HR / Payroll implementation support services to Licensee on an as needed basis during normal business hours, including the provision of such services both on-site at Licensee's facility, and on a remote basis, as reasonably determined by CrossPointe.net in consultation with Licensee.

Through such resources, CrossPointe.net will provide HR/Payroll implementation support services to Licensee as follows:

o Subject Matter Expert will be first source of information about the system functionality and business practices of the CrossPointe.net HR and Payroll systems and will work closely with the key HR/Payroll personnel at Licensee
o Manage the Fit/Gap analysis and development of the Gap document
o Participate in review of the Gap document with Licensee
o Manage development of specification of customer changes
o Participate in review of the customer change specifications with Licensee to secure sign off
o Manage the development of customer changes
o Participate in preparation of installation/implementation schedule
o Work with Licensee to set up Shared Options and Global Controls for the institution
o Manage the development of data conversion routines
o Manage the conversion of data
o Participate in the review of the converted data with Licensee
o Manage the development of the Testing scripts
o Participate in the review of the Testing scripts with Licensee
o Participate in development of the acceptance process and review it with Licensee
o Serve as the primary resource for help desk support
o The Subject Matter Expert conducts in person and online training of the HR/Payroll Systems
o Manage preparation of the Training agenda for the various modules
o Participate in project tracking of CrossPointe.net delivered services
o Participate in assessing the status of the project and assess and identify significant risks to its completion
o Write a monthly project status report for the HR/Payroll systems

As part of CrossPointe.net Subject Matter Expert Services, the assigned CrossPointe.net SME will conduct a periodic review with the key HR/Payroll personnel from Licensee.
The frequency of these reviews will be jointly determined by Licensee and CrossPointe.net. If not otherwise defined, these reviews will take place at least once a month. These reviews will always have a predefined and agreed Agenda and the discussions will be documented.

Human Resources / Payroll Implementation Services

The CrossPointe.net HR / Payroll implementation will consist of two Phases.

Phase I

- o Employee Profile
- o Position Management
- o Professional Development
- o Substitute Monitoring
- o Employee Portal

- o Code Tables
- o State Reporting
- o Time & Attendance
- o Payroll
- o Budgeting

Phase II

- o Applicant Tracking

Human Resources / Payroll Installation Services

The CrossPointe.net Human Resources and Payroll Consultants will provide the services described in the Installation Services section of this document. See Page 10.

Human Resources / Payroll Data Conversion Services

The CrossPointe.net Human Resources and Payroll technical Consultants will provide the services described in the Data Conversion Services section of this document. See Page 13.

Human Resources / Payroll Training & Documentation Services
The CrossPointe.net Human Resources and Payroll Consultants and Documentation Specialists will perform the services defined in the Training & Documentation Services section of this document. The specific Application Education topics and recommended audiences are defined below:

HR / Payroll Application Education
- o Human Resource Series Overview:
  This course introduces the Human Resources series and its component parts. Emphasis is placed on analyzing the features and facilities of the series as well as its interactions with other series within the CrossPointe.net solution.
  Audience: Planners and decision makers

- o Options and Controls:
  Learn how to define and maintain the district level controls used by the Human Resource Management Series. Each module examines the facilities used to implement the district's decisions on how the system will be deployed. Topics such as setting the installation options and defining generic and permanent controls will be discussed. Also, defining local data elements and printing reports will be covered. Audience: System Administrators, IT staff

- o Defining a New Fiscal Year:
  Learn how to efficiently prepare employee files and records for a new fiscal year.
  Audience: System Administrators, IT staff

- o Salary and Benefit Budgeting:
  Learn the tasks involved with preparing the district's staffing allocations, salaries, and benefit costs for the coming year.
  Audience: System Administrators, IT staff, Budgeting personnel

- o Position Management – District Level:
  Learn how to view and maintain the district's staffing levels using CrossPointe.net's on-line screens and batch programs. This class will teach you how to sort positions using various criteria and how to implement position management decisions (red-line, freeze, etc.).
  Audience: System Administrators, district level administrators

- o Position Management – School/Department:
  Learn how to view and maintain your school's or department's staffing using on-line screens and batch programs. This class will teach you how to sort positions using various criteria, use reports and on-line queries, and how to implement position management decisions.
  Audience: School Principals, Department managers and supervisors

- o Posting Vacancies:
  Learn how to create announcements for the district's vacant positions. The announcements generated may be viewed and applied for both on-line and by traditional applications means.
  Audience: Administrators, Principals, Managers, Supervisors

- o Processing Applications:
  This course guides you through the tasks associated with defining applications utilizing the CrossPointe.net on-line screens. Learn how to schedule and track interviews, and maintain applicant history by applicant and position.
  Audience: Personnel Department, Principals, Supervisors, Administrators

- o Accessing the Applicant Pool:
  Learn how to create applicant pools for available positions. This class demonstrates various methods of matching applicants to positions.
  Audience: Personnel Department, Principals, Supervisors, Administrators

- o Maintaining Employee Records:
  Learn how to create and maintain employee records in the CrossPointe.net system. This class guides you through the employee experience from date of hire to retirement or termination. The class concentrates on the creation of the employee record and reviews a series of maintenance issues including late start salary calculations, terminations, and mid-year salary changes.
  Audience: Personnel Department

- o Pay Day Processing – Defining a Payroll:
  Learn how to define the district's pay cycles to the CrossPointe.net system. This class covers not only regular payroll runs but also special payroll processing.
  Audience: Payroll Department

- o Pay Day Processing – Transactions (School/Department):
  Learn how to enter employee time and attendance. This class teaches users how to record all types of employee time and how to recognize which tools to use for each category of employee.
  Audience: Department and School personnel responsible for employee time and attendance

- o Pay Day Processing – Transactions (District level):
  This class teaches payroll department personnel how to enter employee time and attendance, create one-time payments for employees, and process payroll adjustments.
  Audience: Payroll Department

- o Processing Payroll:
  In this class we will follow the systematic normal payroll process and will learn how to edit and balance transactions, run the payroll calculator, print checks and direct deposit statements, and post the payroll to employee job records, the district's ledgers and accounts payable.
  Audience: Payroll Department

- o Payroll On-demand Processing:
  Upon occasion it will be necessary to create a single transaction outside the normal payroll process. Learn how to create manual checks and void or adjust existing checks in this class.
  Audience: Payroll Department

- Periodic Processing:
  In this class learn how to create and transmit required monthly, quarterly, and yearly files as required by local, state, and federal agencies (W-2s, Unemployment Compensation, Retirement, etc.).
  Audience: Payroll and Personnel Departments

- Staff Development – Curriculum Management:
  This course will familiarize you with the tasks associated with creating and maintaining the districts master in-service plan in accordance with state standards. This course will cover two functional areas:
  - defining the districts catalog of in-service components with strategies and objectives
  - defining the activities for those components
  Audience: In-service Activity Personnel, System Administrators

- Staff Development – Participation Tracking
  This course covers the "human" aspect of managing the district's in-service activities. In this course you will learn the different methods of enrolling participants into activities, recording results, and reviewing employee status toward certification.
  Audience: Personnel Department, In-service Activity Personnel

- External Reporting:
  In this course you will learn how to gather information from the CrossPointe.net Human Resource series database and assemble it into the various formats that must be reported to the state Department of Education.
  Audience: System Administrators

Student Information System Subject Matter Expert Services

CrossPointe.net will provide Licensee with Student Information System Subject Matter Experts during the period specified in the Product Order Form. A "SME designee" is a designated CrossPointe.net employee (or his/her replacement, in the event of such person's death, disability, or other unavailability to serve in such designated position) provided by CrossPointe.net to provide student information system implementation support services to Licensee on an as needed basis during normal business hours, including the provision of such services both on-site at Licensee's facility, and on a remote basis, as reasonably determined by CrossPointe.net in consultation with Licensee.

Through such resources, CrossPointe.net will provide Student Information System implementation support services to Licensee as follows:

- o SME will be first source of information about the system functionality and business practices of the CrossPointe.net SIS system and will work closely with the key SIS personnel at Licensee
- o Manage the Fit/Gap analysis and development of the Gap document
- o Participate in review of the Gap document with Licensee
- o Manage development of specification of customer changes
- o Participate in review of the customer change specifications with Licensee to secure sign off
- o Manage the development of customer changes
- o Participate in preparation of installation/implementation schedule
- o Manage the development of data conversion routines
- o Manage the conversion of data
- o Participate in the review of the converted data with Licensee
- o Manage the development of the Testing scripts
- o Participate in the review of the Testing scripts with Licensee
- o Participate in development of the acceptance process and review it with Licensee
- o Manage preparation of the Training agenda for the various modules
- o Participate in project tracking of CrossPointe.net delivered services
- o Participate in assessing the status of the project and assess and identify significant risks to its completion
- o Write a monthly project status report for the SIS system

As part of CrossPointe.net Subject Matter Expert Services, the assigned CrossPointe.net SME will conduct periodic review with the key Business/Finance personnel from Licensee. The frequency of these reviews will be jointly determined by Licensee and CrossPointe.net. If not otherwise defined, these reviews will take place at least once a month. These reviews will always have a predefined and agreed Agenda and the discussions will be documented.

Student Information System Implementation Services

SIS implementation services are comprised of the implementation of three applications: the administrative application, the grade book application, and the parent portal.

Phase I

CrossPointe.net Gradebook application implementation includes the following areas:

- Attendance tracking
- Communications
- Configuration

- Grading scales
- Assignments

Phase II

CrossPointe.net SIS administrative system implementation includes the following modules:

- Demographics
- Admissions
- Attendance
- Scheduling
- State Reporting
- Grade Reporting

- Discipline
- Health
- Test Scores
- Summer School
- Special Programs

CrossPointe.net Parent Portal application implementation includes the following areas:

- Attendance reporting
- Communications
- Configuration

- Grade reporting
- Alerts

Student Information System Installation Services
The CrossPointe.net Student Consultants will provide the services described in the Installation Services section of this document. See Page 10.

Student Information System Data Conversion Services
The CrossPointe.net Student technical Consultants will provide the services described in the Data Conversion Services section of this document. See Page 13.

Student Information System Training & Documentation Services

The CrossPointe.net Student Consultants and Documentation Specialists will perform the services defined in the Training & Documentation Services section of this document. The specific Application Education topics and recommended audiences are defined below:

SIS Application Education
o   Student Information System Overview:
    This course provides a broad brush introduction to the series. It begins with an examination of its structure and how it integrates with other series in the CrossPointe.net family of products. The presentation then moves through an analysis of the major features and facilities of each component of the Student series.
    Audience: Planners, System Administrators, IT staff

o   Options and Controls:
    Learn how to define and maintain the district level controls used by the Student series. Each module examines the facilities used to implement the district's decisions on how the system will be displayed. Topics such as setting the installation options and defining the generic and permanent controls will be discussed.
    Audience: Planners, System Administrators, IT staff

o   Student Reassignment (Defining a New Year):
    Learn how to define the Calendars for "next" year. Also, learn how to roll annual control records for an upcoming school year. This class will include handling grade level retentions as well. Creating enrollment records from admission records is covered, as well as initializing annual student date. It is a prerequisite to scheduling students for an upcoming school year.
    Audience: Planners, System Administrators, IT staff

o   Preparing for next year scheduling process
    Learn how to get ready for next school year scheduling. This class handles rolling course catalogs for next school year and creating student admission records. This class also covers setting options and controls for next scheduling season.
    Audience: Planners, System Administrators, IT staff

o   Summer School/Intersession Processing:
    Learn how to process enrollment for Summer School/Intersession. Learn how to have students enrolled in the current (regular school year) and still enroll them in Summer School.
    Audience: System Administrators, IT staff

o   Maintaining Basic Records:
    Learn how to establish school-level resources used by the Enrollment module and how to maintain your student population. New entries, transfers, and withdrawals are covered along with recording additional information such as contacts and transportation. Printing rosters, mailing labels, and enrollment summaries are also emphasized. Learn how to record district-defined student activities, fees, and fines. Learn how to define and maintain bus routes and their associated stops and assign students to stops. Audience: Principals, Managers, School-level end-users

o Attendance – Daily Absences:
Learn how to record and maintain daily absences using data entry facilities and be aware of student-level settings that may affect attendance. Understand how teachers are processing attendance and find teachers who are not posting the attendance on daily basis. Understand how to produce a daily absentee roster and how CrossPointe.net handles the creation of an auto-dialer file. You will also learn about the daily attendance reports that are available and how to best utilize them.
Audience: Principals, School-level attendance personnel

o Attendance – Period Absences:
Learn how to record and maintain period absences using data entry facilities. The course is specifically designed for those districts and or schools that use an 'official attendance period' for recording attendance. Be aware of student-level settings that may affect attendance. Understand how to produce an absentee roster and how CrossPointe.net handles the creation of an auto-dialer file. The period attendance reports that are available and how to best utilize them is also discussed.
Audience: Principals, School-level attendance personnel

o Attendance – Information Retrieval:
Learn how to post detailed daily attendance to an attendance history to create average daily attendance and average daily membership statistics. Be aware of the on-line facilities that are available to view the attendance history and how to produce and utilize attendance history reports. Learn how to produce reports that give information related to students who have excessive absences. Understand how to use the facilities that are available to determine the courses in which students may be in jeopardy of not earning credit due to poor attendance. Learn how to update the absence warnings records and track notification letters.
Audience: Principals, District and School-level attendance personnel

o Scheduling Options:
This course discusses the options available within the Scheduling component. It begins with an analysis of curriculum definition, adoption, and management. Concepts such as package, modular, and block scheduling; teaming and wheel courses; and how they may be used are reviewed. Focus then shifts to an examination of various data collection strategies. Finally, each of the facilities that may be used is presented in hands-on exercises. At the completion of the course students will be able to decide how the component will best serve each school and what must be done to implement those decisions.
Audience: Principals, System Administrators, IT staff

o Mass Scheduling – Phase I:
Mass scheduling is divided into two distinct types of activity: defining resources and requirements: and allocating resources to meet those requirements. This course focuses on the first of these, addressing the creation of time, space, teacher, and curriculum resources and how a student population makes requests for those. At the end of the course you will know how load and manage resource and request data and create the reports that will serve as guiding tools in Phase II.
Audience: System Administrators, IT staff

o Mass Scheduling – Phase II:
In Mass Scheduling Phase I, you identified your students' needs and the resources available to meet them. In this phase, we will allocate those resources to fulfill those requests in the most effective way possible. At the end of this course you will be able to build a Master Schedule of classes, schedule students, adjust outcomes, and produce reports to students, parents, and teachers.
Audience: System Administrators, IT staff

o Schedule Maintenance:
The start of school is not the end of scheduling. Classes are added and dropped. Students enter and withdraw or simply change classes. All these on-going daily activities are covered in this course. At the end of this course, you will know how to: maintain and analyze teacher, class, and course loads, interactively schedule new students, and process add and drop requests for students already scheduled. You will also be able to perform mass updates to the database based on scheduled records.
Audience: System Administrators, Enrollment and Guidance personnel, IT staff

o Grade Reporting – Personal Development Skills Grades:
Learn the steps involved in collecting personal development skill (PDS) grades and producing report cards. Be aware of student-level settings that can affect grade reporting. Learn how to record personal development skill grades data entry facilities or Crosspointe.net Gradebook application. Be able to produce verification reports, make corrections, and print report cards.
Audience: Planners, System Administrators, IT staff

o Grade Reporting – Academic Grades:
Learn the steps that are involved from collecting grades to producing report cards. Be aware of student-level settings that can affect grade reporting. Learn how to record and maintain academic course grades using optical mark readers and data entry facilities. Understand how grade point averages and class ranks are computed and stored. Know how to update absence information in the Grade Reporting component with information from the Attendance component. Be aware of how to produce verification reports and make corrections. Printing report cards and GPA reports is also discussed.
Audience: System Administrators, Teachers, IT staff

o Grade Reporting – Academic History/Transcripts
Learn how to use the on-line and batch facilities that are available to evaluate students' academic progress. The evaluation tools include an on-line academic history and graduation status. In addition, there are batch programs that print transcripts and that can be used to monitor progress toward graduation based on one or more pre-defined plans.
Audience: System Administrators, Principals, Guidance Counselors

o Discipline Reporting:
First learn how the CrossPointe.net SIS system manages discipline events and their associated incidents and actions for individual students. This section is geared to the facilities that will be used on a day-to-day basis at the school level to record discipline infractions involving a single student. Then, learn how CrossPointe.net manages discipline events for groups of students and how to address event 'ownership'. Also, learn how to retrieve detailed and summary information concerning discipline events.
Audience: System Administrators, Principals, Guidance and school level personnel

o Health and Clinic Processing:
Learn how to track visits to the clinic, track mandatory immunization records, monitor in school medication distribution, and record the results of mass health screenings. The class also addresses the reports and facilities that are related to clinic visits.
Audience: System Administrators, Health personnel

o Special Program Processing:
Learn how to track students in many special programs, specifically: Drop-out Prevention Programs, Exceptional Student Program Participation, Federal and State Programs, Limited English Proficiency Programs, Local Programs, and Participation in Department of Juvenile Justice Programs.
Audience: System Administrators, Special Education personnel

o Test Scores – Norm-referenced:
Explore the facilities in the CrossPointe.net SIS package that are available for identifying and managing standardized test scores.
Audience: System Administrators

o Teacher Attendance process
Learn how to track student attendance by teachers using the CrossPointe.net Gradebook application. Explore teacher access to student information such as contacts, schedules, academic history and much more. This class also addresses reports such as class rosters and student attendance details required by the teacher.
Audience: Teachers, Teacher Trainers, System Administrators, Principals

o Teacher Grade/Progress process (Report Card)
Learn how to post student report card grades and progress grades using the CrossPointe.net Gradebook application. Explore teacher access to student information such as contacts, schedules, academic history and much more. This class also addresses reports such as class rosters and student grade details.
Audience: Teachers, Teacher Trainers, System Administrators, Principals

o Teacher Gradebook process
Learn how to track student assignment grades by teachers using the CrossPointe.net Gradebook application. Understand how to create assignments and track score and averages on each class. Learn how to copy assignments from the previous year or another class. This course also addresses reports such as class average report and student assignment information that can be used in parent teacher conference.
Audience: Teachers, Teacher Trainers, System Administrators, Principals

- o Teacher Gradebook process
  Understand the CrossPointe.net Parent Portal application options and setup procedures. Also explore student information that is available to parents. Learn how the registration process is integrated in Portal application
  Audience: System Administrators, IT staff and Teacher Trainers

Assumptions

1. Organization/Staffing

The School District will partner with CrossPointe.net LLC, an education software development company to manage the implementation of an integrated suite of software applications including Student Information, Gradebook, Human Resource, Payroll and Finance.

The Superintendent will appoint a senior level Cabinet Administrator as Executive Sponsor to take ownership of the project and assume responsibility and accountability for execution and delivery of its objectives and deliverables.

A Project Steering Committee will be formed consisting of the Superintendent, Executive Sponsor, senior Cabinet Administrators, CIO, IT Director, Project Manager from the District and members of CrossPointe.net management including the CIO, Program Director, Sr. Account Executive, and Project Manager.

CrossPointe.net will provide a Program Director to provide management oversight and governance of the project. The Program Director will ensure the Project Team follows the proven CrossPointe.net implementation methodology. He, along with District personnel, will also be responsible for scheduling regular weekly project review meetings and monthly Steering Committee Meetings.

The School District and CrossPointe.net will co-manage the project. The district will provide a full time, dedicated PM and Crosspointe.net will provide a fulltime, dedicated PM on the customer's site.

2. Guiding Principles

The district and CrossPointe.net understand the importance and significance of the project and are totally committed to its success. The project will have a significant impact on the district's business processes and its operating costs.

To mitigate risk, members of the Project Team from both organizations, CrossPointe.net and the District, will be identified and dedicated to the project. They will be made available from their respective jobs and responsibilities to work on the project as required based on the approved project plan.

Members of the Project Team from the district will be incentivized as a means to recognize their participation and motivate them to meet and achieve project milestones, and objectives. Examples of this could include such items as: Professional Development credit for Teachers who support testing or training.

Success of the project will be measured in terms of the Project Team meeting key milestone dates and requirements defined in the Statement of Work and successfully implementing applications specified in the approved Project Plan and Timetable.

The district is engaging CrossPointe.net on a fixed price contract basis to implement and deliver its ERP suite of applications.

Members of the project team will be the "best of the best" resources from both the district and CrossPointe.net organizations. They will be appointed to the Project Team based on their performance, knowledge, skill, and experience.

3. Communications

As part of the kickoff process, the Superintendent will issue an e-mail announcing the need for the project, its purpose, objectives, benefits, and timetable for implementation.

The district will assign/appoint a Communications Specialist to be responsible for all communications related to the project. The CIO and Project Manager(s) will provide regular monthly updates on the status of the project and any pertinent information about the project that would be of relevant interest to the community.

The Webmaster for the district will create a Project Website as a means to communicate and inform district administrators and teachers about all aspects of the project. The website would describe the project, its organization, its scope and benefits, and answer frequently asked questions, as well as be used as a platform to announce major milestones and achievements.

4. Governance

The CrossPointe.net Program Director will conduct a weekly review of the project with the Project Manager(s). They will meet weekly with the district CIO and IT Director, and provide a written status report on the progress of the project.

There will be monthly Project Steering Committee meetings to update the Executive Sponsor and the members of the Steering Committee.

The Board of Directors will be updated by the Executive Sponsor along with the CIOs of the district and CrossPointe.net on the overall progress and status of the project. These meetings will be scheduled quarterly.

5. Facilities

The district will provide a Project War Room (i.e. Conference Room) dedicated for the duration of the Project for use by the Project Team. The room will contain whiteboards, projection equipment, internet connections, computers and printers for use by project team members.

The district will provide reasonable office/cubicle space, telephones, and Internet connections for the CrossPointe.net Program Director and Project Manager.

6. Project Management

The project Team will follow CrossPointe.net's System Development Life Cycle Management Process and Methodology to implement CrossPointe.net's ERP suite of applications.

Detailed Project Plans using the MS Project tool will be developed and used to implement and manage the project.

The Issue Track Tool will be used to identify, track, and report on all issues the project team encounters in the course of the project. It will be used as the official register to document every issue and report on its resolution.

7. Data Conversion

The District will assume ownership and responsibility for its data and the cleanup of its data during the data conversion process. It will provide CrossPointe.net reasonable access to functional experts or key users who own and manage data related to its legacy applications.

CrossPointe.net will provide a Project Manager and technical resources to convert data from the district's legacy systems to the new CrossPointe.net ERP suite of applications.

8. Change Management.

The CrossPointe.net Program Director will be responsible for managing and maintaining the scope of the Project. A baseline project plan will be provided to the District within thirty (30) days of contract execution and will serve as the basis for determining changes to scope. The on-going maintenance of the project plan will be the joint responsibility of the CrossPointe.net and District project managers. Any changes or modifications to the project plan or software not defined in the Statement of Work, and associated Gap Documents, will be documented in the form of a Change Request Form (see Attachment E) and reviewed by the IT Director, CIO, and Executive Sponsor. A response to all Change Requests Forms will be provided within a one week period.

Every effort will be made to keep modifications and changes to the software at a minimum in order to meet key milestone dates and deliver the project within budget and on schedule.

Items approved by the Executive Sponsor will also require Steering Committee review and approval for inclusion into the project. CrossPointe.net will provide the District with a pool of up to 2,500 man-hours to address these items. As each change is approved, the hours required to address the change will be subtracted from the pool of hours.

Changes or modifications required beyond the 2,500 hours provided, or rework of delivered services due to district initiated delays to the project of 30 days or more (such as the unavailability of district personnel) will be billed separately to the district at a rate of $150/hour.

Professional services agreement

1. Services

   CrossPointe.net agrees to perform for Sarasota County Schools (the District) the services listed in this Statement of Work and executed by both parties. Such services are hereinafter are referred to as "Services" the District agrees that Consultants shall have ready access to district staff and resources as necessary to perform the services provided for by this contract.

2. Duties and Responsibilities

   a. CrossPointe.net hereby agrees to provide and perform for the District those services set for in this Statement of Work. CrossPointe.net shall devote its best efforts to the performance of the services.

   b. CrossPointe.net and the District shall use its best efforts to furnish competent personnel possessing a sufficient working knowledge of the software and/or business practices to fulfill CrossPointe.net's obligations. Any Consultant of CrossPointe.net who, in the sole opinion of CrossPointe.net, is unable to adequately perform any services here defined shall be replaced by CrossPointe.net within 5 days after receipt of notice from the District of its desire to have such Consultant replaced.

   c. CrossPointe.net shall use its best efforts to comply with, and ensure that each of its Consultants complies with, all policies and practices regarding the use of facilities at which services are to be performed.

   d. Personnel supplied by CrossPointe.net to provide services to the District under this Agreement will be deemed CrossPointe.net employees and will not for any purpose be considered employees or agents of the District. CrossPointe.net assumes full responsibility for the actions of such personnel while performing services pursuant to this Agreement and shall be solely responsible for their supervision, daily direction and control.

3. Confidential Information

   CrossPointe.net hereby acknowledges that during the performance of this contract that CrossPointe.net may learn or receive confidential District information and therefore CrossPointe.net hereby confirms all such information relating to the District's business, employees, students, and other constituents will be kept confidential by CrossPointe.net.

   a. CrossPointe.net shall take all reasonable precautions to prevent any other person with whom CrossPointe.net is or may become associated from acquiring confidential information at any time.

   b. CrossPointe.net agrees that all confidential information shall be deemed to be and shall be treated as the sole and exclusive property of the District.

   c. Upon termination of this contract, CrossPointe.net shall return to the District all letters, reports and all other printed material relating to such confidential information which are in the possession or under the control of CrossPointe.net.

d. Upon termination of this contract, CrossPointe.net shall remove and/or erase any electronic information relating to such confidential information which is in the possession or under the control of CrossPointe.net.

4. Termination

a. The term of this Agreement shall commence on the first date indicated in Product Order Form and shall terminate on the last date indicated there within.

b. Either party may, by delivering written notice thereof to the other party, terminate any or all of its obligations under this Agreement, effective immediately, if the other party hereto:

   i. Is rendered bankrupt or becomes insolvent, and such insolvency is not cured within 90 days after written notice, or files written petition in bankruptcy or an answer admitting the material facts recited in such petition filed by another, or discontinues its business, or has a receiver or other custodian of any kind appointed to administer a substantial amount of its property; or

   ii. Commits a material breach of its duties, obligation or understandings under this Agreement, which breach is not cured within 30 days following written notice of such breach from the non-breaching party.

Any such termination shall be in addition to any other rights or remedies available at law or in equity to the terminating party.

c. Each party hereto agrees to consult in advance with the other party to bring to the attention of the other party any problems, differences of opinion, disagreements or any other matters that may lead such party to terminate or seek to terminate this Agreement. The purpose and intent of the parties in including this provision is to insure that both parties to this Agreement are made aware of any problems arising out of or relating to this Agreement or the relationship of the parties hereunder, so that the parties hereto may, in good faith, consult with one another concerning such problems and, where possible, resolve such problems to the parties' mutual satisfaction, thereby preserving their contractual relationship and goodwill and mutual respect presently existing between the parties of this Agreement.

5. Excusable Delay

Neither party will be in default of its obligations under this Agreement or liable to the other for any noncompliance arising from causes beyond the reasonable control of either party, including without limitation, fires, floods, natural disasters. Each party will use reasonable efforts to resolve promptly any type of excusable delay.

6. Price and Payment

The District shall pay Crosspointe.net for the Services contained herein, in the manner and as specified in the initial and/or any subsequent Product Order Form executed by the District pursuant to this Agreement (collectively the "Product Order Price").

   a. All payments hereunder shall be made in United States Dollars. Unless otherwise specified on the District's Product Order Form, all invoices shall be due and payable within thirty (30) days of receipt of invoice. On any invoice not paid within sixty (60) days, CrossPointe.net may assess and the District shall pay a service charge accruing thereafter until the date of payment equal to the lesser of:

      i. the rate of one and one-half percent (1.5%) per month or

      ii. the maximum lawful interest rate applicable.

   b. In the event the District's account is in arrears for more than ninety (90) days for ANY reason, CrossPointe.net shall be entitled to immediately place the District on support hold. No Services will be provided while the District is on support hold. The District shall remain on support hold until the District's account is paid current.

7. Limitations of Liability

In no event will CrossPointe.net, CrossPointe.net's Third Parties or the District be liable for indirect, incidental, punitive, exemplary, special or consequential damages, or damages for loss of profits, revenue, data or use, incurred by either Party, whether in contract or tort, even if the other Party has been advised of the possibility of such damages. Neither Party will seek or apply for such damages. CrossPointe.net's and its Third Parties' aggregate liability for damages to the District for the Agreement, the Products, the Product Warranty, Support or the Subscription Services, whether in contract or tort, shall be limited to actual direct money damages in an amount not to exceed:

   a. the License Fees paid by the District to CrossPointe.net for the Products subject to the damage claim if the claim arose within two years after the date of the earliest Product Order Form for those Products,

   b. the most recent annual Service Fees paid by the District to CrossPointe.net for the Products subject to the damage claim if the claim arose more than two years after the date of the earliest Product Order Form for those Products or

   c. the most recent annual Subscription Services Fees paid by District to CrossPointe.net for the Subscription Services subject to the damage claim.

The Parties will each use reasonable efforts to mitigate their damages. These limitations represent the agreed allocation of risk. THE FOREGOING LIMITATION OF LIABILITY SHALL REMAIN IN FULL FORCE AND EFFECT REGARDLESS WHETHER DISTRICT'S REMEDIES HEREUNDER HAVE FAILED THEIR ESSENTIAL PURPOSE.

8. General

    a. Unless otherwise specifically agreed in writing by an authorized representative of District and a Vice President or higher ranking officer of CrossPointe.net, this Agreement will solely govern any present or future purchases/licenses by the District from CrossPointe.net. Any additional Schedules shall be attached and incorporated into this Agreement by reference.

    b. Each party acknowledges that it has read this Agreement, understands it, and agrees to be bound by its terms. This Agreement, along with the respective Product Order Forms and attachments, is the complete and exclusive statement of the Agreement between the parties with respect to the System and shall supersede all prior proposals, understandings and all other agreements, oral and written. The terms and conditions in this Agreement shall take precedence over the terms and conditions included in all purchase orders and other documentation submitted by District pursuant to this Agreement. This Agreement may not be modified or altered except by a written instrument duly executed by both parties.

    c. Neither party hereto shall be liable or deemed in default for any delay or failure in performance hereunder resulting from any cause beyond its reasonable control.

    d. This Agreement, and any action arising out of or related to it, shall be governed by and construed in accordance with the laws of the State of Florida; however, except as otherwise expressly stated herein, the parties specifically waive and disclaim the applicability of the Uniform Commercial Code; Unfair Trade Practices Act, Uniform Electronic Transactions Act, and Uniform Computer Information Transactions Act to this Agreement. Except for the District and CrossPointe.net, no other party may sue or be sued under this Agreement.

    e. If any provision of this Agreement is held to be ineffective, unenforceable or illegal for any reason, such decision shall not affect the effectiveness, validity or enforceability of any or all of the remaining provisions hereof, and if any provision of this agreement is held to be ineffective, unenforceable or illegal with respect to particular circumstances, such provision shall remain in full force and effect in all other circumstances.

    f. This Agreement shall be binding upon and inure to the benefit of only the parties hereto and their respective successors and permitted assigns.

    g. The waiver or failure of either party to exercise any right provided for in this Agreement shall not be deemed a waiver of any further right hereunder.

    h. All communications or notices permitted or required to be given or served under this Agreement shall be in writing, shall be addressed to the other Parties at the appropriate Party's address or as set forth below, and shall be deemed to have been duly given or served if delivered in person or deposited in the United States mail, certified mail, return receipt requested.

i. This Agreement shall become effective upon the signature hereof by an authorized representative of the District and CrossPointe.net and receipt by CrossPointe.net of the initial payment specified herein.

j. All services provided by CrossPointe.net will be provided as an independent contractor, and neither Party will be, or represent itself to be, the franchiser, franchisee, agent or legal representative of the other Party.

k. The Agreement may be amended only in writing signed by the Parties, except that CrossPointe.net may, upon notice to the District and without the District's signature, amend a Product Order Form to correct errors. All purchase orders, prior agreements, representations, statements, requests for proposal, proposals, negotiations, understandings and undertakings concerning the Products, Support or Subscription Services are superseded by the Agreement.

9. Jurisdiction, Service of Process

Tentative Language – DRAFT Requires Approval from CrossPointe.

"Venue shall be in Sarasota County, Florida and the sole and exclusive jurisdiction to resolve any disputes under the contract shall be in the county or circuit court for the Twelfth Judicial Circuit in and for Sarasota County, Florida."

Acceptance and authorization

IN WITNESS WHEREOF, the parties hereto each acting with proper authority have executed this Statement of Work, under seal.

CrossPointe.net   Sarasota County Schools

                                             Caroline G. Zucker
_____   _____
Full name   Full name

                                             Sarasota County School Board -
                                             Chair
_____   _____
Title   Title

_____   _____
Signature   Signature

_____   _____
Date   Date