



# **SCHOOL BOARD ACTION REPORT**

**DATE:** October 10, 2017  
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**For Intro:** October 18, 2017  
**For Action:** November ~~15~~, 2017

## **1. TITLE**

Award three-year contract to Hobsons' Naviance for new Career and College Readiness software solution, services, and support

## **2. PURPOSE**

The purpose of this Board Action Report is to approve a three-year contract with Hobsons' Naviance to provide career and college readiness and planning technology to eighth through twelfth grade students, their counselors/teachers, their parents/guardians, and administration/office staff. Design and implementation is expected to begin in the 2017-18 school year.

## **3. RECOMMENDED MOTION**

I move that the School Board authorize the Superintendent to execute a contract with Hobsons' Naviance in the total amount of \$619,538.00 over three years, for a Career and College Readiness software solution in the form of the draft Agreement ~~dated October 5, 2017 and~~ attached to the School Board Action Report, with any minor additions, deletions, and modifications deemed necessary by the Superintendent, and to take any necessary actions to implement the contract.

## **4. BACKGROUND INFORMATION**

### **a. Background**

In its 2013 to 2018 strategic plan, the district identified the strategic necessity of improving its capability to meet students' needs and strengthen school, family and community engagement. Goal Two, Strategy Three, states: "Integrate and align operational, business, technology and academic systems to support the needs of students, teachers and schools".

On February 9, 2016, voters of the City of Seattle approved the Buildings, Technology and Academics IV (BTA IV) Capital Levy providing \$475.3 million in funding for

capital improvements. Included in this levy was \$104.7 million allocated towards improvements in technology. The Career and College Readiness software is one of the systems allocated for levy funds.

One of the key recommendations of the 24-credit planning task force is to adopt and deploy a districtwide, electronic High School and Beyond planning platform.

A High School and Beyond plan is one of the outputs of a typical career and college readiness platform. The purchase and implementation of a district-wide career and college readiness tool is intended to guide students, in collaboration with counselors, teachers and parents, to discover career goals and to plan their educational path to achieve them.

The current student counselor caseload is now over 400:1, whereas the American School Counselor Association (ASCA) recommends a student-to-counselor ratio of 250:1. The 24-Credit Task Force is calling to reduce counselors' caseloads to the ASCA recommended ratio. Community input gathered by the 24-Credit Task Force states that large counselors' caseloads was hindering a high quality, meaningful High School and Beyond planning process. While counselors are doing their best to meet the needs of their students, this is currently a very labor intensive process. An online tool will assist students and counselors to do meaningful research and planning for the students' future.

A career and college readiness tool provides a wide range of direct services to students. This RFP is school and counselor driven. Counselors have been looking for this type of tool for several years. Individual schools are currently using similar tools, eager to get these resources to students. In addition to providing students with robust college and career exploration and planning support, the tool will also provide counselors with time saving features like electronic transcript provisioning. It will also support counselors with developing master schedules that align to student college and career goals. Most importantly, counselors are committed to eliminating the opportunity gap by insuring that all students have access to high quality college and career exploration and planning support, not just the students who can afford to pay privately for these services.

**b. Alternatives**

**Interim Online Washington School Information Processing Cooperative (WSIPC) High School and Beyond Plan Authoring Tool**

This approach only automates the basic paper process. The system is integrated with the Seattle Public Schools (SPS) student information system, PowerSchool. A student's High School and Beyond plan, a part of career and college readiness planning, is authored and stored online. Guidance is provided through visual sections that organize the work needed to meet the State requirements of the High School and Beyond plan.

This tool does not relieve any counselor workload, nor provide assistance in the planning process. For example, connecting careers and education paths to student skills and interests assessments are not integrated with this tool.

### **Continue Manual Career and College Counseling**

This approach utilizes current counseling methods without electronic tools to minimize the need for manual research and planning.

It does not relieve any counselor workload, encourage family collaboration, nor provide much assistance in the planning process. A counselor cannot adequately help all the students in their caseload. Their work with each student is necessarily brief. Students are frequently left to research options, and make the connection from their high school education to their desired post high school goals on their own.

This approach does not serve our students well or support the district's strategic plan.

#### **c. Research**

Research was done to find the options and tools available for a career and college readiness platform. First, the district has a small number of individual secondary schools currently using Hobsons' Naviance and Career Cruising – two tools well established in this industry. Next, online search results identified an additional eleven integrated solutions in the career and college readiness platform space.

Additionally, informational interviews were conducted with four school districts in Washington State (Highline, Sumner, Everett, and Spokane) to understand the human resources needed for the implementation, end user adoption, and ongoing support specific to Hobsons' Naviance and Career Cruising. It was assumed a similar experience could be expected for any of the solutions identified. The conversations were unscripted except for the opening request of "tell us about your lessons learned." The general themes identified from these conversations were:

- A minimum of one permanent, dedicated, full-time resource at the central office is needed for the initial and ongoing implementation to be successful.
- One or more staff who are trained as solution experts and designated as "school leads" are needed in each school to ensure end user adoption.

Finally, the RFP02760 Career and College Readiness Software was developed and published to gather vendor responses. For this Request for Proposal (RFP), vendors were required to respond to 169 functional requirements and 118 technical requirements, as well as provide a narrative response to the RFP for the categories of Implementation and Approach, Vendor Qualifications and Experience with K-12 districts of similar size. Functional requirements were identified by counselors and include the categories of Application Process, Communication, Community Based Organizations, Course Waivers, Curriculum, Equity, Event Management, Experiences, Exploration, Family Engagement, Financial Aid, Goals, Graduation, High School and Beyond Plan, Jobs, Letters of Recommendation, Online Course Requests, Portfolios, Readiness Indicators, Research, Scheduling, Student Data, Student Interactions, Student Records, Student Supports, Surveys, Tests, Transcripts, and Transitions.

**5. FISCAL IMPACT/REVENUE SOURCE**

Fiscal impact to this action will be \$619,538.00 over three years.

The revenue source for this motion is Buildings, Technology and Academics IV (BTA IV) levy.

Expenditure:  One-time  Annual  Multi-Year  N/A

Revenue:  One-time  Annual  Multi-Year  N/A

**6. COMMUNITY ENGAGEMENT**

With guidance from the District’s Community Engagement tool, this action was determined to merit the following tier of community engagement:

Not applicable

Tier 1: Inform

Tier 2: Consult/Involve

Tier 3: Collaborate

Stakeholders for this initiative include students, counselors, parents and guardians, teachers, and District staff.

Feedback received as a result of community engagement was in the form of survey responses by student, parent and guardian, and counselor participants, who were given access to test sandbox instances of software for the vendor finalists. Participants were gathered as volunteers through High School Principal outreach, Counselor outreach, and selected interested Staff members. An activity was organized for the participants to conduct vendor software testing in a sandbox environment. Ballard High School, Chief Sealth International High School, Center School, Ingraham High School, Rainier Beach High School, and West Seattle High School all provided participants in the sandbox testing. The Counselors and Career Center Specialist participants support these schools, whose student populations represent a very wide range of ethnic and socio-economic backgrounds. The student participants represented a diverse demographic that included Special Education, English Language Learner, International Baccalaureate, and College Bound Scholarship/Free and Reduced Lunch students. Ethnicity was also diverse for these students, which included Hispanic, Native American, African, and Eastern European Caucasian. Their feedback was used as input into the RFP Vendor Response evaluation and selection process.

**7. EQUITY ANALYSIS**

While no specific activity was done to evaluate racial equity impact of this project, there have been deliberate efforts made to gather input from stakeholders of a wide range of demographic groups. In addition, this software platform will be implemented for all eighth through twelfth grade students district-wide. The content will be presented at the sixth grade level appropriate for many students with special needs.

Currently, a few individual schools have purchased a career and college readiness tool for their school student's use only. Additionally, students that have the means are able to pay for private college counselors. These private counselors use the same type of college and career readiness tool that the district is looking to purchase.

Providing a career and college readiness tool at the district level eliminates this opportunity gap and provides equal access to a high quality career and college readiness planning tool.

**8. STUDENT BENEFIT**

This action will enable access for all secondary school students to a robust online career and college readiness software suite. From interest and skills assessments, related career opportunities, education paths and post-secondary opportunities, students will connect how the work they do in school leads to achieving their career goals. They will learn to plan their high school and post-secondary education and track progress, make adjustments along the way, and achieve their career plan.

**9. WHY BOARD ACTION IS NECESSARY**

- Amount of contract initial value or contract amendment exceeds \$250,000 (Policy No. 6220)
- Amount of grant exceeds \$250,000 in a single fiscal year (Policy No. 6114)
- Adopting, amending, or repealing a Board policy
- Formally accepting the completion of a public works project and closing out the contract
- Legal requirement for the School Board to take action on this matter
- Board Policy No. \_\_\_\_\_, [TITLE], provides the Board shall approve this item
- Other: \_\_\_\_\_

**10. POLICY IMPLICATION**

Per Policy No. 6220, Procurement, any contract over \$250,000 must be brought to the Board for approval.

**11. BOARD COMMITTEE RECOMMENDATION**

This motion was discussed at the Operations Committee meeting on June 15, 2017. The Committee reviewed the motion and moved it forward to the full Board with a recommendation for consideration. Additionally, this motion was brought to the Operations Committee meeting on September 7, 2017 as a Special Attention Item once the selected vendor and contract amount was finalized. Finally, this motion was brought to the Curriculum and Instruction Committee meeting on October 10, 2017 as a Special Attention Item for informational purposes only.

**12. TIMELINE FOR IMPLEMENTATION**

Upon approval of this motion, the contract will go into effect with the following established timelines for full implementation:

Setup and Configure Software	November 2017
Define School Requirements	November 2017 – December 2017
Design and Build Functionality- Including interfaces	January 2018 – March 2018
User Acceptance Testing	April 2018 – August 2018
Training and Implementation	August 2018
Operations and Support	September 2018 – October 2018

**13. ATTACHMENTS**

- [Agreement \(for approval\)](#)
- [Agreement Exhibits A-F](#)
- RFP02760

**AGREEMENT**  
**College and Career Readiness Software**

This Agreement, Contract No. RFP02760, is effective upon mutual execution by and between Seattle School District No. 1, a Washington municipal corporation (District), and Naviance, Inc. (Vendor). The District and Vendor agree as follows:

**1. SCOPE OF WORK AND SCHEDULE**

Vendor shall provide services as described in Exhibit A, Project Approach Summary. Vendor is authorized to proceed upon receipt of this signed Agreement. The initial term of the contract shall be in effect from the effective date through October 31, 2020. With mutual agreement, the District and firm has the option to exercise four (4) additional, one-year extensions to begin November 1 and end October 31 of each year. Either party may terminate this Agreement per the terms in Exhibit D, Terms of Service.

**2. CONTRACT PRICE**

District agrees to pay Vendor an amount estimated to be SIX HUNDRED FOURTEEN THOUSAND FIVE HUNDRED SIXTY-SIX DOLLARS AND SIXTY THREE CENTS (\$614,566.63). This amount constitutes the "Maximum Authorized Compensation" as shown in Exhibit E, Sales Order Form (licensing and Professional Services) and page 13 of the Project Approach Summary (estimated training and travel expenses), for services to perform the work identified in the Request for Proposal No. RFP02760.

This amount shall constitute complete compensation for all costs and fees incurred, including any expenses for meals, travel, lodging, and Washington State sales tax, if applicable. Any increase above this amount will require agreement by the parties.

Compensation will be paid quarterly as described in Exhibit D to the extent that Vendor presents documented evidence of fees earned and expenses incurred during the period for which payment is requested, and in no case shall the total compensation exceed the Maximum Authorized Compensation. Vendor shall submit its invoices in the form and according to the schedule prescribed in the Terms of Service, to the address listed in paragraph 3.

**3. COMMUNICATION**

The District's representative for this contract is Caleb Perkins, Director of College and Career Readiness. All correspondence, requests, notices and other communications to the District, in relation to this Agreement, shall be in writing and shall be delivered to:

**To the District:**

Caleb Perkins  
Director, College and Career  
Readiness  
Mail Stop 32-303  
Seattle School District No. 1  
P.O. Box 34165  
Seattle, WA 98124-1165

**To Vendor:**

Todd Tribble  
VP, Sales Development/Operations  
Naviance, Inc.  
3033 Wilson Blvd., Suite 500  
Arlington, VA 22201

Either party may from time to time change such addresses by giving the other party notice of such change in accordance with the provisions in Paragraph 3. above.

**4. VENDOR'S REPORTS**

Vendor shall provide reports as requested by District and as specified in Exhibit A, Project Approach Summary.

5. **PERSONNEL**

Vendor shall assign the personnel listed in Exhibit B.3, Team Organization, for the performance of the Work and shall not (for so long as they remain in Vendor's employ) reassign or remove any of them without the prior written consent of District.

6. **THIS AGREEMENT INCLUDES THE FOLLOWING ATTACHMENTS:**

<b>Exhibit</b>	<b>Topic</b>
A	Project Approach Summary
B	Proposal Response Sections for RFP0270 dated May 8, 2017: B.1: Product Design, Features and Functionality B.2: Team Organization, Availability and Capacity
C	Addendum No. 1, dated April 25, 2017; Addendum No. 2, dated May 2, 2017; Addendum No. 3 dated May 23, 2017
D	Terms of Service
E	Sales Order Form
F	VPAT Form

NAVIANCE, INC.

  
Signature

Jason Fletcher  
(Vendor Representative)

CFO  
Title

11/14/17  
Date Signed

Hobsons, Inc.  
Company Name

20330  
Employer I.D. No. or Social Security No.

SEATTLE SCHOOL DISTRICT NO. 1

\_\_\_\_\_  
Signature

Dr. Larry Nyland

Superintendent  
Title

\_\_\_\_\_  
Date Signed





# Career and College Readiness Tool

## Agreement Exhibits A through F

Seattle Public Schools is committed to making its online information accessible and usable to all people, regardless of ability or technology. Meeting web accessibility guidelines and standards is an ongoing process that we are consistently working to improve.

While Seattle Public Schools endeavors to only post documents optimized for accessibility, due to the nature and complexity of some documents, an accessible version of the document may not be available. In these limited circumstances, the District will provide equally effective alternate access.

For questions and more information about this document, please contact the following:

Caleb Perkins  
Director, Career and College Readiness  
206-252-0062

This document includes Exhibits A-F of the proposed agreement with Naviance for a Career and College Readiness software tool.



## Naviance - Career and College Readiness Software

### Project Approach Summary

November 6<sup>th</sup>, 2017

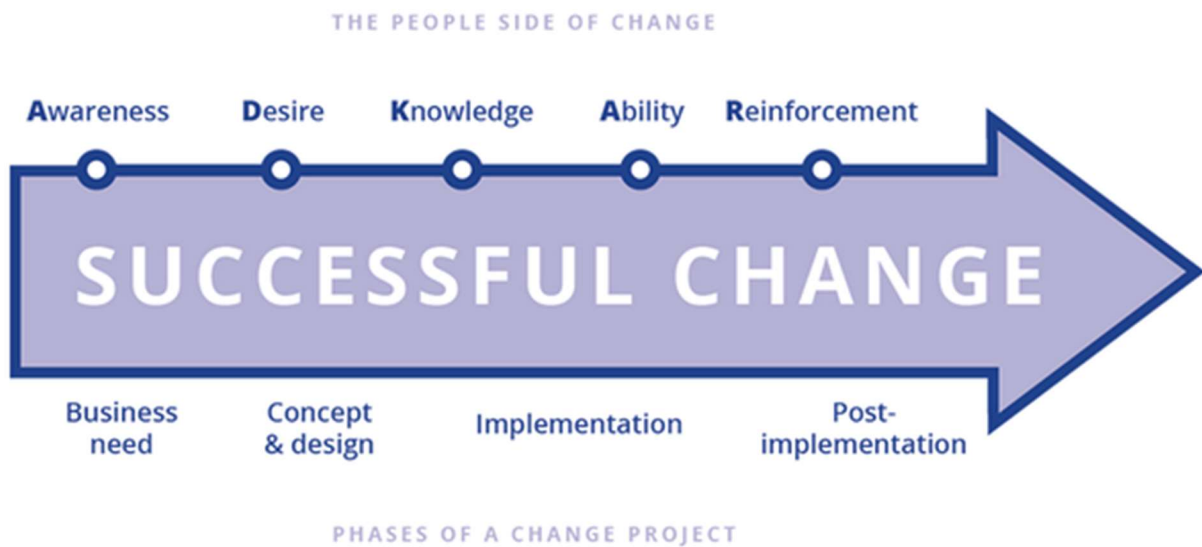
Prepared by: Andrew Wamala, Strategic Account Executive  
3033 Wilson Boulevard, Suite 500, Arlington, VA 22201  
phone: 703-859-7519 | e-mail: [andrew.wamala@hobsons.com](mailto:andrew.wamala@hobsons.com)



## 1. Project Approach

Hobsons understands that SPS is looking for a solution that will provide engaging activities that can be incorporated in or outside of the classroom covering critical 21st century academic concepts and skills, college and career planning, and financial literacy. SPS wants a platform that will provide students with a learning style inventory, career exploration and goal setting features, a portfolio repository, and general college knowledge along with college assessment preparation. SPS needs a platform that will help to fulfil its mission to innovate, educate, graduate—which is exactly what the Naviance solution can do.

Hobsons will provide implementation services that will enable SPS to leverage the Naviance platform to promote college and career readiness through increased collaboration, rigor and transparency. The professional services team utilizes proven change management models such as the Prosci ADKAR model as well as a proven five-phase implementation methodology to ensure optimal implementation user adoption. The services will also assist staff on ensuring student and family engagement through the Family Connection portal.



Source: ADKAR Change Management Model Overview & Exercises | Prosci. (n.d.). Retrieved from <https://www.prosci.com/adkar/adkar-model>

Hobsons has more than 10 years of experience implementing Naviance for school districts to address their college and career readiness needs. The services Hobsons will provide to Seattle Public Schools are strategic planning, change management support, implementation guidance, professional development, and user support through our Professional Services organization. Our methods foster collaboration with clients through a hands-on approach to defining requirements, to utilizing the solution, to monitoring usage and user adoption. This methodology will systematically address goals, technology, culture and processes of SPS by leveraging best practices and proven templates and methods to deliver a sustainable and robust solution ensuring post-secondary success. Our professional services team will ensure that SPS staff not only has the toolset needed to reach their college and career readiness goals with Naviance but also the essential mindset required to ensure staff and students excel.



**Phase I: Assess**

The Assess phase is designed to prepare clients for success in the implementation and ongoing management of their Naviance solution. A Hobsons Consultant works with key stakeholders to identify and prioritize key objectives and education drivers for the implementation. The team also defines initiatives, processes, configuration workflows, and a measurement plan to help ensure not only a return on your investment, but a successful rollout that can maximize the impact on students more quickly.

Key tasks of the Assess phase include:

Requirements	Professional Development Planning
<ul style="list-style-type: none"> <li>Establish Steering Committee to represent needs of various users and ensure objectives and goals have input from all relevant stakeholders.</li> <li>Establish goals and objectives for Naviance implementation.</li> <li>Identify functionality needed to meet objectives.</li> <li>Understand challenges facing school or district and determine how Naviance can address them.</li> <li>Document known risks and define risk mitigation plan.</li> <li>Define criteria for measuring achievement of defined objectives.</li> </ul>	<ul style="list-style-type: none"> <li>Identify individuals who will set up and support Naviance (for example, who will handle data imports and user administration).</li> <li>Establish timeframe for achieving objectives with defined checkpoints / milestones throughout.</li> <li>Determine activities and milestones that should be completed by staff and students.</li> <li>Review implementation plan to ensure complete and aligned with objectives.</li> </ul>

Ensuring that all requirements are considered and accounted for in a comprehensive implementation plan will ensure a successful rollout.

**Phase II: Import**

During the Import phase, the steering committee identifies the data that needs to be imported into Naviance and the process for importing the data. Key tasks of this phase include:

Requirements Analysis and Planning	Technical Integration Considerations	Executing and Scheduling
<ul style="list-style-type: none"> <li>Determine student, parent, and test score fields to be imported.</li> <li>Facilitate communication between end users and IT on data needed for import.</li> <li>Determine how data can be used in Naviance and the analysis that can be done based on available data.</li> </ul>	<ul style="list-style-type: none"> <li>Identify who is responsible for data integration.</li> <li>Make sure school or district understands effort involved to use SchoolSync</li> <li>Explain options available and steps involved for data importing and updating with SchoolSync.</li> </ul>	<ul style="list-style-type: none"> <li>Convey to IT sense of urgency to load relevant data so users can start using Naviance.</li> <li>Determine timeline and frequency for loading data and order in which data should be loaded based on dependencies.</li> <li>Ensure school or district prepares files correctly for import.</li> </ul>

Requirements Analysis and Planning	Technical Integration Considerations	Executing and Scheduling
<ul style="list-style-type: none"> <li>Construct requirements document with end users that can be given to IT to start the data importing process.</li> </ul>	<ul style="list-style-type: none"> <li>Determine records, fields and file format for importing.</li> <li>Assess need for exporting data from Naviance for further analysis.</li> <li><b>Note:</b> with the <b>Integration Bundle</b>, support for Clever’s Secure Sync is included and would be used in place of SchoolSync.</li> </ul>	<ul style="list-style-type: none"> <li>Validate and test import data for accuracy and completeness.</li> </ul>

**Phase III: Configure**

During the Configure phase, the Hobsons Consultant works with the steering committee using results from the Assess and Import phases to ensure that all relevant components of Naviance are set up correctly and that school and district staff can perform their jobs. This phase occurs in combination with the training schedule and supporting documentation.

Key tasks of the Configure phase include:

User Administration and Setup	Student Data Management	Family Connection
<ul style="list-style-type: none"> <li>Define login security and implement single sign-on (SSO).</li> <li>Establish level of integration with student information system (SIS) as it relates to external staff IDs.</li> <li>Determine whether to activate teacher accounts and level of effort involved.</li> <li>Define user accounts, including roles, rights, and permissions.</li> <li>Establish who controls user permissions and whether maintained at the school or district level.</li> <li><b>Note:</b> with the <b>Integration Bundle</b>, support for Clever Instant Login (SSO) is included</li> </ul>	<ul style="list-style-type: none"> <li>Understand student activity and how it is handled in Naviance.</li> <li>Manage and edit student data and personal data profiles.</li> <li>Assign counselors to students and establish student groups.</li> <li>Learn how to communicate with student groups.</li> <li>Add and edit parent data and manage teacher lists.</li> <li>Understand batch updates and when they would be used.</li> </ul>	<ul style="list-style-type: none"> <li>Decide what you want to achieve in Family Connection and map those objectives to required functions.</li> <li>Identify functionality / content available for students and parents.</li> <li>Determine Optional features you want to implement.</li> <li>Establish look and feel for Family Connection and customize as required.</li> <li>Set permissions and activate and control access.</li> <li>Preview site before going live.</li> </ul>



**Phase IV: Deploy**

During the Deploy phase, we focus on the planning dimensions relevant to achieving the stated objectives. We ensure proper training has been received to enable users to configure and use the college, career, and success planning features. Key tasks of the Deploy phase include:

Middle School	High School
<ul style="list-style-type: none"> <li>• Work with students on completion of assessments.</li> <li>• Work with students to add careers and clusters to list.</li> <li>• Review student career lists and assessments.</li> <li>• Review assessment results and reports.</li> </ul>	<ul style="list-style-type: none"> <li>• Review student career lists and assessments.</li> <li>• Work with students to connect career pathways with post-secondary paths.</li> <li>• Monitor student tasks and goals.</li> <li>• Comment on success plans.</li> </ul>

**Phase V: Measure**

During the Measure phase, we review and report our progress against the stated objectives to determine our degree of achievement and areas to focus on for ongoing implementation and rollout. Progress is reported based on survey results, reports, and various forums for interacting with users to assess user acceptance and satisfaction.

Key tasks of the Measure phase include:

Reporting	Lessons Learned	Next Steps
<ul style="list-style-type: none"> <li>• Align available reports to previously established objectives.</li> <li>• Review student reports to measure student tasks, milestones, and Family Connection usage.</li> <li>• Review college reports to measure applications, acceptance, and scores.</li> <li>• Review career reports to measure student progress with assessment status and careers and career clusters interest.</li> <li>• Review accomplishments and shortcomings.</li> </ul>	<ul style="list-style-type: none"> <li>• Determine areas of success and investigate what factors made the most difference.</li> <li>• Identify missed objectives and major challenges that prevented success.</li> <li>• Identify areas of dependency that may have contributed to objectives not being met (such as time and resources).</li> <li>• Submit requests to IT, school administration, and Naviance on how to improve workflow and deficiencies moving forward.</li> </ul>	<ul style="list-style-type: none"> <li>• Define next set of objectives to achieve.</li> <li>• Define critical success factors and criteria for measuring achievement of defined objectives.</li> <li>• Identify risks and obstacles to achieving objectives.</li> <li>• Update and maintain implementation plan with risk mitigation factors.</li> <li>• Verify stakeholders and re-establish team if needed.</li> </ul>

A detailed implementation plan is included as Appendix B.



## 2. Team Organization, Availability and Capacity

To help ensure the highest level of client service, Hobsons assigns professional services staff upon receipt of the signed contract. This helps ensure that we are keeping a balanced work load across all professional services employees and providing our clients with a consistent and appropriate level of support. In addition, our professional services management conducts an internal review of the client's business processes with sales to identify any unique needs of the client which may further determine which professional service representative is best equipped to work with the client. That said, Hobsons reserves the right to assign professional service staff as needed.

Hobsons works hard to keep staff assignments consistent and encourages clients to provide feedback throughout implementation and after so that we can ensure a mutually beneficial partnership with the client. When changes in assigned staff are required, Hobsons will proactively communicate the change with the client and work to ensure a smooth transition.

The following are descriptions of the roles of staff we would have working with Seattle Public Schools.

### Strategic Consultant

Strategic consultants assist districts in defining the purpose behind their Naviance implementation. With their deep experience and passion for seeing districts and schools succeed, strategic consultants use established strategic planning methodology to find clarity in a district's goals and the steps acquired to achieve them. Through the identification of key metrics and the development of a holistic scope and sequence, Strategic Consultants ensure you not only have the toolset you need to reach your college and career readiness goals with Naviance but also the essential mindset required to make your staff and students excel. The Strategic Consultant will be responsible for working directly with the SPS team to define and establish goals and key performance indicators, provide change management support, identify challenges and potential risks, build an implementation plan and professional development plan, establish student and family communication plans, and monitor progress towards the goals. Collaboration with the consulting team is based on the purchased strategic consulting hours.

### Project Consultant

The Project Consultant assigned to this project can provide services in both onsite and remote capacities. They provide a detailed project plan to track progress as well as tactical, hands-on support to augment the implementation efforts of your staff. The Project Consultant will be available to assist with the execution of the project plan, importing of data, configuration steps of the program (i.e. create user roles/accounts in Naviance, configure school and district preferences, etc.) to align with the goals set, and deliver onsite and web based training. Training is usually done in a sandbox account but can also be conducted in each school's environment for real-time application of lessons. Naviance proposes onsite training delivery to best meet the needs of SPS. Onsite days can be delivered back-to-back or individually and will be scheduled based on the agreed upon training plan. The offering will include a blend of onsite sessions delivered by Naviance trainers for SPS staff while other sessions will be dedicated to implementing a Train the Trainer model. The goal of the Train the Trainer program is to effectively train the SPS training team to deliver Naviance training courseware to their own school staff in order to successfully implement the Naviance solution. While working to prepare SPS internal trainers on the content and delivery methodology, project consultants will



also deliver training sessions. Collaboration with the project consulting team is based on the purchased project consulting hours.

### **Support Specialist**

The Naviance Support Specialist to be used on this project will vary as we provide centralized technical support to all our Naviance Network members out of the Arlington, VA office. The Naviance Support Services team fields inquiries in the order in which they are received. All school staff and district staff users of the solution can contact Naviance Support Services by emailing them (support@naviance.com); calling them (1-866-337-0080) or submitting an online request through the online help menu in the Naviance Help Library. A Naviance Support Specialist will address any question submitted by a user and will open a case to document the question. Questions are handled in the order in which they are received. Once a case is opened, a support specialist will interact with the user to gather more information or to aid in troubleshooting for resolution. All interactions with the user are documented in the case so case history is always available to reference at a later point in time. If the issue cannot be resolved, the case will be escalated and flagged as a case requiring Product Engineering support. If the case cannot get resolved same day, the Naviance Support Specialist will communicate with the client on a daily basis keeping them informed about the progress of their case. Users can always track their open case status directly in the online help interface as well. The entire team will support this project on an as-needed basis. When working on a case associated with this project the Naviance Support Specialist is 100% devoted to the resolution of that issue in a timely manner.

### **Strategic Success Manager**

The success manager for this project will serve as the “glue” for the entire project team and will engage the appropriate resource at the right time throughout the project. They will serve as your single point of contact while you are a Naviance Network member. They will coordinate support from all different groups— Consulting, Professional Development, Support Services, and Engineering—to ensure the implementation stays on track and the district objectives are met. The Naviance team members each bring a wealth of experience, best practices, repeatable processes and templates that can be leveraged and tailored to Seattle Public Schools implementation of Naviance.

### **Strategic Account Executive**

The Strategic Account Executive for the Seattle Public Schools project will serve as the main point of contact during the RFP process, project evaluation, contract review, negotiations, commencement of formal partnership, post-acquisition and on-going needs. Specifically, your assigned Strategic Account Executive, will serve as the project lead, in part, making sure Hobsons is accurately diagnosing SPS’s requirements, interpreting and recommending for appropriate actions from the Hobsons’ Project team to ensure a successful and sustainable implementation across the entire district during the stated Performance Period.



### 3. Detailed Implementation Plan

#### Naviance Implementation Plan

##### Seattle Public Schools

The district-wide implementation of Naviance is mission critical to support Seattle Public School with its commitment to “ensure that each student will graduate ready for college, career and life.” We are confident that the thoughtful, strategic, district-wide implementation of Naviance will assist the District in three strategic goals

Ensure educational excellence and equity for every student

Improve systems districtwide to support academic outcomes and meet students’ needs

Strengthen school, family and community engagement

#### Phase 1: Assess



Identify key objectives and requirements, plan the implementation of Naviance, and schedule Professional Development courses.

Task	Start Date	Resources
<b>Initial Planning/Implementation Meetings</b> Finalize Implementation Committee Designate District and School Site Managers Finalize goals and KPIs by year and grade level Designate District and School Site Managers Identify timeline for achieving set-up and implementation objectives Change Management Planning/Readiness Assessment Review Professional Development Plan and finalize schedule Reoccurring implementation meetings to check in on project plan	November 2017	District Key Stakeholders, District Implementation Staff, Success Manager, & Naviance Services team
<b>Develop Communication Plan</b>	December – January 2018	District Implementation Staff & Naviance Services Team
<b>Awareness &amp; Empowerment Workshops for Administrators</b>	December – January 2018	School Administrators & Naviance Service Team

## Phase 2: Import



Identify the data needed for importing into Naviance as well as the process for importing so that functional objectives and reporting needs can be met.

Task	Completion Date	Resources
<b>User Accounts and Roles and Rights Workshop</b>	December – January 2018	District Site Manager/s & Naviance Service Person
<b>Select preferred Single Sign On Option</b>	December – January 2018	IT Staff
<b>Configure User Accounts and Roles and Rights</b>	December – January 2018	IT Staff & Naviance Service Person
<b>Data Import Meeting</b> Student Data Parent Data Test Scores	December – January 2018	IT Staff Naviance Service Person
<b>Data Import: Student Data, Parent Data, Test Scores</b>	December – January 2018	IT Staff
<b>Establish data automation of student, parent, and test score data with Naviance SchoolSync</b>	January – March 2018	IT Staff
<b>Configure preferred Single Sign On Option</b>	January – March 2018	IT Staff

## Phase 3: Configure



Leverage Professional Services to ensure that all relevant components of Naviance are properly set up so that users can perform their jobs and increase student readiness.

Task	Completion Date	Resources
<b>Configure Family Connection for each school Site</b>	January – March 2018	Naviance Service Team
<b>Configure College Planning tools for each school site</b>	January – March 2018	Naviance Service Team
<b>Configure Naviance Curriculum for each school site</b>	January – March 2018	Naviance Service Team
<b>Configure Scope and Sequence via Success Planner</b>	January – March 2018	Naviance Service Team

### Phase 4: Deploy



Focus on rolling out the implementation plan and working toward established goals. Proper training has been received to enable users to configure and leverage the features of College, Career, and Success Planner aspects of Naviance.

Task	Completion Date	Resources
<b>Awareness Training for Staff:</b> Introduction to Naviance	April 2018	Administrators, counselors, SPS Trainers, & Naviance Service Team
<b>Functional Training for Staff:</b> College Planning Research Tools Career Planning	May 2018	Counselors, SPS Trainers & Naviance Service Team
<b>Deploy – Train the Trainer:</b> Master the Content Learn to Teach Certify to Teach	April – August 2018	SPS Trainers & Naviance Service Team
<b>Pre-eDocs Planning Workshop:</b> College Application Process Audit eDocs Process Creation	April – August 2018	Senior counselors, Registrar/Secretary, & Naviance Service Team
<b>Scope and Sequence Roll Out Workshop:</b> College & Career Process Audit Student Roll-Out Planning	June – August 2018	School Site Managers & Naviance Service Team
<b>Functional Training for Staff:</b> College Planning: Application Tools & eDocs Collaborative Tools	July – August 2018	Senior counselors, Registrar/Secretary, & Naviance Service Team
<b>Provide communication and deployment resources to school-based staff to support the student rollout</b>	August 2018	District Site Manager/s & Naviance Service Team
<b>Letter of Recommendation Teacher Awareness Session</b>	August 2018	School Site Managers & Teachers
<b>Introduce Naviance to 8<sup>th</sup>, 9<sup>th</sup> &amp; 12<sup>th</sup> graders</b>	Sept – Nov 2018	School staff
<b>Introduce Naviance to 10<sup>th</sup> &amp; 11<sup>th</sup> graders</b>	Nov – Dec 2018	School staff

### Phase 5: Measure



In alignment with SPS's strategic initiatives, we will determine the best data metrics to track and measure student success and effectiveness of Naviance. Because SPS may not have district-wide data related to the attainment of college and career readiness standards for grades 8 -12, Academic Year 2017-2018 will provide a chance for us to collect baseline data for the school district to identify where our students are starting and inform our year-over-year percentage increase goals for the 2018-2019 implementation year.

SPS will be communicating a focused and specific implementation plan and following a data-driven approach to encourage district-wide adoption of Naviance. Our goal is to build capacity and increase collaboration throughout the district with professional learning communities focused on using data from Naviance to measure impact and continuously improve. **Below are example metrics:**

**Ensure high school readiness**

- % of 8<sup>th</sup> grade students completing a high school four-year plan of study
- % of 8<sup>th</sup> grade students completing transition to high school survey
- % of middle school students creating an academic goal
- % of middle school students who complete Strengths based assessment
- % of middle school students who develop plans for maximizing their strengths
- % of students who watch Roadtrip Nation career videos to learn how various leaders overcame challenges to reach success

**Increase the high school graduation rate**

- % of students who set academic, personal/social, and post-secondary goals
- % of students who identify their strengths and develop plans for utilizing their strengths to maximize academic ability and achievement
- % of students who met academic, personal/social, and post-secondary goals
- % of students who utilize College Profiles to determine requirements and eligibility
- % of students who meet with school staff twice a year to review course plan and graduation requirements
- % of students who identify at least 3 colleges of interest
- % of students who intend to attend college after graduation

**Foster post-graduate success**

- % of students who complete a career assessment (e.g. StrengthsExplorer, Career Cluster Finder, Do What You Are, Career Interest Profiler)
- % who identify careers and career clusters of interest
- % who report they understand the links between careers and preparation needed
- % of students who apply to 4 year colleges
- % of students who are accepted to 4 and/or 2 year colleges
- % of students who matriculate to a 4 and/or 2 year college
- % of students who utilize College Profiles to determine requirements and eligibility
- % who create strategies to finance college costs
- % of students who have applied to at least 1 scholarship
- % of students creating a resume
- % of alumni students enrolled in college one-year post graduation
- % of students who complete a scholarships search
- % of students who complete the FAFSA
- Total scholarship dollars awarded



## 4. Seattle Public Schools Service Summary

Description	Details	Hours	Travel Costs
<b>Year 1</b>			
<i>Project Consulting</i>	11 onsite days (88 hours, includes 6 hours of delivery and roughly 2 hours of prep time per day)	88	
	<b>Travel Budget for Enablement and Training</b>		\$ 7,150.00
	27 Web Training hours (roughly 12 training sessions plus prep time)	27	
	<b>Train the Trainer:</b> 2 courses, 50 hours per course (4 Days Per Course for Certification)	100	
	<b>Implementation support:</b> Functional Training, Data import, Roles and rights, Configuration, Timeline management, Implementation best practices	100	
	<b>Travel Budget for Implementation Support</b>		\$ 2,850.00
<b>Total</b>		<b>315</b>	<b>\$ 10,000.00</b>
<i>Strategic Consulting</i>	<b>Strategic consultation and advising:</b> Change management, Strategic plan alignment, Communication plans, Key Performance Indicators & Data analysis	75	
<b>Year 2</b>			
<i>Project Consulting</i>	3 onsite days (25 hours, including 6 hours of delivery and roughly 2 hours of prep time per day)	25	
	<b>Travel Budget for Enablement and Training</b>		\$ 2,000.00
	15 web hours (roughly 6 training sessions plus prep time)	15	
	<b>Train the Trainer:</b> 2 courses, 50 hours per course (4 Days Per Course for Certification)	100	
	<b>Implementation support:</b> Functional Training, Data import, Roles and rights, Configuration, Timeline management, Implementation best practices	60	
	<b>Travel Budget for Implementation Support</b>		\$ 5,000.00
<b>Total</b>		<b>200</b>	<b>\$ 7,000.00</b>
<i>Strategic Consulting</i>	<b>Strategic consultation and advising:</b> Change management, Strategic plan alignment, Communication plans, Key Performance Indicators & Data analysis	70	
<b>Year 3</b>			
<i>Project Consulting</i>	3 onsite days (25 hours, including 6 hours of delivery and roughly 2 hours of prep time per day)	25	
	<b>Travel Budget for Enablement and Training</b>		\$ 1,950.00
	10 web hours (roughly 4 training sessions plus prep time)	10	
	<b>Implementation support:</b> Functional Training, Data import, Roles and rights, Configuration, Timeline management, Implementation best practices	50	
	<b>Travel Budget for Implementation Support</b>		\$ 1,550.00
<b>Total</b>		<b>85</b>	<b>\$ 3,500.00</b>
<i>Strategic Consulting</i>	<b>Strategic consultation and advising:</b> Change management, Strategic plan alignment, Communication plans, Key Performance Indicators & Data analysis	60	

Redacted for Contract Purposes

## 7. Product Design, Features & Functionality

**a. Provide a brief summary overview of the key design features and functionality of the product(s) or solution(s) offered and describe how they meet the requirements specified by Seattle Public Schools in this RFP.**

Naviance is a college and career readiness platform that helps connect academic achievement to post-secondary goals. Its comprehensive college and career planning solutions optimize student success, enhance school counselor productivity, and track results for school and district administrators.

Naviance enables schools and districts to create personalized success plans for each of their students, and aligns to many state mandates for individual learning plans. The solution offers a core set of functionality that enables students and counselors to connect college and career planning to individual student goals. The platform allows students to collaborate with educators to: set personal goals and tasks; search for colleges; and explore careers based on personal skills and interests.

In addition, the Naviance platform offers schools and districts the flexibility to customize the solution to their needs, and add additional functionality that extends the reach of their college and career readiness efforts. These solutions include:

- Naviance College & Career Readiness Curriculum
- Electronic Transcript and Document Exchange
- Course Planning
- Alumni Tracking
- AchieveWORKS
- Career Key

The Naviance Marketplace provides a wide variety of third-party solutions that complement a school's Naviance implementation. Learn more at <http://www.naviance.com/marketplace>.

The Naviance Family Connection portal provides students with web-based and mobile access to help students plan for their futures and stay in communication with school staff about their post-secondary goals. Parents have visibility into their students' progress and can see where they may need extra help.

**For detailed information on the Naviance Solution refer to Appendix A, the Naviance Solution Overview.**

**b. Insert your completed Attachment 1, Functional Requirements Form in this section. This attachment and any supplemental documentation will not count towards your page limit.**

RF02760

Functional Requirements

Attachment 1



**→ INSTRUCTIONS**

- 1) For each row select a value in **column E**.
- 2) Fill out **column F** if you selected any of these in **column E**: Configuration required, Extended (Custom Code), or Third Party Tool.

Vendor Name:

**Career and College Planning Tool**  
Vendor Response Matrix  
Functional Requirements  
**RF02760**

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.01	Application Process	Ability to link to the Coalition Application (Coalition for Access, Affordability, and Success).	Should Have	Not supported		
1.02	Application Process	Ability to link to the Common Application (Common App).	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.03	Application Process	Ability to upload/organize/store documents for multiple applications (up to 15) per student.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.04	Application Process	Ability to manage (organize and coordinate) the application process.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.05	Application Process	Ability to track student progress on completing application (admissions) packages.	Must Have	Works out-of-the-box		
1.06	Application Process	Ability to securely electronically send/submit all documentation needed for post secondary education applications.	Must Have	Works out-of-the-box		
1.07	Communication	Ability to chat/instant message between staff.	Should Have	Not supported		
1.08	Communication	Ability to chat/instant message between students.	Should Have	Not supported		
1.09	Communication	Ability to chat/instant message between students and staff such as counselors.	Should Have	Not supported		
1.10	Communication	Ability for staff such as counselors to send bulk notifications (such as email) to groups of recipients (such as students and their families) based on some criteria such as College Bound Scholarship participants.	Must Have	Works out-of-the-box		

Seattle Public Schools

5/8/2017

Page 1

RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.11	Communication	Ability for students to provide their personal email address to receive emails.	Should Have	Works out-of-the-box		
1.12	Communication	Ability for students to provide their personal cell phone number to receive text messages.	Should Have	Not supported		
1.13	Communication	Ability to send mass text messages to a group of designated recipients.	Should Have	Not supported		
1.14	Community Based Organizations	Ability to document (organization name, contact person, contact information, school locations, type of service/activity and start and end dates) community based organizations (CBOs) that provide resources and/or support.	Could Have	Works out-of-the-box		
1.15	Community Based Organizations	Ability to link to community based organizations (CBOs) websites that provide resources and/or support.	Could Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.16	Course Waivers	Ability to document an approved course waiver.	Must Have	Not supported		
1.17	Course Waivers	Ability to report on approved waivers.	Must Have	Not supported		
1.18	Course Waivers	Ability to document a denied waiver.	Could Have	Not supported		
1.19	Course Waivers	Ability to report on denied waivers.	Could Have	Not supported		
1.20	Curriculum	Ability to deliver curriculum appropriate for middle school students (grades 6, 7, and 8)	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.21	Curriculum	Ability to deliver curriculum appropriate for high school students (grades 9-12)	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.22	Curriculum	Ability to deliver curriculum appropriate for elementary school students (grades 1-5)	Could Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.23	Curriculum	Ability to deliver job-related curriculum to students such as: filling out a job application, providing job references, business writing, time management, career networking, communicating clearly and effectively, conflict resolution and negotiation, working in teams, presentation skills, workplace norms, personal finance, work/life balance.	Should Have	Works out-of-the-box		

Seattle Public Schools

5/8/2017

Page 2



RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.24	Curriculum	Ability to document assignment due dates.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.25	Curriculum	Ability to document curriculum test results.	Must Have	Works out-of-the-box		
1.26	Curriculum	Ability to document career and college planning student assignments (met, unmet).	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.27	Equity	Ability to deliver resources/curriculum that meet the needs of all (special populations, mainstream) middle school students (grades 6, 7, and 8).	Must Have	Works out-of-the-box		
1.28	Equity	Ability to deliver resources/curriculum that meet the needs of all (special populations, mainstream) high school students (grades 9-12).	Must Have	Works out-of-the-box		
1.29	Equity	Ability to deliver resources that meet the needs for all (special populations, mainstream) elementary school students (grades 1-5).	Must Have	Works out-of-the-box		
1.30	Event Management	Ability to schedule, promote, register and send reminders for student-focused events.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.31	Event Management	Ability to schedule, promote, register and send reminders for events (student engagement, family engagement).	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.32	Event Management	Ability to notify families (text message, email), based on their students' plans, about events such as college visits, college fairs, financial aid workshops, and so on.	Must Have	Works out-of-the-box		Emails, but not text messages, can be done through the Naviance Solution.
1.33	Event Management	Ability to notify students (text message, email, popup window, message waiting indicator/icon) based on their personal interests, goals, pathways, about events such as college visits, college fairs, financial aid workshops, and so on.	Must Have	Works out-of-the-box		Emails, but not text messages, can be done through the Naviance Solution.

Seattle Public Schools

5/8/2017

Page 3

RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.34	Experiences	Ability to document co-curricular activities such as mentoring programs, leadership programs, student newspapers, musical performances, art shows, mock trials, debate competitions, and mathematics, robotics, and engineering teams and contests and so on.	Must Have	Works out-of-the-box		
1.35	Experiences	Ability to manage (organize and coordinate) the student's participation in postsecondary program experiences such as site visits, campus tours, virtual tours, meeting with representatives.	Must Have	Works out-of-the-box		
1.36	Experiences	Ability to document work-based learning experiences such as internships; externships; job shadowing; community service, apprenticeships and so on.	Must Have	Works out-of-the-box		
1.37	Explore	Ability for students to identify abilities.	Must Have	Works out-of-the-box		
1.38	Explore	Ability for students to identify interests.	Must Have	Works out-of-the-box		
1.39	Explore	Ability for students to identify skills.	Must Have	Works out-of-the-box		
1.40	Explore	Ability for students to identify strengths and weaknesses.	Must Have	Works out-of-the-box		
1.41	Family Engagement	Ability to generate electronic/digital forms to be completed by parents and guardians online.	Must Have	Works out-of-the-box		
1.42	Family Engagement	Ability to generate paper forms to be completed by parents and guardians offline.	Must Have	Not supported		
1.43	Family Engagement	Ability to upload and store completed/signed forms (scanned paper) returned from the recipient.	Must Have	Works out-of-the-box		
1.44	Family Engagement	Ability to document staff (counselor) interactions with parents and guardians.	Should have	Works out-of-the-box		
1.45	Family Engagement	Ability to categorize documented interactions between staff (counselor) interactions with parents and guardians).	Should have	Configuration required		This functionality is supported upon configuring the product at implementation.

Seattle Public Schools

5/8/2017

Page 4

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.46	Family Engagement	Ability to generate student-specific letters to be sent to parents and guardians.	Should have	Works out-of-the-box		
1.47	Family Engagement	Ability to store letters to parents and guardians.	Should have	Works out-of-the-box		
1.48	Family Engagement	Ability to document letters to parents and guardians by topic, date sent, and so on.	Should have	Works out-of-the-box		
1.49	Family Engagement	Ability to report on letters to parents and guardians.	Should have	Not supported		
1.50	Family Engagement	Ability to manage (organize and coordinate) the family engagement process such as scheduling activities, setting deadlines and reminders; marking activities complete and so on.	Must Have	Not supported		Supported for Students, but not currently for Parent/Family Engagement
1.51	Family Engagement	Ability for parents and guardians to view their students' online course requests for the next school year.	Must Have	Not supported		Supports ability for parents to see students' course plans (not course request)
1.52	Family Engagement	Ability to provide an online secure portal for parents and guardians.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.53	Family Engagement	Ability to translate on demand the parent and guardian functionality (parent portal) in multiple languages. (The district generally translates information in 12 languages.)	Could Have	Not supported		The user interface for Naviance is in English. However, schools can enter custom content in Family Connection (for example, welcome messages, announcements, and custom HTML pages) in Spanish, Korean, Chinese simplified, Chinese traditional, and Vietnamese. Student groups can also be created for ELL, special education, and other groups of students to develop specialized success plans, course plans, and surveys. Students can be placed into these groups manually or via the automated data import. The SuperMatch™ College Search also helps make it easier for students to identify colleges with services to meet their needs.
1.54	Family Engagement	Ability to securely communicate with parents and guardians about career and college readiness planning and their student(s).	Must Have	Works out-of-the-box		
1.55	Family Engagement	Ability to generate forms to be completed by parents and guardians, which are customized for a specific student or group of students, which is in a common document format (.docx, .rft and so on) that is editable for translation.	Should have	Not supported		
1.56	Family Engagement	Ability to upload and store translated forms.	Could Have	Works out-of-the-box		
1.57	Family Engagement	Ability to generate letters to be sent to parents and guardians, which are customized for a specific student or group of students, which is in a common document format (.docx, .rft and so on) that is editable for translation.	Should Have	Not supported		
1.58	Family Engagement	Ability to upload and store translated letters.	Could Have	Works out-of-the-box		

RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.59	Financial Aid	Ability to link to the Free Application for Federal Student Aid (FAFSA).	Must Have	Configuration required		This can be configured during implementation.
1.60	Financial Aid	Ability to link to the Washington Application for State Financial Aid (WASFA).	Must Have	Configuration required		This can be configured during implementation.
1.61	Financial Aid	Ability to document the outcomes of all submitted financial aid applications.	Must Have	Works out-of-the-box		
1.62	Financial Aid	Ability to provide a secure delivery mechanism for submitting all documentation needed for financial aid applications (if not provided by the lender).	Should Have	Not supported		
1.63	Financial Aid	Ability to search Washington state for financial aid (student loans, scholarships, and grants.)	Must Have	Configuration required		This can be configured during implementation.
1.64	Financial Aid	Ability to search nationally for financial aid (student loans, scholarships, and grants)	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.65	Financial Aid	Ability to search internationally for financial aid (student loans, scholarships, and grants)	Must Have	Not supported		
1.66	Financial Aid	Ability to track student progress on completing financial aid packages.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.67	Goals	Ability to relate a student's current levels of academic performance and course selections to their post-secondary education goals.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.68	Goals	Ability to document student goals.	Must Have	Works out-of-the-box		
1.69	Goals	Ability to document plans for achieving student goals such as interim steps/goals and timeframes.	Must Have	Works out-of-the-box		
1.70	Graduation	Ability to track student progress toward an on-time graduation by identifying students who are behind in credits for their target graduation year.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.71	Graduation	Ability to notify (auto-run a report, display an icon or popup in the UI, send an email or text ) counselors when a student is behind in credits for their target graduation year.	Must Have	Not supported		

Seattle Public Schools

5/8/2017

Page 7

RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.72	Graduation	Ability to track student progress toward satisfying state graduation requirements.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.73	Graduation	Ability to track student progress toward satisfying District graduation requirements.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.74	Graduation	Ability to identify and report on students who have met requirements to receive a diploma.	Could Have	Not supported		
1.75	Graduation	Ability to identify and report on students who have met requirements to attend the graduation ceremony (to walk)	Could Have	Not supported		
1.76	Graduation	Ability to track student progress toward satisfying personal pathway requirements.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.77	Graduation	Ability to link to District information pertinent to graduation progress such as SPS Graduation Bulletins.	Could Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.78	Graduation	Ability to document service learning information (hours, organizations, type of activities performed by student)	Must Have	Works out-of-the-box		
1.79	Graduation	Ability to upload/store service learning documentation with an identifier (such as curriculum area; or organization name).	Must Have	Works out-of-the-box		
1.80	Graduation	Ability to search service learning documentation by assigned identifier.	Must Have	Not supported		
1.81	Graduation	Ability to track yearly student progress toward meeting District service learning hours of service goal for graduation.	Must Have	Third-Party Tool		The third party tool to support this is x2vol.
1.82	Graduation	Ability to document service learning including electronic signature via a smart phone.	Could Have	Not supported		
1.83	Graduation	Ability to report on service learning hours by student, by groups of students, by building, by groups of buildings, by district.	Must Have	Not supported		

Seattle Public Schools

5/8/2017

Page 8

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.84	High School and Beyond Plan	Ability to document a High School and Beyond Plan that includes a career goal, an educational goal, a four-year high school course plan, and identification of assessments (high school graduation, post secondary admissions, post secondary placement) necessary to achieve goals.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.85	High School and Beyond Plan	Ability to make frequent revisions to High School and Beyond Plan as interests and goals change; treating the plan as a living document	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.86	High School and Beyond Plan	Ability to include a plan for the year after high school.	Must Have	Not supported		
1.87	High School and Beyond Plan	Ability to document student self reflection as part of High School and Beyond Plan.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.88	High School and Beyond Plan	Ability to document a personalized pathway - a body of coursework that is deemed necessary to attain the post secondary career or educational goals chosen by the student.	Must Have	Not supported		
1.89	High School and Beyond Plan	Ability to document any certificates of course completions for CTE equivalency courses completed by a student.	Must Have	Not supported		
1.90	Jobs	Ability to store multiple cover letters for each student.	Must Have	Works out-of-the-box		
1.91	Jobs	Ability for students to create cover letters via "best practice" letter templates.	Must Have	Configuration required		Students may upload cover letters to their student profile as a custom Success Planner task
1.92	Jobs	Ability to document industry-recognized credentials earned by students/technical competencies.	Must Have	Works out-of-the-box		
1.93	Jobs	Ability to store multiple job reference letters for each student. Up to 10 per student.	Could Have	Works out-of-the-box		School staff may upload an unlimited number of supporting student documents to the student's Naviance portfolio
1.94	Jobs	Ability to store multiple resumes for each student. Up to 10 per student.	Must Have	Works out-of-the-box		

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.95	Jobs	Ability to create resumes via a current "best practices" resume builder and/or resume templates that is refreshed at a minimum annually.	Must Have	Works out-of-the-box		
1.96	Letters of Recommendation	Ability to manage (organize and coordinate) inbound queue of requests for letters of recommendation from students.	Must Have	Works out-of-the-box		
1.97	Letters of Recommendation	Ability to mark a letter of recommendation request as "complete".	Must Have	Works out-of-the-box		
1.98	Letters of Recommendation	Ability to mark a letter of recommendation request as "complete".	Must Have	Works out-of-the-box		DUPLICATE OF 1.97
1.99	Letters of Recommendation	Ability to attach/upload and securely store letters of recommendation.	Must Have	Works out-of-the-box		
1.100	Letters of Recommendation	Ability to categorize a letter for easy search and retrieval at a later time.	Must Have	Not supported		
1.101	Letters of Recommendation	Ability to search for a specific letter that is stored	Must Have	Not supported		
1.102	Letters of Recommendation	Ability to securely send letters of recommendation as part of the application process to a post-secondary educational institution.	Must Have	Works out-of-the-box		
1.103	Online Course Requests	Ability to make online course requests for the next school year via integration with PowerSchool.	Must Have	Not supported		Functionality exists to export course plans from Naviance in a CSV format that can get imported into a school's SIS
1.104	Portfolios	Ability to organize the content of student portfolios.	Must Have	Works out-of-the-box		
1.105	Portfolios	Ability to categorize the content of student portfolios when adding or updating.	Could Have	Not supported		
1.106	Portfolios	Ability to store student portfolios.	Must Have	Works out-of-the-box		
1.107	Portfolios	Ability to send portfolio pieces as part of sending post-secondary education application materials.	Must Have	Not supported		

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.108	Portfolios	Ability to report on portfolios, by portfolio category.	Could Have	Works out-of-the-box		Not all Portfolio categories are available via reports
1.109	Portfolios	Ability to export portfolio items to a zip file.	Should Have	Not supported		
1.110	Readiness Indicators	Ability to specify student <u>career readiness indicators</u> (as defined by SPS) - such as a satisfactory performance rating by a supervisor in a paid or unpaid internship, co-curricular experience, school enterprise, or other qualifying experience that allows students to apply and demonstrate career-related transferable skills; industry-recognized skill certificate or credential; and so on.	Must Have	Works out-of-the-box		
1.111	Readiness Indicators	Ability to specify student <u>college readiness indicators</u> (as defined by SPS) such as grades, coursework taken, attendance, test scores and so on.	Must Have	Not supported		We are not able to monitor/track attendance
1.112	Readiness Indicators	Ability to specify readiness indicator business rules.	Must Have	Not supported		
1.113	Readiness Indicators	Ability to notify (auto-run a report, send an email, display a visual cue/icon) designated recipients, when readiness indicators are met or unmet.	Must Have	Not supported		
1.114	Research	Ability to research 2 year college postsecondary education options.	Must Have	Works out-of-the-box		
1.115	Research	Ability to research 4 year college/university postsecondary education options.	Must Have	Works out-of-the-box		
1.116	Research	Ability to research graduate postsecondary education options.	Should Have	Not supported		
1.117	Research	Ability to research less common postsecondary education options (e.g. coding boot camps, Year Up, industry certifications, bachelor/master degree combined programs, and so on).	Should Have	Third-Party Tool		The third-party tool to support this is the TeenLife Enrichment Program and custom enrichment program research options.

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.118	Research	Ability to access profiles of postsecondary institutions with information in a minimum of these areas: rankings, applications process and deadlines, admissions criteria, academic life, student life, cost and financial aid.	Must Have	Works out-of-the-box		
1.119	Research	Ability to search for specific programs and careers within an institution.	Must Have	Works out-of-the-box		
1.120	Research	Ability to search for specific programs and careers across multiple institutions.	Must Have	Works out-of-the-box		
1.121	Research	Ability to access career/occupation information including profiles, demand/growth, salaries, and educational requirements.	Must Have	Works out-of-the-box		
1.122	Research	Ability to compare and contrast multiple postsecondary education institutions/organizations across key data points such as graduation rates, job placement rates, cultural characteristics, and financial aid availability.	Should Have	Works out-of-the-box		
1.123	Research	Ability to access Washington state job market information and trends.	Must Have	Works out-of-the-box		Wages are available by state
1.124	Research	Ability to access national job market information and trends.	Must Have	Works out-of-the-box		
1.125	Research	Ability to access current job market information - the number of jobs that are available in a particular place or for a particular type of work.	Must Have	Not supported		
1.126	Research	Ability to access current job outlooks - a forecast of the change in the number of people employed in a particular occupation over a set period.	Must Have	Works out-of-the-box		
1.127	Research	Ability to access current job trends (such as telecommuting, networking, freelance/self employment, lifelong learning, personal branding, hybrid jobs)	Must Have	Not supported		

RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.128	Research	Ability to connect students to professionals who are already working in a field of interest (networking) for informational interviews, developing contacts and so on.	Should Have	Not supported		
1.129	Research	Ability to document interactions between students and working professionals.	Should Have	Not supported		
1.130	Research	Ability to search nationally for post-secondary education opportunities including admissions and tuition information.	Must Have	Works out-of-the-box		
1.131	Research	Ability to research vocational, technical, business, and trade postsecondary education options.	Must Have	Works out-of-the-box		
1.132	Research	Ability to search Washington state for post-secondary education opportunities including admissions and tuition information.	Must Have	Works out-of-the-box		
1.133	Research	Ability to search internationally for post-secondary education opportunities including admissions and tuition information.	Must Have	Works out-of-the-box		
1.134	Scheduling	Ability to schedule meetings with students.	Must Have	Works out-of-the-box		
1.135	Scheduling	Ability to remind non-students (staff, counselors, parents and guardians) of scheduled meetings with students.	Must Have	Not supported		
1.136	Scheduling	Ability to remind students of scheduled meetings.	Must Have	Works out-of-the-box		
1.137	Student Data	Ability for student to access their data after high school graduation.	Must Have	Works out-of-the-box		That access is determined by Seattle Public Schools.
1.138	Student Data	Ability for student to access their data after they leave school and/or the district without graduating.	Must Have	Works out-of-the-box		That access is determined by Seattle Public Schools.
1.139	Student Data	Ability for parents and guardians to access their student's data with their own user account (username and password), and not use their student's account.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.

Seattle Public Schools

5/8/2017

Page 13

RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.140	Student Data	Ability to select a group of student records and then perform a bulk/mass operation/function on the records such as edit, assign, or run a report.	Must Have	Works out-of-the-box		
1.141	Student Data	Ability to export in common formats (not proprietary formats) student data for data and trend analysis.	Must Have	Works out-of-the-box		
1.142	Student Interactions	Ability to document staff/counselor-student interactions (student, staff/counselor, topic, date, and so on) with respect to career and college planning.	Must Have	Works out-of-the-box		
1.143	Student Interactions	Ability to search for staff/counselor interaction notes by multiple search criteria (student, counselor, topic, date and so on).	Should Have	Not supported		
1.144	Student Interactions	Ability to report on staff/counselor interactions.	Should Have	Not supported		
1.145	Student Records	Ability to organize student information (records) so they are available for retrieval by end users (e.g. public record requests).	Must Have	Works out-of-the-box		
1.146	Student Records	Ability to handle disposition (storing in current location, transferring to another location or destroying the record) of student records when the record is at the end of its "life cycle" (record creation, active use/maintenance, archival or destruction).	Must Have	Works out-of-the-box		
1.147	Student Supports	Ability to provide career and college readiness planning and curriculum appropriate for elementary students (grades 1-5).	Could Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.148	Student Supports	Ability to provide career and college readiness planning and curriculum appropriate for middle school students (6-8).	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.149	Student Supports	Ability to provide career and college readiness planning and curriculum appropriate for high school students (grades 9-12)	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.

Seattle Public Schools

5/8/2017

Page 14

RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.150	Surveys	Ability to create/send surveys to multiple groups of recipients such as students and/or their families.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.151	Surveys	Ability to survey graduates (senior exit survey) on their post-secondary plans at the building/school level.	Must Have	Works out-of-the-box		
1.152	Surveys	Ability to compile/report on build/school level the postsecondary plan survey results for graduates, at the district level.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.153	Surveys	Ability to provide a library of out-of-the-box and customizable survey templates.	Must Have	Works out-of-the-box		
1.154	Surveys	Ability to manage (organize and coordinate) survey responses.	Must Have	Works out-of-the-box		
1.155	Surveys	Ability to report on survey responses and results.	Must Have	Works out-of-the-box		
1.156	Tests	Ability to manage (organize and coordinate) exams for earning college credit such as CLEP, Advanced Placement, and International Baccalaureate.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.157	Tests	Ability to manage (organize and coordinate) college readiness assessment tests such as critical thinking assessments or College-readiness Performance. Assessment System (C-PAS).	Must Have	Not supported		
1.158	Tests	Ability to upload/organize/store documents for multiple tests (up to 15) per student.	Must Have	Works out-of-the-box		
1.159	Tests	Ability to manage (organize and coordinate) the test process such as: specifying applicable tests and marking as planned; scheduling test-specific activities and setting reminders; marking activities complete; documenting test dates and outcomes/scores.	Must Have	Works out-of-the-box		
1.160	Tests	Ability to manage (organize and coordinate) exams for postsecondary program admission such as SAT, ACT, and ASVAB.	Must Have	Works out-of-the-box		

Seattle Public Schools

5/8/2017

Page 15

RF02760

Functional Requirements

Attachment 1

#	Area	Feature Description	SPS Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
1.161	Tests	Ability to manage (organize and coordinate) postsecondary education placement/proficiency tests such as CASAS, Accuplacer, or ALEKS.	Must Have	Not supported		
1.162	Tests	Ability to manage (organize and coordinate) preparation activities (pre-tests, workshops, coursework) for testing (admissions, readiness, placement/proficiency).	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.163	Transcripts	Ability to manage (organize and coordinate) inbound queue of student requests for transcripts received by counselors.	Must Have	Works out-of-the-box		
1.164	Transcripts	Ability to document resolved student requests for transcripts.	Must Have	Works out-of-the-box		
1.165	Transcripts	Ability to securely send transcripts as part of the application process to a post-secondary educational institution.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
1.166	Transitions	Ability to manage (organize and coordinate) student activities when transitioning from middle school to high school.	Must Have	Works out-of-the-box		
1.167	Transitions	Ability to document interactions between high school counselors and middle school students (rising 8th graders).	Could Have	Not supported		Supported if high school counselors have user account access to the middle school accounts
1.168	Transitions	Ability to manage (organize and coordinate) student activities when transitioning from high school to work.	Could Have	Works out-of-the-box		
1.169	Transitions	Ability to manage (organize and coordinate) student activities when transitioning from high school to post-secondary education such as college housing application, financial aid acceptance, connecting to on-campus resources and so on.	Could Have	Not supported		

Seattle Public Schools

5/8/2017

Page 16

**c. Insert your completed Attachment 2, Technical Requirements Form in the section. This attachment and any supplemental documentation will not count towards your page limit.**

RF02760

Technical Requirements

Attachment 2



**INSTRUCTIONS**

- 1) For each row select a value in column E.
- 2) Fill out column F if you selected any of these in column E: Configuration required, Extended (Custom Code), or Third Party Tool.

Vendor Name:

Career and College Planning Tool  
Vendor Response Matrix  
Technical Requirements  
RF02760

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
2.01	User Experience	Ability to be accessible via any internet connection such as: dial-up; broadband: cable, DSL and variants, fiber; wireless: 3G/4G mobile, or satellite.	Must Have	Works out-of-the-box		
2.02	User Experience	Ability to provide users with the equivalent capabilities regardless of what internet connection they use such as: dial-up; broadband: cable, DSL and variants, fiber; wireless: 3G/4G mobile, or satellite.	Must Have	Works out-of-the-box		
2.03	User Experience	Ability to provide spellcheck functionality in all areas where users have the ability to create/add and update/edit free-form text.	Must Have	Configuration required		When using certain features in Naviance, you may want to check the spelling of the text you are editing. You can accomplish this by using the spell check tool within your Web browser. The steps for adding spell check vary depending on the browser you are using. Instructions for accomplishing this are included in Naviance.
2.04	User Experience	Ability to provide cut and paste functionality (action performed by keyboard command - e.g., Ctrl+X to cut and Ctrl+V to paste - and/or with a mouse).	Must Have	Works out-of-the-box		
2.05	User Experience	Ability to provide copy and paste functionality (action performed by keyboard command - e.g., Ctrl + C to copy and Ctrl + V to paste - and/or with a mouse.)	Must Have	Works out-of-the-box		
2.06	User Experience	Ability to export tabular data in multiple delimited file formats such as: comma separated values (.csv); Tab separated values (.tsv); Text files (.txt).	Must Have	Works out-of-the-box		

Seattle Public Schools

5/8/2017

Page 1

RF02760

Technical Requirements

Attachment 2

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
2.07	User Experience	Ability to attach files in multiple formats such as: <u>Audio file formats</u> - .mid or .midi, .mp3, .wav, .wma, .mpa; <u>Data file formats</u> - .csv; <u>Image file formats</u> - .bmp, .tiff, .gif, .jpeg or .jpg, .png; <u>Presentation file formats</u> - .pps, .ppt, .ppbx; <u>Spreadsheet file formats</u> - .xls, .xlsx; <u>Video file formats</u> - .mkv, .mp4, .avi, .m4v, .mov, .mpeg or .mpeg, .swf, .wmv; <u>Word processing/text file formats</u> - .doc, .docx, .pdf, .rtf, .txt; <u>Flowchart/Diagramming formats</u> - .vsdx, .vsdm and so on.	Must Have	Works out-of-the-box		
2.08	User Experience	Ability to provide users with a reasonable character limit that is appropriate for the type of content being entered into free-form text boxes.	Must Have	Works out-of-the-box		
2.09	User Experience	Ability to move from high-level information to more detailed, focused information (drilldown) - to the lowest level of detail.	Must Have	Works out-of-the-box		
2.10	User Experience	Ability to provide users with the equivalent capabilities regardless of what web browser they use such as Microsoft Internet Explorer, Mozilla Firefox.	Must Have	Works out-of-the-box		
2.11	User Experience	Ability to provide users with the equivalent capabilities regardless of what device/form factor they use such as desktop, laptop, netbook, tablet, or smart phone.	Must Have	Works out-of-the-box		

Seattle Public Schools

5/8/2017

Page 2



#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
2.12	User Experience	Ability to provide user assistance that supports the needs of each user group (e.g. parents and guardians, school staff, district staff) such as: screen titles and subtitles, UI labels, data masks, field input hints, inline text, informational messages, tooltips, hover help, wizards, embedded help panes, and contextual online help.	Must Have	Works out-of-the-box		
2.13	User Experience	Ability to keep users informed about what is going on, through appropriate onscreen feedback within a reasonable time. (progress indicators)	Must Have	Works out-of-the-box		
2.14	User Experience	Ability to "speak the user's language" - with words, phrases and concepts familiar to the user - rather than system-oriented terms.	Must Have	Works out-of-the-box		
2.15	User Experience	Ability to support user control by providing undo and redo capabilities.	Must Have	Works out-of-the-box		
2.16	User Experience	Ability to follow platform/industry conventions so that users do not have to wonder whether different words, situations or actions mean the same thing.	Must Have	Works out-of-the-box		
2.17	User Experience	Ability to minimize user errors with helpful constraints (e.g. an end date cannot be before a start date and so on).	Must Have	Works out-of-the-box		
2.18	User Experience	Ability to promote efficiency of use by allowing users to tailor frequent actions (e.g. reusable templates and so on).	Must Have	Works out-of-the-box		
2.19	User Experience	Ability to help users recognize, diagnose and recover from errors such as error messages expressed in plain language (no codes) that precisely indicate the problem and constructively suggest a solution.	Must Have	Works out-of-the-box		
2.20	User Experience	Ability to search end user documentation.	Must Have	Works out-of-the-box		Online help is available through Naviance.

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
3.01	Compliance	Ability to comply with <b>Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d)</b> , as amended, and all other regulations promulgated under <b>Title II of the Americans with Disabilities Act (ADA)</b> .	Must Have	Works out-of-the-box		
3.02	Compliance	Ability to must comply with the <b>Web Content Accessibility Guidelines (WCAG) 2.0 AA</b> accessibility guidelines.	Must Have	Not supported		The student and parent interface (Family Connection) has been tested with a screen reader to ensure accessibility for students and parents with visual impairments. Naviance is a legacy platform, and currently meets most Web Content Accessibility Guidelines (WCAG) level A standards. Our roadmap includes investments that are designed to continue enhancing the level of accessibility.
3.03	Compliance	Ability to support compliance with applicable <b>Seattle Public Schools</b> policies and procedures: See <i>Attachment 6</i>	Must Have	Works out-of-the-box		
3.04	Compliance	Ability to support compliance with applicable <b>Revised Code of Washington (RCW)</b> : See <i>Attachment 6</i>	Must Have	Works out-of-the-box		
3.05	Compliance	Ability to support compliance with applicable <b>Washington Administrative Code (WAC)</b> : See <i>Attachment 6</i> .	Must Have	Works out-of-the-box		
3.06	Compliance	Ability to comply with the <b>Family Educational Rights and Privacy Act (FERPA)</b> .	Must Have	Works out-of-the-box		

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
3.07	Compliance	For records management, ability to comply with applicable Washington State legislation for record retention for school districts: <a href="https://www.sos.wa.gov/archives/RecordsManagement/Records-Retention-Schedules-for-School-Districts-and-Educational-Service-Districts.aspx">https://www.sos.wa.gov/archives/RecordsManagement/Records-Retention-Schedules-for-School-Districts-and-Educational-Service-Districts.aspx</a>	Must Have	Configuration required		As a system of record for its Clients, we retain the data at the sole discretion of Clients, and for as long as they have active agreements for Naviance. After termination of an agreement, we will retain Client data for a limited time period in accordance with the Naviance Data Retention Policy for the convenience of Clients, so that they may retain continuity of their experience should they choose to reengage with Naviance. At the end of the data retention period, we securely delete and destroy personal information from Clients. However, at any time upon termination of an agreement or otherwise at their discretion, Clients may submit a written request to have their personal information provided to Naviance deleted. We will comply with such written requests within (30) days. Note that in the event that a user chooses to submit data to a postsecondary institution, we are unable to delete or otherwise retract that information from the receiving institution. Notwithstanding the above, we do retain non-personal information, including aggregated, de-identified data.
3.08	Compliance	For records management, ability to comply with the <b>Design Criteria Standard for Electronic Records Management Software Applications DoD 5012.02</b> or be certified or have an acceptable approach to support the requirements in the standard, when storing documents that are records for Seattle Public Schools.	Must Have	Configuration required		Refer to our response to question 3.07
4.01	Document Management	Ability to comply with Washington State legislation for scanning density (WAC 434-663-305) when interoperating with a document scanner to capture complete and accurate document copies. <a href="http://apps.leg.wa.gov/WAC/default.aspx?cite=434-663">http://apps.leg.wa.gov/WAC/default.aspx?cite=434-663</a>	Must Have	Not supported		Our product does not interoperate with a document scanner.

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
4.02	Document Management	Ability to retain the document's original native format after the document is stored within the solution.	Must Have	Works out-of-the-box		
4.03	Document Management	Ability to allow all stored documents to be exported in their native format for archiving.	Must Have	Configuration required		Naviance includes a Data Export feature that lets you save your school's Naviance data to your computer in comma-separated values (CSV) files. These files can be opened in Excel and other commonly used applications.
4.04	Document Management	Ability to support parent/guardian electronic signatures via a parent portal.	Should Have	Not supported		
4.05	Document Management	Ability to automate the electronic signature workflow (hand off from person-to-person) for a minimum of 12 authorization levels.	Could Have	Not supported		
4.06	Document Management	Ability to provide versioning and control of documents for an unlimited number of revisions.	Must Have	Works out-of-the-box		
4.07	Document Management	Ability to store documents up to 10 years.	Must Have	Works out-of-the-box		Naviance data belongs to the district and can be retained, archived, or deleted only as directed by the Seattle Public Schools.
4.08	Document Management	Ability to search across all stored documents by keyword and with search operators.	Must Have	Not supported		
4.09	Document Management	Ability to store documents up to 1 GB in size.	Must Have	Works out-of-the-box		
4.10	Document Management	For records management, ability to delete student data.	Must Have	Works out-of-the-box		
5.01	Reports and Queries	Ability to provide a range of standard/pre-defined reports, with report parameters to customize the results, that are available "out-of-the-box."	Must Have	Works out-of-the-box		
5.02	Reports and Queries	Ability to schedule reports to run automatically.	Must Have	Works out-of-the-box		
5.03	Reports and Queries	Ability to provide a customizable dashboard capability to meet a range of needs - from end user to executive level.	Must Have	Works out-of-the-box		A staff member's ability to update student data is controlled by permissions and roles. Additionally, any staff changes will be overwritten by the nightly import if there is conflicting data in the SIS.

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
5.04	Reports and Queries	Ability to provide drill-down capability that takes the user from a more general view of the data to a more specific one, with a similar look-and-feel at each level of detail.	Must Have	Works out-of-the-box		
5.05	Reports and Queries	Ability to provide drill-through capability that allows the user to pass from one report to another while still analyzing the same set of data.	Could Have	Works out-of-the-box		
5.06	Reports and Queries	Ability for users to display data visually in graph format - a pictorial representation of statistical data or of a functional relationship between variables - includes bar graphs (bar charts) and pie graphs (pie charts).	Must Have	Works out-of-the-box		Not all Naviance reports can be displayed in graph format.
5.07	Reports and Queries	Ability for users to create, run, save and share (with other users) ad hoc data queries.	Must Have	Works out-of-the-box		A staff member's ability to update student data is controlled by permissions and roles. Additionally, any staff changes will be overwritten by the nightly import if there is conflicting data in the SIS.
5.08	Reports and Queries	Ability to provide novice/inrequent users with simple options for custom reporting design.	Must Have	Works out-of-the-box		A staff member's ability to update student data is controlled by permissions and roles. Additionally, any staff changes will be overwritten by the nightly import if there is conflicting data in the SIS.
5.09	Reports and Queries	Ability to provide expert/frequent users with sophisticated options for custom reporting design.	Could Have	Configuration required		Naviance includes reports at the district and school level. These reports can be customized by removing and adding select fields, defining filters, and changing sorting options. Customized reports can be saved for future use. Additional custom reports can be generated by Consulting Services based on the needs of the school or district.

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
5.10	Reports and Queries	Ability to export report data in multiple formats such as: delimited file formats - .csv, .tsv, .txt; spreadsheet formats - .xls, .xlsx; markup language formats - xml, xhtml, html; word processing formats - .doc, .docx, rtf, pdf; image file formats - .tiff	Must Have	Works out-of-the-box		Naviance includes a Data Export feature that lets you save your school's Naviance data to your computer in comma-separated values (CSV) files. These files can be opened in Excel and other commonly used applications.
5.11	Reports and Queries	Ability to generate reports without the purchase of additional 3rd party reporting software.	Must Have	Works out-of-the-box		
5.12	Reports and Queries	Ability to provide a report writer that enables the user to select data records that meet certain conditions, display the records in a tabular or diagram format selected by the user, and save the format specification to reuse for new data.	Must Have	Configuration required		This functionality is supported upon configuring the product at implementation.
5.13	Reports and Queries	Ability to run scheduled reports and then send reports automatically to external subscribers (outside of the District) via email.	Must Have	Works out-of-the-box		
5.14	Reports and Queries	Ability to run scheduled reports and send those reports automatically to internal subscribers such as school district departments (Curriculum, Assessment & Instruction, Legal and so on) via email.	Must Have	Works out-of-the-box		
6.01	Technology	Ability to export data in the following formats: flat file - a file containing records that have no structured interrelationship; ASCII file - a file that contains data made up of ASCII characters; XML file - a SIF (School Interoperability Framework) compliant plain text file.	Must Have	Works out-of-the-box		The following types of data can be exported from the system as a manual export: (1) student data (2) parent data (3) application data (4) SAT/PSAT scores (5) ACT scores (6) AP Scores (7) TOEFL scores (8) scholarship data (9) college contacts

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
6.02	Technology	Ability to work with current SPS browsers: Internet Explorer (currently v11); Firefox ESR (currently v45)	Must Have	Works out-of-the-box		Naviance is officially supported on Internet Explorer 9 and 10 on Windows-based PCs, Safari 7 on Mac OSX (Desktop Only), Firefox 24, and Chrome 33+. It is very likely that our site will work fine in Opera or other browsers, but we do not test these browsers and they are not supported.
6.03	Technology	For any client software, the ability to work with an operating system of Windows 7 or higher.	Must Have	Works out-of-the-box		
6.04	Technology	For any client software, the ability to deploy it programmatically using a web-based client, MSI, MAC package installer or similar. → In the Response column for this item, document the deployment methods for the solution.	Must Have	Works out-of-the-box		Naviance is officially supported on Internet Explorer 9 and 10 on Windows-based PCs, Safari 7 on Mac OSX (Desktop Only), Firefox 24, and Chrome 33+. It is very likely that our site will work fine in Opera or other browsers, but we do not test these browsers and they are not supported.
6.05	Technology	Ability to refresh non-production environments (such as test, UAT, training) with production data, on demand by the customer.	Must Have	Not supported		Per our security policy, we do not load production data into non-production environments.
6.06	Technology	Ability to support simultaneous sessions for > 5,000 users (parents/guardians, staff, students) without a noticeable reduction in performance. → In the Response column for this item, document the required bandwidth per simultaneous user.	Must Have	Works out-of-the-box		Standard internet connection is required.
6.07	Technology	Ability to be a web application optimized for the web browsers used by Seattle Public Schools.	Must Have	Works out-of-the-box		
6.08	Technology	Ability to have a mobile application and/or a responsive web design application.	Must Have	Works out-of-the-box		
6.09	Technology	Ability to have user-definable workflows.	Must Have	Works out-of-the-box		
6.10	Technology	Ability to have user-definable notifications triggered from user-definable business rules.	Must Have	Works out-of-the-box		

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
6.11	Technology	Ability to have a configurable user interface (required fields, items in drop down menus and so on).	Must Have	Works out-of-the-box		
6.12	Technology	Ability to be available to end users working from non-District locations (e.g. home)	Must Have	Works out-of-the-box		
6.13	Technology	Ability to refresh/keep current all informational resources presented to end users by the solution; at a minimum annually.	Must Have	Works out-of-the-box		
6.14	Technology	Ability to install client software, if applicable. → In the Response column for this item, document all the frameworks, technology, run time environments, and platforms that must be installed on client machines for the solution to install and function. For example MS Silverlight, Adobe Flash, MS .NET, Java.	Must Have	Not supported		Naviance is implemented and installed by Hobsons employees. There are no special requirements needed on Seattle's computers. Naviance is officially supported on Internet Explorer 9 and 10 on Windows-based PCs, Safari 7 on Mac OSX (Desktop Only), Firefox 24, and Chrome 33+. It is very likely that our site will work fine in Opera or other browsers, but we do not test these browsers and they are not supported. Some reports that leverage FusionCharts require Flash. Some college and career videos require Flash. Flash 8 or higher is recommended for this functionality.
6.15	Technology	For on-premise solutions, the ability to run the solution on a VMWare host.	Must Have	Not supported		Naviance is a SaaS solution.
6.16	Technology	For on-premise solutions, the ability to run the solution on a physical, self-hosted server. → In the Response column for this item, document the hardware and software requirements for the server.	Must Have	Not supported		Naviance is a SaaS solution.
7.01	System Integration	Ability to provide secure, reliable bi-directional exchange of messages over the Intranet using industry standard protocols and security controls to prevent unauthorized access to systems and data such as SOAP, XML, HTTP, SSL.	Must Have	Not supported		We support automated one-way data exchange from Seattle to Naviance. We support the export and report of Naviance data to any EDW or system. SchoolSync™ uses the HTTPS protocol and an SSL certificate to ensure data is transferred securely to our servers.

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
7.02	System Integration	Ability to be a PowerSchool ISV Partner.	Must Have	Works out-of-the-box		
7.03	System Integration	For user access, ability to integrate with ADFS, LDAP or Office 365.	Must Have	Third-Party Tool		This capability will be supported via integration with the third party, Clever.
7.04	System Integration	Ability to schedule batch exports of data to downstream consumers of the data.	Must Have	Configuration required		If data can be exported from a system in a CSV or tab-delimited format, then it can be imported into Naviance. The automated import via SchoolSync can be run daily. All district imports are processed overnight.
7.05	System Integration	Ability to schedule batch imports of data from upstream providers of data.	Must Have	Configuration required		If data can be exported from a system in a CSV or tab-delimited format, then it can be imported into Naviance. The automated import via SchoolSync can be run daily. All district imports are processed overnight.
7.06	System Integration	Ability to have customer-configurable data fields (text boxes and drop down lists) in the user interface that are available for exporting of data.	Must Have	Configuration required		Fields are not customizable in the user profile. However, the user profile can be configured to include the fields of your choice.
7.07	System Integration	Ability to have customer-configurable data fields (text boxes and drop down lists) in the user interface that are available for reporting.	Must Have	Works out-of-the-box		
7.08	System Integration	Ability to provide documented, out-of-the-box, REST application program interfaces (APIs) for interactions between the solution and external systems.	Must Have	Configuration required		This capability will be supported via Clever integration.
7.09	System Integration	Ability to provide REST APIs that are transaction-based (not table-based) for both reads and writes.	Must Have	Configuration required		This capability will be supported via Clever integration.
7.10	System Integration	Ability to provide documented, out-of-the-box, connectors for accessing the solution's database; at a minimum ODBC.	Must Have	Not supported		Naviance is a multi-tenant SaaS solution with databases that are not designed to be accessible from outside of the organization for security reasons.
7.11	System Integration	Ability to perform a regular reconciliation between itself and the system of record for data to ensure data integrity.	Could Have	Configuration required		The capability will be supported via SchoolSync or Clever integration

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
7.12	System Integration	Ability for solution to be available 24 x 7 x 365 except for scheduled maintenance windows.	Should Have	Works out-of-the-box		
7.13	System Integration	Ability to directly integrate with PowerSchool (powschool.org)	Must Have	Configuration required		The capability will be supported via SchoolSync or Clever integration
7.14	System Integration	Ability to upload data (student planning data) from My School Data - High School and Beyond Plan tool (www.wsipc.org)	Must Have	Configuration required		All of the following information can be imported into Naviance: ☒ Student demographic data ☒ Student test scores ☒ Student course history ☒ Parent data ☒ Teacher lists ☒ Course catalog ☒ College application data ☒ Scholarship data ☒ National Student Clearinghouse data The first time you import data of a particular type, you will use the Naviance web interface to map the fields in your data file. This data needs to be in a CSV or tab-delimited text file and depending on the data type, certain fields are required.
7.15	System Integration	Ability to upload data (student fines that may impact transcripts) from District's new point-of-sale solution, which is to be determined.	Should Have	Works out-of-the-box		
8.01	Security	For hosted/SaaS solutions, ability for the vendor to store Seattle Public Schools data on a dedicated server with a dedicated database that is separate from the data stored for other customers.	Must Have	Works out-of-the-box		Your data will reside on servers owned by Hobsons, protected by industry leading firewalls owned and managed by Hobsons. The Tier 1 data center is located in the suburbs of Washington, DC. Several government agencies and large financial institutions have a presence in the same data center. All access to the data center requires pre-approval and multiple levels of biometric scans along with an escort from the facility itself.
8.02	Security	For hosted/SaaS solutions, ability for the vendor to employ a firewall to protect resources from external threats.	Must Have	Works out-of-the-box		

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
8.03	Security	Ability for the vendor to employ system integrity mechanisms to protect the solution from both external and internal threats such as intrusion detection, anti-virus, anti-malware.	Must Have	Works out-of-the-box		
8.04	Security	For hosted/SaaS solutions, ability for the vendor to employ an incident response protocol with a defined SLA for notification to the customer of security breaches.	Must Have	Works out-of-the-box		We are committed to providing uptime and as such maintain internal disaster recovery and business continuity plans. These plans are confidential.
8.05	Security	Ability for the vendor to employ a Seattle Public Schools approved method of secure file transfer. (SFTP over SSH)	Must Have	Not supported		Naviance does not utilize SFTP or FTPS for exports or imports. Curl with TLS encryption is used for imports. TLS also protects exports in transit via HTTPS.
8.06	Security	Ability to have single sign on that uses a federated identity standard (SAML, OpenID) for end users.	Must Have	Third-Party Tool		This capability will be supported via Clever integration.
8.07	Security	Ability to use Role Based Access Control (RBAC) to limit access to solution capabilities based on the roles of individual users within the organization.	Must Have	Works out-of-the-box		
8.08	Security	Ability to use Discretionary Access Control (DAC) to limit access to specific solution resources such as database tables.	Must Have	Works out-of-the-box		
8.09	Security	Ability to record all authentication/authorization activities in an audit log.	Must Have	Works out-of-the-box		Delegated authentication allows a school to use a user directory (e.g. an LDAP directory) that it already maintains for staff users or student users as login credentials for Naviance. This provides easier maintenance of user accounts and passwords to access Naviance. Currently, delegated authentication is not supported for parents. Delegated authentication is right for you if you want to centrally manage passwords for multiple applications including
8.10	Security	Ability to run reports on authentication/authorization activities.	Must Have	Works out-of-the-box		Reports are not built into the product but login activity is captured in system logs and can be requested on a one off as needed basis in writing.
8.11	Security	Ability to limit the user's ability to search for and view data via role based access control (RBAC).	Must Have	Works out-of-the-box		

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
8.12	Security	Ability for vendor to destroy media on which student data is stored or recorded: <ul style="list-style-type: none"> <li>• Paper, film, or other hard copy media have been shredded or destroyed such that the student record cannot be read or otherwise cannot be reconstructed.</li> <li>• Electronic media have been cleared, purged, or destroyed consistent with NIST Special Publication 800-88, Guidelines for Media Sanitization such that the data cannot be retrieved.</li> </ul>	Must Have	Works out-of-the-box		Physical media is destroyed. Electronic media that is no longer required is shredded using Securis.com.
8.13	Security	Ability to support HTTP and/or HTTPS.	Must Have	Works out-of-the-box		
8.14	Security	Ability to not place undisclosed cookies (a type of message that is given to a web browser by a web server, generally to identify users) on SPS desktops.	Must Have	Not supported		Cookies are required for storing a session key to maintain state. JavaScript must be enabled to effectively use the application.
8.15	Security	Ability to have a data store that is encrypted.	Must Have	Works out-of-the-box		
8.16	Security	Ability to have a security model that allows the assignment of the fewest privileges consistent with the assigned duties and functions of district staff.	Must Have	Works out-of-the-box		
8.17	Security	Ability to have the audit logs that include the following elements: date, time, user, client IP, action, object, prior value, new value.	Must Have	Extended (Custom Code)		Audit log activity for a specific user and be requested including: date, time, user, client IP. Our logs do not capture: action, object, prior value, new value.
8.18	Security	Ability to configure audit log retention and storage characteristics (e.g. size, first-in-first-out).	Must Have	Not supported		
8.19	Security	Ability to store audit logs securely.	Must Have	Works out-of-the-box		Access logs are stored on encrypted volumes and redundantly.
8.20	Security	Ability to configure and save audit log queries.	Could Have	Extended (Custom Code)		Customers cannot query logs directly but specific requests can be accommodated on a one off as needed basis by user.

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
8.21	Security	Ability to protect the data it sends to a target system (e.g. disaster recovery system) from corruption (e.g. unauthorized addition, modification, deletion, or replay)	Must Have	Works out-of-the-box		
8.22	Security	Ability to employ encryption processes for data at rest that are consistent with NIST Special Publication 800-111, Guide to Storage Encryption Technologies for End User Devices.	Must Have	Works out-of-the-box		
8.23	Security	Ability to employ encryption processes for data in motion that are consistent with NIST Special Publications 800-52, Guidelines for the Selection and Use of Transport Layer Security (TLS) Implementations; 800-77, Guide to IPsec VPNs; or 800-113, Guide to SSL VPNs, or others which are Federal Information Processing Standards (FIPS) 140-2 validated.	Must Have	Works out-of-the-box		

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
9.01	Support	Ability to provide a staffed help desk as a single point of contact for users to get assistance 24 hours a day, 7 days a week, 365 days a year.	Must Have	Not supported		Support Services are available by phone from 7:00 am to 7:00 pm Eastern Standard/Daylight Time, Monday through Friday. The team actively troubleshoots cases during regular business hours and responds to cases submitted within 2 hours of case submission. If you submit a case after working hours, the case will be picked up the next business morning. We also have extended hours beyond the core 7:00am-7:00pm EST/EDT support we offer. Extended hours are offered during application season and peak usage times. During those high usage times identified, we are working to ensure clients will receive support 24/5. You can submit a case in one of three ways: Web form within the Naviance Help Library. Email to support@naviance.com. Phone 1-866-337-0080, option 2, in the United States and Canada; phone +1 703-859-7300, option 2, in other countries. Hobsons Support Services does not provide direct technical support to users who are students, students' families, or any other person who registers for the service through an account provided by a client (whether a school or district-wide account). We recommend that these users contact the client (such as a counselor, teacher, or administrator) to troubleshoot their issues. If necessary, the client's Support Liaison can submit a request. If the Support Services team receives a request from one of these users, we will recommend that they log their case with the client's Support Liaison with whom we will work directly to provide case resolution. The Naviance Help Library provides access to additional support tools on demand.
9.02	Support	Ability to provide an unstaffed self-service support capability for users to get assistance 24 hours a day, 7 days a week, 365 days a year.	Must Have	Works out-of-the-box		

#	Area	Feature Description	SPS Overall Priority	Vendor Meets requirements?	Additional time and costs to meet (Time/Cost)	Response
9.03	Support	Ability to provide on demand self-study training materials such as webinars, study guides and so on.	Must Have	Works out-of-the-box		
10.01	Infrastructure Hosted	For hosted/SaaS solutions, ability for vendor to employ a disaster recovery plan that restores the solution at the database and/or object level.	Must Have	Works out-of-the-box		We are committed to providing uptime and as such maintain internal disaster recovery and business continuity plans. These plans are confidential.
10.02	Infrastructure Hosted	For hosted/SaaS solutions, ability for solution to have a Recovery Time Objective (RTO) of 4 hours.	Must Have	Not supported		We are committed to providing uptime and as such maintain internal disaster recovery and business continuity plans. These plans are confidential.
10.03	Infrastructure Hosted	For hosted/SaaS solutions, ability for solution to have a Recovery Point Objective (RPO) of 24 hours.	Must Have	Not supported		We are committed to providing uptime and as such maintain internal disaster recovery and business continuity plans. These plans are confidential.
10.04	Infrastructure Hosted	For hosted/SaaS solutions, ability for solution to have a minimum of a daily back-up.	Must Have	Works out-of-the-box		
10.05	Infrastructure Hosted	For hosted/SaaS solutions, ability for vendor to demonstrate server capacity and response time (throughput measured by remote user).	Must Have	Works out-of-the-box		Hobsons leverages industry leading monitoring tools to monitor health and performance of our products on a 24x7x365 basis.
10.06	Infrastructure Hosted	For hosted/SaaS solutions, ability to have 24x7x365 availability via a staffed/monitored datacenter.	Must Have	Works out-of-the-box		
10.07	Infrastructure Hosted	For hosted/SaaS solutions, ability to have a reliable and redundant network connectivity at a level acceptable to Seattle Public Schools.	Must Have	Works out-of-the-box		Hobsons SaaS solution is hosted using redundant network links for user access.
10.08	Infrastructure Hosted	For hosted/SaaS solutions, ability to have datacenter reliability (power, HVAC, and so on) at a level acceptable to Seattle Public Schools.	Must Have	Works out-of-the-box		Hobsons datacenter leverages industry standard redundancy for power grid access including, but not limited to, multiple vendor power sources and on-site power generators.
10.09	Infrastructure Hosted	For hosted/SaaS solutions, ability to have an incident/failure response time at a level acceptable to Seattle Public Schools.	Must Have	Works out-of-the-box		Hobsons monitors its systems 24x7x365 including weekend and off-hours NOC (Network Operations Center) to triage and escalate any system failures to a tiered team of engineers.
10.10	Infrastructure Hosted	For hosted/SaaS solutions, ability to have physical datacenter security at a level acceptable to Seattle Public Schools that is audited.	Must Have	Works out-of-the-box		Hobsons' data centers utilize multiple levels of state-of-the-art physical security measures and access lists are reviewed periodically.

**d. IMPORTANT: Please email Contracting Services at [contractingservices@seattleschools.org](mailto:contractingservices@seattleschools.org) to obtain Attachments 1 and 2 in MS Excel format. The District would like firms to submit the completed Attachments 1 and 2 in both .PDF and .XLS format.**

Completed and included Excel Spreadsheets with our response.

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## 8. Team Organization, Availability and Capacity

**a. Briefly discuss how you propose to organize your team to support this project. Identify each of the key players and define their roles and responsibilities. Describe each of the key team members' relevant professional experience, certification and education in resume form. Highlight implementation and integration experience with Power School.**

To help ensure the highest level of client service, Hobsons assigns professional services staff upon receipt of the signed contract. This helps ensure that we are keeping a balanced work load across all professional services employees and providing our clients with a consistent and appropriate level of support. In addition, our professional services management conducts an internal review of the client's business processes with sales to identify any unique needs of the client which may further determine which professional service representative is best equipped to work with the client. That said, Hobsons reserves the right to assign professional service staff as needed.

Hobsons works hard to keep staff assignments consistent and encourages clients to provide feedback throughout implementation and after so that we can ensure a mutually beneficial

partnership with the client. When changes in assigned staff are required, Hobsons will proactively communicate the change with the client and work to ensure a smooth transition.

The following are descriptions of the roles of staff we would have working with Seattle Public Schools.

### **Strategic Consultant**

Strategic consultants assist districts in defining the purpose behind their Naviance implementation. With their deep experience and passion for seeing districts and schools succeed, strategic consultants use established strategic planning methodology to find clarity in a district's goals and the steps acquired to achieve them. Through the identification of key metrics and the development of a holistic scope and sequence, Strategic Consultants ensure you not only have the toolset you need to reach your college and career readiness goals with Naviance but also the essential mindset required to make your staff and students excel. The Strategic Consultant will be responsible for working directly with the SPS team to define and establish goals and key performance indicators, provide change management support, identify challenges and potential risks, build an implementation plan and professional development plan, establish student and family communication plans, and monitor progress towards the goals. Collaboration with the consulting team is based on the purchased strategic consulting hours.

#### **Strategic Consultant–Kelsey Carroll**

Kelsey Carroll is a Strategic Consultant at Hobsons. Kelsey earned her bachelor's degree in business at the University of Denver, and has returned to the same institution to pursue her Master of Education. Kelsey's focus during her master's program is the intersection of K12 and Higher Education and how it affects issues of access and retention for students entering college. Prior to joining Hobsons, Kelsey was a member of the Implementation Services Group at Pearson eCollege, implementing learning management systems for Higher Education and K12 partners. Kelsey joined the professional services team at Hobsons in 2013 as the sole consultant for a statewide electronic transcript solution in Utah, Wyoming, Iowa and Virginia managed by the respective states' Departments of Education. Kelsey soon transitioned to a role of Project Consulting, working with large districts in the western half of the United States to implement Naviance, including Jefferson County Public Schools, Denver Public Schools, Aurora Public Schools, Kent School District and Spokane Public Schools. Kelsey's greatest achievements have been helping districts customize the implementations of their college and career readiness state mandates. For example, Kelsey has continued to work with Jefferson County Public Schools (JEFFCO) as it works to implement the Individualized Career and Academic Plan (ICAP) so that students receive the largest benefit. JEFFCO is the second-largest school district in Colorado. Working with a small and focused team of administrators, Kelsey has provided recommendations to help JEFFCO further evolve its ICAP rollout using Naviance as the implementation vehicle to maximize student learning. To that end, JEFFCO continues to enjoy near 100% student completion rates of the ICAP program through Naviance every year. Kelsey is a client-focused strategic consultant skilled at listening to a district's unique needs and creating a concrete plan to help them achieve their individualized goals. To aid administrators and counseling teams in their decision-making, Kelsey encourages the use of data to reveal areas of improvement or potential change. Kelsey enjoys challenging and empowering the

districts with which she works so that they may fully realize their ideal college and career readiness program and culture while using Naviance.

## **Project Consultant**

The Project Consultant assigned to this project can provide services in both onsite and remote capacities. They provide a detailed project plan to track progress as well as tactical, hands-on support to augment the implementation efforts of your staff. The Project Consultant will be available to assist with the execution of the project plan, importing of data, configuration steps of the program (i.e. create user roles/accounts in Naviance, configure school and district preferences, etc.) to align with the goals set, and deliver onsite and web based training. Training is usually done in a sandbox account but can also be conducted in each school's environment for real-time application of lessons. Naviance proposes onsite training delivery to best meet the needs of SPS. Onsite days can be delivered back-to-back or individually and will be scheduled based on the agreed upon training plan. The offering will include a blend of onsite sessions delivered by Naviance trainers for SPS staff while other sessions will be dedicated to implementing a Train the Trainer model. The goal of the Train the Trainer program is to effectively train the SPS training team to deliver Naviance training courseware to their own school staff in order to successfully implement the Naviance solution. While working to prepare SPS internal trainers on the content and delivery methodology, project consultants will also deliver training sessions. Collaboration with the project consulting team is based on the purchased project consulting hours.

### **Project Consultant– Brad Blakemore**

Brad Blakemore is a native to Arizona, where he received his Master's in Educational Technology and Instructional Design from Arizona State University. Brad worked extensively with educational technology implementations while working for ASUOnline, using data and analytics to measure these tools' success. Since becoming a project consultant for Hobsons, Brad has used his experience in collaborating with faculty and instructors in order to maximize the benefits of Naviance to identify college and career readiness solutions. Coming from a family of teachers, Brad has always been enthusiastic about working in education and using his specialty in technology to improve student outcomes. He works with districts across California, Arizona, Washington, New Mexico and Texas, including Houston ISD, Austin ISD, Tempe Union High School District, Santa Fe Public Schools and Pajaro Valley Unified.

## **Support Specialist**

The Naviance Support Specialist to be used on this project will vary as we provide centralized technical support to all our Naviance Network members out of the Arlington, VA office. The Naviance Support Services team fields inquiries in the order in which they are received. All school staff and district staff users of the solution can contact Naviance Support Services by emailing them (support@naviance.com); calling them (1-866-337-0080) or submitting an online request through the online help menu in the Naviance Help Library. A Naviance Support Specialist will address any question submitted by a user and will open a case to document the question. Questions are handled in the order in which they are received. Once a case is opened, a support specialist will interact with the user to gather more information or to aid in troubleshooting for resolution. All interactions with the user are documented in the case so case history is always available to reference at a later point

in time. If the issue cannot be resolved, the case will be escalated and flagged as a case requiring Product Engineering support. If the case cannot get resolved same day, the Naviance Support Specialist will communicate with the client on a daily basis keeping them informed about the progress of their case. Users can always track their open case status directly in the online help interface as well. The entire team will support this project on an as-needed basis. When working on a case associated with this project the Naviance Support Specialist is 100% devoted to the resolution of that issue in a timely manner.

### **Strategic Success Manager**

The success manager for this project will serve as the “glue” for the entire project team and will engage the appropriate resource at the right time throughout the project. They will serve as your single point of contact while you are a Naviance Network member. They will coordinate support from all different groups—Consulting, Professional Development, Support Services, and Engineering—to ensure the implementation stays on track and the district objectives are met. The Naviance team members each bring a wealth of experience, best practices, repeatable processes and templates that can be leveraged and tailored to Seattle Public Schools implementation of Naviance.

#### **Strategic Success Manager-Ray Weaver:**

Ray Weaver’s background is entirely in education with a focus on serving students and families from a low socio-economic background. Ray taught fourth and fifth grade for three years as a Teach for America corps member in Houston. He then served as Director of Program for a Houston non-profit that connects high school students to high impact after-school and summer learning opportunities worldwide. In the Houston Independent School District central office Ray led a team as Senior Manager, developing streamlined intra- and inter-departmental processes in the newly created College Readiness Department. He provided direct support to middle and high school counselors at over 100 campuses, oversaw recentralization and norming of the District’s Naviance implementation, and realized a \$70 million increase in student scholarships and financial awards. At Hobsons as a Senior K-12 Consultant he has supported Naviance implementations in large, urban districts across the northeast – notably The School District of Philadelphia, three of the five Big 5 school districts in New York (Buffalo, Rochester, Syracuse), and Springfield Public Schools (MA).

### **Strategic Account Executive**

The Strategic Account Executive for the Seattle Public Schools project will serve as the main point of contact during the RFP process, project evaluation, contract review, negotiations, commencement of formal partnership, post-acquisition and on-going needs. Specifically, your assigned Strategic Account Executive, will serve as the project lead, in part, making sure Hobsons is accurately diagnosing SPS’s requirements, interpreting and recommending for appropriate actions from the Hobsons’ Project team to ensure a successful and sustainable implementation across the entire district during the stated Performance Period.

#### **Strategic Account Executive–Andrew Wamala:**

Andrew Wamala is a Sr. Strategic Account Executive with Hobsons charged with managing existing and new partnership opportunities within school districts characteristically high in student enrollment and based in large urban communities. A sampling of some of his clients include: San Jose Unified, Antelope Union HSD, Eastside Union HSD, Pasadena Unified, Kern Union HSD, San Juan USD, Fontana USD, Simi Valley and several others. Andrew's professional career spans over 12 years in the K12 public education sector, partnering with schools and districts in the area of public education advocacy, enterprise resource planning and organizational efficiency. Prior to Hobsons, Andrew held various roles in the K12 vertical with globally known educational technology organizations like Scantron and Global Scholar providing him with an extensive understanding of the issues effecting communities, schools and districts in California. Andrew earned a bachelor's degree in business and economics at the highly recognized Mihaylo College of Business at California State University Fullerton.

**b. Briefly discuss the availability of all key personnel for the scheduled time frame of the proposed project, and identify their proposed location during provision of the requested services. Additionally, discuss the capacity of the proposed team, as a whole, to accomplish the work.**

Refer to our previous responses above providing detailed information on implementation.



April 25, 2017

**ADDENDUM NO. 1 FOR RFP NO. RFP02760: CAREER AND COLLEGE  
READINESS SOFTWARE FOR SEATTLE PUBLIC SCHOOLS**

This addendum shall become part of the contract documents and modifies the original bidding documents for RFP No. RFP02760: Career and College Readiness Software for Seattle Public Schools. Please acknowledge this addendum in your response. Failure to do so may subject the proposer to disqualification.

**CHANGES TO RFP**

1. 2.2 Pre-Proposal Conference:

Please **REVISE** the last sentence of the first paragraph to read as follows:

“Please call 206-252-0320, #2 #3 promptly at 2:00 p.m. Pacific Time to access the conference bridge.”

**END OF ADDENDUM NO. 1**

A handwritten signature in blue ink, appearing to read "Diane T. Navarro".

Diane T. Navarro  
Contracting Services Manager



May 2, 2017

**ADDENDUM NO. 2 FOR RFP NO. RFP02760: CAREER AND COLLEGE READINESS SOFTWARE FOR SEATTLE PUBLIC SCHOOLS**

This addendum shall become part of the contract documents and modifies the original bidding documents for RFP No. RFP02760: Career and College Readiness Software for Seattle Public Schools. Please acknowledge this addendum in your response. Failure to do so may subject the proposer to disqualification.

**PLEASE NOTE** the **DUE DATE** for this RFP has **CHANGED** from May 8, 2017 **to MAY 9, 2017 at 10:00 a.m.**

**ANSWERS TO QUESTIONS:**

**Question No. 1:** Regarding Attachment 1 [Functional Requirements]:

- a) For “special populations” in rows 34-36 - What accommodations do expect the vendor to provide?
- b) What does “Ability to schedule, **promote**, register and send reminders for student-focused events.” mean in line 37? What sort of promotions do you envision?
- c) In lines 39 & 40, “Ability to notify families (text message, email), based on their students’ plans” are text messages to families required, or will email suffice?
- d) What does “Ability for students to identify skills or abilities” mean in lines 44, 46? How does SPS want to assess students’ skills and abilities?
- e) “Ability to generate electronic/digital forms to be completed by parents and guardians online” line 48. Do you want the system to create forms, or simply serve documents that someone created? If the former, what are typical forms?
- f) “Ability to document service learning including electronic signature via a smart phone.” Line 89. What does this mean? Please say more about how you’d like this to work.
- g) “Ability to manage (organize and coordinate) student activities when transitioning from middle school to high school.” (Line 173) What activities do you want to manage and organize?

- h) Ability to manage (organize and coordinate) student activities when transitioning from high school to work. (Line 175) What activities do you want to manage and organize?

Answer:

- a) (Requirements 1.27, 1.28, and 1.29) Capabilities in the solution that serve the needs of students in the District such as ADA/504, ELL, homeless, Native American, and first generation to attend college students – for example. This might include access to targeted information resources or assessments that can meet the needs of these students in a way that they benefit from career and college planning like their peers. We are looking for an awareness by the vendor that is visible in the solution that these groups of students are considered in the solution and accommodated.
- b) (Requirement 1.30) Marketing-type activities that publicize an event such as a “save the date” or “don’t forget to register” type communication sent via email or text message or that displays in a parent/guardian portal.
- c) (Requirements 1.32 and 1.33) Only having email will not disqualify your proposal. If you have other means of notification or future plans in this area, please include that information in the Comments column.
- d) (Requirements 1.37 and 1.39) Capability to offer students access to reputable inventories, assessments, surveys that the student can complete to “discover themselves.”
- e) (Requirement 1.41) Both.
- i. Where applicable, preference is to bring together student data stored in the solution with content added by a counselor into a form that can be printed or pushed to a parent portal, then signed electronically where appropriate, and the signed document stored in the solution.
  - ii. Generic forms created outside of the solution are expected to be uploaded into the solution and made available to authorized users for downloading and printing.
  - iii. Typical forms include: Petition for a pass/no credit grade; Equivalency course of study proposal; Credit and Grade Addition to High School Transcript Application Form, Course Replacement Request, Course/Grade/Credit Change Form, PE Waiver form, International Baccalaureate Option Form and so on.
- f) (Requirement 1.82) Students are required to earn service-learning hours for graduation. They volunteer with a local non-profit organization and a representative from that organization “signs off” on the hours of student participation and the work they performed. How this is accomplished without paper and pen might include a mobile app or an online form accessed through a web portal via a smart phone or other device, which allows for an electronic signature.
- g) (Requirement 1.166) Examples include: Summer Bridge program tasks, homework assignments, project materials, summer deadlines to sign up for programs or activities that start in the Fall and are specific to high school and so



on. Solution should allow for six (6) or more years of planning, to initially cover 8th thru 12th grades and one (1) year after high school.

- h) (Requirement 1.168) Examples include: Deadlines for submitting job applications, list of prospective job references, uploading/storing letters of recommendation, coordinating people to review a resume, tracking a list of local apartment rentals, appointments for practicing how to interview, organizing cover letters and resumes by employer and so on. Solution should allow for six (6) or more years of planning, to initially cover 8th thru 12th grades and one (1) year after high school.

**Question No. 2:** Does a “Separate Section” in the proposal have to begin a new page?

Answer: We would prefer each new section began on a new page; however, it is not a requirement. Regardless of the sections starting on a new page or not, we do require the start of each section be “bookmarked” within the .pdf file so that the review team may quickly navigate through proposals.

**Question No. 3:** Does Seattle Public Schools want ongoing training for individual school users, or train-the-trainer to train and support district personnel?

Answer: For the initial rollout of the technology solution, the preference is to train individual users onsite and to train a number of “trainers” so that the ongoing training is primarily train-the-trainer complemented by online vendor resources such as webinars or similar. If there is a significant enhancement to functionality in the future, depending on its scope and complexity, there may be a need to provide training to individual users and “trainers” again.

**Question No. 4:** I was reviewing the requirements for this RFP and one of the must have qualifications is an ability to integrate with the Common Application. We have the ability to do this, but Common App will only allow Naviance to integrate with them. I have spoken with Common App leadership multiple times and there is no indication that this will change. Would this disqualify us from consideration?

Answer: The requirement (1.02) is to link to the Common Application, not necessarily integrate with it. At a minimum, we would like a link (URL) within the solution for this application.

**Question No. 5:** Attachment 1, codes 1.27 & 1.28. “Ability to deliver resources/curriculum that meet the needs of all (special populations, mainstream) middle school students (grades 6, 7, and 8).” Also High School students. What special resources and curriculum might we have to deliver for “special populations”?

Answer: See answer to Question No. 1a.

**Question No. 6:** Can you tell us what systems you currently use for the functions detailed in your RFP?

- Career planning

- College planning
- College application management
- Portfolios
- Document management

Answer: For career and college planning, SPS currently has no district-wide technology solutions for the functions listed.

**Question No. 7:** “The District plans to implement this system initially for use by all eighth through twelfth (8th – 12th). Breaking out by grade levels, there are 12 high schools (9-12), 11 middle schools (6-8) – with two more opening for the 2017-18 school year, 11 K-8 schools, and 7 service schools”. You have provided pooled enrollment – thank you. However, can you please provide a list of participating schools, enrollment at each school, specifically outlining 8<sup>th</sup> grade enrollment at each school.

Answer: See the following table for current enrollment levels for 8<sup>th</sup> grade:

Middle Schools		K-8		Service Schools	
Name	8 <sup>th</sup> grade Enrollment	Name	8 <sup>th</sup> grade Enrollment	Name	8 <sup>th</sup> grade enrollment
Jane Addams Middle School	313	Catharine Blaine K-8 School	67	Cascade Parent Partnership Program	10
David T Denny International Middle School	280	Louisa Boren STEM K-8 School	0	Seattle World School	27
Robert Eagle Staff Middle School (opening Fall 2017)	n/a	Broadview-Thomson K-8 School	91		
Nathan Eckstein Middle School	314	Licton Springs K-8 School	11		
Alexander Hamilton International Middle School	371	Madrona K-8 School	22		
Aki Kurose Middle School	251	Orca K-8 School	38		
James Madison Middle School	292	Pathfinder K-8 School	58		

Middle Schools		K-8		Service Schools	
Worth McClure Middle School	178	Salmon Bay K-8 School	115		
Edmond S. Meany Middle School (opening Fall 2017)	n/a	South Shore K-8 School	80		
Asa Mercer International Middle School	398	TOPS K-8 School	58		
Washington Middle School	369	Hazel Wolf K-8 School	87		
Whitman Middle School	280				

**Question No. 8:** Attachment 3 presents a 3-year term... Will Seattle PS want us to capture expansion of Middle School use (6<sup>th</sup> and 7<sup>th</sup> Grade) in Year 2 or 3? And if so, can you provide the enrollment numbers by site (6<sup>th</sup> and 7<sup>th</sup> Grade) for us to add in scope?

Answer: No, expansion to 6<sup>th</sup> and 7<sup>th</sup> grades is not anticipated in the first three years using the solution.

**Question No. 9:** Has Seattle Public Schools appropriated budget and a specific dollar amount for this project? Can you provide us this budget cost for all 3 years?

Answer: The budget for this solution is part of Levy dollars approved by our voters. The specific budget amount will be determined in part by the selected proposer.

**Question No. 10:** Regarding Attachment 1, please clarify the following:

- a) 1.01: Can you please elaborate on Coalition application.
- b) 1.02: Can you please elaborate on common application.
- c) 1.03: Can you please provide details on application process workflow, user roles involved and selection criteria.
- d) 1.15: Will there be a single sign-on to access the websites?
- e) 1.20: It is assumed that there is an existing LMS with which we have to integrate proposed application. Please confirm, if our understanding is correct.
- f) 1.24: When assigning due date to the student; is it expected by the application to capture relevant log information also like when it was submitted etc.
- g) 1.25: What will be the format to upload test results ? Please provide a sample format.
- h) 1.26: Please provide sample information which needs to be captured. Do we need to maintain history logs as well?

- i) 1.55: It is assumed that pre-approved forms can be uploaded in the specified format in the repository. The same form can be downloaded from the application (multiple times) using some credentials if required. Please confirm.
- j) 1.57: It is assumed that pre-populated form will be used to generate letters and will be customized for specific student or group. Please confirm.
- k) 1.78: It is assumed that service learning information related data is already available with existing LMS or SIS. Please confirm.
- l) 1.147: Is there any existing LMS with which proposed application has to be integrated. It is assumed that curriculum will be provided by LMS. Please confirm.

Answer:

- a) Please refer to [Coalition for College Access](#) for information about the coalition application. At a minimum, we would like a link (URL) within the solution to this application.
- b) Please refer to [The Common Application](#) for information about the common application. At a minimum, we would like a link (URL) within the solution for this application.
- c) The application process is comprised of all activities to successfully complete the requirements of a specific post-secondary organization's application for admission in a timely and complete fashion. The activities are primarily performed by the student with support from their family, high school counselor and teachers. Selection criteria by which students are admitted to an organization are defined by that organization.
- d) No, single sign on with a Community Based organization's website is not in scope. Including a link (URL) within the solution to that website is all that is needed.
- e) The District's LMS is Schoology, which is currently integrated with the District's SIS, PowerSchool. Integration between the career and college planning solution and Schoology could be as simple as including a link (URL) within a Schoology page to the new tool, or a more extensive integration may be needed, depending on the solution selected.
- f) All actions taken by all end users in the solution are expected to be documented in audit logs. Refer to the Technical Requirements (Attachment 2 of the RFP) for more information about audit logging (8.09, 8.17, 8.18, 8.19).
- g) Documenting test or quiz results related to the career and college planning curriculum could be a data entry field where an alphanumeric value is entered in conjunction with a free-form text box where the name of the test/quiz is documented, or some other user interface design solution. With respect to an uploaded document, that format would likely be a .PDF file.
- h) Documenting assignments that have been completed by a student (or not completed) could be a free form text box where the name of the assignment is documented, with a drop down list box containing the values of "complete, incomplete", or some other user interface design solution. The solution would need to capture information about this activity and all activities in an audit log.

- Refer to the Technical Requirements (Attachment 2 of the RFP) for more information about audit logging (8.09, 8.17, 8.18, 8.19).
- i) Generic forms without any student data could be created offline (outside of the solution), translated, and then uploaded to a parent portal to be downloaded multiple times by authorized users. Forms customized to a specific student or group of students – those that are generated within the solution where student data is combined with other content - could be downloaded or saved in a format such as a Word document, translated, and then uploaded to the parent portal to be downloaded multiple times by authorized users.
  - j) Letter templates, either provided out-of-the-box by the vendor, or created and uploaded by District staff, would be customized to a specific student or group of students by combining student data with the template, and then downloaded or saved in a format such as a Word document, translated, and then uploaded to the parent portal to be accessed by authorized users.
  - k) Currently, the details about an individual service learning experience are documented on a paper form that is turned in by the student to school staff. These individual paper forms are saved by staff at each school until the required number of hours for graduation (currently 60) have been earned by the student. Once the student has reached 60 hours, a staff person documents the hours in PowerSchool.
  - l) Please see the answer to “e” above. Any vendor-provided or district-developed curriculum could be made available to students either through the vendor solution or through the District’s LMS – Schoology. Schoology is preferred.

**END OF ADDENDUM NO. 2**



Diane T. Navarro  
Contracting Services Manager



May 23, 2017

**ADDENDUM NO. 3 FOR SHORTLIST VENDORS FOR RFP NO. RFP02760:  
CAREER AND COLLEGE READINESS SOFTWARE FOR SEATTLE PUBLIC  
SCHOOLS**

This addendum shall become part of the contract documents and modifies the original bidding documents for RFP No. RFP02760: Career and College Readiness Software for Seattle Public Schools. Please acknowledge this addendum in your response. Failure to do so may subject the proposer to disqualification.

**QUESTIONS:**

**Question No. 1:** In the Functional Demonstration scenario table, the last row of the table has “Boeing” under Student 4 and “SpaceX” under Student 6. What is the meaning of this row? Is this where students want to seek jobs, or is it where family members or friends work?

Answer: This is the student’s career goal – either a specific company (e.g. Boeing and so on) or a specific career (Immigration Lawyer and so on). It has been provided in advance so that no time need be spent identifying the career goal during the demonstration of each scenario.

**END OF ADDENDUM NO. 3**

A handwritten signature in blue ink, appearing to read "Diane T. Navarro".

Diane T. Navarro  
Contracting Services Manager

## Terms of Service

Naviance Inc. maintains the Naviance platform inclusive of Naviance for High Schools, Naviance for Middle Schools, Naviance for Districts, Naviance eDocs, Naviance Course Planner, Naviance Alumni Tracker, Naviance Student, and Naviance Marketplace as well as the PrepMe customized learning and test preparation products and services (collectively, the "Service") subject to the terms and conditions described herein. Your use of the Service constitutes an agreement by you to abide by these terms and conditions (the "Agreement"). If you have entered into this Agreement on behalf of an organization, you represent that you have the authority to bind that organization to these terms and conditions. The term "Client" herein refers to (i) the organization and its officers, directors, agents, and employees or (ii) an individual, in the case of a non-legal entity who are registered to use the Service as a counselor, teacher, admissions officer, or other professional capacity. The term "User" herein refers to a student, a student's parent(s) or guardian(s), and/or a person who registers for the Service through an account provided by a Client or who registers for the Service as an individual. If you do not have the necessary authority, or if you do not agree with these terms and conditions, then you may not use the Service.

**1. Scope.** The Service includes a browser interface and data encryption, transmission, access, and storage (subject to commercially-reasonable limits as may be imposed by Naviance in its sole discretion). Client's and User's registration for, or use of, the Service shall constitute an acceptance to abide by this Agreement including any materials incorporated by reference herein. Client and Users are responsible for their own Internet connection, communications and computer costs.

**2. Service Fees.** Certain websites or features of the Service are fee-based and may require a fee for access or use. Such fees are subject to the provisions of this Section.

**2.1 Charges and Payments.** Client will pay all fees or charges to its account in accordance with the billing terms in effect at the time a fee or charge is due and payable. In respect of Professional Services, Client shall be invoiced for twenty percent (20%) of the Year 1 total upon execution of the relevant Order Form and be billed quarterly in arrears for Professional Services thereafter. At the end of the final quarter, all unused totals in respect of Professional Services shall become due upon issuance of final invoice. Service fees are non-refundable whether or not Client actively uses the Service. Client may add additional, optional features by request. Naviance reserves the right to change the fees, applicable charges and usage policies and to introduce new charges at any time, upon at least sixty (60) days prior notice to Client; provided, however that such fees shall not become effective for Client for services then in effect on Client's account until the next renewal period for Client's account.

**2.2 Billing and Renewal.** Naviance charges in advance for use of the Services, unless otherwise noted herein. Naviance will notify Client of the opportunity to renew the Service approximately thirty (30) days or more prior to the subscription expiration date. Service fees are exclusive of all taxes, levies, or duties imposed by taxing authorities, and Client shall be responsible for payment of all such taxes, levies, or duties as may be applicable to the Service fees (exclusive of any taxes or similar fees that may be imposed on the net income of Naviance).

**2.3 Billing Information.** Client agrees to provide Naviance with complete and accurate billing and contact information. This information includes legal name, street address, e-mail address, and name and telephone number of an authorized billing contact. Client agrees to update this information within thirty (30) days of any change to it.

**2.4 Non-Payment and Suspension of Service.** Client's account will be considered delinquent if payment in full is not received within sixty (60) days of the date of an invoice. Naviance reserves the right to suspend or terminate this Agreement and Client's and Client's Users' access to the Service if Client's account becomes delinquent. Delinquent invoices are subject to an interest of 1.5% per month on any

## Exhibit D

outstanding balance, or the maximum permitted by law, whichever is less, plus all expenses of collection. Client will continue to be charged during any period of suspension. If Client or Naviance initiates termination of this Agreement, Client will be obligated to pay the balance due on the account computed in accordance with Section 2.1 Charges and Payments. Client agrees that Naviance may charge such unpaid fees to Client's credit card, if applicable, or otherwise bill Client for such unpaid fees. Naviance also reserves the right to impose a separate reconnection fee should Client thereafter again request access to the Service.

**3. License.** Subject to the terms of this Agreement, Naviance grants Client a non-exclusive, non-transferrable worldwide right to use the Service, solely for Client's own business purposes and for the right to provide Users individual accounts to use the Service. Client shall not, without the prior written approval of Naviance: (i) license, sublicense, sell, resell, transfer, or assign the Service to any third party, (ii) modify or make derivative works based upon the Service; or (iii) commercially exploit the Service in any way. All rights not expressly granted to Client are reserved by Naviance and its licensors. Subject to the terms of this Agreement, Client grants to Naviance the non-exclusive, worldwide right to use, copy, store, transmit and display Client and User data hosted on the Service by Naviance ("Client Data") in accordance with the terms of the privacy policy referenced in Section 5.1 herein. User acknowledges that User has no rights except as expressly identified in the Privacy Statement with respect to Client Data.

## **4. Client and User Responsibilities.**

**4.1 Client Responsibilities.** Client is responsible for any and all activities (other than User purchases) that occur under Client's and its Users' accounts. Client shall: (i) maintain the confidentiality of Users' names and passwords; (ii) notify Naviance immediately of any unauthorized use of any password or account or any other known or suspected breach of security; (iii) report to Naviance immediately and use reasonable efforts to stop immediately any use of the Service inconsistent with the terms of the License provided in Section 3 herein that is known or suspected by Client; (iv) assure that use of the Service shall at all times comply with all applicable local, state, federal, and international laws, regulations, and conventions, including without limitation those related to data collection, use, disclosure and privacy; international communications; and the exportation of technical or personal data; (v) assure that use of the Service shall at all times conform to the terms and conditions of this Agreement; and (vi) not impersonate another user of the Service or provide false identity information to gain access to or use the Service.

**4.2 User Responsibilities.** Users are responsible for any and all activities that occur under their accounts. Users shall: (i) maintain the confidentiality of their names and passwords; (ii) notify Client who provides User's access immediately of any unauthorized use of any password or account or any other known or suspected breach of security; (iii) report to Client who provides User's access immediately and use reasonable efforts to stop immediately any use of the Service inconsistent with the terms of the License provided in Section 3 herein that is known or suspected by Users; (iv) use the Service in compliance with all applicable local, state, federal, and international laws, regulations, and conventions, as well as with the terms and conditions of this Agreement; and (v) not impersonate another user of the Service or provide false identity information to gain access to or use the Service. User will not attempt to change any fields that are not intended for User modification. Any attempt by User to view or manipulate the records of another User will be deemed a material breach and, in addition to exercising its termination rights under this Agreement, Naviance may, in its discretion, inform any relevant authorities.

## **5. Account Information and Data.**

**5.1 Privacy.** Naviance is committed to protecting the privacy of Client Data and maintains a detailed privacy policy, which may be viewed at <http://succeed.naviance.com/auth/signin#privacy>. Naviance reserves the right to modify its privacy policy in accordance with the procedure outlined in Section 17 herein. Without limiting the generality of Section 4.1(iv) of this Agreement, Client represents that it complies with all applicable data privacy laws, rules and regulations with respect to the personal data it stores, collects, and maintains through the Service.



## Exhibit D

**5.1.1 Student User Privacy in Education Rights Act ("SUPER").** Naviance agrees to comply with the Student User Privacy in Education Rights Act ("SUPER Act" - a Washington State law on student privacy) if the provisions of SUPER Act apply to the school services provided by the Naviance to the Client. School service means a website, mobile application, or online service that: (a) Is designed and marketed primarily for use in a K-12 school; (b) is used at the direction of teachers or other employees of a K-12 school; and (c) collects, maintains, or uses student personal information. A "school service" does not include a web site, mobile application, or online service that is designed and marketed for use by individuals or entities generally, even if also marketed to a United States K-12 school.

## 5.2 Security.

**5.2.1** The Service has security measures in place to help protect against the loss, misuse, and alteration of the data under Naviance's control. When the Service is accessed using a supported web browser, Secure Socket Layer (SSL) technology protects information using both server authentication and data encryption to help ensure that data are safe, secure, and available only to authorized users. Naviance also implements an advanced security method based on dynamic data and encoded session identifications, and hosts the Service in a secure server environment that uses a firewall and other advanced technology in an effort to prevent interference or access from outside intruders. Finally, the Service requires unique account identifiers, user names, and passwords that must be entered each time a Client or User signs on. These safeguards help to prevent unauthorized access, maintain data accuracy, and ensure the appropriate use of data. The Internet, however, is not perfectly secure and Naviance shall not be responsible for security breaches not reasonably within its control.

**5.2.2** Without limiting the generality of Section 4.1(iv) of this Agreement, Client shall comply with all applicable data security laws, regulations and business guidance published by the Federal Trade Commission, and implement, maintain and update (as appropriate) reasonable security policies, procedures and practices appropriate to the nature of the personal information collected through the Service, in order to protect such information from unauthorized access, destruction, use, modification or disclosure.

In the event of unauthorized access to Client personal information, Naviance shall provide notice to Client within forty-eight (48) hours of discovery and the unauthorized access and in accordance with applicable laws, and will reasonably cooperate with Client in providing any required notice to Client End Users. Naviance shall also provide Client with information regarding the nature and scope of the unauthorized access, steps taken to mitigate the incident and safeguards to prevent similar incidents in the future.

**5.3 Family Educational Rights and Privacy Act ("FERPA").** In the event Client is subject to the provisions of the Family Educational Rights and Privacy Act (FERPA), the Parties agree as follows: (A) Client appoints Naviance as a "school official" as that term is used in FERPA §§99.7(a)(3)(iii) and 99.31(a)(1) and as interpreted by the Family Policy Compliance Office, and determines that Naviance has a "legitimate educational interest," for the purpose of carrying out its responsibilities under the Agreement. (B) Naviance acknowledges that it shall be bound by all relevant provisions of FERPA and agrees that personally identifiable information obtained from Client by Naviance in the performance of this Agreement: (i) will not be disclosed to third parties, except as expressly provided for in FERPA §§99.31, without signed and dated written consent of the student, or if the student is under eighteen (18) years of age, signed and written consent of the student's parents/guardians and (ii) will be used only to fulfill Naviance's responsibilities under the Agreement. In accordance with FERPA, the Parties agree that any consents to disclose information may be made electronically.

**5.4 Children's Online Privacy Protection Act ("COPPA").** Without limiting the generality of Section 4.1(iv) of this Agreement, in the event that Client's use of the Service subjects Client to the provisions of COPPA, Client acknowledges that: (i) if it chooses to make Family Connection available to Users that Client shall be considered the "operator" of that website for the purposes of COPPA, and (ii) Client shall fully comply with COPPA and any rules or regulations promulgated thereunder.

## **6. Term and Termination.**

**6.1 Term of Service.** This Agreement commences on the date Client access to the Service is first enabled ("Effective Date") and shall continue for an initial term of one year or longer subject to mutual agreement by the Parties, which may be renewed by mutual agreement, unless terminated sooner pursuant to this Agreement. In the event the term is longer than one year as agreed upon and stipulated on the order form and the client desires to cancel this agreement before the end of that term, Client shall remain responsible for 100% of the amount of this agreement.

### **6.2 Termination for Cause.**

**6.2.1** Any breach of payment obligations or unauthorized use of the Service by Client or User will be deemed a material breach of this Agreement. Naviance, in its sole discretion, may terminate Client's and Users' passwords, account or use of the Service if Client or User breaches or otherwise fails to comply with this Agreement.

**6.2.2** If Naviance shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if Naviance shall violate any of the provisions of this Agreement, or if Naviance becomes insolvent or the subject of any proceeding under bankruptcy, insolvency or receivership law or makes an assignment for the benefit of creditors, Client shall thereupon have the right to terminate this Agreement by giving written notice of such termination and specifying the effective date thereof as a certain date at least seven (7) days after the notice, during which period Naviance shall have the right to cure the default.

**6.3 Termination for Client.** In the event Client is not allotted funds for the next fiscal year to continue using Services under this agreement, and there are not funds for the purchase of Services performing similar functions to those performed by the products/services hereunder, then Client may terminate this agreement by giving written notice to Naviance of such termination at least thirty (30) days prior to the end of the then current fiscal year. Additionally, Client must provide proof of the lack of appropriations as well as not appropriate funds for the same or similar Services within the term of this Agreement. Furthermore, Client remains responsible for payment of all products and services it has implemented, used or purchased through the time of termination, and Client will not be refunded for any prepaid fees.

**6.4 Data Retention.** Naviance agrees and acknowledges that Client owns all Client and User data hosted on the service by Naviance. Client agrees and acknowledges that Naviance has no obligation to retain Client Data, and may delete Client Data, more than thirty (30) days after termination. Upon termination of this Agreement, or at the discretion of Client, Client may request in writing that Client Data be deleted, and Naviance shall comply with such written request within thirty (30) days after termination. Naviance has no obligation to retain Client Data if Client or User has materially breached this Agreement and such breach has not been cured within thirty (30) days of notice of such breach. Naviance has no obligation to retain Client Data if the account is delinquent, and such Client Data may be irretrievably deleted. Prior to deletion, Naviance may charge a reasonable fee, for which payment shall be made in advance, to transfer Client Data to Client in a reasonable manner.

**7. Naviance Ownership.** Naviance alone (and its licensors, where applicable) owns all right, title and interest, including all related copyright, patent, trademark and other proprietary rights ("Intellectual Property" rights), in and to the Service and will own any suggestions, ideas, enhancement requests, feedback, and recommendations provided by Client, Users, or any other party relating to the Service. This Agreement is not a sale and does not convey any rights of ownership in or related to the Service or Intellectual Property owned by Naviance to Client or Users. Naviance is a registered trademark, and the Naviance logo and product names associated with the Service are trademarks of Naviance or third parties, and no right or license is granted to use them; provided, however, that Client may link to the homepage of a Naviance website or to the Service from another website for the purposes of directing

## Exhibit D

Users to the website or the Service and that such link may include the Naviance name and relevant product name(s). Client may not frame any page of a Naviance website

### **8. Third-Party Rights.**

**8.1** During use of the Service, Client may enter into correspondence with, purchase goods and/or services from, or participate in promotions of third-parties showing their goods and/or services through the Service, which may be disabled by Client through its control of the Service. Any such activity, and any terms, conditions, warranties or representations associated with such activity, is solely between Client and the applicable third-party. Naviance and its licensors shall have no liability, obligation or responsibility for any such correspondence, purchase or promotion between Client and any such third-party. Naviance does not endorse any sites on the Internet that are linked through the Service. Naviance is providing these links to Client only as a matter of convenience. Naviance does not control the third-party sites and in no event shall Naviance or its licensors be responsible for any content, data practices, products, or other materials on or available from such sites.

**8.2** Naviance engages the services of third-party intermediaries to provide credit card processing services to Client and Users. Such intermediaries are solely a link in the distribution chain, and are not permitted to store, retain, or use the information provided, except for the sole purpose of credit card processing and as required by law. Before Client and Users submit credit card information, Client and Users shall be required to agree to any applicable third-party intermediaries' terms of service and privacy policies, including provisions on limited warranties and liability. **Naviance understands and agrees that the Client will not be utilizing any services that require credit card processing.**

**8.3** In connection with the Services provided by Naviance, Client may register for, purchase, access, or obtain products, services, and/or features to be provided by third parties (e.g., Naviance Marketplace partners). The agreements between Naviance and such third parties may permit Naviance (i) to bill Client for such third party products or services, and/or (ii) deliver such third party products or services to Client. Such third party products or services shall not be considered "Services" for the purposes of this Agreement, and the liability of Naviance to Client or any Users for or in connection with any such third party products or services shall be limited to the amount of fees paid to Naviance by such Client or User for such third party products or services less any amounts paid by Naviance to such third party for such third party product or service.

**9. Representation & Warranties.** Each party represents and warrants that it has the legal power and authority to enter into this Agreement. Naviance represents and warrants that it will provide the Service in a manner consistent with general industry standards reasonably applicable to the provision thereof, and that the Service will perform substantially in accordance with the on-line Naviance help documentation under normal use and circumstances. Client and Users represent and warrant that they have not falsely identified themselves nor provided any false information to gain access to the Service and that they will comply with the terms and conditions of this Agreement. Each party represents and warrants that it shall make commercially-reasonable efforts, including the use of virus-scanning software on computers that upload files to the Service, to prevent the Service from becoming infected with or spreading a computer virus.

### **10. Indemnification.**

**10.1** Client shall indemnify and hold Naviance, its licensors and each such party's parent organizations, subsidiaries, affiliates, officers, directors, employees, attorneys and agents harmless from and against any and all claims, costs, damages, losses, liabilities and expenses (including attorneys' fees and costs) arising out of or in connection with: (i) a claim alleging that use of Client Data infringes the Intellectual Property of, or has caused harm to, a third party, or (ii) a claim arising from or alleging breach by Client or Users of this Agreement; provided that Naviance: (a) promptly gives written notice of the claim to Client; (b) gives Client sole control of the defense and settlement of the claim (provided that Client may not settle

## Exhibit D

or defend any claim unless it unconditionally releases Naviance of all liability and such settlement does not affect Naviance's business or the Service); (c) provides to Client all reasonably available information and assistance; and (d) has not compromised or settled such claim without Client's prior written consent.

**10.2** Naviance shall indemnify and hold Client and its parent organizations, subsidiaries, affiliates, officers, directors, employees, attorneys and agents harmless from and against any and all claims, costs, damages, losses, liabilities and expenses (including attorneys' fees and costs) arising out of or in connection with: (i) a claim alleging that the Service directly infringes the Intellectual Property of a third party, or (ii) a claim arising from or alleging breach by Naviance of this Agreement; provided that Client: (a) promptly gives written notice of the claim to Naviance; (b) gives Naviance sole control of the defense and settlement of the claim (provided that Naviance may not settle or defend any claim unless it unconditionally releases Client of all liability); (c) provides to Naviance all reasonably available information and assistance; and (d) has not compromised or settled such claim without Naviance's prior written consent. Naviance shall have no indemnification obligation, and Client shall indemnify Naviance pursuant to this Agreement, for claims arising from any alleged infringement related to the combination of the Service with any of Client's or any of Client's licensor's products, service, hardware or business process(es), so long as such use was not authorized or directed by Naviance, such authorization and/or direction having been given in writing.

**11. Disclaimer of Warranties.** (I) NAVIANCE AND ITS LICENSORS MAKE NO REPRESENTATION, WARRANTY, OR GUARANTY AS TO THE RELIABILITY, TIMELINESS, QUALITY, SUITABILITY, AVAILABILITY, ACCURACY OR COMPLETENESS OF THE SERVICE OR ANY CONTENT; (II) NAVIANCE AND ITS LICENSORS DO NOT REPRESENT OR WARRANT THAT (A) THE USE OF THE SERVICE WILL BE SECURE, TIMELY, UNINTERRUPTED OR ERROR-FREE OR OPERATE IN COMBINATION WITH ANY OTHER HARDWARE, SOFTWARE, SYSTEM OR DATA, (B) THE SERVICE WILL MEET CLIENT'S REQUIREMENTS OR EXPECTATIONS, (C) ANY STORED DATA WILL BE ACCURATE OR RELIABLE, (D) THE QUALITY OF ANY PRODUCTS, SERVICES, INFORMATION, OR OTHER MATERIAL PURCHASED OR OBTAINED BY CLIENT THROUGH THE SERVICE WILL MEET CLIENT'S REQUIREMENTS OR EXPECTATIONS, (E) ERRORS OR DEFECTS WILL BE CORRECTED, OR (F) THE SERVICE OR THE SERVER(S) THAT MAKE THE SERVICE AVAILABLE ARE FREE OF VIRUSES OR OTHER HARMFUL COMPONENTS; (III) THE SERVICE AND ALL CONTENT IS PROVIDED TO YOU STRICTLY ON AN "AS IS" AND "AS AVAILABLE" BASIS; AND (IV) ALL CONDITIONS, REPRESENTATIONS AND WARRANTIES, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT OF THIRD PARTY RIGHTS, ARE HEREBY DISCLAIMED TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

**12. Internet Delays.** THE SERVICE MAY BE SUBJECT TO LIMITATIONS, DELAYS, AND OTHER PROBLEMS INHERENT IN THE USE OF THE INTERNET AND ELECTRONIC COMMUNICATIONS. NAVIANCE IS NOT RESPONSIBLE FOR ANY DELAYS, DELIVERY FAILURES, OR OTHER DAMAGE RESULTING FROM SUCH PROBLEMS.

### **13. Limitation of Liability.**

**13.1** EXCEPT FOR INDEMNITY OBLIGATIONS OR AMOUNTS ACTUALLY DUE FOR PROVISION OF THE SERVICE, IN NO EVENT SHALL ANY PARTY'S AGGREGATE LIABILITY UNDER ANY THEORY OR FOR ANY REASON WHATSOEVER EXCEED THE AMOUNTS ACTUALLY PAID BY AND/OR DUE FROM CLIENT IN THE TWELVE (12) MONTH PERIOD IMMEDIATELY PRECEDING THE EVENT GIVING RISE TO SUCH CLAIM. IN NO EVENT SHALL ANY PARTY AND/OR ITS LICENSORS BE LIABLE TO ANYONE FOR ANY INDIRECT, PUNITIVE, SPECIAL, EXEMPLARY, INCIDENTAL, CONSEQUENTIAL OR OTHER DAMAGES OF ANY TYPE OR KIND (INCLUDING LOSS OF DATA, REVENUE, PROFITS, USE OR OTHER ECONOMIC ADVANTAGE) ARISING OUT OF, OR IN ANY WAY CONNECTED WITH THE SERVICE, INCLUDING BUT NOT LIMITED TO THE USE OR INABILITY

Exhibit D

TO USE THE SERVICE, OR FOR ANY CONTENT OBTAINED FROM OR THROUGH THE SERVICE, ANY INTERRUPTION, INACCURACY, ERROR OR OMISSION, REGARDLESS OF CAUSE IN THE CONTENT, EVEN IF THE PARTY FROM WHICH DAMAGES ARE BEING SOUGHT OR SUCH PARTY'S LICENSORS HAVE BEEN PREVIOUSLY ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

**13.2** The liability insurance required herein shall be written for not less than that stated in these Contract Documents; or one million dollars (\$1,000,000), whichever is greater. Except for workers' compensation, limits shall be project specific and dedicated to work performed under this Contract, unless otherwise agreed to by Client. The amounts of insurance shall not be less than:

workers' compensation	statutory
employer's liability	\$1,000,000 each accident
(stop gap)	\$1,000,000 disease-policy limit
	\$1,000,000 each employee (per occurrence/aggregate)
commercial general liability	\$1,000,000/\$2,000,000
bodily injury and property damage	\$1,000,000
personal and advertising injury	\$1,000,000/\$2,000,000
products and completed operations	\$100,000
Damage to premises rented to You	\$1,000,000 per occurrence
automobile liability (owned, non-owned, leased or hired)	\$2,000,000 per occurrence
umbrella/excess coverage	\$1,000,000 each occurrence
professional liability	

**14. Additional Rights.** Certain states and/or jurisdictions do not allow the exclusion of implied warranties or limitation of liability for incidental or consequential damages, so the exclusions set forth above may not apply to Client or Users.

**15. Local Laws and Export Control.** The Service provides services and uses software and technology that may be subject to United States export controls administered by the U.S. Department of Commerce, the U.S. Department of Treasury Office of Foreign Assets Control, and other U.S. agencies. Client acknowledges and agrees that the site shall not be used, and none of the underlying information, software, or technology may be transferred or otherwise exported or re-exported to Afghanistan, Burma, Cuba, Iraq, Iran, Libya, Sudan, or any other countries to which the United States maintains an embargo (collectively, "Embargoed Countries"), or to or by a national or resident thereof, or any person or entity on the U.S. Department of Treasury's List of Specially Designated Nationals or the U.S. Department of Commerce's Table of Denial Orders (collectively, "Designated Nationals"). The lists of Embargoed Countries and Designated Nationals are subject to change without notice. By using this site, Client represents and warrants that it is not located in, under the control of, or a national or resident of an Embargoed Country or a Designated National. Client agrees to comply strictly with all U.S. export laws and assumes sole responsibility for obtaining licenses to export or re-export as may be required. The Service may use encryption technology that is subject to licensing requirements under the U.S. Export Administration Regulations, 15 C.F.R. Parts 730-774 and Council Regulation (EC) No. 1334/2000. Naviance and its licensors make no representation that the Service is appropriate or available for use in other locations. If Client uses the Service from outside the United States, Client is solely responsible for compliance with all applicable laws, including without limitation export and import regulations of other countries. Any diversion of the content contrary to United States law is prohibited.

**16. Notice.** Naviance may give notice by means of a general notice on the Service or by written communication or e-mail to the address of the primary contact for Client or Users on record with Naviance. Such notice shall be deemed to have been given to Client or Users upon the expiration of 48

## Exhibit D

hours after mailing or posting (if sent by first class mail or prepaid post) or 12 hours after sending (if sent by e-mail). Client or Users may give notice to Naviance at any time by letter delivered by a nationally recognized overnight delivery service or first class postage prepaid mail, by e-mail, or by fax to Naviance Inc., 3033 Wilson Boulevard, Suite 500, Arlington, VA 22201, 703-859-7319 (fax), legal@naviance.com, or such other address as may be designated from time-to-time. Such notice shall be deemed given when received by Naviance.

**17. Modification.** Naviance reserves the right to change the terms and conditions of this Agreement at any time. Naviance shall notify Client and Users not fewer than sixty (60) days prior to any material change in the terms and conditions of this Agreement. Such change shall be effective upon renewal of this Agreement. Renewal of this Agreement after any such changes shall constitute Client's consent to such changes. Continued use by Users after notice - and, if Users have access to the Service through an account provided by Client, Client's renewal - shall constitute User's acceptance of the changes.

**18. Assignment.** This Agreement, including all rights and obligations hereunder, may not be assigned by Client or Users without the prior written approval of Naviance, however, this Agreement may be assigned by either party without prior written approval to (i) a parent or subsidiary, (ii) an acquirer of assets, or (iii) a successor by merger. Any purported assignment in violation of this Section shall be void.

**19. General.** This Agreement shall be governed by the law of the state of Washington and controlling United States federal law, without regard to the choice or conflicts of law provisions of any jurisdiction, and any disputes, actions, claims or causes of action arising out of or in connection with this Agreement or the Service shall be subject to the exclusive jurisdiction of the state and federal courts located in King County, Washington. In the event of any inconsistency between this Agreement and any purchase order or similar terms on any client form, this Agreement shall control. All parties will at all times comply with all applicable laws, rules and regulations. If any provision of this Agreement is held by a court of competent jurisdiction to be invalid or unenforceable, then such provision(s) shall be construed, as nearly as possible, to reflect the intentions of the invalid or unenforceable provision(s), with all other provisions remaining in full force and effect. No joint venture, partnership, employment, or agency relationship exists between Naviance and Client or Naviance and Users as a result of this Agreement or use of the Service. The failure of Naviance to enforce any right or provision in this Agreement shall not constitute a waiver of such right or provision unless acknowledged and agreed to by Naviance in writing. This Agreement comprises the entire agreement between Naviance and Client and Naviance and Users with respect to the Service and supersedes all prior or contemporaneous negotiations, discussions or agreements, whether written or oral, between the parties regarding the subject matter contained herein. In the event of any conflict or inconsistency between the terms of this Agreement and any Order Form, exhibits, or attachments hereto, the terms of this Agreement shall control, unless the relevant Order Form expressly provides otherwise. Sections 2 (for any Service provided prior to termination), 6, 7, 10.1, 11, 13, and 19 shall survive termination of this Agreement.

**19.1 Debarment.** Naviance warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions (defined as not being eligible to receive federal funds) by any local, state or federal department or agency. Naviance agrees to be bound by the terms of School Board Policy No. 6973, which provides additional requirements applicable to debarment of contracts from receiving future contracts with Client.

**19.2 Cooperation with District Auditor and State Auditor.** Naviance agrees to provide reasonable cooperation with any inquiry by either the district or Washington State Auditor relating to the performance of this contract. The Client has the right to audit records of Naviance relating to payment or performance under this contract, for one year after completion of this contract. Failure to cooperate may be cause for debarment from award of future contracts.

**20. Additional Terms.**

## Exhibit D

**20.1 Professional Services.** In the event Client elects to receive professional services, including professional development and/or consulting services from Naviance, the following terms shall apply. Client agrees to contact Naviance prior to the session if Client has any questions regarding these responsibilities.

**20.1.1. Client Responsibilities for Professional Development.** With respect to professional development sessions, participants should meet the prerequisites stated for each course to ensure that each session is productive and effective. All professional development sessions are hands-on sessions and require a computer for each participant. The Client must ensure that participants' computers are in good working order, that the appropriate hardware and software necessary to connect to the network provided in the training facility is installed, and that participants know how to connect the computer to a network. The Client must also plan to have no more than 15 individuals attend a private session at a time to ensure proper student to instructor ratio for effective learning. Client agrees to work with Naviance to ensure that any private professional development session purchased is conducted **no later than six months** from the date of purchase and acknowledge that a failure to have Naviance deliver a session within six months from the date of purchase shall constitute a cancellation by Client as described in Section 20.1.6. For seats purchased in public webinars, Client agrees to register and attend public webinars hosted by Naviance **no later than three months** from the date of purchase. Failure to attend a public webinar in the designated timeframe shall constitute a cancellation by Client as described in Section 20.1.6.

**20.1.2. Client Responsibilities for Consulting Services.** With respect to consulting services, Client agrees to the required preparation as outlined by Naviance to effectively start the engagement and utilize the services of the Naviance Consultant. Client agrees to work with Naviance to ensure that all consulting hours purchased are utilized within 12 months from the date of purchase and acknowledge that a failure to have Naviance deliver consulting services within 12 months from the date of purchase shall result in a forfeit of the consulting hours purchased. With regards to Delegated Authentication, implementation of this service is the responsibility of the client. The Naviance consultant cannot provide a SOAP-based web service or the technical support to create this service. With regards to automated data import, implementation of cURL is the responsibility of the client. The Naviance consultant cannot install cURL, create a cURL directory or configure cURL for the Client.

**20.1.3. Warranties.** Naviance warrants that each of its instructors and consultants performing such professional services shall have the proper skill, training, and background to perform in a competent and professional manner. Such professional services may include unknown and unforeseen problems and Naviance shall attempt to resolve such problems, should they occur. Client acknowledges that Naviance does not warrant that a satisfactory solution to all problems will be possible.

**20.1.4. Payments and Refunds.** Client or a contact designated by Client will be invoiced for professional development session(s) and consulting services at the time of purchase. If applicable, Naviance will invoice Client for travel expenses incurred by the instructor(s) for any on-site professional development services and consultant(s) for any on-site consulting services. Payments are due in accordance with Section 2 and within the time frame stated on each invoice and all consulting services and professional development sessions are non-refundable except as a result of a request by Naviance to cancel or reschedule a professional development session as described in Section 20.1.5.

**20.1.5. Cancellation or Rescheduling by Naviance.** Naviance reserves the right to cancel or reschedule sessions. In the event Naviance cancels or asks to reschedule a session, Client may choose to reschedule, attend another comparable session, or receive a full refund.

**20.1.6. Cancellation or Rescheduling by Client.** Client may reschedule a private on-site or webinar session that has been previously confirmed by Naviance, provided that Client agrees to: (a) notify Naviance in writing at least 3 business days in advance prior to the start of the session; (b) pay costs incurred on Client's behalf for the session as originally scheduled (including but not limited to any

## Exhibit D

cancellation fees paid to our instructor(s) and, if applicable, travel expenses), and (c) pay travel expenses associated with the session once rescheduled, if applicable. If Client is unable to attend a previously confirmed public webinar session, Client may register and attend an alternate public webinar session provided that session has availability and that the Client notifies Naviance in writing at least 24 hours in advance prior to the scheduled start of the original public webinar session. A session shall be considered canceled by Client, with no further obligations by Naviance, in the event of any of the following: (a) failure to schedule a private session to be conducted within six months from the date of purchase, (b) failure to attend a public webinar session within 3 months from date of purchase, (c) failure by Client to attend a session for which Client is registered without providing the specified advance notice to Naviance, or (d) failure by Client to reschedule a session in accordance with the provisions of this Section. Client agrees to pay any fees for services and to pay any expenses incurred by Naviance on Client's behalf in connection with sessions confirmed by Naviance and canceled by Client. If cancellation of a private or public session is a result of inclement weather resulting in a school closing or delay, Client is still responsible for paying any expenses incurred by Naviance on the Client's behalf, however the session will not be considered cancelled by the client.

### **20.2 Use of Interactive Areas.**

**20.2.1.** The Service may contain discussion forums in which Clients, Users, or third-parties may post reviews of, make recommendations for or give ratings of content, events, products, services or third-party providers, or post other content, messages, materials or other items ("Interactive Areas"). If Naviance provides such Interactive Areas, you are solely responsible for your use of such Interactive Areas and use them at your own risk. You acknowledge and agree that Naviance may set up any such forum to be accessible by all Clients and Users or by certain Clients and Users selected at the sole discretion of Naviance or any designee chosen by Naviance. Eligibility for access or membership in any given forum (or any continued access and membership) shall be determined by Naviance or its designee in its sole discretion, and you may not be given access to certain forums.

**20.2.2.** No review, recommendation or rating within the Service or in any Interactive Area shall be deemed to be an endorsement by Naviance of any the particular matter subject of the review, recommendation or, if such matter is a third-party provider, a guarantee of such provider's quality, competency, qualifications, experience, resources, character, honesty, integrity, responsiveness or other personal and professional characteristics.

**20.2.3.** Naviance takes no responsibility and assumes no liability for any content posted, stored or uploaded by you or any third party, or for any loss or damage thereto, nor is Naviance liable for any mistakes, defamation, slander, libel, omissions, falsehoods, obscenity, pornography or profanity you may encounter. As a provider of interactive services, Naviance is not liable for any statements, representations or content provided by its Clients and Users in any public forum, personal home page or other Interactive Area. Although Naviance has no obligation to screen, edit, or monitor any of the content posted to or distributed through any Interactive Area, Naviance reserves the right, and has absolute discretion, to remove, screen, or edit without notice any content posted or stored within the Service at any time and for any reason, and you are solely responsible for creating backup copies of and replacing any material you post or store in these areas at your sole cost and expense.

**20.2.4.** Any use of the Interactive Areas or other portions of the Service in violation of the foregoing violates these Terms of Service and may result in, among other things, termination or suspension of your rights to use the Interactive Areas and/or the Service. In order to cooperate with legitimate governmental requests, subpoenas or court orders, to protect Naviance's systems and customers, or to ensure the integrity and operation of Naviance's business and systems, Naviance may access and disclose any information it considers necessary or appropriate, including, without limitation, user profile information (i.e. name, e-mail address, etc.), IP addressing and traffic information, usage history, and posted content



## Exhibit D

**20.2.5.** Naviance does not and cannot review all content submitted by Clients and Users to the Service, and Naviance therefore does not make any representation or warranty with respect to it and Naviance does not endorse any specific products or services which may be included in any such content. However, Naviance reserves the right to block or remove content or communications that Naviance determines, in its discretion, to be in violation of these Terms of Service. As explained above, under Disclaimer of Warranties, the Service is offered "as is," and you use it at your own risk. Without limitation, this means that, despite the requirements of these Terms of Service, Clients and Users may post content that violates them. Naviance assumes no responsibility or liability for such content. If you have submitted objectionable content, Naviance may, in its sole discretion, terminate your account, take legal action against you and/or, if applicable, notify the appropriate authorities or parties, all without prior notice or liability to you.

**20.3. Digital Millennium Copyright Act.** The Digital Millennium Copyright Act of 1998 (the "DMCA") provides recourse for copyright owners who believe that material appearing on the Internet infringes their rights under U.S. copyright law. Naviance reserves the right to remove any material on the Service which allegedly infringes another person's copyright. If you believe in good faith that materials hosted by Naviance infringe your copyright, you (or your agent) may send us a notice requesting that the materials be removed, or access to them blocked. Such notice must meet statutory requirements imposed by the DMCA and must be in writing and include the following information in writing: (i) an electronic or physical signature of the person authorized to act on behalf of the owner of the copyright interest; (ii) a description of the copyrighted work that you claim has been infringed. Please describe the work and, where possible, include a copy or the location (e.g., URL) of an authorized version of your work; (iii) a description of the material that you claim to be infringing, as well as its location within the Service; (iv) your name, address, telephone number, and e-mail address; (v) a statement by you that you have a good faith belief that the disputed use of the materials is not authorized by the copyright owner, its agent, or the law; and (vi) a statement by you, made under penalty of perjury, that the above information in your notice is accurate and that you are the copyright owner or authorized to act on the copyright owner's behalf. If you believe in good faith that a notice of copyright infringement has been wrongly filed against you, the DMCA permits you to send us a counter-notice. Notices and counter-notices for the Service should be sent to: Paul M. Vogt, Esq., 46 Southfield Avenue, Suite 400, Stamford, CT 06902. We suggest that you consult your legal advisor before filing a notice or counter-notice. Also, be aware that there can be substantial penalties for false claims.

**21. Warranty of Accessibility.** If services include the provision of technology related products, Naviance warrants the following:

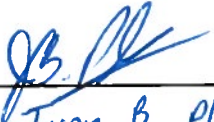
A. The system and services provided to the Client will comply with all local, state, and federal laws, regulations and relevant regulatory guidelines. Naviance further agrees that the system and services provided to the Client will comply with all laws prohibiting discrimination with regard to race, creed, color, national origin, sex, sexual orientation, marital status, age, or the presence of any sensory, mental, or physical disability. Naviance will furnish such documents and information as may be reasonably requested by the Client to evidence Naviance's compliance with the terms of this agreement.

B. Naviance will use reasonable efforts to ensure that, to the extent directly affecting the intended daily use by end users of the system and services provided to the Client under this agreement, such system and services will, at a minimum, conform with all applicable laws, including Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d), as amended, all other regulations promulgated under Title II of the Americans with Disabilities Act, and the accessibility standards of the Web Content Accessibility Guidelines ("WCAG") 2.0 A. With the upgrades and update to Family Connection's mobile responsive interface, Naviance is committed to achieving the accessibility standards of the Web Content Accessibility Guidelines ("WCAG") 2.0 AA compliance by the full launch date of August 2018 given the ability to continue to test and address deficiencies through August 2019. This will allow Naviance to follow our standard roadmap protocol procedure for bug fix and iteration release. Should there be any known deficiencies in our ability to achieve WCAG 2.0 AA compliance by the August 2018 release, Naviance will notify Seattle Public Schools of known deficiencies.

Exhibit D

By affixing their signatures below and intending to be bound, the duly authorized representatives of Naviance and Client indicate their agreement to the terms and conditions of this Agreement as of the date last signed below.

**Naviance, Inc.**

Signature:   
Name: Jason B. Pletcher  
Title: CFO  
Date: 11/9/17

**Seattle School District No. 1**

Signature: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_



50 E Business Way  
Suite 300  
Cincinnati, OH 45241  
[www.hobsons.com](http://www.hobsons.com)

**Sold To:** Seattle School Dist 1  
**Name:** Diane Navarro  
**Address:** 2445 3rd Ave S, Seattle, WA 98134-1923  
**Email:** [contractingservices@seattleschools.org](mailto:contractingservices@seattleschools.org)  
**Phone:** (206) 252-0564  
**Naviance ID:** 5307710dus

**Hobsons Contact:**  
**Name:** Andrew Wamala  
**Email:** [andrew.wamala@hobsons.com](mailto:andrew.wamala@hobsons.com)  
**Phone:** (703) 859-7519

**Order Date:** October 9, 2017

**Valid Until:** 9/29/2017  
**Quote Number:** Q214061  
**Contract Start Date:** 11/1/2017  
**Contract End Date:** 10/31/2020  
**Contract Term (In Months):** 36  
**Currency:** USD

**Purchase Order:**  
**Payment Term:** Net 30

Product or Service	Quantity	Unit	Start Date	Term (In Months)	Sub-Total
AchieveWorks	12,896	Enrollment	11/1/2017	36	40,622.40
AchieveWorks	31	Site	11/1/2017	36	48,825.00
Career Key	24	Sites	11/1/2017	36	16,200.00
Family Connection Engagement Package	41	Package	11/1/2017	1	24,600.00
Implementation Guide	41	Guides	11/1/2017	1	24,600.00
Naviance College and Career Readiness Curriculum	18,810	Enrollment	11/1/2018	24	86,526.00
Naviance Course Planner for District	14,500	Enrollment	11/1/2017	36	45,675.00
Naviance eDocs	15	Sites	11/1/2018	24	16,500.00
Naviance eDocs	1,017	Enrollment	11/1/2018	24	2,237.40
Naviance for High School - District Edition	14,500	Enrollment	11/1/2017	36	152,250.00
Naviance for Middle School - District Edition	4,310	Enrollment	11/1/2017	36	29,739.00
Project Consulting Hours	315	Hours	11/1/2017	12	63,000.00
Project Consulting Hours	200	Hours	11/1/2018	12	40,000.00
Project Consulting Hours	85	Hours	11/1/2019	12	17,000.00
Strategic Consulting Hours	75	Hours	11/1/2017	12	16,875.00
Strategic Consulting Hours	70	Hours	11/1/2018	12	15,750.00
Strategic Consulting Hours	60	Hours	11/1/2019	12	13,500.00
Teacher Engagement Package	41	Package	11/1/2017	1	24,600.00

Exhibit E

Sub Total:	678,499.80
Discount:	84,433.17
Total Price:	594,066.63

<b>Notes: (if applicable)</b>	Professional Services must be utilized within twelve (12) months from date of purchase. If the term is longer than twelve (12) months and Professional Services are purchased for additional term years, Professional Services must be used within the term defined. Subscription to Naviance eDocs is based on enrollment of Senior class only.
<b>Comments:</b>	All figures quoted are exclusive of sales tax. Payment Schedule for Seattle Public Schools:  Year 1 Invoice Amount Due 11/1/2017 = \$213,725.62 Year 2 Invoice Amount Due 11/1/2018 = \$200,979.56 Year 3 Invoice Amount Due 11/1/2019 = \$179,361.45  Total Contract Amount: \$594,066.63  Services and Travel Billable Per Agreed Terms

Please complete or update the following information:

Account Contacts	Name	Email Address
Primary	Diane Navarro	contractingservices@seattleschools.org
Billing	Diane Navarro	contractingservices@seattleschools.org
<b>Payment Method:</b>	Purchase Order #  Check  Wire Transfer #	<b>Paying by credit or debit card?</b>  Credit Card #  Card Holder Name: Expiration Date (MM/YY): Billing Zip Code: Security Code: Country:
<b>CEEB Code:</b>	1	

Unless separate invoice and payment terms are specified, Hobsons will issue invoices once per year, with the first taking place upon execution of the order form and then annually thereafter throughout the term of the contract.

The services are delivered in accordance with applicable terms that can be found at <https://succeed.naviance.com/auth/signin?tos=1#/tos>. By signing below, you agree to be bound by such terms and that such terms are made a part of this contract.

Please complete the contact and payment information as indicated, then sign below to indicate your acceptance. By signing this contract, you are stating that you are authorized by your institution to make this purchase. If a Purchase Order is required for payment to be issued, please indicate below. If you have selected professional services, travel expenses for on-site professional services will be billed separately following your session(s).

\_\_\_\_\_ Yes, a Purchase Order is required. It will be sent to Hobsons by \_\_\_\_\_.

Upon execution by Authorized Signatory, Client hereby agrees to the Terms of Service which will become effective together with this Order Form as of the Signature Date below.

## Exhibit E

Signature

Printed Name and Position

Signature Date

**Purchase Order & Order Forms:**

Naviance, Inc.  
50 E. Business Way, Suite 300  
Cincinnati, OH 45241

**Remit To:**

Naviance, Inc.  
P.O. Box 504571  
St. Louis, MO 63150-4571

**IF YOU CHOOSE TO FAX, THEN PLEASE CLICK ON THE 'SIGN ON PAPER' BUTTON FOLLOWED BY 'PRINT AND FAX' BUTTON AND FAX YOUR SIGNED ORDER FORM TO THE NUMBER PROVIDED ON THE COVERPAGE OF THE DOWNLOADED DOCUMENT**

Exhibit E

Exhibit F

VPAT Review For ITI

Reviewed by Michael Miller 06/01/2017

Approved by Michael Miller via email 06/06/2017

Please have vendor respond to the comments in the form and resubmit for review.

In reference to Seattle Public Schools questions surrounding alt-text, this minor accessibility function is being addressed and will be working in July 2017.

# VPAT™

## Voluntary Product Accessibility Template®

### Version 1.3

The purpose of the **Voluntary Product Accessibility Template**, or **VPAT™**, is to assist Federal contracting officials and other buyers in making preliminary assessments regarding the availability of commercial “Electronic and Information Technology” products and services with features that support accessibility. It is assumed and recommended that offerers will provide additional contact information to facilitate more detailed inquiries.

The first table of the Template provides a summary view of the Section 508 Standards. The subsequent tables provide more detailed views of each subsection. There are three columns in each table. Column one of the Summary Table describes the subsections of subparts B and C of the Standards. The second column describes the supporting features of the product or refers you to the corresponding detailed table, e.g., “equivalent facilitation.” The third column contains any additional remarks and explanations regarding the product. In the subsequent tables, the first column contains the lettered paragraphs of the subsections. The second column describes the supporting features of the product with regard to that paragraph. The third column contains any additional remarks and explanations regarding the product.

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**Date:** 1/30/2017

**Name of Product:** Naviance - Admin

**Contact for more Information (name/phone/email):** Joe Karschnik,  
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<b>Summary Table</b> <b>VPAT™</b> <b>Voluntary Product Accessibility Template®</b>		
<i>Criteria</i>	<b>Supporting Features</b>	<b>Remarks and explanations</b>
Section 1194.21 <a href="#">Software Applications and Operating Systems</a>	Supports with exceptions	
Section 1194.22 <a href="#">Web-based Internet Information and Applications</a>	Supports with exceptions	
Section 1194.23 <a href="#">Telecommunications Products</a>	Not Applicable	
Section 1194.24 <a href="#">Video and Multi-media Products</a>	Not Applicable	
Section 1194.25 <a href="#">Self-Contained, Closed Products</a>	Not Applicable	
Section 1194.26 <a href="#">Desktop and Portable Computers</a>	Not Applicable	
Section 1194.31 <a href="#">Functional Performance Criteria</a>	Supports with exceptions	
Section 1194.41 <a href="#">Information, Documentation and Support</a>	Supports	

[Return to the top of the page.](#)

## **Section 1194.21 Software Applications and Operating Systems – Detail**

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<i>Criteria</i>	<b>Supporting Features</b>	<b>Remarks and explanations</b>
(a) When software is designed to run on a system that has a keyboard, product functions shall be executable from a keyboard where the function itself or the result of performing a function can be discerned textually.	Supports with exceptions	Some items are missing alt text tags
(b) Applications shall not disrupt or disable activated features of other products that are identified as accessibility features, where those features are developed and documented according to industry standards. Applications also shall not disrupt or disable activated features of any operating system that are identified as accessibility features where the application programming interface for those accessibility features has been documented by the manufacturer of the operating system and is available to the product developer.	Supports	
(c) A well-defined on-screen indication of the current focus shall be provided that moves among interactive interface elements as the input focus changes. The focus shall be programmatically exposed so that Assistive Technology can track focus and focus changes.	Supports with exceptions	Cursor does exist correctly, however background colors not specified

All non-text items must have alt tags. Please explain how information in non-alt tagged elements is provided to people with disabilities.

<p>(d) Sufficient information about a user interface element including the identity, operation and state of the element shall be available to Assistive Technology. When an image represents a program element, the information conveyed by the image must also be available in text.</p>	<p>Supports with exceptions</p>	<p>Some items are missing alt text tags</p>	<p>All non-text items must have alt tags. Please explain how information in non-alt tagged elements is provided to people with disabilities.</p>
<p>(e) When bitmap images are used to identify controls, status indicators, or other programmatic elements, the meaning assigned to those images shall be consistent throughout an application's performance.</p>	<p>Supports</p>		
<p>(f) Textual information shall be provided through operating system functions for displaying text. The minimum information that shall be made available is text content, text input caret location, and text attributes.</p>	<p>Supports with exceptions</p>	<p>Some items are missing alt text tags</p>	<p>All non-text items must have alt tags. Please explain how information in non-alt tagged elements is provided to people with disabilities.</p>
<p>(g) Applications shall not override user selected contrast and color selections and other individual display attributes.</p>	<p>Supports with exceptions</p>	<p>Program allows for assistive overrides, but does have some default contrast issues.</p>	
<p>(h) When animation is displayed, the information shall be displayable in at least one non-animated presentation mode at the option of the user.</p>	<p>Not Applicable</p>		
<p>(i) Color coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.</p>	<p>Supports</p>		
<p>(j) When a product permits a user to adjust color and contrast settings, a variety of color selections capable of producing a</p>	<p>Supports with exceptions</p>	<p>Program allows for assistive overrides, but does have</p>	

range of contrast levels shall be provided.		some default contrast issues.
(k) Software shall not use flashing or blinking text, objects, or other elements having a flash or blink frequency greater than 2 Hz and lower than 55 Hz.	Supports	
(l) When electronic forms are used, the form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.	Supports	

[Return to the top of the page.](#)

**Section 1194.22 Web-based Internet  
information and applications – Detail**

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<b>Criteria</b>	<b>Supporting Features</b>	<b>Remarks and explanations</b>
(a) A text equivalent for every non-text element shall be provided (e.g., via "alt", "longdesc", or in element content).	Supports with exceptions	Some items are missing alt tag attribute
(b) Equivalent alternatives for any multimedia presentation shall be synchronized with the presentation.	Not Applicable	
(c) Web pages shall be designed so that all information conveyed with color is also available without color, for example from context or markup.	Supports	
(d) Documents shall be organized so they are readable without requiring an associated style sheet.	Supports	
(e) Redundant text links shall be provided for each active region of a server-side image map.	Supports	
(f) Client-side image maps shall be provided instead of server-side image maps except where the regions cannot be defined with an available geometric shape.	Supports	
(g) Row and column headers shall be identified for data tables.	Supports	
(h) Markup shall be used to associate data cells and header	Supports	

All non-text items must have alt tags. Please explain how information in non-alt tagged elements is provided to people with disabilities.

cells for data tables that have two or more logical levels of row or column headers.		
(i) Frames shall be titled with text that facilitates frame identification and navigation	Supports	
(j) Pages shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.	Supports	
(k) A text-only page, with equivalent information or functionality, shall be provided to make a web site comply with the provisions of this part, when compliance cannot be accomplished in any other way. The content of the text-only page shall be updated whenever the primary page changes.	Supports	
(l) When pages utilize scripting languages to display content, or to create interface elements, the information provided by the script shall be identified with functional text that can be read by Assistive Technology.	Supports	
(m) When a web page requires that an applet, plug-in or other application be present on the client system to interpret page content, the page must provide a link to a plug-in or applet that complies with §1194.21(a) through (l).	Not Applicable	
(n) When electronic forms are designed to be completed on-line, the form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.	Supports	

(o) A method shall be provided that permits users to skip repetitive navigation links.	Not Applicable	
(p) When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.	Supports	

Note to 1194.22: The Board interprets paragraphs (a) through (k) of this section as consistent with the following priority 1 Checkpoints of the Web Content Accessibility Guidelines 1.0 (WCAG 1.0) (May 5 1999) published by the Web Accessibility Initiative of the World Wide Web Consortium: Paragraph (a) - 1.1, (b) - 1.4, (c) - 2.1, (d) - 6.1, (e) - 1.2, (f) - 9.1, (g) - 5.1, (h) - 5.2, (i) - 12.1, (j) - 7.1, (k) - 11.4.

[Return to the top of the page.](#)

**Section 1194.23 Telecommunications**

**Products – Detail**

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<b>Criteria</b>	<b>Supporting Features</b>	<b>Remarks and explanations</b>
(a) Telecommunications products or systems which provide a function allowing voice communication and which do not themselves provide a TTY functionality shall provide a standard non-acoustic connection point for TTYs. Microphones shall be capable of being turned on and off to allow the user to intermix speech with TTY use.	Not Applicable	
(b) Telecommunications products which include voice communication functionality shall support all commonly used cross-manufacturer non-proprietary standard TTY signal protocols.	Not Applicable	
(c) Voice mail, auto-attendant, and interactive voice response telecommunications systems shall be usable by TTY users with their TTYs.	Not Applicable	
(d) Voice mail, messaging, auto-attendant, and interactive voice response telecommunications systems that require a response from a user within a time interval, shall give an alert when the time interval is about to run out, and shall provide sufficient time for the	Not Applicable	



<p>user to indicate more time is required.</p>		
<p>(e) Where provided, caller identification and similar telecommunications functions shall also be available for users of TTYs, and for users who cannot see displays.</p>	<p>Not Applicable</p>	
<p>(f) For transmitted voice signals, telecommunications products shall provide a gain adjustable up to a minimum of 20 dB. For incremental volume control, at least one intermediate step of 12 dB of gain shall be provided.</p>	<p>Not Applicable</p>	
<p>(g) If the telecommunications product allows a user to adjust the receive volume, a function shall be provided to automatically reset the volume to the default level after every use.</p>	<p>Not Applicable</p>	
<p>(h) Where a telecommunications product delivers output by an audio transducer which is normally held up to the ear, a means for effective magnetic wireless coupling to hearing technologies shall be provided.</p>	<p>Not Applicable</p>	
<p>(i) Interference to hearing technologies (including hearing aids, cochlear implants, and assistive listening devices) shall be reduced to the lowest possible level that allows a user of hearing technologies to utilize the telecommunications product.</p>	<p>Not Applicable</p>	
<p>(j) Products that transmit or conduct information or communication, shall pass through cross-manufacturer, non-proprietary, industry-standard codes, translation protocols, formats or other information necessary to provide the</p>	<p>Not Applicable</p>	

<p>information or communication in a usable format. Technologies which use encoding, signal compression, format transformation, or similar techniques shall not remove information needed for access or shall restore it upon delivery.</p>		
<p>(k)(1) Products which have mechanically operated controls or keys shall comply with the following: Controls and Keys shall be tactilely discernible without activating the controls or keys.</p>	<p>Not Applicable</p>	
<p>(k)(2) Products which have mechanically operated controls or keys shall comply with the following: Controls and Keys shall be operable with one hand and shall not require tight grasping, pinching, twisting of the wrist. The force required to activate controls and keys shall be 5 lbs. (22.2N) maximum.</p>	<p>Not Applicable</p>	
<p>(k)(3) Products which have mechanically operated controls or keys shall comply with the following: If key repeat is supported, the delay before repeat shall be adjustable to at least 2 seconds. Key repeat rate shall be adjustable to 2 seconds per character.</p>	<p>Not Applicable</p>	
<p>(k)(4) Products which have mechanically operated controls or keys shall comply with the following: The status of all locking or toggle controls or keys shall be visually discernible, and discernible either through touch or sound.</p>	<p>Not Applicable</p>	

[Return to the top of the page.](#)

**Section 1194.24 Video and Multi-media  
Products – Detail**

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<b>Criteria</b>	<b>Supporting Features</b>	<b>Remarks and explanations</b>
<p>a) All analog television displays 13 inches and larger, and computer equipment that includes analog television receiver or display circuitry, shall be equipped with caption decoder circuitry which appropriately receives, decodes, and displays closed captions from broadcast, cable, videotape, and DVD signals. As soon as practicable, but not later than July 1, 2002, widescreen digital television (DTV) displays measuring at least 7.8 inches vertically, DTV sets with conventional displays measuring at least 13 inches vertically, and stand-alone DTV tuners, whether or not they are marketed with display screens, and computer equipment that includes DTV receiver or display circuitry, shall be equipped with caption</p>	<p align="center">Not Applicable</p>	

<p>decoder circuitry which appropriately receives, decodes, and displays closed captions from broadcast, cable, videotape, and DVD signals.</p>		
<p>(b) Television tuners, including tuner cards for use in computers, shall be equipped with secondary audio program playback circuitry.</p>	<p>Not Applicable</p>	
<p>(c) All training and informational video and multimedia productions which support the agency's mission, regardless of format, that contain speech or other audio information necessary for the comprehension of the content, shall be open or closed captioned.</p>	<p>Not Applicable</p>	
<p>(d) All training and informational video and multimedia productions which support the agency's mission, regardless of format, that contain visual information necessary for the comprehension of the content, shall be audio described.</p>	<p>Not Applicable</p>	
<p>(e) Display or presentation of alternate text presentation or audio descriptions shall be user-selectable unless permanent.</p>	<p>Not Applicable</p>	

[Return to the top of the page.](#)

**Section 1194.25 Self-Contained, Closed Products – Detail**

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<b>Criteria</b>	<b>Supporting Features</b>	<b>Remarks and explanations</b>
(a) Self contained products shall be usable by people with disabilities without requiring an end-user to attach Assistive Technology to the product. Personal headsets for private listening are not Assistive Technology.	Not Applicable	
(b) When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.	Not Applicable	
(c) Where a product utilizes touchscreens or contact-sensitive controls, an input method shall be provided that complies with §1194.23 (k) (1) through (4).	Not Applicable	
(d) When biometric forms of user identification or control are used, an alternative form of identification or activation, which does not require the user to possess particular	Not Applicable	

<p>biological characteristics, shall also be provided.</p>		
<p>(e) When products provide auditory output, the audio signal shall be provided at a standard signal level through an industry standard connector that will allow for private listening. The product must provide the ability to interrupt, pause, and restart the audio at anytime.</p>	<p>Not Applicable</p>	
<p>(f) When products deliver voice output in a public area, incremental volume control shall be provided with output amplification up to a level of at least 65 dB. Where the ambient noise level of the environment is above 45 dB, a volume gain of at least 20 dB above the ambient level shall be user selectable. A function shall be provided to automatically reset the volume to the default level after every use.</p>	<p>Not Applicable</p>	
<p>(g) Color coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.</p>	<p>Not Applicable</p>	
<p>(h) When a product permits a user to adjust color and contrast</p>	<p>Not Applicable</p>	

<p>settings, a range of color selections capable of producing a variety of contrast levels shall be provided.</p>		
<p>(i) Products shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.</p>	<p>Not Applicable</p>	
<p>(j) (1) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: The position of any operable control shall be determined with respect to a vertical plane, which is 48 inches in length, centered on the operable control, and at the maximum protrusion of the product within the 48 inch length on products which are freestanding, non-portable, and intended to be used in one location and which have operable controls.</p>	<p>Not Applicable</p>	
<p>(j)(2) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Where any operable control is 10 inches or less behind</p>	<p>Not Applicable</p>	

<p>the reference plane, the height shall be 54 inches maximum and 15 inches minimum above the floor.</p>		
<p>(j)(3) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Where any operable control is more than 10 inches and not more than 24 inches behind the reference plane, the height shall be 46 inches maximum and 15 inches minimum above the floor.</p>	<p>Not Applicable</p>	
<p>(j)(4) Products which are freestanding, non-portable, and intended to be used in one location and which have operable controls shall comply with the following: Operable controls shall not be more than 24 inches behind the reference plane.</p>	<p>Not Applicable</p>	

[Return to the top of the page.](#)



**Section 1194.26 Desktop and Portable  
Computers – Detail**

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<b>Criteria</b>	<b>Supporting Features</b>	<b>Remarks and explanations</b>
(a) All mechanically operated controls and keys shall comply with §1194.23 (k) (1) through (4).	Not Applicable	
(b) If a product utilizes touchscreens or touch-operated controls, an input method shall be provided that complies with §1194.23 (k) (1) through (4).	Not Applicable	
(c) When biometric forms of user identification or control are used, an alternative form of identification or activation, which does not require the user to possess particular biological characteristics, shall also be provided.	Not Applicable	
(d) Where provided, at least one of each type of expansion slots, ports and connectors shall comply with publicly available industry standards	Not Applicable	

[Return to the top of the page.](#)

**Section 1194.31 Functional Performance**

**Criteria – Detail**

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<b>Criteria</b>	<b>Supporting Features</b>	<b>Remarks and explanations</b>
(a) At least one mode of operation and information retrieval that does not require user vision shall be provided, or support for Assistive Technology used by people who are blind or visually impaired shall be provided.	Supports	
(b) At least one mode of operation and information retrieval that does not require visual acuity greater than 20/70 shall be provided in audio and enlarged print output working together or independently, or support for Assistive Technology used by people who are visually impaired shall be provided.	Supports	
(c) At least one mode of operation and information retrieval that does not require user hearing shall be provided, or support for Assistive Technology	Supports	

<p>used by people who are deaf or hard of hearing shall be provided</p>		
<p>(d) Where audio information is important for the use of a product, at least one mode of operation and information retrieval shall be provided in an enhanced auditory fashion, or support for assistive hearing devices shall be provided.</p>	<p>Supports</p>	
<p>(e) At least one mode of operation and information retrieval that does not require user speech shall be provided, or support for Assistive Technology used by people with disabilities shall be provided.</p>	<p>Supports with exceptions</p>	<p>Some items do not have alt attribute tag</p>
<p>(f) At least one mode of operation and information retrieval that does not require fine motor control or simultaneous actions and that is operable with limited reach and strength shall be provided.</p>	<p>Supports</p>	

[Return to the top of the page.](#)

**Section 1194.41 Information, Documentation  
and Support – Detail**

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<i>Criteria</i>	Supporting Features	Remarks and explanations
(a) Product support documentation provided to end-users shall be made available in alternate formats upon request, at no additional charge	Supports	
(b) End-users shall have access to a description of the accessibility and compatibility features of products in alternate formats or alternate methods upon request, at no additional charge.	Supports	
(c) Support services for products shall accommodate the communication needs of end-users with disabilities.	Supports	

[Return to the top of the page.](#)