PROPOSAL FOR

St. Charles Parish Public Schools

IN RESPONSE TO:

Assessment Data Management System RFP

DUE:

March 8, 2017 at 12:00 p.m. CT

SUBMITTED BY:

Roderick Sams, Ed.D.
Director, Education Solutions
roderick.sams@performancematters.com

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EXECUTIVE SUMMARY

On behalf of Performance Matters, I want to thank you for considering the Unify platform as your comprehensive Assessment Data Management platform. With a mission to leverage world class assessment, powerful data analytics, and professional learning content, solutions, tools and services to accelerate measurable improvements in teaching and learning, Performance Matters (PM) will be the ideal partner to fulfill the goals of this RFP. Performance Matters has a deep respect for District leaders who desire a system that motivates students to continue learning, encourages teachers to differentiate instruction and enables administrators to provide appropriate professional development.

Performance Matters' Student Learning and Growth Solutions are powered by Unify, an award-winning flagship student assessment platform. Educators use Unify to create and administer assessments, analyze student and educator data, and act on that data to inform instruction and impact teaching and learning throughout the school year. Unify is a next-generation collaborative assessment and data management system designed in collaboration with customers to meet the current and future needs of K-12 schools. Unify is designed to serve instructional purposes by providing teachers and administrators with actionable data about the effectiveness of recently delivered instruction and will provide the optimal solution to the requirements, specifications and needs as detailed in this RFP.

Unify provides a robust comprehensive student assessment platform that features a flexible online testing engine with tools similar to those on the state assessments, as well as plain paper scanning. Unify is an open assessment platform for teacher or district level testing for every subject and all grade levels. The platform is content neutral, allowing the district to author locally created items with graphics, math equations and formulas, load licensed items and item banks, and use content provided by Performance Matters. With Unify authoring tools, the District can author technology enhanced items and create both formative, benchmark and summative assessments. In a user friendly platform, Unify supports the administration of authentic assessments with innovative item types that create varied interaction opportunities for students. Unify offers the building and administering of multiple technology-enhanced items that allow students more interaction with the content, as well as increasing its rigor. Students will encounter many of these item types on their state assessments and Unify is built to provide assessment experiences in line with the state assessments.

Additionally, districts can utilize QTI 2.1 compliant third party item banks and tests to supplement any authoring initiatives. In order to support integrated solutions, Performance Matters has invested engineering resources in the IMS Global standards for interoperability. Performance Matters has engineered with QTI and LTI being foundational standards within the Unify platform and Unify is certified for QTIv2.1 final. This specification is used to ingest content from third party sources. Performance Matters has been processing QTI packages for several years, and has deep domain expertise and a variety of methods to deal with the anomalies faced with non standard QTI integration. In addition, Performance Matters' representatives serve on the IMS Technical Advisory Board and on the Executive Board on Assessment in order to stay current and to provide our voice and the voice of our customers in the IMS road map.

> *"Performance Matters has a firm foundation in assessment and data analysis. More importantly, they have been a true partner in working with us to create a platform that matches our needs. Having these integrated systems will ensure everyone is looking at the same data, so we can have data-driven conversations across the district. With this information, we believe that teachers' planning time and students' learning time will be more focused and effective." - Dr. Valerie Whitehead, Executive Director of Assessment and Accountability, Glynn County School System*

Unify also features a unique and unrivaled performance application that provides visibility into student work and is ideally suited for performance tasks. The Performance Scoring App can be utilized for a variety of applications. Unify provides visibility into student work and is ideally suited for performance tasks through the interactive scoring of constructed student responses in media, print or text using

bracketed rubrics and anchors. In addition, multiple raters and blind scoring can be engaged in the scoring of performance tasks, in order to reduce bias and increase reliability.

The Early Warning System allows educators to monitor academic and behavioral achievement for a targeted student or groups, and a built-in Response to Intervention (RtI) module offers educators the ability to determine how a student is performing against their peers. The Curriculum Connector feature allows the integration of the Unify platform with other tools that meet IMS Global's Learning Tool Interoperability (LTI) standards, thus supporting the concept of assessment for learning.

Unify will provide an accessible platform for teachers to access student data and reports that analyze growth and standards mastery. Features include role-based dashboards that analyze student data, summative and benchmark test scores, and other critical information in an easy-to-understand, color-coded and graphical format. Teachers can easily and quickly view student growth against specific standards and competencies, as well as student growth over time for individuals and groups. Sorting and filtering options ensure that even the largest reports are easily manageable.

Featuring "drill-down" capabilities, Unify provides a tabular format that allows educators to view multiple student records and reports with graphical depictions of the data from a single screen. A successful and deep integration with the District's student information system, PowerSchool, ensures that all student information is timely and accurate. With the proven ability to scale larger as student enrollment increases, Unify can consistently support district needs, both now and in the future.

Performance Matters' award-winning platform paired with outstanding customer service and dedication are the keys to the company's success. Performance Matters has a passion for the advancement of education, exemplary track record for customer service, and a strong service-oriented culture. Providing timely implementation, Performance Matters' service offerings include a helpdesk with highly skilled technicians, a Customer Relationship Manager that is familiar with local school processes, and flexible training options designed to the district's desires. In addition, Performance Matters hosts both national and regional user groups to continually improve the product for the benefit of our customers.

Successfully partnering with many districts similar in size and scale, Performance Matters has a proven track record as an industry leader with a history of significant reliability providing all stakeholders in the educational process ready access to the information and resources needed to accelerate student learning, instruction and teacher effectiveness. The most qualified statements regarding the abilities and solutions of Performance Matters come directly from our customers themselves who have voted multiple prestigious awards, including Unify as five-time consecutive recipients of the Top 100 Products Award.

Performance Matters looks forward to the opportunity to work with St. Charles Parish Public Schools and help the District achieve its mission. Based on our successful implementations and experiences with other districts, a partnership will provide St. Charles Parish Public Schools with effective insight as to the efficient allocation of resources for maximum student achievement.

Best Regards,

Dr. Roderick Sams, Director, Education Solutions
770-283-4145 | Roderick.Sams@PerformanceMatters.com

1. COST

The Assessment Data Management System Cost Summary Form is submitted on the following pages with separate pricing for assessment and analytics, per instructions from clarification asked of SCPPS. Pricing is valid for 90 days from bid opening. SCPPS has indicated that E-Rate is not applicable to this RFP.

Cost Summary Form – Option 1 Analytics

St. Charles Parish Public Schools
Assessment Data Management System Cost Summary Form

Vendor Performance Matters, LLC

E-rate Category _____ SPIN _____

==========

	Cost for Year 1 Option 1- Analytics	
Equipment		$23,250.00
Installation		$0.00
Services		$5,000.00
Professional Development		$2,400.00
Travel		$0.00
Supplies		$0.00
Other Items		$0.00
Delivery		$0.00
Other/Miscellaneous		$0.00
	Sub Total	$30,650.00
Equipment Required from Other Vendors		$0.00
Software Required from Other Vendors		$0.00
Services Sub-Contracted		$0.00
Miscellaneous Expenses from Other Vendors		$0.00
	Grand Total for Turn Key Project	$30,650.00

==========

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Recurring Cost for Years 2 & 3

Describe in detail the recurring cost for 2 years subsequent to year 1.

Year 2 Licence amount: $24,459.00

Year 3 License amount: $25,668.00

Each subsequent year includes a 5% annual increase. Additional items available upon additional purchase (i.e. training, increased student count, additional funtionality, etc.)

==========

In addition to this form, provide a detailed narrative with a breakdown of the cost associated with the project. This is a turn key project. The installation cost must include all expenses associated with "turning on" this service. Be sure to include **all** cost associated with successful completion of the project. Missing or hidden cost will lower your score when the proposals are evaluated. The costs submitted must be valid for at least 90 days from the due date.

Name: Woody Dillaha (print/type) Title: President (print/type)

Authorized Representative: (signature) Date 2/28/17 (print/type)

Cost Summary Form – Option 2 Assessment

St. Charles Parish Public Schools
Assessment Data Management System Cost Summary Form

Vendor Performance Matters, LLC

E-rate Category _____ SPIN _____

==========

	Cost for Year 1 Option 2- Assessment	
Equipment		$23,250.00
Installation		$0.00
Services		$3,500.00
Professional Development		$12,000.00
Travel		$0.00
Supplies		$0.00
Other Items		$0.00
Delivery		$0.00
Other/Miscellaneous		$0.00
	Sub Total	$38,750.00
Equipment Required from Other Vendors		$0.00
Software Required from Other Vendors		$0.00
Services Sub-Contracted		$0.00
Miscellaneous Expenses from Other Vendors		$0.00
	Grand Total for Turn Key Project	$38,750.00

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Recurring Cost for Years 2 & 3

Describe in detail the recurring cost for 2 years subsequent to year 1.

Year 2 Licence amount: $24,459.00

Year 3 License amount: $25,668.00

Each subsequent year includes a 5% annual increase. Additional items available upon additional purchase (i.e. training, increased student count, additional funtionality, etc.)

==========

In addition to this form, provide a detailed narrative with a breakdown of the cost associated with the project. This is a turn key project. The installation cost must include all expenses associated with "turning on" this service. Be sure to include **all** cost associated with successful completion of the project. Missing or hidden cost will lower your score when the proposals are evaluated. The costs submitted must be valid for at least 90 days from the due date.

Name: Woody Dillaha (print/type) Title: President (print/type)

Authorized Representative: (signature) Date 2/28/17 (print/type)

Detailed Pricing Narrative – Option 1 Analytics

Year 1:

Performance Matters Service Description	Count	Unit	Unit Price	Total	Due
Unify License: Annual Fee - See Unify Modules Service Descriptions	9,300	Per student	$2.50	$23,250.00	Net 30
Implementation: One Time Fee Active Directory SIS Integration – Waived for 'First in State' implementation	1 1	Each	$5,000.00 $7,500.00	$5,000.00 WAIVED	Net 30
Professional Development: Measure Student Growth with Multi Measures (Onsite)	1	Each	$2,400.00	$2,400.00	Net 30
			Total:	**$30,650.00**	

Year 2:

Performance Matters Service Description	Count	Unit	Unit Price	Total	Due
Unify Modules – See Unify Modules Service Description	9,300	Per student	$2.63	$24,459.00	Net 30
			Total:	**$24,459.00**	

Year 3:

Performance Matters Service Description	Count	Unit	Unit Price	Total	Due
Unify Modules – See Unify Modules Service Description	9,300	Per student	$2.76	$25,668.00	Net 30
			Total:	**$25,668.00**	

<u>Pricing Terms</u>

- Pricing reflects current Performance Matters pricing
- Pricing is valid for 90 days after bid opening.
- Performance Matters software fees are due annually on the contract or contract renewal date with invoice terms NET 30
- Performance Matters services fees are due upon completion of delivery milestones established upon contract
- Performance Matters Training Fees are due Net 30 at the beginning of the annual term.
- Unify subscription fees shall increase 5% each year.

Option 1 - Analytics

Unify Modules Service Descriptions - Student Growth and Analytics

Analyze: Gain valuable insight into student achievement with actionable data and analytics that scale to inform decisions at any level of your school system.

Module	Description	Included
Baseball Card and Scoreboard Analytics	Powerful ad hoc and comparative reporting for a wide range of measures and attributes including local, state and third party assessments.	✓
MyUnify Home Page	Educators Home Page that provides relevant information with on demand connections to assessment, intervention, and curriculum resources.	✓
Early Warning Indicators	Customized business rules that drive the identification of students at risk among a broad range of measures.	✓
FASTe Analytics	Longitudinal analysis of state test performance and teacher observation results.	Optional
FASTe Multi-Measure	Reporting to support multi-measure educator evaluations.	Optional

Act: Modules that support data driven actions including MTSS/RTI, Student Learning Objectives and Progress Monitoring Plans.

Module	Description	Included
Response to Intervention	Administration and progress monitoring tool to support academic and behavioral interventions.	Optional
Student Learning Objectives	Rationale, administration, reporting and roster verification tool for Student Learning Objectives (SLOs).	✓
Progress Monitoring Plan	Set data driven flags to identify students for intervention.	Optional

Implementation Services:

Service	Description	Included
SIS Integration	Integration of SIS scheduling information using PM record layouts.	✓
Active Directory	Integration with customer Active Directory via SAML.	✓

Training Options:

Performance Matters specializes in creating implementation plans that match district goals, learning styles, and district protocols. Our training options include the following types of services:

Option	Description	Included
Training - Onsite	Six hours of instructor-led onsite professional development for either one full-day or two half-day sessions held on the same day for up to 20 participants per session.	✓
Training - Virtual	Six hours of instructor-led virtual professional development with hands-on practice for up to 15 participants per session.	Optional
Training - Webinar	One-hour webinar presentation for up to 1000 attendees.	Optional
Training - Video	3-5 minute custom video delivered as an MP4 video stored on the platform.	Optional
Context-Sensitive Online Help	Searchable database of help articles with printable PDF QuickDocs and User Guides.	✓
Video Tutorial Library	Library of 3-5 minute video tutorials on basic product usage.	✓

The following training proposal has been developed to support the goals stated in the RFP.

Training Proposal – Option 1 Analytics

Training Resources					
Title	**Description**	**#**	**Cost**	**Value**	**Actual**
Context-Sensitive Online Help	Searchable database of help articles with printable PDF QuickDocs and User Guides	1	2,500	2,500	Waived
Video Tutorial Library	Library of 3-5 minute video tutorials on basic product usage	1	2,500	2,500	Waived
Training Classes					
Title	**Description**		**Cost**	**Value**	**Actual**
Measure Student Growth with Multi Measures (Onsite)	(2) three-hour sessions held on the same day for up to 20 participants per session	1	2,400	2,400	2,400
			TOTAL	**$ 7,400**	**$ 2,400**

Detailed Pricing Narrative – Option 2 Assessment

Year 1:

Performance Matters Service Description	Count	Unit	Unit Price	Total	Due
Unify License: Annual Fee - See Unify Modules Service Descriptions	9,300	Per student	$2.50	$23,250.00	Net 30
Implementation: One Time Fee Scan Engine Set-Up Active Directory – included in Analytics SIS Integration – Waived for 'First in State' implementation	1 1 1	Each Each Each	$3,500.00 $5,000.00 $7,500.00	$3,500.00 Included WAIVED	Net 30
Professional Development: See Detailed Training Proposal	5	Each	$2,400.00	$12,000.00	Net 30
			Total:	**$38,750.00**	

Year 2:

Performance Matters Service Description	Count	Unit	Unit Price	Total	Due
Unify Modules – See Unify Modules Service Description	9,300	Per student	$2.63	$24,459.00	Net 30
			Total	**$24,459.00**	

Year 3:

Performance Matters Service Description	Count	Unit	Unit Price	Total	Due
Unify Modules – See Unify Modules Service Description	9,300	Per student	$2.76	$25,668.00	Net 30
			Total	**$25,668.00**	

<u>Pricing Terms</u>

- Pricing reflects current Performance Matters pricing
- Pricing is valid for 90 days after bid opening.
- Performance Matters software fees are due annually on the contract or contract renewal date with invoice terms NET 30
- Performance Matters services fees are due upon completion of delivery milestones established upon contract
- Performance Matters Training Fees are due Net 30 at the beginning of the annual term.
- Unify subscription fees shall increase 5% each year.

Option 2 - Assessment

Unify Modules Service Descriptions - Student Growth and Assessment

Author: Districts create their own high-quality formative and interim assessments utilizing standard form and technology enhanced items created within the Unify platform, as well as from item banks and Performance Matters social item exchange, PM Nation.

Module	Description	Included
Collaboration	Collaborate with others inside or outside of your organization to author, review, rate, and approve assessment content.	Optional
Blueprint	Design a complete standards-based blueprint for any course or choose from the broad selection of blueprints available.	✓
Design Studio	Build innovative items and assessments; build assessments from existing item banks or choose from a broad selection of existing assessments.	✓

Administer: Deliver assessments online or via plain paper forms that are easily scored using a scanner or GradeCam camera.

Module	Description	Included
Performance Scoring	Interactive scoring of constructed student responses in media, print or text using bracketed rubrics and anchors.	✓
ScanEngine	Testing via plain paper Scan Form using any modern scanner or multi-function printing technology.	✓
OnLineAssessment (OLA)	Student online testing platform that incorporates the new Technology Enhanced Items. *Requires Performance Scoring to score constructive response questions.	✓
GradeCam	Administer classroom assessments via Unify using GradeCam's camera-based capture software.	Optional

Analyze: Gain valuable insight into student achievement with actionable data and analytics that scale to inform decisions at any level of your school system.

Module	Description	Included
Student Item Analysis	Interactive item analysis of Unify assessments to evaluate student performance and item quality.	✓
Item Statistics	Item discrimination, test validity and distractor analysis that connect to item edit and review workflow to continuously improve assessment content.	Optional

Student Growth Solutions Third Party Item Bank Services:

Service	Description	Included
INSPECT by Key Data Systems	Assessment content for Math, Reading, Science and Social Studies.	Optional
Certica (formerly NWEA)	Assessment content for Math, Reading, Science and Social Studies.	Optional

Student Growth Solutions Implementation Services:

Service	Description	Included
ScanEngine Setup	Configuration and testing of one unit each of the scanner device types to be used.	✓

Student Growth Solutions Training Options:

Performance Matters specializes in creating implementation plans that match district goals, learning styles, and district protocols. Our training options include the following types of services:

Option	Description	Included
Training - Onsite	Six hours of instructor-led onsite professional development for either one full-day or two half-day sessions held on the same day for up to 20 participants per session.	✓
Training - Virtual	Six hours of instructor-led virtual professional development with hands-on practice for up to 15 participants per session.	Optional
Training - Webinar	One-hour webinar presentation for up to 1000 attendees.	Optional
Training - Video	3-5 minute custom video delivered as an MP4 video stored on the platform.	Optional
Training - Documentation	Client-specific custom documentation.	Optional
Context-Sensitive Online Help	Searchable database of help articles with printable PDF QuickDocs and User Guides.	✓
Video Tutorial Library	Library of 3-5 minute video tutorials on basic product usage.	✓

Certification Training Options:

Onsite Certification	Description	Included
Data Analyst	Dialogues with Data Class (1 Day) for 10 participants, Certification Project and Exam.	Optional

Onsite Certification	Description	Included
Test Designer	Assessment Design and Delivery Class (1 Day) for 10 participants, Certification Project and Exam.	Optional
Item Writer	Introduction and Advanced Item Writing Classes (2 Days) for 10 participants, Certification Project and Exam.	Optional
Unify User	Dialogues with Data, Introduction to Item Writing, and Assessment Design and Delivery Classes (3 Days) for 10 participants, Certification Project and Exam.	✓
Unify Power User	Dialogues with Data, Introduction and Advanced Item Writing, and Assessment Design and Delivery Classes (4 Days) for 10 participants, Certification Project and Exam.	Optional
Unify Administrator	Dialogues with Data, Introduction and Advanced Item Writing, Assessment Design and Delivery, and Unify System Management Classes (5 Days) for 10 participants, Certification Project and Exam.	Optional

The following training proposal has been developed to support the goals stated in the RFP.

Training Proposal

Training Resources					
Title	**Description**	**#**	**Cost**	**Value**	**Actual**
Context-Sensitive Online Help	Searchable database of help articles with printable PDF QuickDocs and User Guides	1	2,500	2,500	Waived
Video Tutorial Library	Library of 3-5 minute video tutorials on basic product usage	1	2,500	2,500	Waived
Training Classes					
Title	**Description**		**Cost**	**Value**	**Actual**
Unify User Certification Class (Onsite)	(3) days of onsite instructor-led training for 1 group of 10 participants: Dialogues with Data, Introduction to Item Writing, Assessment Design and Delivery	1	7,200	7,200	7,200
Analyze Assessment Data to Impact Learning (Onsite)	(2) three-hour sessions held on the same day for up to 20 participants per session (Administrators)	1	2,400	2,400	2,400
Getting Started with Unify (Onsite)	(1) day of onsite instructor-led training for 1 group of 20 participants: Basic overview of item writing, test building, test delivery and analyzing reports (Teachers)	1	2,400	2,400	2,400
			TOTAL	**$ 17,000**	**$ 12,000**

Additional Requested Information

A detailed pricing narrative has been provided on the preceding pages for both options requested. Each option includes a breakdown of all the costs associated with the successful implementation and management of that phase of the project.

Performance Matters is committed to providing exceptional service for our clients, and we have included our standard service level agreement as instructed in Section 6. Maintenance/Support. We will gladly discuss details associated with our service levels and any concerns about non-performance as part of the contract negotiation process; due to its proprietary and confidential nature, such information is not provided in publicly available documentation. Performance Matters has all resources to deliver the project on time and has a proven track record of successful implementation and support of all contracts.

A copy of our Subscription, Services and Hosting Agreement is also included on the pages that follow.

ATTACHMENT A:

Performance Matters LLC Subscription, Services and Hosting Agreement

Performance Matters' offering is subscription based software tool, available via Performance Matters' Software-as-a-Service [SaaS]. To conform to the requirements of a SaaS service, Performance Matters Subscription, Services and Hosting Agreement reflects accepted industry terms and is included as Attachment A. This Subscription, Services and Hosting Agreement in the form attached is incorporated into and made part of this Solicitation response. References to "Customer" shall mean "District."

Performance Matters Subscription, Services and Hosting Agreement is included on the pages that follow and is also available for review at this link:

http://www2.performancematters.com/terms

ATTACHMENT A:

Performance Matters LLC Subscription, Services and Hosting Agreement

This Subscription, Services and Hosting Agreement ("Agreement") is made by and between the following parties:

Performance Matters LLC, a Utah limited liability company**,** located at: 7730 South Union Park Avenue, Suite 500 Sandy, Utah 84047 (referred to in this Agreement as "**PM**") and	**Customer, located at** Address 1 Address 2 City, State, Zip Code (referred to in this Agreement as "**Customer**")

RECITALS

A. PM is a provider of internet-based professional growth, development and assessment platforms, products, systems and hosting services for schools, district, educators and other educational institutions and customers.

B. Customer wishes to engage PM, subscribe to PM's system, and utilize PM's services and products to manage its professional development needs.

NOW THEREFORE, Customer agrees to engage PM, and PM agrees to provide the products and perform the services as provided for and subject to the terms and conditions set forth in this Agreement.

1. **SITE SUBSCRIPTION, PRODUCTS AND SERVICES**. During the Term of this Agreement, PM agrees to provide Customer and Customer-identified authorized users ("Authorized Users") a subscription that includes access to and usage of a PM-hosted, Customer-branded website on the internet (the "Site") and PM's internet-based K-12 professional growth system as described in the quote or proposal supplied by PM to Customer, and attached hereto as Exhibit A. The Site will include certain proprietary software of PM and certain content provided by Customer. PM will provide ongoing support and maintenance services for the Professional Growth System, including application software required to support the Products and enhancements when generally made available. In conjunction with the subscription, PM will also provide (a) Implementation Services, (b) Hosting Services, (c) Software and Products, and (d) Training Services, each as set forth in detail in Exhibit A.

   a. Hosting Services. Unless otherwise specified in Exhibit A or in a separate Service Level Agreement ("SLA"), and subject to routine maintenance and upgrade requirements, PM will use commercially reasonable efforts to have Hosting Services available for the Customer Site at all times. The Customer will be notified by the PM Project Team regarding scheduled system maintenance, product patch release dates and associated information. *Provided, however,* that Hosting Services for the Site do not include internet access at Customer's or any Authorized User's location; obtaining and maintaining internet access will be solely Customer's responsibility and PM shall have no liability for interruptions and outages caused by Customer's Internet Service Provider.

   b. Software and other Products. PM will provide Customer license, access to and use of proprietary software for the number of users, the term and at the cost specified in Exhibit A. As provided in Section 5 below, all Software licenses are non-exclusive and non-transferable, and shall terminate on the same date as this Agreement.

   c. Training Services. Training services, Site and Product training, videos and/or documentation ("Training Services") for Customer are detailed in Exhibit A, and will be scheduled at a time

mutually agreeable to the parties. All Training Services listed in Exhibit A must be completed within the first twelve months of the initial Term of the Agreement. Any Training Services detailed in Exhibit A, that are not used during the first twelve months of the initial Term are forfeited by the Customer. Upon execution of the Agreement, any unused Training Services previously purchased by Customer will expire. Class size for any Training Services is limited to twenty (20) attendees per session. PM may charge an extra fee for additional attendees in its sole discretion.

d. Service Change Requests. Any Customer requested updates, revisions and enhancements or other changes in cope or price for the Site that are not provided for in Exhibit A must be documented in a Service Change Request ("SCR") in the form attached as Exhibit B. Each SCR is an amendment to the Agreement, and must be executed by the parties prior PM commencing any of the work requested.

2. **CUSTOMER RESPONSIBILITIES AND OBLIGATIONS.** During the Term of the Agreement, Customer will be responsible for the following:

a. Customer Data Format for Import and Implementation. PM has provided or will provide Customer with specific formatting and content requirements for the customer data that will be imported onto PM's platform (the "Data Import Requirements"). Customer will provide PM with all employee and other Authorized User information in the format set forth in Data Import Requirements as needed to perform the Implementation Services. Customer is responsible for insuring that the customer data file to be imported meets the Data Import Requirements, and if Customer's implementation requires development and processing of custom import files that do not meet the Data Import Requirements, additional charges will apply and will be set forth in an SCR.

c. Customer will manage and protect all Authorized User registration, maintenance of passwords and accounts for end-user access, will keep all passwords secure and confidential, and will disable accounts and passwords as appropriate upon termination of any Authorized User. Customer will use commercially reasonable efforts to prevent unauthorized access to its accounts. In the event Customer becomes aware of any breach or unauthorized access to its account(s), Customer will notify PM within forty-eight (48) hours.

d. Customer be solely responsible for the accuracy and completeness of Customer Data and all activity in its account and on the Site;

e. Customer will use the Site, Products and Services only in accordance with PM's written technical guides and applicable law. Customer may allow authorized third parties to access the Product and Site in compliance with the terms of this Agreement, provided that (i) the access is for the sole benefit of Customer; and (ii) such Customer-authorized third parties are contractually bound to comply with Applicable Law and with the terms of this Agreement.

3. **EFFECTIVE DATE, TERM AND TERMINATION.** This Agreement begins on the last date of signature ("Effective Date"). The initial Agreement term is three years ("Term"). Upon expiration of the initial three year term, the agreement automatically renews on the anniversary of the Effective Date for successive one-year terms ("Renewal Term") unless Customer gives PM written notice no less than sixty (60) days before the end of the Term or current Renewal Term. The Term and each Renewal Term includes the Subscription Term identified in Exhibit A.

a. Mutual Termination for Material Breach. Except for non-payment, if either party is in material breach of this Agreement, the non-breaching party may terminate this Agreement

at the end of a written 30-day notice/cure period, if the breach has not been cured.

b. Suspension for Violations of Law. PM may temporarily suspend the Service or remove the applicable Customer Data, or both, if PM in good faith believes that Customer has violated any Applicable Law as part of using the PM System.

c. Effect of Termination. Upon termination or expiration of the Agreement:

1. PM will end Customer's Subscription, and terminate Customer's access to the Site, Services, Products, and related software.

2. Customer will immediately pay any fees due and owing prior to the termination date.

3. Upon written request of Customer, PM will make the Site and any Product available for Customer to export customer data for 60 days after termination.

d. Funding-Out Clause. Customer's payment obligation may be conditioned upon the availability of funds that are appropriated or allocated by the applicable government agency. If funds are not allocated, Customer may terminate this Agreement at the end of the period for which funds are available. Customer must notify PM in writing before such termination, and provide PM with sufficient legal documentary proof of the non-availability of the funds. If Customer terminates Agreement due to lack of funding, Customer agrees not to acquire similar services from a third party for the remainder of the Term of the Agreement.

e. Non-payment of Fees. PM may terminate this Agreement and Customer's access to the Site, Services, Products and associated software for Customer's non-payment of amounts owed.

4. FEES.

a. Fees and Payment Terms. Customer will pay all fees set forth on Exhibit A within thirty (30) days of receipt of invoice, unless other payment terms have been provided for and agreed in in Exhibit A. Payments not made when due, shall bear interest at the rate of 1.5% per month, or the highest legal rate, whichever is less, commencing as of the due date, until fully paid.

b. Taxes. If Customer provides PM with a valid tax exemption certificate authorized by the appropriate taxing authority, PM will not charge or collect sales or other taxes as the exemption certificate provides. If no exemption certificate is provided, Customer must pay any taxes, impositions, or other charges imposed or levied by any governmental authority, including any sales, use, value-added, or withholding taxes, in connection with the Invoice (except for any PM income or PM employee taxes).

5. INTELLECTUAL PROPERTY, OWNERSHIP AND LICENSES

a. License to Use Products. PM grants to Customer a limited, non-exclusive, non-transferable license to access and use of each Product for the number of users and for the term specified in Exhibit A. This license is solely for Customer's internal educational and training purposes.

b. Customer Data. Customer represents and warrants that Customer has appropriate rights to any data and content uploaded or entered into the Site or a Product by Customer ("Customer Data"). All Customer Data remains the property of Customer, as between PM and Customer. Customer grants PM the right to use the Customer Data solely for purposes of performing under this Agreement and in accordance with all applicable federal, state and local laws and regulations ("Applicable Laws"). PM will adopt, implement and maintain commercially reasonable security

measures and procedures (including, firewalls, passwords, encryption, commercially available virus protection, access and use of adequate back-up computer servers, and periodic back-up of data) on a continuing basis.

c. Restrictions. Customer may not (i) sell, resell, rent or lease the Professional Growth System, Site, Products, Software, or any other deliverable under this Agreement, (collectively, the "PM System") or use the PM System in a service provider capacity; (ii) use the PM System to store or transmit infringing, unsolicited marketing emails, libelous, or otherwise objectionable, unlawful or tortious material, or to store or transmit material in violation of third-party rights or Applicable Law; (iii) interfere with or disrupt the integrity or performance of the PM System or attempt to gain unauthorized access to the PM System or their related systems or networks; (iv) use the PM System for any use other than for internal Customer educational or professional development purposes; (v) reproduce, frame, mirror, modify, translate, enhance, decompile, disassemble, copy, download or reverse engineer the PM System, or modify, create derivative works based on the PM System or (vi) access the PM System to build a competitive service or product, or copy any feature, function or graphic for competitive purposes. Any such materials placed on the PM System inconsistent with the foregoing requirements shall be deemed to be a material breach of this Agreement and may be removed by PM.

d. Products. All audio, video and other content, curriculum, documentation, and software (including without limitation applets, animations, and application software) required to support the PM System provided by PM as part of the Subscription are licensed to Customer as follows: PM grants Customer a non-exclusive, non-transferable license during the term of the Agreement to access and use the PM System for internal educational and training purposes solely in connection with this Agreement.

e. Artistic and Content Control. Except as expressly provided otherwise under the Agreement, Customer shall have exclusive artistic and editorial control over the Site, including the Site design and integration of Customer Content. Any changes made to the artistic and editorial content of the Site following Customer's initial acceptance of the Site, will be subject to a SCR executed by the parties.

f. PM's Reservation of Rights. The content, documentation, code, software, workflow processes, user interface, website, designs, design concepts, know-how, methodologies, used in or part of the PM System under this Agreement are the sole property of PM and/or its licensors, and all right, title and interest in and to such items, including all associated intellectual property rights, remain solely with PM or its licensors. Customer may not remove or modify any proprietary marking or restrictive legends in the PM System. PM reserves all other rights not expressly granted to Customer in this Agreement.

7. MUTUAL CONFIDENTIALITY.

a. Definition of Confidential Information. Confidential Information means all non-public information including Personally Identifiable Information ("PII") as defined by applicable law, disclosed by a party ("Discloser") to the other party ("Recipient"), whether orally or in writing, that is designated as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of disclosure ("Confidential Information"). PM's Confidential Information includes without limitation the Product, its user interface design and layout, pricing information, the Services or any deliverables.

b. Protection of Confidential Information. The Recipient must use the same degree of care that it uses to protect the confidentiality of its own confidential information (but in no event less than

reasonable care) not to disclose or use any Confidential Information of the Discloser for any purpose outside the scope of this Agreement. The Recipient must make commercially reasonable efforts to limit access to Confidential Information of Discloser to those of its employees and contractors who need such access for purposes consistent with this Agreement and who have signed confidentiality agreements with Recipient no less restrictive than the confidentiality terms of this Agreement.

c. Exclusions. Confidential Information *excludes* information that: (i) is or becomes generally known to the public without breach of any obligation owed to Discloser, (ii) was known to the Recipient prior to its disclosure by the Discloser without breach of any obligation owed to the Discloser, (iii) is received from a third party without breach of any obligation owed to Discloser, or (iv) was independently developed by the Recipient without use or access to the Confidential Information. The Recipient may disclose Confidential Information to the extent required by law or court order, but will provide the non-disclosing party with advance notice to seek a protective order.

8. INDEMNIFICATION.

a. PM will defend or settle any third party claim against Customer to the extent that such claim alleges that PM technology used to provide the Site, Services or Products violates a copyright, patent, trademark or other intellectual property right, if Customer, promptly notifies PM of the claim in writing, cooperates with PM in the defense, and allows PM to solely control the defense or settlement of the claim. PM will pay infringement claim defense costs, PM-negotiated settlement amounts, and court awarded damages incurred as part of its obligations under this Agreement. If such a claim appears likely, then PM may modify the Site, Services or Products, procure the necessary rights, or replace the infringing part of the Site, Services or Products with a functional equivalent. If PM determines that none of these are reasonably available, then PM may terminate access to the Site, Services or Products and refund any prepaid and unused fees. PM has no obligation for any claim, in whole or in part, arising from information, items or technology not provided by PM or for any third party web services not owned by PM. THIS SECTION CONTAINS CUSTOMER'S EXCLUSIVE REMEDIES AND PM'S SOLE LIABILITY FOR INTELLECTUAL PROPERTY INFRINGEMENT CLAIMS.

b. To the extent permitted under applicable law, Customer will defend, indemnify and hold harmless PM from and against any third party claims, losses, damages, settlements, penalties, fines, costs, or expenses (including reasonable attorneys' fees) that arise from or relate to (i) Customer's negligence, misconduct or breach of this Agreement, (ii) any Customer Data or third party content, products, services or systems, including their integration or their required third party integration with the Service, and (III) any Customer violation of applicable law which results in third party claim against PM.

9. WARRANTY AND WARRANTY EXCLUSION.

a. Compliance Warranty. Each party will comply with, and will cause each of its employees, agents, and contractors to comply with all laws applicable to its performance under this Agreement, including without limitation the Family Educational Rights and Privacy Act ("FERPA") and the Children's Online Privacy Protection Act ("COPPA").

b. PM Service Warranty. PM warrants that commercially reasonable efforts will be made to maintain the online availability of the Site, Services or Products. CUSTOMER'S EXCLUSIVE REMEDY AND PM'S ENTIRE LIABILITY UNDER THIS WARRANTY WILL BE FOR PM TO REPAIR THE NON-CONFORMING SERVICES OR PRODUCT, OR IF PM CANNOT MAKE SUCH REPAIR WITHIN A

REASONABLE PERIOD OF TIME, THEN PM MAY TERMINATE ACCESS TO THE SITE, SERVICES OR PRODUCTS AND REFUND THE PORTION OF THE FEE ATTRIBUTABLE TO SUCH NON-CONFORMING SERVICE.

c. DISCLAIMERS. ALL LICENSED MATERIAL IS PROVIDED "AS IS" AND WITH ALL FAULTS. EXCEPT FOR THE ABOVE WARRANTIES, THE SITE, SERVICES AND PRODUCTS ARE PROVIDED ON AN "AS-IS" AND "WHEN AVAILABLE" BASIS. ALL OTHER REPRESENTATIONS AND WARRANTIES CONCERNING THE LICENSED MATERIAL, THE SITE, SERVICES OR PRODUCTS ARE HEREBY EXPRESSLY DISCLAIMED TO THE EXTENT ALLOWED BY LAW, INCLUDING ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. THERE IS NO WARRANTY THAT THE OPERATION OR CONNECTIVITY OF THE SITE, SERVICES OR PRODUCTS WILL BE UNINTERRUPTED OR ERROR-FREE, OR THAT THE SITE, SERVICES OR PRODUCTS WILL BE FREE OF ALL POSSIBLE METHODS OF UNAUTHORIZED ACCESS, ATTACK, OR INTRUSION.

10. LIMITATIONS OF LIABILITY.

a. EXCLUSION OF INDIRECT DAMAGES. PM IS NOT LIABLE FOR ANY INDIRECT, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF OR RELATED TO THIS AGREEMENT (INCLUDING, WITHOUT LIMITATION, COSTS OF DELAY; LOSS OF DATA, RECORDS OR INFORMATION; AND LOST PROFITS), EVEN IF IT KNOWS OF THE POSSIBILITY OF SUCH DAMAGE OR LOSS.

b. TOTAL LIMIT ON LIABILITY. PM'S TOTAL LIABILITY ARISING OUT OF OR RELATED TO THIS AGREEMENT (WHETHER IN CONTRACT, TORT OR OTHERWISE) DOES NOT EXCEED THE AMOUNT PAID BY CUSTOMER WITHIN THE 12-MONTH PERIOD PRIOR TO THE EVENT THAT GAVE RISE TO THE LIABILITY.

11. GENERAL.

a. Assignment. This Agreement will bind and inure to the benefit of each party's permitted successors and assigns. Neither party may assign this Agreement, in whole or in part, without the other party's prior written consent; provided however that PM may assign this Agreement to a purchaser of all or substantially all of its assets or its business provided that the assignee agrees to be bound by all of PM's duties and obligations under this Agreement. Any attempt to assign this Agreement without such consent will be null and void.

b. Severability. In the event that any provision of this Agreement is held invalid or unenforceable by a court of competent jurisdiction, that provision will be enforced to the fullest extent permitted by law, and the remaining provisions shall remain in full force and effect.

c. Force Majeure. Except for payments due under this Agreement, neither party will be responsible for any failure to perform due to causes beyond its reasonable control including acts of God, war, riot, embargoes, acts of civil or military authorities, denial of or delays in processing of export license applications, fire, floods, earthquakes, accidents, strikes, failure of the internet, or fuel crises, provided that such party gives prompt written thereof to the other party. The time for performance will be extended for a period equal to the duration of the Force Majeure, but in no event longer than sixty (60) days, at which time this Agreement will be deemed terminated by mutual consent of the parties subject to each party's post-termination obligations set forth in this Agreement.

d. Notices. All notices under this Agreement will be deemed given when delivered personally, sent by confirmed facsimile transmission, or sent by certified or registered U.S. mail, return-receipt requested, or nationally recognized express courier, to the address shown above, attention the

parties' authorized representative, or as may otherwise be specified by either party.

e. Independent Contractors. The parties to this Agreement are independent contractors. There is no relationship of partnership, joint venture, employment, franchise, or agency between the parties. Neither party will have the power to bind the other or incur obligations on the other's behalf without the other's prior written consent.

f. Waiver. No failure of either party to exercise or enforce any of its rights under this Agreement will act as a waiver of such rights.

g. Export Control. The sale, resale, or other disposition of Products and any related technology or documentation are subject to the export control laws, regulations, and orders of the United States of America and may be subject to the export and/or import control laws, regulations, and orders of other countries. Customer agrees to comply with all such laws, regulations, and orders and acknowledges that it shall not directly or indirectly export or import any Products to any country to which such export, import, or transmission is restricted or prohibited. Customer acknowledges and agrees that Customer is responsible to obtain any license to export, re-export, import, or transmit as may be required.

h. Governing Law. This Agreement will be governed by and construed in accordance with the laws of the state where Customer is located.

i. Money Damages Insufficient. Any breach by a party of this Agreement or violation of the other party's intellectual property rights could cause irreparable injury or harm to the other party. The other party may seek a court order to stop any breach or avoid any future breach.

j. RFP Terms and Conditions. If the proposal or quote in Exhibit A has been supplied to Customer in response to a Customer-issued Request for Proposal ("RFP"), any terms and requirements of such RFP that are identified as "mandatory" or similar terms, shall be deemed incorporated herein by reference, but only to the extent such terms and requirements are not inconsistent with the terms of this Agreement. If any additional documents materials have been supplied by PM in response to an RFP ("Proposal Documents"), such Proposal Documents are also deemed incorporated into this Agreement by reference. In the event there are any conflicting terms in any Customer purchase order, form, or other purchasing document, the terms of this Agreement shall control.

k. Entire Agreement: Amendment. This Agreement, the attached Exhibits, and any other documents incorporated by reference comprise the complete agreement between the parties with respect to the subject matter hereof, superseding and replacing any and all prior agreements, communications, and understandings (both written and oral) regarding such subject matter. This Agreement may only be modified by a written agreement executed by both parties.

IN WITNESS WHEREOF, the Parties have caused this Subscription, Services and Hosting Agreement to be executed as of the Effective Date.

Accepted as of the Effective Date:

Customer:	**Performance Matters LLC**
By: _____	By: _____
Name: _____	Name: _____
Title: _____	Title: _____
Date: _____	Date: _____

EXHIBIT A

FEES, IMPLEMENTATION REQUIREMENTS and PRICING

District Pricing Summary:

a. Standard system concurrency user rate is 3% of all portal users.
b. The Products are provided with "AS IS" functionality available on the Effective Date of this contract.
c. No custom work is included in the listed price.

1. **SITE IMPLEMENTATION FEES**. The Site Implementation Fees are based on the standard hours required by PM to perform the Baseline Site setup. Any additional hours needed to complete the Baseline Site setup will be addressed in a SCR to be agreed upon and executed by the parties. Implementation fees are detailed in the chart below:

Site Implementation Services	Hours	Fee
• XXX • XXX • XXX	XXX	$XXX
Total of all Site Implementation Services:		**$**xx,xxx

2. **TRAINING SERVICES.** Training must be taken within the initial term of this contract.

Training Services	Quantity	Fee
On-site Training Days		$xxx
Bundle of 3 Training Videos		$xxx
Total of all Training Services:		**$xx,xxx**

3. **SUBSCRIPTION AND HOSTING FEES**. Subscription Fees listed in the chart below are for Year 1 of the contract and include hosting services. All subscription and hosting fees will be increased by five percent (5%) annually on the anniversary of the Effective Date for the term of the Agreement.

Product	Per User Cost	Subscription Term	Subscription Fee
		Total Subscriptions	**$xxx,xxx**

4. **INVOICING**:

Milestone	Fee Due Upon Milestone Completion	Invoice Terms
		NET 30
		NET 30

Exhibit B

Form of Service Change Request ("SCR")

Performance Matters LLC ("PM") **a Utah limited liability company, located at:** **7730 South Union Park Avenue, Suite 500** **Sandy, Utah 84047**		**[Customer Name] ("Customer")** **located at:** **Address1** **City, State Zip Code**	
SCR Effective Date		**SCR Number**	
PM contact:		**Client contact:**	

Effective on the SCR Effective Date, this SCR is incorporated by this reference into the [insert name of Agreement] dated [_____, ___] ("Agreement") by and between the parties and is governed by the terms and provisions of that Agreement. Except as amended or supplemented by this SCR, the terms and conditions of the Agreement remain in full force and effect.

The Payment Remittance Address is ACCOUNTS RECEIVABLE, 8860 East Chaparral Road, Suite 100, Scottsdale, AZ 85250. All payments should be directed to at this address. Any billing questions may be sent via email to <accounting@performancematters.com>.

Description of SCR Change to Agreement:

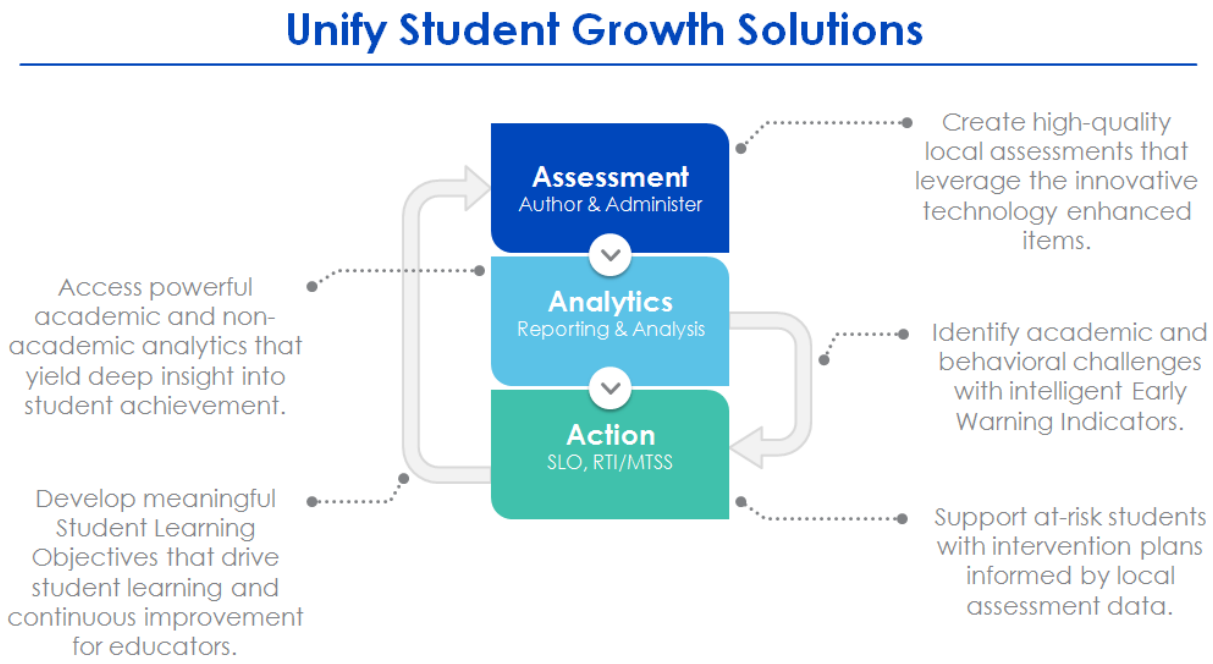
Accepted and Agreed as of SCR Effective Date.

[**Customer**]	**Performance Matters LLC**
Signed:	Signed:
Name:	Name:
Title:	Title:
Date:	Date:

2. PROJECT MINIMUMS

Describe how your product/service aligns with the project minimums. The project minimums were determined from feedback of features from stakeholders, including school and district administrators, teachers, technology and curriculum and instruction staff. Notice that the project minimums say must, should, or could. All project minimums that say "must" or "should" need to be answered. If the project minimum says could, a response may be submitted for consideration but will not be scored. All "must" and "should" responses will be scored. If the product does not meet all "must" project minimums, it will be eliminated from consideration.

Unify fully aligns with all stated project minimums and surpasses them in many areas. Additional benefits available through Unify include a revolutionary Performance Scoring application designed to simplify the teacher scoring process for performance-based tasks and items as well as a Student Learning Objective (SLO) module that can automatically calculate SLOs as part of the district's Value Added Model, which will reduce time-intensive calculations. As instructed, Performance Matters has responded with a written narrative addressing each item listed. For convenience, our responses are in blue text. Additional detailed information and screen shots are provided in the Unify Solution Narrative included as an appendix.



Unify Assessment and Analytics Component Chart

On the following page is a summary chart of the available modules within the four main services provided within Unify:
Author, Administer, Analyze, and **Act**

Service	Module	Description
Author	Collaboration	Collaborate with others inside or outside of your organization to author, review, rate and approve assessment content.
	Blueprint	Design a complete standards-based blueprint for any course or choose from the broad selection of blueprints available.
	Design Studio	Build innovative items and assessments, build assessments from existing item banks or choose from a broad selection of existing assessments.
Administer	Performance Scoring	Interactive scoring of constructed student responses in media, print or text using bracketed rubrics and anchors.
	ScanEngine	Testing via plain paper Scan Form using any modern scanner or multi-function printing technology.
	On Line Assessment (OLA)	Student online testing platform that incorporates the new Technology Enhanced Items. *Requires Performance Scoring to score constructive response questions.
	GradeCam	Administer classroom assessments via Unify using GradeCam's camera based capture software.
Analyze	Student Item Analysis	Interactive item analysis of Unify assessments to evaluate student performance and item quality.
	Baseball Card and Scoreboard Analytics	Powerful ad hoc and comparative reporting for a wide range of measures and attributes including local, state and third party assessments.
	My Unify Home Page	The Educator's Home Page that provides relevant information with on demand connections to assessment, intervention and curriculum resources.
	Early Warning Indicators	Customized business rules that drive the identification of students at risk among a broad range of measures.
	Item Statistics	Item Discrimination, test validity and distractor analysis that connects to item edit and review workflow to continuously improve assessment content.
Act	Response to Intervention	Administration and progress monitoring tool to support academic and behavioral interventions.
	Student Learning Objectives	Rationale, administration, reporting and roster verification tool for Student Learning Objectives (SLOs).
	Progress Monitoring Plan	Set data driven flags to identify students for intervention.

- The system must have the capability to upload and maintain students, courses, sections teachers and staff to the system from SIS (currently PowerSchool). This may be embedded or through a service. If through another service, this upload should be supported by the vendor. Automated update of SIS data must be in a timely fashion.

  Performance Matters has worked with countless districts that utilize PowerSchool as their SIS and is well versed in uploading and maintaining all SCPPS-specified data elements. A core file template will be provided and reviewed during implementation. This core file will be populated with all necessary information from PowerSchool and then automatically uploaded via SFTP to Performance Matters on a nightly basis. Updated information will be available the following day within the Unify platform. Performance Matters has also successfully implemented solutions with many other SIS vendors and will integrate with the SIS vendor of choice for SCPPS.

- The system must store and maintain assessment for both formative and summative assessments. Assessments include, but not limited to, state assessments (ie, LEAP 2025, EOC), national assessments (ie, ACT, CollegeBoard AP), local assessments (ie, benchmark, diagnostic, unit tests), teacher made assessments.

  Unify can store and maintain results from any local, state, national and third-party assessments.

  Data Import Integrations

  Unify Analytics includes the integration of existing data from various sources such as SIS, HRIS, LEAP 2025 and EOC Testing Data, third party assessment results, application portals and Learning Management Systems. Performance Matters provides comprehensive specifications for integration with flexibility in the integration approach to ensure it is as simple as possible for our customers. This listing shows third party data already loaded into Unify customer sites. Additional data types, such as Edgenuity assessment results, can be loaded by the Performance Matters Support Team or by advanced users following the provided file layout. Below is a list of supported measures in Unify.

Unify Measures

	Test Name	Description	Included
State	**LEAP 2025 and EOC**	PM will load as many years of state test scores from provided files/CD's. Includes state Reading, ELA, Math, Science Social Studies, Writing and any HS EOCs – examples are Biology, Geometry, Algebra I, Algebra II, US History, 9th Lit, 11th Lit.	Yes
National Standardized	**ACT**	English, Math, Reading, Science and Composite Scores	Yes
	ACT Aspire	28 different areas including Reading, Math, English, Writing, and 24 more sub-areas under each subject.	Yes
	Explore	English, Math, Reading, Science and Composite Scores	Yes
	Plan	English, Math, Reading, Science and Composite Scores	Yes
	PSAT	Verbal, Math, Writing and Composite scores	Yes
	SAT	Verbal, Math, Writing and Composite scores	Yes
	Access for ELL	Listening, Speaking, Reading, Writing, Comprehension, Oral, Literacy and Composite scores. Both the Scale Score and Proficiency Levels for each area.	Yes

	Test Name	Description	Included
3rd Party Vendor	**AICE**	Advanced International Certificate of Education all courses	Yes
	Aimsweb	Letter Naming, Letter Sound, Phoneme Segmentation and Nonsense Word	Yes
	AP	Advanced Placement all courses	Yes
	Cella	Including Oral Skills, Reading and Writing	Yes
	DIBELS **/DIBELS**	DIBELS color coded for risk level. Includes previous DIBELS scores and 8 areas for DIBELS Next	Yes
	ERB	Each administration for Overall Development, Organization, Support, Sentence Structure, Word Choice, Mechanics, Total Score, Scale Score, Suburban Stanine, Suburban PR, Independent Stanine, Independent PR	Yes
	Fountas and Pinnell	Reading Level, Accuracy, Comprehension and Fluency	Yes
	IB	International Baccalaureate - all courses	Yes
	IDEL	Spanish version of DIBELS assessments provided in the same format as DIBELS	Yes
	iReady	**Math and Reading** for all measures including both the SS and Placement for Overall, Number and Operations, Algebra and Algebraic Thinking, Measure and Data, Geometry	Yes
	ISEL	Alphabet Recognition, Story Listening, Phonemic Awareness, One-to-One, Letter Sounds, Developmental Spelling, Word Recognition, Passage Reading	Yes
	ITBS	Includes all 20 areas of testing	Yes
	Lexile/SRI	Student Lexile scores color coded for grade equivalent. Support Multiple administrations per year.	Yes
	NWEA MAP	Separate report of student performance among the academic results scored on the MAP tests	Yes
	Read 180	Scholastic Reading Inventory Lexile Scores	Yes
	Renaissance Learning (STAR)	**Early Literacy** for all measures including Grade Equivalent, Phonemic Awareness, Phonics, Structural Analysis, Vocabulary, Literacy Percentile Rank, Alphabetic Principals, Concept of Words, Visual Discrimination, Sentence and Comprehension, Paragraph Level Comprehension, Early Numeracy **Math and Reading** for all measures including Grade Placement, Scaled Score, Percentile Rank, Normal Curve Equivalent, Reading Instructional Level, Upper and Lower Zone of Proximal Development,	Yes

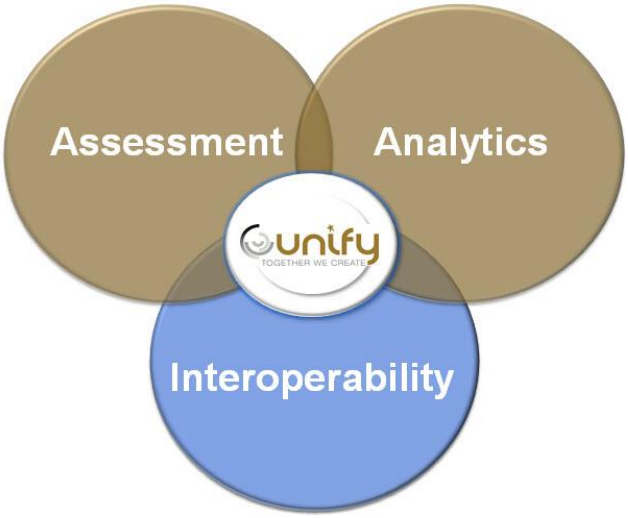
	Test Name	Description	Included
	Stanford 10	Student performance among the academic results scored on the Stanford 10 including Listening, Reading Comprehension, Word Study Skills, Word Reading, Reading First, Sentence Reading, Reading Total, Math Problem Solving, Math Total, Basic Battery, Total Battery, Environments	Yes
	TerraNova	Reading, Language Arts and Math Grade Equivalence and National Percentile Rank	Yes
Local	**Other Metrics**	Load your own assessments that aren't in the list using our data layout included with instructions.	Yes
	Grades	Grades by course by student; available in Student Detail and Baseball Card	Yes
	Attendance	Attendance events and attendance rate by student; available in Student Detail	Yes
	Discipline	Discipline events by student; available in Student Detail	Yes

QTI and LTI Integrations

In addition to data import integrations, Unify can also integrate with other Learning Tools Interoperability (LTI) compliant platforms via the Curriculum Connector. With the Curriculum Connector, users can select a learning standard within Unify, such as reporting or the homepage, and link over to other LTI compliant platforms to see available digital content and resources tied to the selected standard. If Single Sign-On (SSO) is utilized, users could be automatically authenticated into other platforms in order to see the available resources without having to leave Unify.

Our system could also be used to identify students who would benefit from specific course ware. For example, looking at local assessments and state tests scores, I can find a group of students who would be at risk for not passing algebra and put them into course ware to support their success.

To carry out Performance Matters' mission to redesign assessment as a catalyst for student success, the core competency and product road map is centered in assessment and analytics. PM subscribes to the good-to-great philosophy. While some of the features and functions that support the product road map will bleed into other functional areas, assessment and analytics will continue to be the strategic focus of Performance Matters.



To support education in a comprehensive way, there are other educational technologies that teachers and administrators need. In order to support integrated solutions, PM invests engineering resources in the IMS Global standards for interoperability. In addition, PM serves on the IMS Technical Advisory Board and on the Executive Board on Assessment in order to stay current and to provide our voice and the voice of our customers in the IMS road map. Performance Matters has engineered with QTI and LTI being foundational standards within the PM Unify platform.

Performance Matters holds the belief that like-minded partners in education technology who focus on deep and rich functionality within their product sets and who invest in these open standards will be uniquely capable of meeting future challenges.

IMS enables a plug and play architecture and ecosystem that provide a foundation on which innovative products are rapidly deployed and work together. IMS suppliers like Performance Matters are the market leaders in innovation. For those requirements that are not core to our assessment and analytics focus, Performance Matters will implement IMS standards like LTI (Learning Tools Interoperability). PM supports LTI and has successfully implemented LTI with Digital Curriculum providers.

Taking a best-of-class approach, districts can select systems that best meet the needs of all stakeholders while maintaining the integrity of the overall goals and vision of the district. This allows a state-of-the-art assessment and reporting platform that integrates with strong, innovative digital learning tools that enhance personalized learning for all students.

Assessment Results

- The system must provide web-based access for the teachers and administrators to view and disaggregate student assessment results. The software/service should generate secure logins from data in student information system.

  Unify is a fully web-based system that is accessible using any modern browser. Teachers and administrators can access results from local, state, national and third-party assessments through a variety of reports for disaggregation purposes. Secure logins are required for system access.

- The system must allow the user to scan, manually enter/edit and import assessment results.

Results for assessments administered in Unify can be scanned, manually entered/edited or entered via the online assessment system. Unify also features easy integration with GradeCam third-party scan sheet and scoring tool to capture and score scan sheets. GradeCam features automated scoring with 99.9% accuracy.

- **Secure and Controlled Testing**
  - Control release of tests, schedule date ranges, and times for availability. Control access to reporting and test booklet.
- **Online and Paper-based**
  - Deliver your assessment your way in the manner that is most effective for your classroom.
- **Machine and Human Scored Items**
  - Scoring capabilities are both efficient and manageable by the educator.
- **GradeCam Integration**
  - Use your smartphone to quickly grade assessments and upload scores directly.

Online Assessment Capabilities

- The system could include the ability for the assessment results to come from an online assessment application as either a part of the system or through a third party. If the system has online assessment capability, please describe the following:
  - test banks

    Unify includes online assessment capabilities. Performance Matters partners with numerous third-party item bank providers whose content is aligned to Louisiana Academic Standards. Additional details are provided in the Assessment Content section of the Unify Solution Narrative included in the Appendix.
  - ability to modify and add questions

    Users can copy and modify any third-party item and can also create original items aligned to multiple standards.
  - user management

    User access, role security and permissions can be controlled through embedded user management features.
  - test session creation and management

    Any type of assessment (e.g., classroom, unit or district benchmark) can be created and fully managed within Unify.

Assessment Product Components

- rubrics

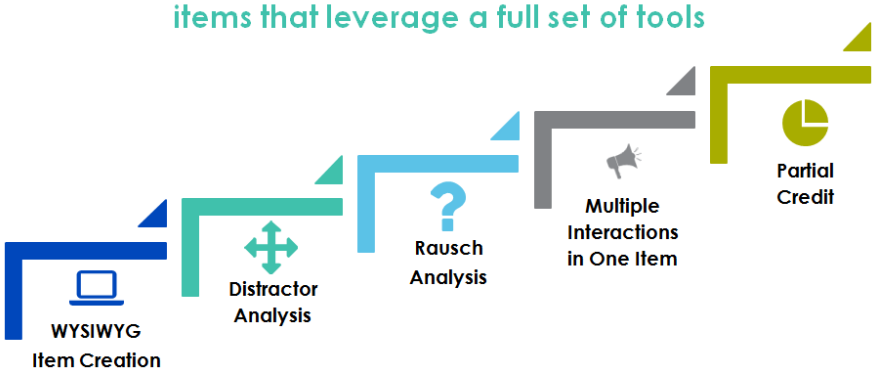
  Both holistic and analytic rubrics can be created directly within Unify and associated to test items. Additionally, many third-party items have embedded scoring rubrics.

- tracking partial mastery or partial credit

  Partial mastery or credit can be allowed and tracked for all item types.

Item Creation

Bring insights into your assessments by building items that leverage a full set of tools

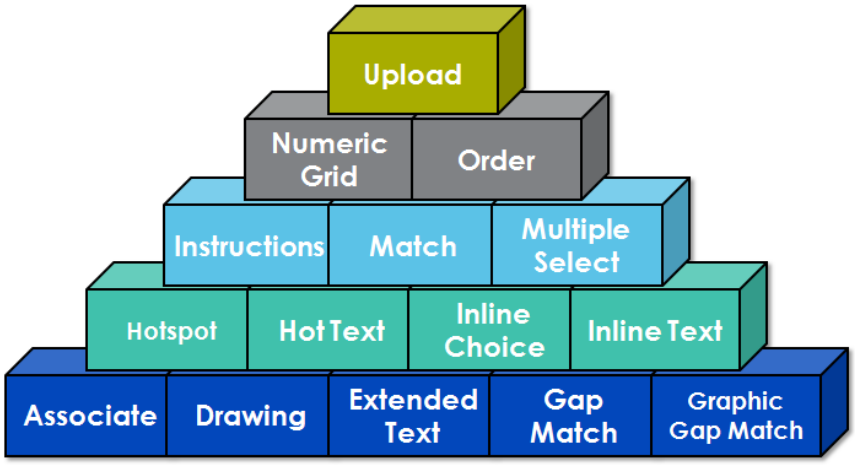


- creation of items/test banks including technology enhanced items

  Unify includes 15 item types, and most are technology enhanced items (TEIs).

Enhanced Items

Use Enhanced Items To Bring Diversity Into Classroom Assessments



- The system should be able to have multiple levels of proficiency, ie, LEAP 2025-Advanced, Master, Basic, Approaching Basic, Unsatisfactory; district assessments scale of 1-10 or 100 points.

  SCPPS can establish levels of proficiency for various assessment types within Unify. Teachers can also establish their own proficiency levels for classroom formative assessments.

- The system must be able to align assessment results to Louisiana Student Standards. Any changes to the standards due to new content adoptions by the Louisiana Department of Education, should be able to be easily updated by the district or automatically uploaded by the vendor.

  All items tied to Louisiana Student Standards can be reported within Unify. These standards will be preloaded into the system and maintained/updated by Performance Matters.

Reporting System – Unify Analytics

- The system must include a reporting system. The system should be able to print reports that are easy to read and will help guide instruction. The reports should be able to be exported. Reports should be easy to read with possible graphs and charts to guide instruction.

  Unify provides numerous reports, including Baseball Card, Scoreboard, MyReports, and MyUnify. All reports have graphing and charting capability to support ease of understanding. Reports can be exported in XLS or CSV format. Reports can also be shared via a live link or into Saved Reports on the MyUnify homepage for easy retrieval.

  Unify's On Demand Reporting tailors data to drive better decision making at every level of your district.

  - **Academic and Non-Academic Measures**
    - Incorporate state assessment results, common assessments, teacher-created, and third-party data into the platform.

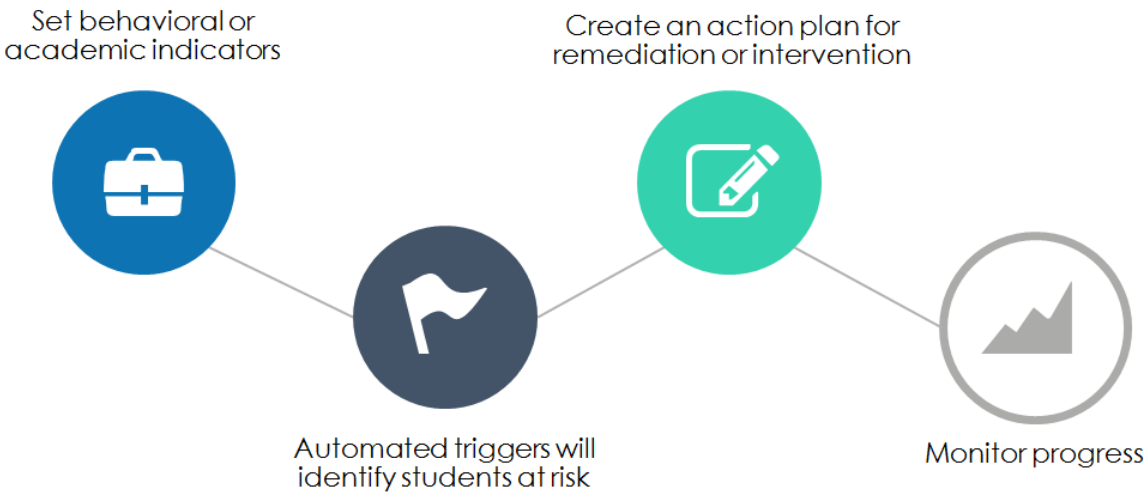
- **Focused Filters**
  - Compare measures across the student population based upon teacher, demographics, programs and more.
- **Dynamic Sharing**
  - Create your own custom reports and share links with a click. Recipients will only see the data relevant to their role.
- **Longitudinal Analysis**
  - Stack longitudinal performance data side by side to identify trends specific to grades, classes, cohorts, or individuals.
- **Vibrant and Intuitive**
  - Color-coded performance bands provide at-a-glance insight into overall student achievement.
- **Instant Access**
  - Data from student measures is ready to view the next day and all shared reports reflect all the latest results.

Analytics Components

The Early Warning System allows educators to monitor academic and behavioral achievement for a targeted student or groups. Customized for your division's early warning criteria you can easily monitor college readiness and track performance trends over time.

- Identify the early warning indicators that your division will track.
- Determine the levels that will flag students.
- Integrate goals into school improvement plans.

Early Warning System



- The system should allow all staff to filter student groups (i.e., by demographics, intervention groups, etc for reporting purpose.

  All reports have on-screen and ad hoc filtering capabilities that accommodate all of your stated requirements, plus additional categories and custom filters.

- The system should have a dashboard for quick assessment analytics.

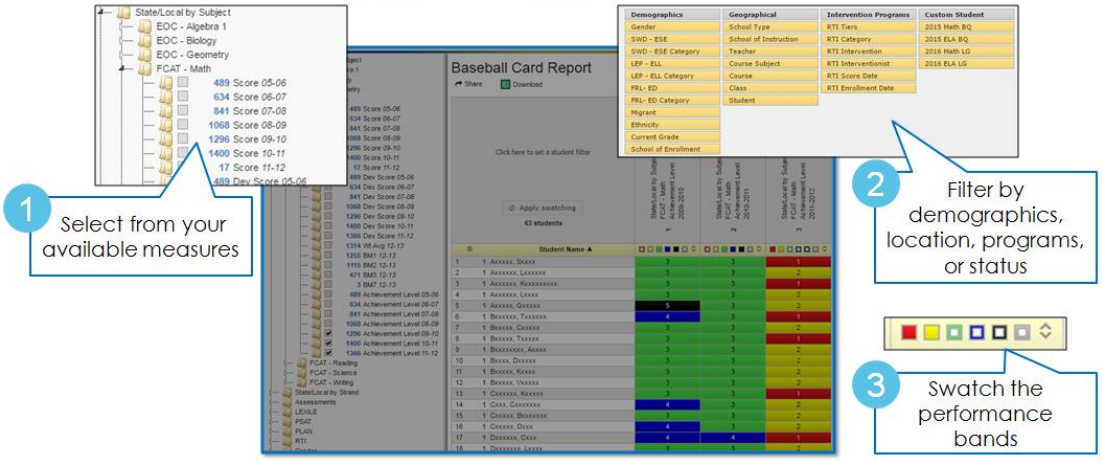
  The MyUnify teacher homepage provides a dashboard view of essential information and analytics on each student and all assessment results.

- The system must be able to disaggregate multiple assessments (state, local, etc) at a time.

  Our Baseball Card and Scoreboard reports were designed for this very purpose. All assessment types can be analyzed and disaggregated concurrently, with multiple viewing and filtering options.

Baseball Card Report

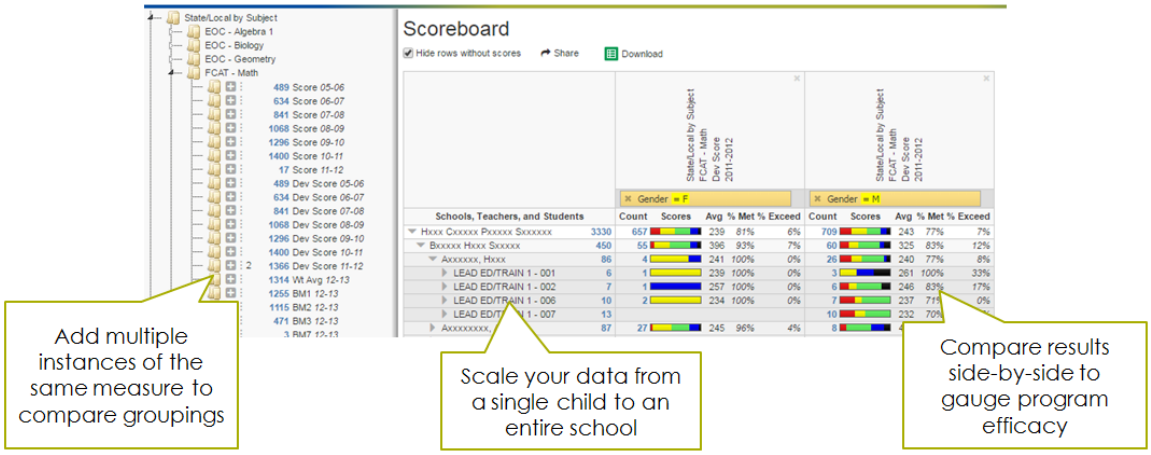
Three easy steps to harnessing powerful student analytics.



The Scoreboard Report has a similar structure as the Baseball Card report, but its primary purpose is to compare course, teacher, school, and district averages for all students as well as their demographic groups. Utilizing the same filtering capabilities found throughout Unify, users can monitor proficiency levels by school, course, teacher, student and subgroup.

Scoreboard Report

Insight into student performance that drives districtwide decisions.

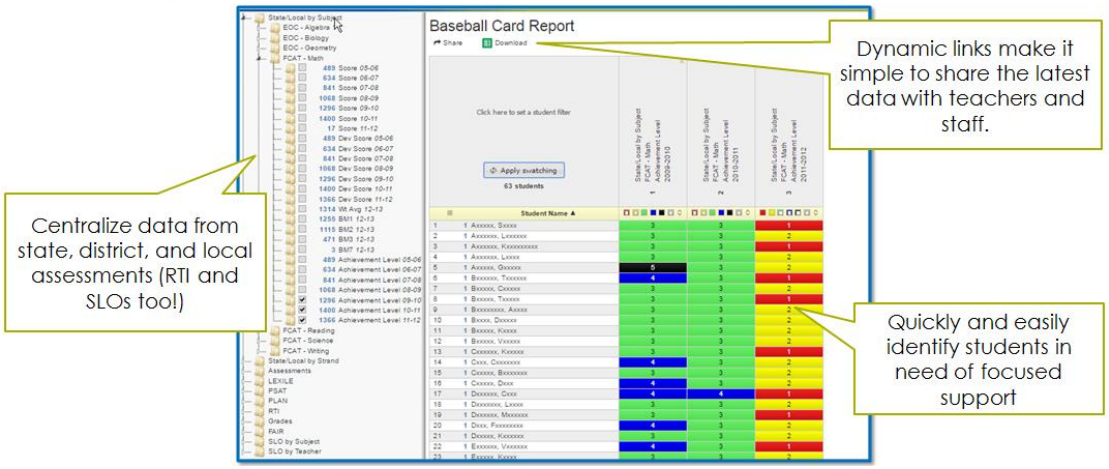


- The system should have the ability to create customized reports.

Most Unify reports offer numerous customization and ad hoc reporting options. For example, Performance Matter's build-your-own reporting tool, Baseball Card on-demand report, can utilize any data measure that is loaded into the Unify system and can group by class, teacher, ethnicity, school, gender, as well as a number of other choices or combination of choices. In conjunction with student information system data, users can query on grades and proficiencies together.

Baseball Card Report

Compare across multiple measures to surface what is working and mitigate what isn't.

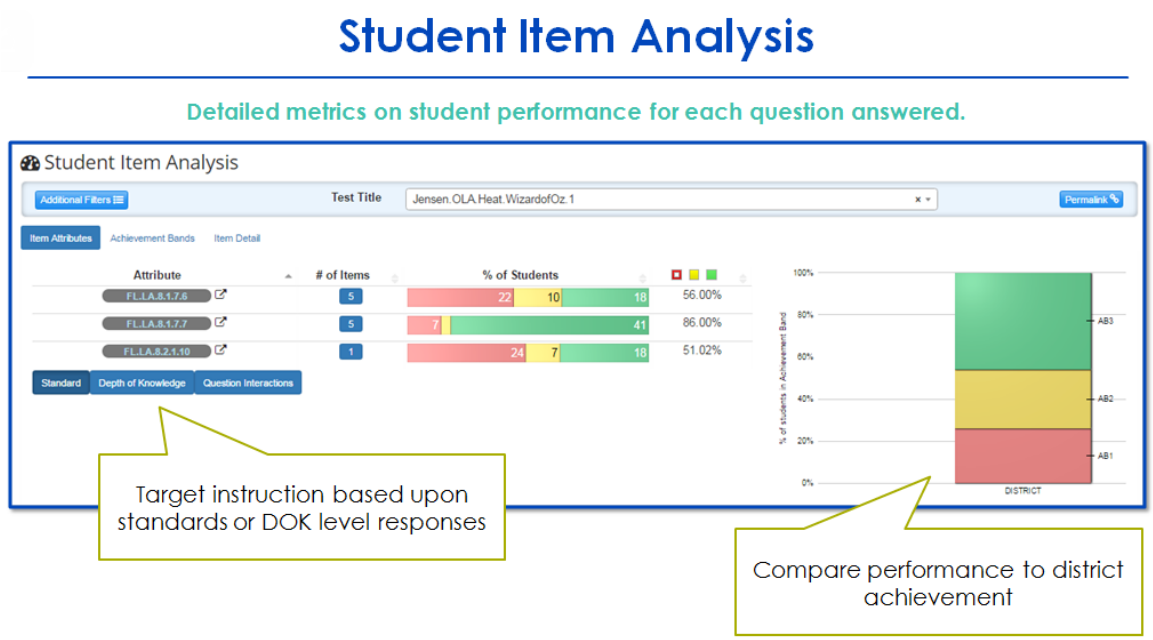


Item Analysis

- The system should have the ability to report item analysis depending on assessment entry method.

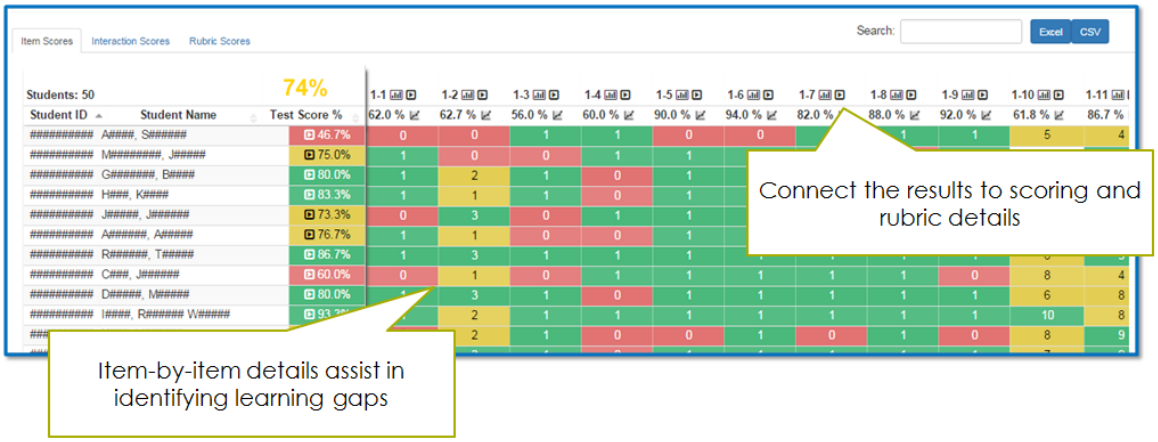
  Our Student Item Analysis provides in-depth item-level reporting for each assessment, including data on standards, Depth of Knowledge (DoK), and item interaction analysis. Student Item Analysis is used to dive into the results of any district, building level or teacher created assessment in Unify. Student Item Analysis connects test results and instructional standards to address gaps in learning.

  - **Analyze by Standard**
    - View student achievement data by content areas down to the individual standard for tests created in Unify.
  - **Compare Performance**
    - Compare district, school, and teacher level results for individual test items aligned to the standards
  - **Review Item Quality**
    - Understand the grade level, Depth of Knowledge, answer options, and weighting on each item to ensure accuracy.
  - **Preview Items**
    - Launch the item to preview the question, answers, and distractor analysis.



Student Item Analysis

Detailed metrics on student performance for each question answered.



Disaggregation of Assessment Results

- The system must be able to disaggregate the assessment results by student, class, course, school, district, grade level, Louisiana Student Standards, student demographics (ie, ethnicity, gender, LEP), assessment score/proficiency.

  All of the elements listed here can be disaggregated within all reports. Additionally, the optional SLO module can utilize assessment results that are associated with the Value Added Model utilized in the district and help with automatic calculations for even greater efficiency.

Hardware and Software

- Hardware and Software:
  - must be compatible with multiple operating systems, browsers

    Unify is entirely web based and is compatible with the current and previous two versions of all major web browsers, including Chrome, Edge/Explorer, Firefox and Safari.
  - must be able to operate on multiple devices (ie, iPads, ChromeBooks, PCs, laptops)

    Unify will work through the browsers of all mobile devices listed in this requirement.
  - could have an app for mobile devices

    Unify is a web-based platform compatible with most browsers available on mobile devices.
  - must interface with PowerSchool

    Unify will automatically import core files from PowerSchool on a nightly basis.
    - but does not change student information

      Unify does not change student information.
  - may be hosted on hardware of the school district or the vendor. If district owned hardware, please provide specs and include in the cost proposal.

    No additional hardware is required beyond web-enabled devices and existing district scanners, which would be used to scan paper bubble sheets.

- must have hardware in sufficient numbers and with capabilities to support sustainability of data for 5 years

  Only web-enabled devices and scanners are required for ongoing use of our platform.

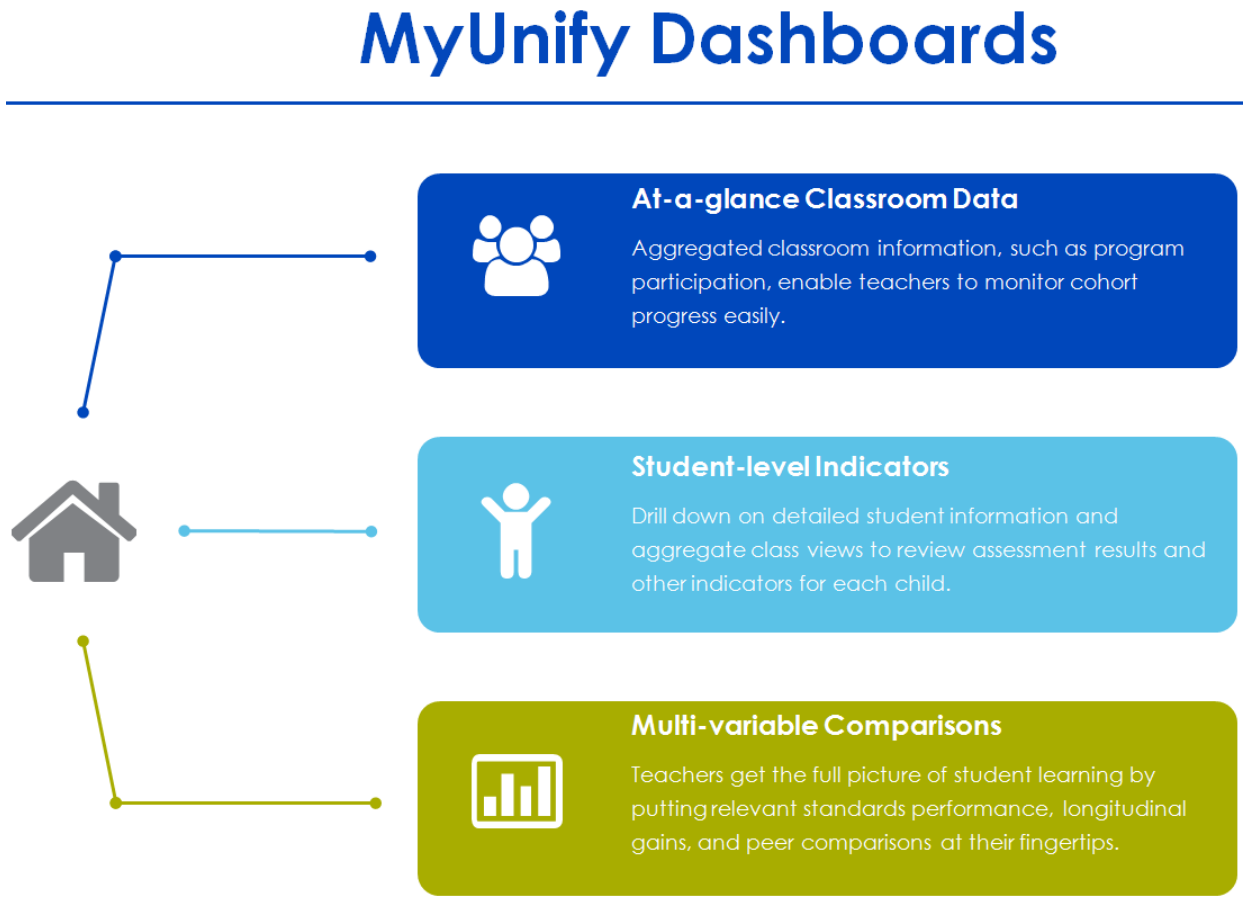
- must include all hardware needed (do not assume that the district has servers, scanners, etc.)

  No special hardware is required to use our platform. We offer several scoring options, including online scoring. We also support scanning of paper bubble sheets; if SCPPS utilizes this process in your schools, scanners would be necessary. Performance Matters can interface with nearly all scanners.

3. EASE OF USE/EFFECTIVENESS/EFFICIENCY

Describe features included in your product and services that contribute towards its ease of use, effectiveness in carrying out the tasks at hand and efficiency within an office setting. This system will be used by multiple stakeholders of varying technology skills and assessment knowledge.

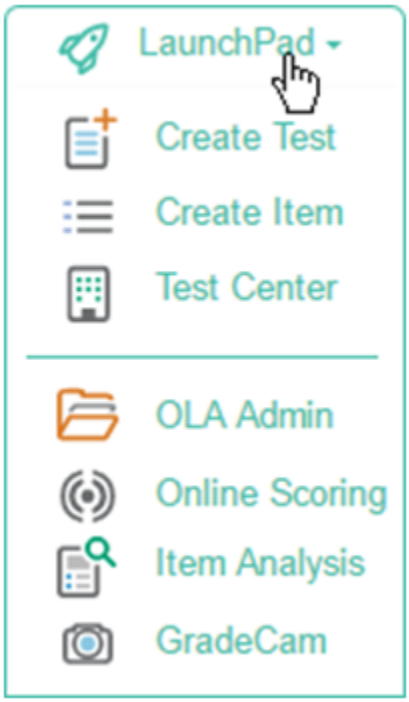
Unify provides a user-friendly platform for access to student data and reports that analyze growth and standards mastery. Features include role-based dashboards that analyze student data, summative and benchmark test scores and other critical information in a simple-to-understand, color-coded and graphical format. Teachers can easily and quickly view student growth against specific standards and competencies, as well as student growth over time for individuals and groups, all directly from their MyUnify homepage. Reporting, though highly robust, is easily implemented and utilized. Sorting and filtering options ensure that even the largest reports are very manageable. Through live link sharing, the simplest or most complex custom report can be distributed to any user in the district. The user simply clicks the link, logs into Unify, and immediately sees the report; details presented are based on assigned user and security settings. This makes the information sharing process extremely easy, as novice users do not need to go through the steps to rebuild a report. Furthermore, all areas of the platform feature context-sensitive help to ensure that whatever tasks a user needs to perform, proper steps are provided directly on the page for guidance through the process.



From MyUnify, a teacher is one click away from student details such as grades, attendance, test scores, personal monitoring plans or test creation, item analysis or any other commonly used function. Each Teacher's first glimpse is an easily navigable and maneuverable teacher portal page that provides a view of all students in their class or classes. Simply clicking on a student allows immediate access to all of their data - state test results, local assessments and other pertinent information for that student.

The MyUnify page is a very simple, yet powerfully relevant, information store for teachers. The aggregated information for a class is displayed at the top of the page with detailed student information below. By clicking on any aggregate measure choice from the demographics, the student listing is immediately limited to that selected population

The LaunchPad is only "one-click away" for teachers to any action.



Create a test from items or manual answer key

Easily create any type of item, including technology enhanced items

Print answer sheets, test booklets, release tests for online consumption or score performance assessments

OLA Admin provides viewing student online testing progress in real time, including number and percentage of correctly answered questions as the students answer.

Score Tests Online

View student results as soon as the test is complete

Score homework or weekly tests from within the classroom using a document camera or web cam

4. IMPLEMENTATION PLAN

The district desires to have this project ready for the beginning of the 17-18 school year. Describe your implementation plan in detail. The action plan, at a minimum, should include a description of the action steps, timeline(s), and the critical players required to complete each action step. Identify the critical players as employees from your firm, sub-contracted employees or from the school district. At a minimum include the following action steps:

- Procurement
- Installation
- Upload of student data from prior system exports (exports will be provided by the district). The district would like to upload 3 years of prior state and local assessment data.
- Account setups
- Professional Development

Performance Matters has a mature implementation methodology built upon traditional Project Management principles. Implementations are managed via a web-based Gantt tool that is shared with the customer stakeholders and the PM project team. Within this management tool are the shared responsibilities and critical paths associated with all aspects of the project.

Project Management

Performance Matters has deployed a software solution for districts of up to 190,000 students and has successfully implemented solutions in many school districts, including nine of the 50 largest K-12 school districts in the nation. Performance Matters has the proven ability to scale to meet the needs of all customers. The firm has the operational and financial resources to ensure a project that is on-time and on budget.

The Performance Matters platform, combined with our dedication and customer service, is the key to our success. The team assembled for this project is second-to-none. Led by former educators, the Performance Matters services group has decades of experience in education. It is important to note that Performance Matters recognizes that every district is different. Therefore, the actual project deliverables and dates will be set early in the deployment process in consultation with the district project leaders.

Project Categories

There are five main project categories:

- **Installation:** The program will be installed on Performance Matters servers located at a secure hosting facility. The installation process is performed by Performance Matters engineers.
- **Set-up:** The set-up process has both a technical and business process component. The technical set-up process ensures that automated procedures are in place and working correctly. This includes integrating Performance Matters with other software packages in the district. FTP file transfers, authentication mechanisms and other security protocol are all reviewed and adjusted, as necessary. Business processes are examined to ensure that the district will receive maximum value out of the proposed solution.
- **Data Migration:** The data migration process is a collaborative effort between the District and Performance Matters engineers. The extraction of data from the legacy system is performed by the District. Performance Matters engineers can consult on data extraction. Once the data is out of the legacy program, Performance Matters engineers map data fields to the new solution and load the data. Testing occurs throughout the data migration process to ensure that the data is timely and accurate.

- **Training:** The training process is based on a train-the-trainer model, onsite training, online training courses and documentation. Power users and the training cadre that will train the end users receive intensive training directly from the Performance Matters staff.
- **Maintenance:** Performance Matters customers are raving fans of the program. One of the main reasons is the ongoing support they receive from the firm. Ongoing training, in the form of self-paced online resources, is provided throughout the entire life of the product. More importantly, the product grows and changes to meet the needs of educators. Performance Matters has assembled a team loaded with the right mix of experience and ability to deliver a successful project to meet your requirements.

Performance Matters outlines an implementation plan that is designed to support the district's goals and objectives in the timeliest manner possible. PM works diligently to adhere to the plan as outlined, and strongly recommends a 90-day implementation for all Unify modules to give the necessary time to test the site at every level, with the goal of ensuring the best user experience possible. However, several districts have deployed district wide testing in less than 45 days.

Below is a 90-day implementation plan overview.

90-Day Implementation Plan Overview	**W 1**	**W 2**	**W 3**	**W 4**	**W 5**	**W 6**	**W 7**	**W 8**	**W 9**	**W 10**	**W 11**	**W 12**	**W 13**
PHASE I – Weeks 1-5													
Kickoff/Project Setup													
Phase I Due Diligence													
Data Setup													
PHASE II – Weeks 6-7													
Data Quality Assurance													
Phase II Due Diligence													
Initial Site Build													

90-Day Implementation Plan Overview	**W 1**	**W 2**	**W 3**	**W 4**	**W 5**	**W 6**	**W 7**	**W 8**	**W 9**	**W 10**	**W 11**	**W 12**	**W 13**
PHASE III – Weeks 11-13													
Professional Development													
Final Customization/ Setup													

Phase I Milestones and Deliverables (approximately 35 calendar days)

- **Kickoff/Project Setup – Establish expectations and foundation for successful project**
  - Establish Timeline and Deliverables
  - Project Kickoff Meeting
  - Stakeholders, Roles and Responsibilities Defined
- **Phase I Due Diligence – Review site with Customer**
  - PM Site Review – Data Source Checklist Complete
  - SIS Requirements to Customer
  - State Test Data Requirements to Customer
  - National/Local/Other Test Data Requirements to Customer
  - Other/Custom Data Requirements to Customer
- **Data Setup – Setup and automate the transmission of identified data files**
  - Data files delivered to PM by Customer
  - FTP Setup and Tested
  - Automated Nightly (or periodic) FTP with files included

Phase II Milestones and Deliverables (approximately 35 calendar days)

- **Data QA – Iterative process between PM and Customer**
  - PM identifies anomalies and works with Customer on resolution
  - Clean data ready for initial load.
- **Phase II Due Diligence – Review site with Customer**
- **Initial Site Build – Build and customize Customer site**
  - Load SIS core data
  - Load State Test data
  - Load Local, National, other data
  - Load configuration data
  - PM signoff on Customer site

Phase III Milestones and Deliverables (approximately 20 calendar days)

- **Professional Development**
  - CRM orientation with Customer
  - Professional Development materials prepared
  - On-site Professional Development with Customer
- **Final Customization/Setup**
  - CRM orientation with Customer
  - Nightly (or periodic) builds occurring

Implementation Planning Meeting

Performance Matters' implementations have been vetted over the course of 13 years. PM takes great pride in our ability to deliver an enterprise production application within 90 days. Typically, PM is able to be production ready well within that time frame.

During our implementation planning, a detailed implementation plan will be vetted and formalized. The Implementation Project Manager will use an outlined critical path as well as other supporting documents to ensure on-track progress and that all stakeholders are aware of their shared responsibilities.

The Director of Customer Implementations and your designated Customer Relationship Manager will collaborate with your key staff for this meeting. In order to respect the schedules of your staff, we will provide an agenda of the topics to be covered prior to the meeting. Suggested District attendees include the assigned Project Manager, representatives from Assessment, Curriculum, Professional Development, and IT.

During the meeting, we will discuss:

- Roles of both the Performance Matters and District Implementation Teams
- The overall project plan
  - A sample plan has been provided
  - Dates will be updated with this specific implementation
- The district Assessment plan
  - Method of Administration
  - Timeline of Assessments
- Professional Development model used in your district and your desired method of rollout
- Data discovery – which measures do you want loaded into Performance Matters
- Technical pieces of the Implementation to include
  - Data Layouts
  - Setting up a secured ftp
  - Method of transferring data
- Setting up weekly status calls

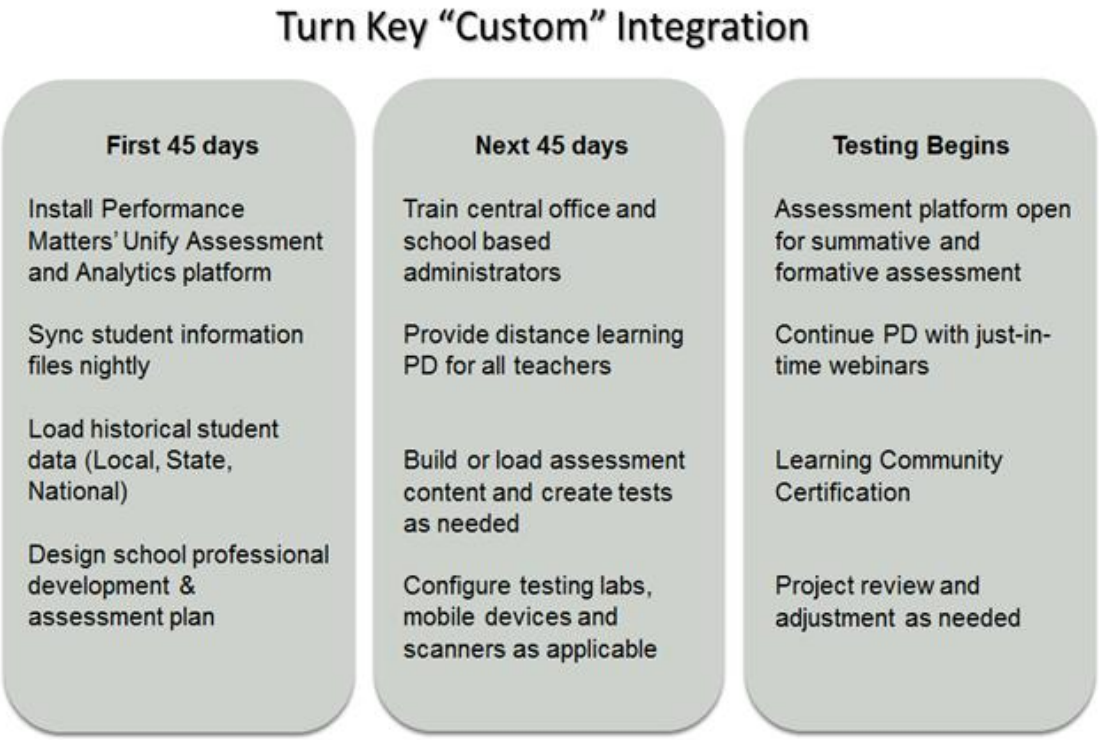
Weekly Status Calls

A weekly status call will take place via conference call. The purpose of this call is to have all teams (data, professional services, assessment) report as to the status of the implementation. Throughout the implementation, each team may be communicating about their individual parts of the project separately. The Weekly Status call will allow everyone to remain updated on all aspects of the

implementation. The project timeline is also reviewed to ensure that we are on track to meet key milestones.

Turn Key "Custom" Integration

A sample project timetable is shown below. The number of implementation days may be reduced based on the district staff's availability to supply Performance Matters with the necessary files in Unify's layout specifications. Performance Matters has successfully implemented districts in shorter timeframes with appropriate district resources. The implementation timetable is dependent upon district resources.



A sample detailed implementation plan is shown below as an example for each option requested in the RPF. The actual project deliverables and dates will be set early in the deployment process in consultation with the district project leaders.

Sample Implementation Plan for Option 1 - Analytics

Task Name	Duration	PM Owner	Customer Owner	Start Date	End Date
Unify Technical Project Plan	57d			06/01/17	08/20/17
Internal Planning	1d			06/01/17	06/01/17
Contract executed	1d	PM Sales	n/a	06/01/17	06/01/17
Implementation Meeting	1d			06/05/17	06/05/17
On Site Implementation Meeting	1d	PM Implementation Team	Implementation Team	06/05/17	06/05/17
PM Production Reporting Site Milestones	27d			06/10/17	07/17/17
PM Initialization	2d	PM Support - L3	n/a	06/10/17	06/12/17
Initialize customer database	2d	PM Support - L3	n/a	06/10/17	06/12/17
PM Data Integration	27d			06/10/17	07/17/17
Core files	5d			06/10/17	06/15/17
Core file data preparation and file loads	5d	n/a	IT	06/10/17	06/15/17
User Access/Security	5d			06/15/17	06/21/17
Single Sign On	5d			06/15/17	06/21/17
SSO installation	5d	PM Support - L3	IT	06/15/17	06/21/17
State Test Scores	5d			06/15/17	06/21/17
State test score data preparation and file loading	5d	n/a	IT	06/15/17	06/21/17
Supplemental Data and Assessments	19d			06/21/17	07/17/17
Preparation and loading of other data measures	15d	PM Proj Mgmt - PH	IT	06/21/17	07/11/17
Early Warning System	5d	PM Support - L1	Curriculum	07/11/17	07/17/17
PM Professional Development Milestones	55d			06/05/17	08/20/17
Professional Services Flyer provided to customer	1d	PM Prof Serv	n/a	06/05/17	06/05/17
Professional Services Planning with Customer	1d	PM Prof Serv	C & A	06/05/17	06/05/17
Administrative	47d			06/15/17	08/20/17
Site administration Training	1d	PM CRM	Project Manager	08/10/17	08/10/17
Zendesk Training	1d	PM Support - L1	Project Manager	06/15/17	06/15/17
Handoff from Implementation Team to Production Team	1d	PM Proj Mgmt - PH	Project Manager	08/20/17	08/20/17

Sample Implementation Plan for Option 2 - Assessment

Task Name	Duration	PM Owner	Customer Owner	Start Date	End Date
Unify Technical Project Plan	57d			06/01/17	08/20/17
Internal Planning	1d			06/01/17	06/01/17
Contract executed	1d	PM Sales	n/a	06/01/17	06/01/17
Implementation Meeting	1d			06/05/17	06/05/17
On Site Implementation Meeting	1d	PM Implementation Team	Implementation Team	06/05/17	06/05/17
PM Production Reporting Site Milestones	23d			06/10/17	07/11/17
PM Initialization	2d	PM Support - L3	n/a	06/10/17	06/12/17
Initialize customer database	2d	PM Support - L3	n/a	06/10/17	06/12/17
PM Data Integration	23d			06/10/17	07/11/17
Core files	5d			06/10/17	06/15/17
Core file data preparation and file loads	5d	n/a	IT	06/10/17	06/15/17
User Access/Security	5d			06/15/17	06/21/17
Single Sign On	5d			06/15/17	06/21/17
SSO installation	5d	PM Support - L3	IT	06/15/17	06/21/17
State Test Scores	5d			06/15/17	06/21/17
State test score data preparation and file loading	5d	n/a	IT	06/15/17	06/21/17
Supplemental Data and Assessments	15d			06/21/17	07/11/17
Preparation and loading of other data measures	15d	PM Proj Mgmt - PH	IT	06/21/17	07/11/17
Assessment Milestones	53d			06/05/17	08/16/17
Development Local Assessment Plan	10d	PM CRM	Assessment	06/06/17	06/19/17
Assessment Administration Prep	53d			06/05/17	08/16/17
Load 3rd party item/test bank	5d	PM Support - L1	n/a	06/05/17	06/09/17
Scan Engine	13d			06/05/17	06/21/17
Confirm supported device inventory	1d	PM Proj Mgmt - PH	IT	06/05/17	06/05/17
Configure Scanners	5d	PM Support - L2	IT	06/15/17	06/21/17
On Line Assessment	53d			06/05/17	08/16/17
OLA Setup	45d			06/05/17	08/05/17
Provide documentation for Online Testing	3d	PM Proj Mgmt - PH	n/a	06/05/17	06/07/17
Student Login File Provided and Loaded	5d	PM Proj Mgmt - PH	IT	06/21/17	06/27/17
Sample Test provided that reflect testing parameters	1d	PM Proj Mgmt - PH	n/a	08/01/17	08/01/17
Ensure all tests have correct OLA settings	1d	PM RSA	Assessment	08/05/17	08/05/17
Lab Certification	9d			08/05/17	08/16/17
Lab/Computer Certification	5d	PM Proj Mgmt - PH	n/a	08/05/17	08/10/17

Documented and tested					
Early Warning System	5d	PM Support - L1	Curriculum	08/10/17	08/16/17
PM Professional Development Milestones	55d			06/05/17	08/20/17
Professional Services Flyer provided to customer	1d	PM Prof Serv	n/a	06/05/17	06/05/17
Professional Services Planning with Customer	1d	PM Prof Serv	C & A	06/05/17	06/05/17
Administrative	47d			06/15/17	08/20/17
Site administration Training	1d	PM CRM	Project Manager	08/10/17	08/10/17
Zendesk Training	1d	PM Support - L1	Project Manager	06/15/17	06/15/17
Handoff from Implementation Team to Production Team	1d	PM Proj Mgmt - PH	Project Manager	08/20/17	08/20/17

Data Integration with Performance Matters

To load assessment results at the student/ test level, the data points below are required. Additionally, answer key information is needed to define the tests before loading the results.

Results:

- Student ID (SIS ID)
- Test Identifier (Unique identifier for each test)
- Student Score (0 to 100, decimal values are acceptable)

Answer Keys:

- Test Name
- Test Identifier
- Test Subject (i.e. Math, Reading, etc.)
- Mastery Cut Value
- Threshold Cut Value
- Grade Level (Optional)

Overview of Data Integration with Performance Matters

In order to start using the Performance Matters Service, a data integration workflow between the District and Performance Matters must be established.

The workflow can be described as follows:

1. The district prepares delimited text files in accordance with Performance Matters' data layout specifications.
2. The text files are compressed and put into a 7-Zip archive.
3. The 7-Zip archive is sent to Performance Matters hosting facility via SFTP
4. The flat files included in the 7-Zip archive are extracted and processed by Performance Matters.

Performance Matters Flat File Layout Specifications – General Requirements

The District must provide its data to Performance Matters via delimited text files. The text files must be provided by the District in accordance with the data layout specifications as provided by Performance Matters. In addition to the individual file data layout specification, there are general requirements that are to be followed for all files. These general requirements are as follows:

1. Files must have .txt or .csv extension.
2. Files must have tab (preferred) or comma delimited columns.
3. Data elements should NOT be padded with spaces (IE. fixed width)
4. Column headers are not required, but are recommended.
5. If using a text qualifier in your files, please use a double quote ("). Text qualifiers are not required.
6. Carriage Return and Line Feed should be used as the record delimiter. If data cannot be provided in this format, please contact Performance Matters.
7. Performance Matters supports automated processing of new data files. However, in order to support automated processing, the following must be true for each file type (if any of these rules are violated, we will need to reset the file type mapping to re-initiate automated processing):

a. Filename must NOT change (file names ARE case sensitive).
b. The column order of the file must NOT change.
c. The record delimiter in the file must NOT change.
d. If sending column headers, each subsequent transmission of that file type must include column headers. Likewise, if the original file does not use column headers, each subsequent transmission of that file type must not include column headers

Pushing Data to Performance Matters

Data files are 'pushed' to Performance Matters by the District via SFTP. However, before the files are sent, they must be put into a 7-Zip archive, and password protected. 7-Zip is an open source file archiver with a high compression ratio. Information about 7-Zip can be found at: http://www.7-zip.org/.

In addition to the 7-Zip archive (has .7z extension), the District will need to provide a blank file with same name as the .7z file, but with a different file extension. This file extension is .done.

The following example illustrates the 'push' process to Performance Matters.

Nightly, the District creates the following flat files to be sent to Performance Matters:

Student.txt
Course.txt
Teacher.txt
School.txt
Schedule.txt
Principal.txt
Assessment.txt

Upon completion of the flat file extract process (flat files above are created), a subsequent process is executed to put the .txt files into a 7-Zip archive and that .7z file is set to be password protected (Performance Matters will communicate to the District the password to be used). The end result is that a file called `district_pm_data.7z` is created that contains the .txt files. The final step in the process is for the District to SFTP `district_pm_data.7z' to Performance Matters with another file called `district_pm_data.done`.

Performance Matters has scripts available to create the 7-Zip archive and SFTP the files to Performance Matters if the District would like to review /modify them for their needs.

5. PROFESSIONAL DEVELOPMENT

Describe your professional development plan for training district employees on all the various aspects of the system. Include PD models for technical systems, classroom/school users, district administrators, etc. Describe all available PD i.e., face-to-face, follow-up, video-archives, web based, research-based practices for assessment, etc.

Performance Matters has included all the requested information about professional development in the section below.

Training Methodology

Performance Matters offers a multi-modal approach to professional development that meets the needs of your school district. We specialize in creating implementation plans that match district goals, learning styles, and district protocols. Our training options include the following types of services and specific professional services will be determined based on consultation with the district.

We off an array of options including:

- **Super User Training:** Select group of administrative personnel with advanced rights and control in the platform to lead the solution's implementation and ongoing use throughout the district
- **Train-the-Trainer Program:** Designated trainers receive training on the product and strategies for teaching others about its use
- **Instructor-led Training:** Onsite professional development and coaching services as well as instructor-led virtual training conducted via webinars
- **Video Tutorials:** General 3-5 minute tutorials targeting a specific task are available free of charge or customized versions can be created for an additional cost
- **Documentation:** Detailed product documentation is embedded in the product free of charge for self-directed learning anytime or customized versions can be created for an additional cost

Training Courses

Onsite training is a hands-on workshop where participants immediately apply each concept through practice exercises on the computer to increase proficiency levels. Six-hour classes are designed to be delivered to a maximum of 20 participants per session during one full-day of training. In the event a half-day session is recommended or requested we require that two half-day sessions for two different groups of 20 participants each are scheduled on the same day. If only one half-day session is requested we suggest doing the training virtually to avoid being charged for a full-day of training.

Virtual training is conducted using a webinar format where participants can log in from their own computer and follow along doing practice exercises during the session. In some instances school districts also gather all the participants in one room for the webinar and use a single log in. We encourage splitting the sessions up to help learners maintain their focus and give them ample practice time between sessions but we will accommodate your learning preferences.

Super User and Train-the-Trainer programs are typically conducted as onsite instructor-led trainings but we also offer the virtual option. Training classes for school-based administrators and teachers can also be delivered onsite or virtually. The virtual option assists school districts with potential substitute shortages.

Unify Introductory Courses	Training Duration
Getting Started with Unify	(1) onsite day or (2) three-hour webinars
Dialogues with Data	(1) onsite day or (2) three-hour webinars
Introduction to Item Writing	(1) onsite day or (2) three-hour webinars
Assessment Design and Delivery	(1) onsite day or (2) three-hour webinars
Unify Advanced Courses	**Training Duration**
Advanced Item Writing	(1) onsite day or (2) three-hour webinars
Unify System Management	(1) onsite day or (2) three-hour webinars
Improve Test Results Using Item Statistics	(1) onsite day or (2) three-hour webinars
Writing High-Quality Assessment Items	(1) onsite day or (2) three-hour webinars
Unify Module Courses	**Training Duration**
Use PM Nation to Create Items and Tests	(1) one-hour webinar
Use SLO/SGO to Measure Growth	(1) onsite day or (2) three-hour webinars
Enter SLO/SGO Goals	(1) one-hour webinar
Use RTI/MTSS to Track Student Interventions	(1) onsite day or (2) three-hour webinars
Enter RTI/MTSS Student Progress Data	(1) one-hour webinar
Manage Student Progress Monitoring Plans	(1) onsite day or (2) three-hour webinars
Identify PMP Students	(1) one-hour webinar

Unify Certification

The certification process is an excellent way to assure transfer of knowledge in a job context. Certification participants are required to submit a project that demonstrates learning and successfully pass a certification exam. These extra steps are an excellent way to support the train-the-trainer method by adequately preparing trainers to train end users and assure the maximization of your training investment. There are six certification programs and each certified user receives a certificate and badge specific to the program they complete.

Data Analyst: Analyze data using Unify reports and Baseball Card

Test Designer: Create balanced assessments from a variety of item sources

Item Writer: Develop quality items using item interaction templates

Unify User: Construct items for use on assessments and analyze the results

Unify Power User: Use technology enhanced item types on assessments and analyze results

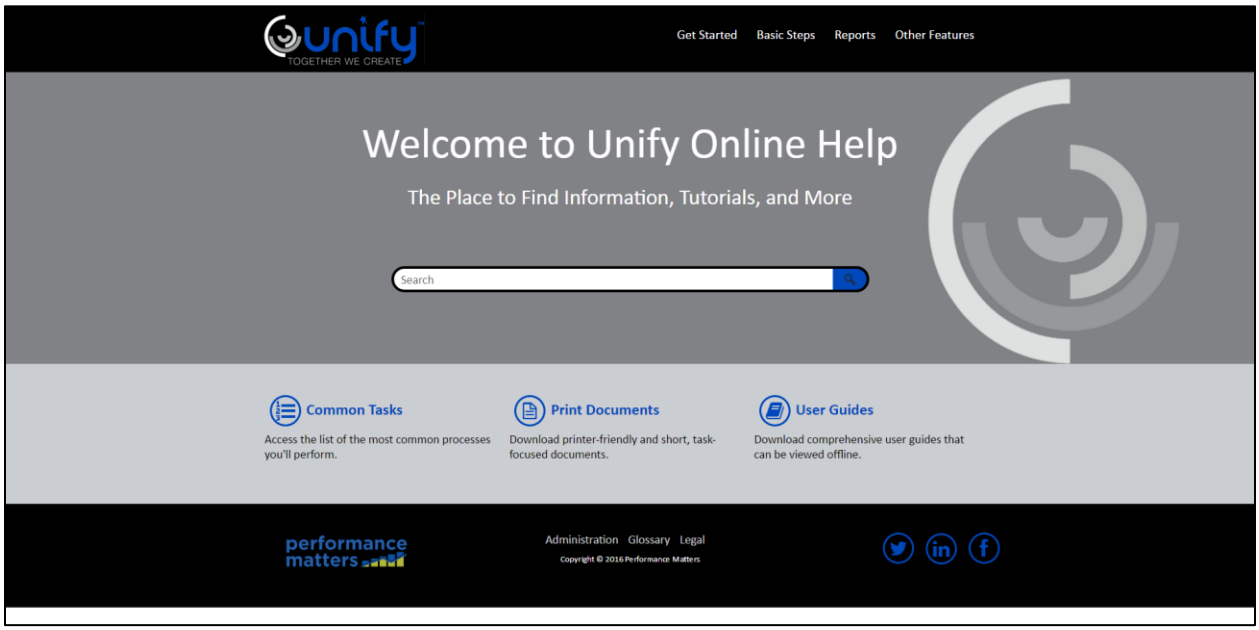
Unify Administrator: Manage the Unify system for your organization

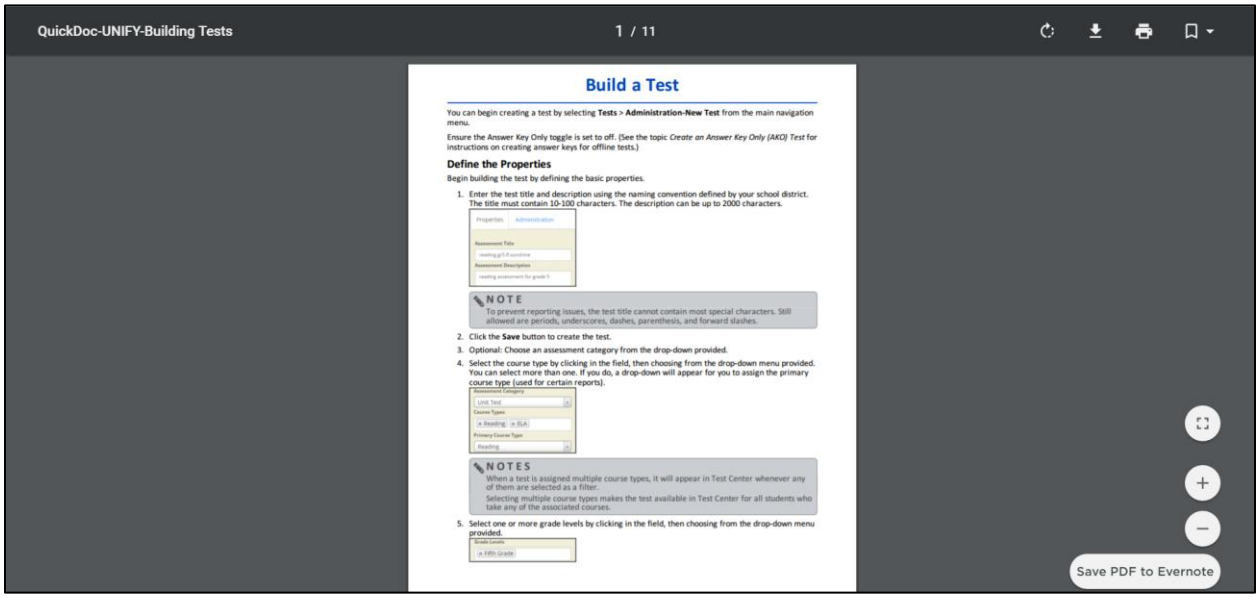
The certification classes align with specific training courses but add the additional rigor of a project and exam. This table outlines the alignment between the classes and certification program.

<table>
<tr><td>Training Courses
(1 Day)</td><td>Dialogues with Data</td><td>Assessment Design and Delivery</td><td>Introduction to Item Writing</td><td>Advanced Item Writing</td><td>Unify System Management</td></tr>
<tr><td rowspan="4">Certification Programs
(1 - 5 Days)</td><td>Data Analyst Certification</td><td>Test Designer Certification</td><td colspan="2">Item Writer Certification</td><td rowspan="3"></td></tr>
<tr><td colspan="3">Unify User Certification</td><td></td></tr>
<tr><td colspan="4">Unify Power User Certification</td></tr>
<tr><td colspan="5">Unify Administrator Certification</td></tr>
</table>

Documentation Online Help

Performance Matters provides rich, context-sensitive Online Help within our platform. The articles are updated with each product release so all information remains current. At the bottom of many articles are links to PDF versions of the documents. Since printed materials can become outdated, Performance Matters encourages the use of Online Help so the latest version of documentation is always referenced, but many trainers find the printed resources helpful for creating training exercises.





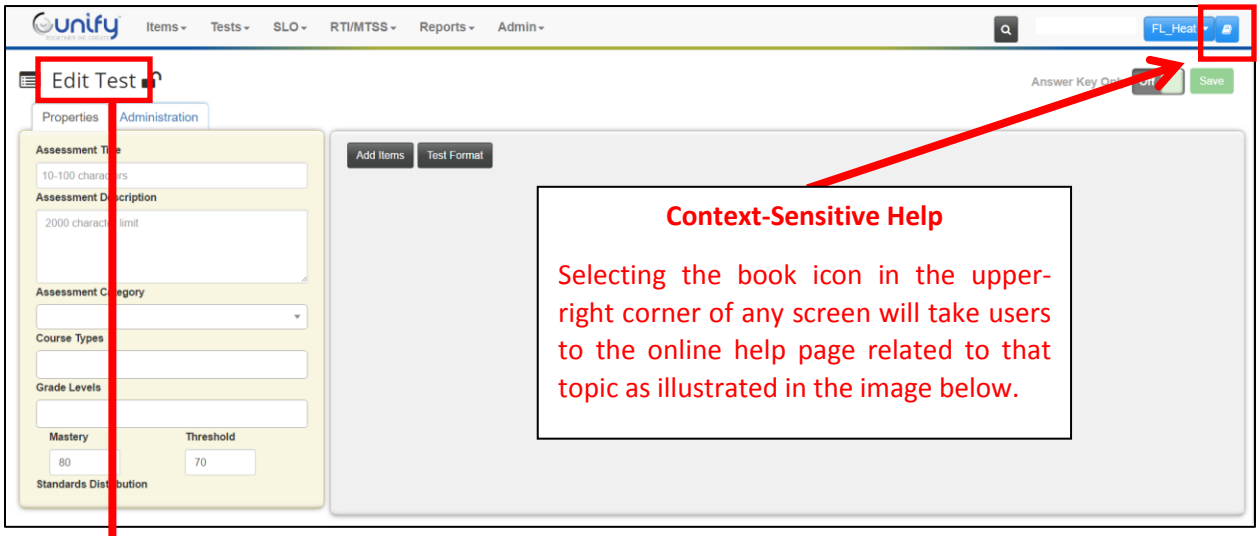
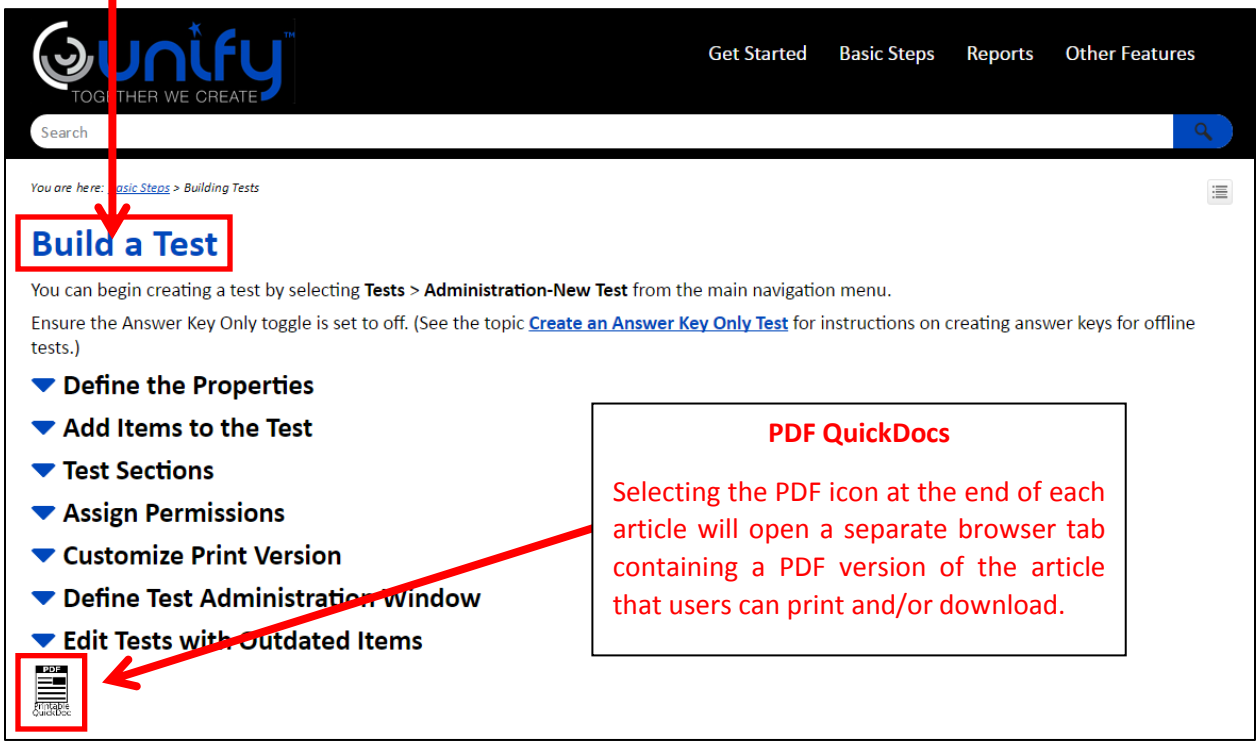
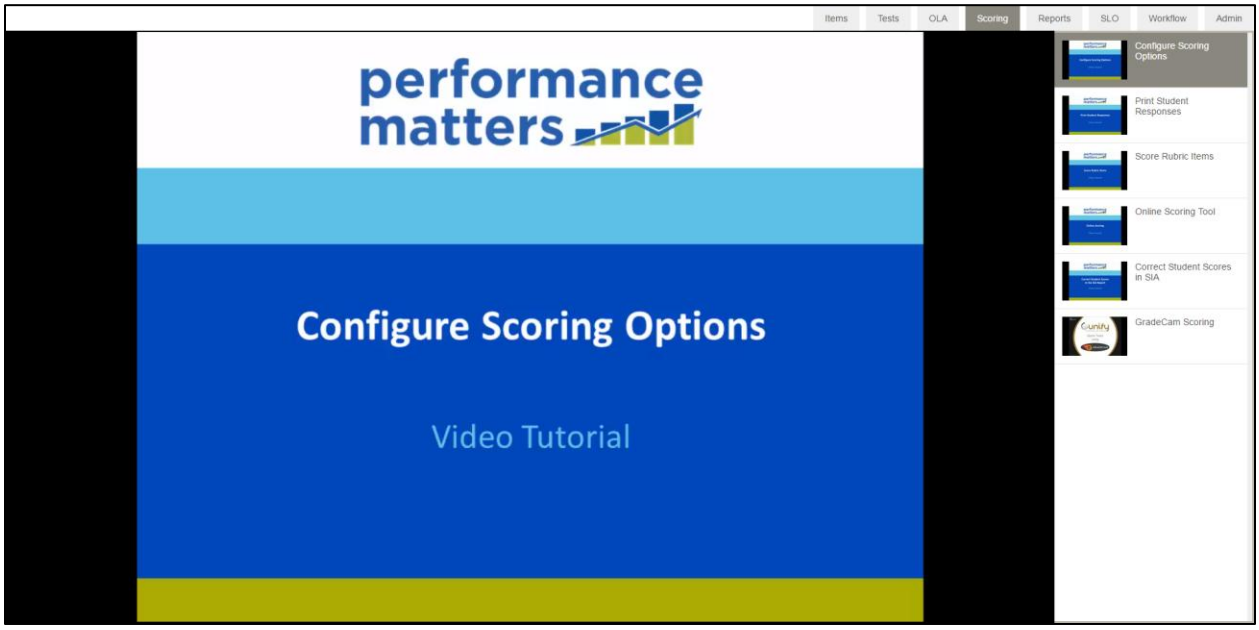


Figure 4: Unify Test Editor



Video Tutorial Library

Performance Matters provides free access to the video library for the convenience of all users. Short 3-5 minute video tutorials are organized into playlists and are available for all products. The library also contains webinars that are 30 or 60 minutes in length and provide more in-depth product training.



Student Growth Training Plans

Unify is a powerful platform to manage assessments and data analytics. A long-term, phased-in approach to rolling out Unify district-wide is highly recommended to achieve optimum results. Careful consideration of your school district's primary goals for using Unify is essential for determining a training plan that will successfully support your implementation.

This table outlines the assessment and analytics levels listed in order from least to most complex. For example, if you are using third party tests that are already created in Unify (Level 1: Third Party Tests) it is far quicker to start assessing students than if you are planning on training all teachers how to write items and construct tests for classroom formative assessments (Level 4: Classroom Tests).

Assessment Administer tests using a common platform	**Analytics** Analyze data to inform decisions
Level 1: Third Party Tests	Level 1: Baseball Card Data Warehouse
Level 2: District Tests (Third Party Item Banks)	Level 2: Student Item Analysis
Level 3: District Tests (District Item Banks)	Level 3: Item Statistics Analysis
Level 4: Classroom Tests (Teacher Item Banks)	

If Assessment is the primary goal, the following training path is recommended.

If Analytics is the primary goal, the following training path is recommended.

A training proposal has been developed for your school district to support the goals stated in the RFP. Details are provided within the narrative requested in Section 1. Cost.

6. MAINTENANCE/SUPPORT

Security/Backup/Business Recovery

- If hosting data, describe the protection that you have in place to ensure that the hosted data is secured and only updated by those individuals who have the rights to do so.

  Unify follows a SaaS model and is centrally hosted by Performance Matters. Performance Matters takes system security seriously. From user authentication to the actual location of the servers, nothing is left to chance. Data encryption methods are state-of-the-art to ensure that data is never compromised while in transit. Performance Matters' servers are hosted at a Level 3 facility. Arguably, Performance Matters provides the most secure solution commercially available today.

  The application physically shares hardware but each client's instance is virtually separated through configuration management and database security. This design places a high degree of emphasis on security while greatly reducing the effort associated with maintenance and support of the system. Our security systems use the latest technologies and facilities to ensure that all areas of access are secured. Performance Matters has specific methodologies in place for physical access, network/machine access and application access protection. Protecting all avenues of access into our systems ensures quality of service and privacy for all clients and their information. Multiple security methods and protocols keep all client data secure.

  The Performance Matters system has three main types of permissions with flexibility to allow each district to establish security as desired. The first set of permissions is related to educational data, i.e., student information, scores, enrollment information. These permissions are set by a user's role in the system. A teacher will only have access to view student information for their actively enrolled students. A school-based user can see any student information for students actively enrolled in their school(s). A district-based user can see student information for any student actively enrolled in the district. The second set of permissions is related to menu security and system-wide filters. Menu security and filter security allow districts to assign what features and functions a user may access. These can be set at a role level, a group level, or even the user level. The third permission type is object permissions. Objects are educational artifacts such as tests, items, blueprints, as well as others. Each object in the system contains its own set of permissions, which can limit a user's access to the content. Please note that a district can create any number of custom roles and that many other security features exist. One such set of features is the district's ability to control reporting around local assessments. By test, a district can choose to hide results, expose results but not item content, or prevent a user from having access to print a student's responses.

  Performance Matters follows all applicable standards in regards to student privacy. Some of the technical details include redundant security systems at the presentation, business and data tiers of our application to protect the privacy and integrity of student and teacher data. Internet browser communications with the systems require SSL connectivity for all users. Supported SSL connections include: SSLv3.0, TLSv1.0, TLSv1.1, and TLSv1.2. User credentials are also hashed using a proven hashing algorithm, SHA-1. All servers are protected by redundant firewall systems, appropriate network segmentations, and a database division at the customer level. Source files are encrypted transferred with IP restriction for origination verification and security. End to end all data is secured to prevent unauthorized access.

  Performance Matters complies with the Family Educational Rights and Privacy Act (FERPA, 20 U.S.C. 1232g), the federal regulations implementing FERPA (34 CFR § 99) and the Student Data Privacy, Accessibility, and Transparency Act (O.C.G.A. § 20-2-660 through O.C.G.A. § 20-2-668) in

its handling of all educational records, student data, and personally identifiable information provided to Performance Matters by the District, District staff and/or agents, students, parents, guardians or individuals acting on behalf of any parent or student. Performance Matters maintains the confidentiality of these records at all times.

- If hosting data, describe your business recovery plan, backup processes, etc.

  The Data Center has redundant cooling, power, ISP, and backup procedures all in place. All Performance Matters data centers adhere to the highest industry standards and are certified SOC1 and SOC2 compliant. These certifications ensure that we are providing the highest levels of reliability, resiliency, security, and access controls and are consistent with enterprise industry standards. The data center is staffed and monitored 24/7 and has a security company in place that only allows people on the Performance Matters roster access to the server cage. Performance Matters has a Business Continuity Plan with measures in place to prevent and mitigate a data breach, as well as an incident response plan. Providing the requested documentation in a public response exposes how we manage security and could be used against us in a malicious way. For security reasons, we will provide the confidential information at the appropriate time and manner in moving forward with the District.

- If the data is on-site, what backup processes or redundant systems are recommended?

  All data is stored within dedicated client servers at Performance Matters' hosting facilities. Performance Matters also creates multiple 'live' backups of their data at the database level. A nightly backup process is maintained for all clients. Performance Matters utilizes an off-site, Tier III+ data center which is staffed and monitored 24x7. The Data Center has redundant cooling, power, ISP, and backup procedures all in place. Performance Matters has nightly backups of data that use secure protocols to transfer data. Mathematically proven encryption methods are used to transfer data to and from Performance Matters.

- Tell how often updates are performed. Will all updates be automatic or will there be opportunity for the district to time updates for convenience.

  Enhancements and upgrades are automatically applied six times a year on a pre-determined schedule that is shared with all clients. Release notes and webinars are provided to clients ahead of each release to allow them to preview upcoming functionality and changes. The district will have access to a dedicated Customer Relationship Manager (CRM), who will be your direct contact within Performance Matters via email or phone. Your CRM will be intimately familiar with all the needs of your district and will gladly discuss all needs and any concerns.

  The CRM is a critical role in our company; this individual has an overarching responsibility to ensure that key customer stakeholders view us as a true partner and that our products and services are fully integrated by customers to support continuous improvement in instruction and learning. In addition to being the regular contact within the company via email or phone, CRMs support customers through:

  - Scheduled weekly calls to answer questions and ensure that districts are able to accomplish their goals within the platform.
  - Quarterly face-to-face meetings in which goals and timelines are established and reviewed.
  - Review of district assessment plans to allow for proper and timely implementation.
  - Review of district training plans to ensure implementation with fidelity.

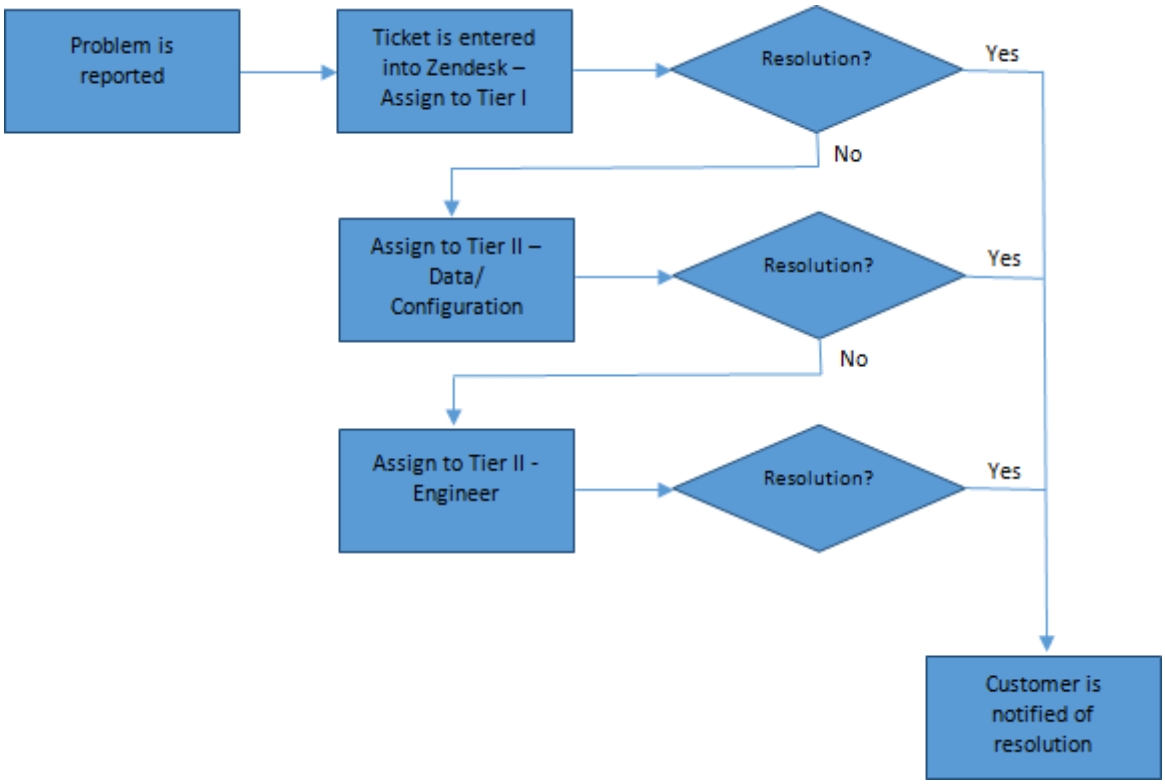
Technical Support

- Describe your support technical support system. Include hours of support, average time of downtime annually, average turnaround time on support issues, and support tier system (if applicable)

  Performance Matters' customers attest to our superb customer service. The ongoing support they receive is second to none. The District will also have access to the Performance Matters Technical Support Team. The Support Help Desk is staffed from Monday through Friday from 7:00 AM ET to 7:00 PM ET, excluding national holidays. Districts will designate support contacts who may report a trouble issue to Performance Matters using one of three methods:

  - **Online Help Desk**—Support contacts may submit a trouble ticket via our Online Help Desk 24/7/365. The requestor will be responded to within 4 business hours. The Performance Matters Online Help Desk is available for trouble reporting, ticket status tracking and basic troubleshooting.
  - **Toll-free telephone number**—Support contacts may call Performance Matters to report a trouble ticket. The phone will always be answered by a knowledgeable team member.
  - **Email**—Support contacts may submit a trouble ticket to support@performancematters.com. Emails will be responded to within 4 business hours, either with resolution or with a specific ticket number that will be tracked in our online helpdesk software.

  Performance Matters utilizes the Zendesk customer service platform to track and report trouble tickets. A typical support call would follow the procedures outlined below:



  The following are standard service level agreements (SLAs):

Org Tier	Area	SLA
Tier I	Notification of issue via phone, email or Online Help Desk	Send acknowledgement with resolution or ticket number within 4 business hours
All	Ticket severity level: Critical	Status update once a day until resolution
All	Ticket severity level: High	Status update every 24 business hours
Tier II	Missing/inaccurate data	Escalated and resolved within 24 business hours
Tier II	Request to load data (non-automated) provided in supported layout	Data loaded within 24 business hours

The Performance Matters support organization is composed of the following groups:

- **Level I:** Product Specialists—Ensure that end users have the necessary support to interact with the application successfully; these individuals are experts in the use of the Performance Matters solution and can quickly determine the nature of a problem experienced by an end user
- **Tier II:** Data and Configuration Analysts—Ensure that all sourced data in the system is processing and displaying correctly in the system; these individuals are responsible for handling all data requests to ensure the timely availability of critical, non-automated data
- **Tier II:** Product Support Engineers—Ensure that all aspects of the database and code base are performing as designed; these individuals address any application defects in a timely and thorough manner

Performance Matters support personnel may escalate a trouble ticket to the appropriate level at any time. Any ticket will be escalated to the Performance Matters management personnel responsible for customer support if an SLA is not met. In addition, if a designated district support contact requests that a ticket be escalated, Performance Matters' support managers will be notified.

Upon resolution of an issue, Performance Matters documents the details of the issue and its resolution in the help desk system and the reporting user is notified via email. Depending on the nature of the issue, Performance Matters may also follow up with the reporting user via telephone.

7. QUALIFICATIONS/PRIOR EXPERIENCE

References

- Provide at least 3 references of projects similar in scope to this project and any other pertinent information on your experience in working with school districts on a large scale similar to St. Charles Parish Public Schools. If possible, include a district in Louisiana.

  Since 2003, Performance Matters has provided Assessment and Data Management Systems to K-12 school districts. This system is installed in 150+ K-12 districts nationwide serving over 2.5 million students, including 25 districts over 20,000 students. Requested references are provided below and additional references are available upon request.

District Name:	Glynn County School System
District Address:	1313 Egmont Street; Brunswick, GA 31520
Contact:	Dr. Valerie Whitehead, Executive Director of Assessment and Accountability
Email Address:	vwhite@glynn.k12.ga.us
Contact Number:	912-267-4100 x 1156
Dates of Service:	Customer since 2015
Scope of Services:	Provided testing, assessment and data management system
District Size:	12,818

District Name:	Columbia County School District
District Address:	372 West Duval Street; Lake City, FL 32055
Contact:	Beth Bullard, Director of Teaching and Learning
Email Address:	bullardb@columbiak12.com
Contact Number:	386-755-8043
Dates of Service:	Customer since 2012
Scope of Services:	Provided testing, assessment and data management system
District Size:	10,239

District Name:	School District of Indian River County
District Address:	1990 25th Street; Vero Beach, FL 32960
Contact:	Brian McMahon, Performance Data Analyst
Email Address:	Brian.McMahon@indianriverschools.org
Contact Number:	772-564-3057
Dates of Service:	Customer since 2003
Scope of Services:	Provided testing, assessment and data management system First in State implementation
District Size:	18,083

Appendix B – Transfer of Personally Identifiable Student Information

APPENDIX B

St. Charles Parish Public Schools

Transfer of Personally Identifiable Student Information

Performance Matters has included the requested information on the pages that follow.

ATTACHMENT A:

Performance Matters LLC Subscription, Services and Hosting Agreement

Performance Matters' offering is subscription based software tool, available via Performance Matters' Software-as-a-Service [SaaS]. To conform to the requirements of a SaaS service, Performance Matters Subscription, Services and Hosting Agreement reflects accepted industry terms and is included as Attachment A. This Subscription, Services and Hosting Agreement in the form attached is incorporated into and made part of this Solicitation response. References to "Customer" shall mean "District."

Performance Matters Subscription, Services and Hosting Agreement is included in Section 1. Cost.

The Respondent's standard Subscription, Services and Hosting Agreement in the form attached is incorporated into and made part of this Solicitation response. References to "Customer" shall mean "District."

Contractor will be providing a software based service product that is delivered via the internet and not on-site. To conform this Agreement to the requirements of a SaaS service, Respondent attaches its standard Agreement that reflects accepted industry terms as Attachment A.

RFP Terms and Conditions. This response supplied to Customer in response to a Customer-issued Request for Proposal ("RFP") is incorporated only to the extent such terms and requirements are not inconsistent with the terms of this Agreement. In the event there are any conflicting terms, the terms of this Agreement shall control.

- Brief Profile of Recipient.

  Performance Matters (PM), "Recipient", is a provider of internet-based professional growth, development and assessment platforms, products, systems and hosting services for schools, district, educators and other educational institutions and customers. St. Charles Parish School Board (SCPSB), "Customer", wishes to engage PM, subscribe to PM's system, and utilize PM's services and products to manage its professional development needs. Customer agrees to engage PM, and PM agrees to provide the products and perform the services as provided for and subject to the terms and conditions set forth in PM's Subscription, Services and Hosting Agreement.

- Complete listing of all the data elements requested or authorized to be transferred.

  Confidential Information means all non-public information including Personally Identifiable Information ("PII") as defined by applicable law, disclosed by a party ("Discloser") to the other party ("Recipient"), whether orally or in writing, that is designated as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of disclosure ("Confidential Information"). PM's Confidential Information includes without limitation the Product, its user interface design and layout, pricing information, the Services or any deliverables.

Confidential Information excludes information that: (i) is or becomes generally known to the public without breach of any obligation owed to Discloser, (ii) was known to the Recipient prior to its disclosure by the Discloser without breach of any obligation owed to the Discloser, (iii) is received from a third party without breach of any obligation owed to Discloser, or (iv) was independently developed by the Recipient without use or access to the Confidential Information. The Recipient may disclose Confidential Information to the extent required by law or court order, but will provide the non-disclosing party with advance notice to seek a protective order.

- Statement on the intended use of the data elements and information requested or authorized.

  Customer agrees to engage PM, and PM agrees to provide the products and perform the services as provided for and subject to the terms and conditions set forth in this Agreement. During the Term of this Agreement, PM agrees to provide Customer and Customer-identified authorized users ("Authorized Users") a subscription that includes access to and usage of a PM-hosted, Customer-branded website on the internet (the "Site") and PM's internet-based K-12 professional growth system as described in the quote or proposal supplied by PM to Customer, and attached hereto as Exhibit A. The Site will include certain proprietary software of PM and certain content provided by Customer. PM will provide ongoing support and maintenance services for the Professional Growth System, including application software required to support the Products and enhancements when generally made available. In conjunction with the subscription, PM will also provide (a) Implementation Services, (b) Hosting Services, (c) Software and Products, and (d) Training Services, each as set forth in detail in Exhibit A.

- Legal authority or requirements associated with this request and potential transfer.

  Customer represents and warrants that Customer has appropriate rights to any data and content uploaded or entered into the Site or a Product by Customer ("Customer Data"). All Customer Data remains the property of Customer, as between PM and Customer. Customer grants PM the right to use the Customer Data solely for purposes of performing under this Agreement and in accordance with all applicable federal, state and local laws and regulations ("Applicable Laws"). PM will adopt, implement and maintain commercially reasonable security measures and procedures (including, firewalls, passwords, encryption, commercially available virus protection, access and use of adequate back-up computer servers, and periodic back-up of data) on a continuing basis.

- Regulations and standards by and to which the Recipient is held regarding confidentiality.

  The Recipient must use the same degree of care that it uses to protect the confidentiality of its own confidential information (but in no event less than reasonable care) not to disclose or use any Confidential Information of the Discloser for any purpose outside the scope of this Agreement. The Recipient must make commercially reasonable efforts to limit access to Confidential Information of Discloser to those of its employees and contractors who need such access for purposes consistent with this Agreement and who have signed confidentiality agreements with Recipient no less restrictive than the confidentiality terms of this Agreement.

- Names of additional entities who may have access or viewership of the data elements and information requested via the acquisition, processing, and/or use of the data elements and information by the Recipient.

  The Recipient must make commercially reasonable efforts to limit access to Confidential Information of Discloser to those of its employees and contractors who need such access for

purposes consistent with this Agreement and who have signed confidentiality agreements with Recipient no less restrictive than the confidentiality terms of this Agreement.

- Description or copy of the Recipient's active data breach response plan, including measures in place to prevent and mitigate such a breach.

  Using the Business Continuity Plan for Performance Matters that includes measures in place to prevent and mitigate a data breach, as well as an incident response plan, Performance Matters complies with applicable laws. Providing the requested documentation in a public response exposes how we manage security and could be used against us in a malicious way. For security reasons, we will provide the confidential information at the appropriate time and manner in moving forward with the District.

You and I ... We are
ST. CHARLES PARISH PUBLIC SCHOOLS

13855 River Road
Luling, LA 70070
985.785.6289
www.stcharles.k12.la.us

Transfer of Personally Identifiable Student Information

Date:

To *Vendor Name*:

In accordance with Act 677 of the 2014 Louisiana Legislature, including all applicable amendments, the St. Charles Parish School Board (SCPSB) seeks to increase awareness of the transfer of personally identifiable student information to ensure that parents and citizens have an accurate picture of said transfers. To that end, SCPSB wishes to enter into an agreement, or clarify an existing agreement, between ourselves and your company (hereinafter referred to as "Recipient"). It is incumbent upon the Recipient to attach the following information for the purposes of satisfying the attached agreement:

- A brief profile of the Recipient.
- A complete listing of all of the data elements requested or authorized to be transferred.
- A statement on the intended use of the data elements and information requested or authorized.
- The legal authority or requirements associated with this request and potential transfer.
- The regulations and standards by and to which the Recipient is held regarding confidentiality.
- The names of additional entities who may have access or viewership of the data elements and information requested via the acquisition, processing, and/or use of the data elements and information by the Recipient.
- A description or copy of the Recipient's active data breach response plan, including measures in place to prevent and mitigate such a breach.

Upon receipt and review, an appointed SCPSB representative will initial each page provided by the Recipient in an attempt to satisfy the requirements of the above request for documentation. Once all pages have been received and approved, SCPSB will execute the attached agreement. This agreement, along with the legally required attachments, will be retained in accordance with the public records law of the state of Louisiana. As time is of the essence, please return the requested items, along with a duly executed copy of the attached agreement, as soon as possible. This, and all questions, should be directed to John Cain at jcain1@stcharles.k12.la.us, 1-985-785-7295, or our central office address listed above.

Sincerely,

Felecia Gomez-Walker
Superintendent

School Board Members

Ellis A. Alexander	DISTRICT 1
Melinda H. Bernard	DISTRICT 2
Dennis J. Naquin	DISTRICT 3
Clarence H. Savoie	DISTRICT 4
John L. Smith	DISTRICT 5
John W. Robichaux	DISTRICT 6
Arthur A. Aucoin	DISTRICT 7
Alex L. Suffrin	DISTRICT 8

Superintendent

Felecia Gomez-Walker

ADVANCED Advancing Excellence in Education Worldwide

Transfer of Personally Identifiable Student Information

In accordance with Act 677 of the 2014 Louisiana Legislature, the St. Charles Parish School Board (SCPSB) seeks to increase awareness of the transfer of personally identifiable student information to ensure that parents and citizens have an accurate picture of said transfers. To that end, SCPSB wishes to enter into an agreement, or clarify an existing agreement, between ourselves and

Performance Matters LLC

hereinafter referred to as "Recipient".

To the fullest extent permitted by law, the Recipient agrees to and shall defend, indemnify and hold the St. Charles Parish School Board (SCPSB), its officers, agents and employees, harmless from and against any and all third party claims, suits, liabilities, losses, expenses, liens, costs, demands and causes of action of every kind and character including those of the Recipient, its agents and employees, as well as parents of SCPSB students, third parties, and all others, for any and all claims including, but not limited to, identify theft, bodily injury, personal injury, damage or destruction of real or personal property, libel, slander, defamation, including costs, attorneys' fees and settlements arising out of or in any way connected with the request, transfer, acquisition, obtainment, processing, use, and/or distribution of data elements and information regarding personally identifiable student information, by any negligent act or omission performed by the Recipient or any agent, employee, invitee or licensee of the Recipient, whether resulting from or contributed to by the negligence in any form by its officers, agents or employees whether active or passive. The Recipient shall pay all reasonable legal fees and costs incurred by SCPSB under this agreement to enforcing the indemnification articulated under this Section.

Recipient agrees that, upon termination of this agreement, it shall return all data to the SCPSB in a usable electronic form, and erase, destroy, and render unreadable all SCPSB data in its entirety in a manner that prevents its physical or digital reconstruction through the use of commonly available file restoration utilities, and certify in writing that these actions have been completed within thirty (30) days said termination. Recipient further acknowledges that the confidentially obligations and duties imposed or implied by the nature of any data elements and information incident to this agreement, as well as those imposed or implied by the agreement itself, shall remain in effect, surviving the termination of this agreement, for a period of fifteen (15) years or for so long as the information remains confidential.

The Executor of this contract for the Recipient herein represents and warrants that he or she has the unrestricted right to execute this agreement and that their doing so will not violate any law or intellectual property, property, proprietary, contract, or other right of any third party.

I have read and agree to the above as revised in the Performance Matters response to the Assessment Data Management System RFP.

Woody Dillaha 2/28/17

Recipient – Signed Date	SCPSB – Signed Date
Woody Dillaha	
Recipient – Printed	SCPSB – Printed
President	
Title	Title

Deviations

Performance Matters LLC ("Vendor")

Deviations to the St. Charles Parish Public Schools

RFP for Assessment Data Management System

Performance Matters LLC submits and details the changes to RFP below. Performance Matters' offering is subscription based software tool + content, available via Performance Matters' Software-as-a-Service [SaaS]. The offering is not a good, product or professional based service (e.g., architect, electrician, construction, etc.). SaaS is not a good for purchase and no transfer of title is contemplated by any future relationship.

SECTION	DEVIATIONS/REVISIONS
TRANSFER OF PERSONALLY IDENTIFIABLE STUDENT INFORMATION Page 18 of RFP Package (Contractor submits the revisions in the right column.)	In accordance with Act 677 of the 2014 Louisiana Legislature, the St. Charles Parish School Board (SCPSB) seeks to increase awareness of the transfer of personally identifiable student information to ensure that parents and citizens have an accurate picture of said transfers. To that end, SCPSB wishes to enter into an agreement, or clarify an existing agreement, between ourselves and Performance Matters hereinafter referred to as "Recipient". To the fullest extent permitted by law, the Recipient agrees to and shall defend, indemnify and hold the St. Charles Parish School Board (SCPSB), its officers, agents and employees, harmless from and against any and all third party claims, suits, liabilities, losses, expenses, liens, costs, demands and causes of action of every kind and character including those of the Recipient, its agents and employees, as well as parents of SCPSB students, third parties, and all others, for any and all claims including, but not limited to, identify theft, bodily injury, personal injury, losses or damage ~~or destruction of real or personal property, libel, slander, defamation~~, including reasonable costs, attorneys' fees and settlements arising out of or in any way connected with the request, transfer, acquisition, obtainment, processing, use, and/or distribution of data elements and information regarding personally identifiable student information, by any negligent act or omission performed by the Recipient or any agent, employee, invitee ~~or licensee~~ of the Recipient, whether resulting from or contributed to by the negligence in any form by its officers, agents or employees whether active or passive. The Recipient shall pay all reasonable legal fees and costs incurred by SCPSB under this agreement to enforcing the indemnification articulated under this Section. Recipient agrees that, upon termination of this agreement and

SECTION	DEVIATIONS/REVISIONS
	upon SCPSB's written request, Recipient shall make the Site and any Product available for SCPSB to export its data for sixty days after termination. ~~it shall return all data to the SCPSB in a usable electronic form, and erase, destroy, and render unreadable all SCPSB data in its entirety in a manner that prevents its physical or digital reconstruction through the use ofcommonly available file restoration utilities, and certify in writing that these actions have been completed within thirty (30) days said termination.~~ Recipient further acknowledges that the confidentially obligations and duties imposed or implied by the nature of any data elements and information incident to this agreement, as well as those imposed or implied by the agreement itself, shall remain in effect, surviving the termination of this agreement. ~~, for a period of fifteen (15) years or for so long as the information remains confidential.~~ The Executor of this contract for the Recipient herein represents and warrants that he or she has the unrestricted right to execute this agreement and that their doing so will not violate any law or intellectual property, property, proprietary, contract, or other right of any third party.
Exhibit A - Agreement - General Provisions *Note: Contractor will be providing a software based service product that is delivered via the internet and not on-site. To conform this Agreement to the requirements of a SaaS service, Respondent attaches its standard Agreement that reflects accepted industry terms as Attachment A.*	***Add:*** ***The Respondent's standard Subscription, Services and Hosting Agreement in the form attached, which is incorporated into and made part of this Solicitation response. References to "Customer" shall mean "District."***

Personnel Qualifications

Available Performance Matters Personnel

SCPPS will be connected to a team of professionals at Performance Matters who care deeply about education, the success of our customers and most importantly, student learning. We work tirelessly to deliver service levels that exceed expectations with an innovative culture relating to all educator stakeholders. Performance Matters personnel have a very real interest in the quality of education and many have deep roots as educators and bring with them a passion for student success. All of the PM staff, from the support team to executive leadership, product management and professional services, have a deep understanding of the educational accountability system and the language specific to educators. This is a major Performance Matters differentiator. Additional personnel are also available as needed.

Amy Wieland, Senior Vice President

Amy Wieland joined Performance Matters in 2010 and has been the catalyst for the sustained and rapid growth of the company. Amy's experience with enterprise platforms and her elite accomplishments as an educator throughout her career provide a unique set of talents to support customers throughout the country. Her reputation is exemplary among the school systems she has worked with across the country. As the Senior Vice President, Amy will provide additional leadership and support to ensure the success of this partnership.

With over 25 years experience in multiple capacities of public education, Amy has valuable experience as a teacher, school leader, technology facilitator, and curriculum specialist in Sarasota County Schools. While in Sarasota, she served as the Project Manager for deployment of an Instructional and Assessment Management System, experience which serves her well in her current position. Her career contains numerous honors including multiple Teacher of the Year Awards, Authentic Assessment Multi Media Award, Pearson's Cross Divisional Communications Award and President's Award both at Pearson and McGraw Hill. Amy holds both a Bachelor and Master of Education degree from the University of South Florida.

Roderick Sams, Ed.D., Director of Education Solutions

Dr. Roderick "Rocky" Sams is the Director of Education Solutions and is responsible for supporting the Performance Matters strategy, product, and service offerings for school districts in the Southern Region of the United States. He also partners with Marketing, Customer Relationship Management, and Product Management to align and deliver product and services to meet the needs of current and future customers.

Rocky has served 20 years in K-12 education as a teacher, coach, assistant principal, and principal at the elementary and secondary levels. Passionate about student success, he believes in the strategy of assessment for learning to improve academic performance. Rocky earned his Bachelor's of Science in Early Childhood Education from Georgia Southern University; Master of Education in Administration and Supervision from Augusta University; Education Specialist in Education Leadership and Doctor of Education in Education Administration, each from Georgia Southern University.

Nick Coniglio, Vice President, Customer Support and Data Services

Nick Coniglio joined Performance Matters in 2007 and is responsible for leading the Support and Database Administration Teams. With previous experience managing new product development at Performance Matters, Nick acquired a unique perspective of all technical operations. Bringing to Performance Matters 20 years of experience in the high-tech industry with a particular focus on business intelligence and data analytics, Nick has served in various capacities from direct customer consulting to

leadership roles in the areas of service delivery and operations. Nick holds a Bachelor of Science degree in Computer Science.

Patrice Hartnett, Director of Internal Programs

With 20 years of experience in Public Education, Patrice Hartnett has an exceptionally strong instructional background. Prior to joining Performance Matters, Patrice was a building level administrator in the largest district in New Hampshire. Her strong communication skills in listening and understanding the needs of our customers are key qualities. These skills are imperative in ensuring that new customers have a smooth and efficient implementation. Patrice holds a Master of Arts in Education and Administration. Patrice serves as the Project Manager for Performance Matters implementations.

Kyle Wolfe, Supervisor of Technical Services

Kyle serves as the Supervisor of Technical Services for Performance Matters. Kyle joined Performance Matters in 2007, and serves as the main contact for the District's Information Technology representative(s) in setting up the data and infrastructure that supports the production system. Kyle holds a Bachelor of Science degree from the University of Central Florida.

Marnie Stockman, Ed.D., Director of Customer Relations

Dr. Marnie Stockman joined Performance Matters in 2013 as a Customer Relationship Manager. Her experiences in school and district level leadership include implementing and training all staff in the use of Performance Matters' modules. As the Director of Customer Relations, Marnie uses these experiences to help make Performance Matters a true partner with school districts. She holds a Teacher and Administration license; Bachelor of Science in Mathematics from Loyola University; a Master of Education from Salisbury University; and a Doctorate of Education in Educational Leadership from Northcentral University.

Todd Greenberg, Customer Relationship Manager

Todd Greenberg has been a key contributor on the Performance Matters team since 2010 and has been instrumental in helping PM build a support system that currently meets the needs of all Georgia customers. Todd is a Customer Relationship Manager who will be an assigned account manager available to provide targeted support for the District throughout the life of the partnership. Todd works closely with identified personnel from the District to ensure the implementation runs smoothly, and to quickly address any identified concerns as they become apparent. This includes regularly scheduled status meetings to provide steady support and ensure any issues are resolved in a timely fashion. Todd has demonstrated a sustained commitment and passion for exceptional customer service and support. Todd's background with the IT division at Performance Matters makes him well suited to ensure all of the technical conversations and implementation needs are met. Todd's platform knowledge allows him to funnel questions and concerns through the proper channels to quick resolution. His experience with dozens of implementations also brings to the table best practices from districts large and small. His ability to understand the goals of the district to provide guidance as to those practices are invaluable. We encourage you to inquire about Todd's support and that of the entire Implementation Team when speaking to our customer references.

Janet Sankar, Director of Learning and Knowledge Management

Janet Sankar joined the team at Performance Matters in 2014, bringing with her a wealth of experience as an educator and leader in the educational technology field where she worked in a variety of school settings as a teacher and district-level administrator. She leads our team of learning specialists to deliver world-class training through webinars, certification courses and onsite training programs. Janet received

her BS in Elementary Education from SUNY Oswego; MA in Curriculum and Teaching with Reading Certification from Teacher College, Columbia University; MA in Instructional Design and Library Media from CU Denver; and her CAS in Educational Administration from SUNY New Paltz. In addition to her Master's degree in Curriculum and Teaching, Janet Sankar also holds the following professional Educational licenses: New York – Elementary Education N-6, Reading, Library Media Specialist, School Administration and Supervision, School District Administrator; New Jersey – Elementary Education; Maryland – Administrator I, Administrator II, Library Media Administrator, Library Media Specialist; Colorado – Elementary Education, Reading Specialist.

Company Qualifications

Over 125 Assessment Successes

Performance Matters provides tools that allow districts to make data-driven decisions to improve student outcomes and increase the impact of educators. Performance Matters has a long history of successful partnerships and implementations. The firm has the resources and a proven track record of delivering a project that is on time and on budget. Performance Matters has always successfully performed and fulfilled its obligations of all contracts.

With a deep belief system and culture that dictates sustained communication and collaboration with both our customers and within Performance Matters, heavy investments have been made into Research and Development, as well as Customer Relations and Support teams. The benefits are first rate service levels and best-in-class products and services that continue to evolve with the needs of all clients of Performance Matters. These partnerships continue to provide Performance Matters unparalleled experience with organizations at the leading edge of professional learning and increasing student achievement, as well as a first-hand understanding of the best practices required to create forward-thinking solutions that meet the needs of every client.

Performance Matters has put the power of student data in the hands of educators, thus informing instruction and classroom practices, and impacting the lives of millions of students every year. The most qualified statement regarding Performance Matters' abilities comes directly our customers themselves who have voted Performance Matters numerous awards. Additionally, Unify was again voted a Reader's Choice Top 100 Education Product, making Performance Matters' Student Growth Solutions *five-time recipients* of the Top 100 Products Award.

Performance Matters Product Suite

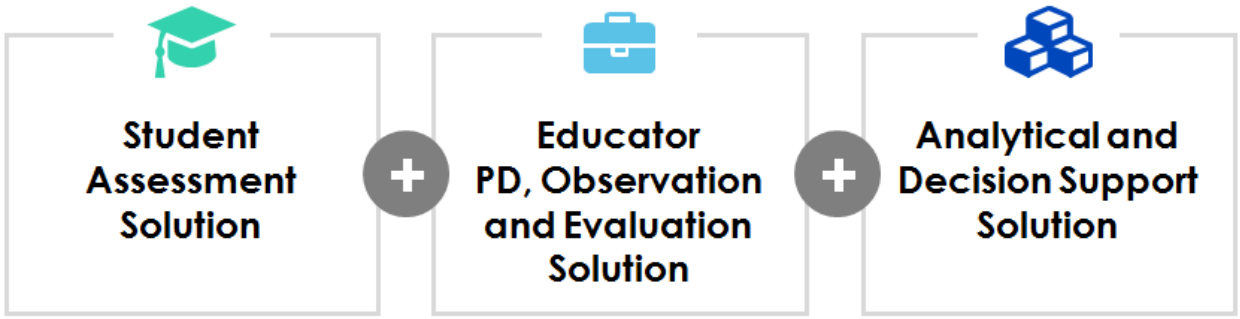
The Performance Matters Platform is an integrated portfolio of solutions all supported with robust data analytics that link student and educator growth together. The Performance Matters Platform offers solutions that encourage professional growth, inform instruction, and increase accountability across your district. Our solutions work together seamlessly, providing leaders and educators with actionable data that highlights opportunities for growth as well as areas of excellence.

Educator Growth Solutions: Add consistency, content, and focus to professional learning programs, plans and policies.

Student Growth Solutions: Comprehensive, scalable assessment platform that incorporates the innovative items and assessment methods needed to prepare students for today's world.

Actionable Analytics Solutions: Use data to shape curriculum, deliver interventions with fidelity and assess the impact of professional learning investments and initiatives.

Performance Matters believes that recording, analyzing and reporting on data that illustrates student learning and educator effectiveness enables educational institutions to make better decisions and deliver better outcomes. This requires a best-in-class suite of tools:



Performance Matters is the only solution that provides best-in-class student and educator platforms in one cohesive, analytically driven solution set.

TESTIMONIALS

Performance Matters has a long history of demonstrated excellence. The following client testimonial is cited as an example of a company history of demonstrated excellence and exceptional customer service.

The 2 dashboards that will get teachers to use data

From a practitioner's point of view, the September 2015 *eSchool News* article, written by Michelle Hall, *an administrator in the Accountability Office, Instructional Data District for Anne Arundel County Public Schools in Maryland,* states that *Performance Matters provides intuitive and informative reports for all stake holders.*

http://www.eschoolnews.com/2015/09/07/teachers-data-842/

By Michelle Hall
September 7th, 2015

How do you get teachers to use data? One district zeroed in on what's important

Every day, educators amass a tremendous amount of academic data. Many of that data ultimately gets entered into online systems and run through analysis software and teacher dashboards. But that data is only valuable if it can be easily accessed and analyzed, and acted upon in a timely manner. And only if the teacher finds it worthwhile enough to complete that process.

In the past, my district used a scanning system to scan paper test forms and quickly make the data available to teachers for their review. The problem was that seven years after we launched the system, I was still teaching our teachers how to use it. Because it wasn't user friendly, it wasn't used very extensively, which meant that data was going to waste.

In 2013, we set out to find a system that would be easier to use, more visual, and better at organizing data in a concise way, and that summer we began using a new assessment and data system (we picked Performance Matters). To introduce its capabilities, we held district-wide trainings for our teachers. A few months later, however, we realized we now faced a challenge at the opposite end of the spectrum. With our previous system, our teachers couldn't get enough data. With our new system, they had access to more data than they knew what to do with.

To help teachers focus on the data most important to them, we launched another round of trainings. To make things as easy as possible, we decided to concentrate on two dashboards we believe are vital to teachers' daily practice in the classroom and to school improvement planning.

Item Analysis

Our Item Analysis dashboard provides item-level detail showing the percentage and number of students who chose each answer (multiple choice items) or earned each score (other item types) on a given assessment. This is particularly helpful when looking for students' misconceptions. If, for example, a teacher sees that 60 percent of students got item No. 1

wrong and that all of these students chose the same answer, they know exactly what they need to re-teach. It can also help determine when an answer choice needs to be updated or replaced.

The Item Analysis dashboard also shows the breakdown of the standards on the assessment and how students scored overall on each standard. This helps teachers easily identify which standards students are struggling with, so they can target their instruction accordingly.

In addition, the Item Analysis dashboard illustrates each student's performance on the standards. Because teachers can instantly see which students are non-proficient, proficient or advanced on each standard, they can easily differentiate their instruction and provide remediation to those students who need it. Teachers say this is a huge time-saver, since they can simply click on a standard and have the re-teaching group immediately displayed for them.

Student Item Analysis

Our Student Item Analysis dashboard gives an overall percentage score for each student as well as how many points the student earned on the test. Teachers can then use these scores in their gradebooks.

This dashboard also shows how each student responded to each question and whether the answer was right or wrong. Teachers can use this data to review the test with students if needed.

Finally, the Student Item Analysis dashboard shows what the most common incorrect answer was and the percentage of students who chose it. This helps teachers address common misconceptions.

Collaborative planning

Both the Item Analysis and Student Item Analysis dashboards provide valuable data for collaborative planning sessions at each school. During these sessions, school leadership teams and teachers can view their students' data so they can share best practices, and offer or ask for assistance. Because the data is easy to access and understand, they now spend less time organizing data and more time doing what needs to be done to improve student outcomes.

We've also provided trainings for our principals, assistant principals, and school leadership teams on how to use data for school improvement planning. The Item Analysis dashboard is especially helpful here. The item-level detail and standards breakdown give school leaders the data they need create standards-specific goals, so they can be more much focused in their school improvement plans.

Thanks to the wide use of these two dashboards, our teachers and school leaders now spend far less time on data retrieval and significantly more time on data analysis and decision making. The key is to keep it simple. Give teachers the tools and data they need to be successful, and give them opportunities to collaborate and use that data to improve their practice. Then, after teachers become comfortable with these key dashboards, offer more advanced training to show them how to use other dashboards to dive deeper into the data.

8. APPENDIX: UNIFY SOLUTION NARRATIVE

Assessments that Energize Learning and Analytics that Power Instruction

Our Performance Matters **Student Growth Solutions** are powered by **Unify**, our flagship student assessment platform.

Unify is redesigning Assessment as a Catalyst for Student Success

Unify connects educators and students through assessment to achieve extraordinary results. Unify is an open assessment platform for teacher or district level testing for any subject and in all grade levels.

Unify gives educators the tools and content to author and review assessment items, administer authentic assessments, and analyze student and educator data from a wide variety of sources. Unify uses collaborative technology to help educators develop, review, administer and analyze quality assessments to inform and improve instruction. Engineered to meet the IMS Global standards of QTI and LTI, Unify maximizes the teaching and learning experience.

Author Administer Analyze Act

The Performance Matters Student Growth Solutions are:

- **Collaborative:** Unify facilitates educator-to-educator collaboration. The result is continuous quality and efficacy in assessments as teachers co-create, share and review content.
- **Comprehensive:** Unify delivers an always-expanding repository of innovative, high-quality assessment items covering core and elective curriculum across the K-12 spectrum.
- **Differentiated:** Unify empowers educators to make evidence-based critical shifts and adaptations to instruction, so they can differentiate and personalize instruction.
- **Future-Focused:** Unify takes the drudgery out of testing, by supporting next-generation item formats, from constructed response approaches to technology-enhanced items. Unify transforms “testing” into learning.

- **Interoperable:** Unify is an open platform, connecting data from local, state, and any other assessments with existing district systems, including student information systems and learning management systems, giving teachers an invaluable tool that is engaging for students.

Harnessing the Potential of Student Achievement

Our Performance Matters Actionable Analytics Solutions combine student and educator data that guide the Performance Matters tools that are used by students and educators to accelerate their growth.

Performance Matters offers comprehensive reporting and analytics that support both our Educator Professional Growth and Student Learning & Growth solutions independently. We also have the unique capability of bringing all of this data together, so system leaders can see the impacts of professional learning on student achievement, educator effectiveness on student learning, or trends in professional development implementation that affect student growth.

The Performance Matters Actionable Analytics Solutions are:

- Responsive: Whether you want to evaluate performance over time, combine select measures of teacher and/or student performance, drill down to specific student and teacher groups or individuals, or evaluate the quality of a single test item, you can request and get analytics at the speed of thought.
- Reliable: Our data gathering, batching, and report presentations are engineered for accuracy, clarity and accountability so you have objective insights you can trust.
- Always-On: Reports and queries are available 24/7/365 from any Internet-connected device. That means preparing for a school board meeting, a community briefing, or a one-to-one with a teacher or parent takes far less time.
- Drive Actions: With data at your fingertips, educators and administrators are able to easily interpret the data, ask the right questions, and determine the next steps towards improving educators' and students' lives.

Real-time Analytics

Real-time Analytics supports all relevant student data including State, Local, National and third party assessments, as well as student demographics, early warning criteria and college and career readiness indicators. With Performance Matters, there is no need to pull together student data from multiple, disparate systems; Performance Matters does it for you.

Data Driven Decision Making: Performance Matters Answers the Guiding Questions

The key to making effective data-driven decisions is focusing and answering the correct questions – the Guiding Questions. Within Unify, Performance Matters has embedded the ability to quickly and simply answer these guiding questions. What are the guiding questions? They are thoughtful questions that ensure K-12 data is evaluated in a comprehensive manner to guide and ensure good decision making based upon three comparative questions outlined in the following table.

How Are We Doing When Compared To?	The Answer is a Measure of Our…
Standard	**Proficiency**
Ourselves	**Progress**
Others	**Productivity**

Standard: This can be any measurable goal that is established within your school or division or one that is set by your state or nationally. The answer to this question is a measure of your **proficiency** toward meeting that standard.

Ourselves: This is a measure of your **progress over time** that will indicate positive or negative growth. While making the proficiency target is important, nothing is more important than positive growth in learning. Performance Matters is uniquely capable of evaluating student, subgroup, school or division performance as compared to the "standard" proficiency target outlined above and the "growth" of cohort student populations that is at the heart of the "compared to ourselves" guiding question. Performance Matters measures the learning growth and proficiency of all students.

Others: This is a measure of your performance as compared to other students, subgroups, schools, divisions and so on. The difference between your performance and that of others is an indication of your **relative productivity**.

The following scenario illustrates the importance of using the guiding questions. To ensure ease of use, Performance Matters uses consistent color-coding throughout the system. Achievement bands are color-coded making interpretation of the results intuitive. Although more color codes are possible within Unify, the example below is based upon the following color codes:

Not Meeting	Marginal	Meeting	Exceeding

The Importance of Guiding Questions in Data Driven Decision Making

Consider the following common scenario to understand the importance of answering the guiding questions to ensure K-12 data is evaluated in a comprehensive manner to guide and ensure good decision-making.

You have just received the high stakes test scores for your school for Math and Reading. For this analysis you are focused on only the proficiency score for Math and the proficiency score in Reading. The following charts color-code the results using the guiding questions:

Subject	*% Proficient Compared to Standard*
Math	**50%**
Reading	**75%**

If you were to make a decision on whether to invest resources in Math or Reading, which would you choose based upon this example? The answer of course would be Math. Based upon the color codes, we did not meet the standard in Math; however, we exceeded the standard in Reading. Now let's look at the same results as compared to ourselves:

Subject	% Proficient *Compared to Standard*	% Proficient *Compared to Ourselves*
Math	**50%**	**50%**
Reading	**75%**	**70%**

Notice the same two numbers now have different meaning. While we did not meet the standard in Math we are making progress that meets expectations. And, while we are exceeding the standard in Reading, our progress over time is marginal. The last comparative question is *"How are we doing when compared to others?"*

Subject	% Proficient *Compared to Standard*	% Proficient *Compared to Ourselves*	% Proficient *Compared to Others*
Math	**50%**	**50%**	**50%**
Reading	**75%**	**75%**	**75%**

The picture has changed dramatically. While we did not meet the standard in Math, we are improving at an acceptable rate and we are outperforming (much more productive) than everyone else! On the other hand, even though we exceeded the standard in Reading we are not improving at the rate that we should be and compared to others, we are at the bottom of the pack. If your goal is to improve student learning, there are clear indications here that what you are doing in Math is making a difference but that you could be facing significant deficiencies in Reading. If we had stopped with the "compared to standard" measure, we would have missed finding the insight of this important trend.

Answering the guiding questions is the foundation of ensuring K-12 data is evaluated properly in a comprehensive manner to guide good decision-making that informs instruction. Unify quickly and easily provides this ability to answer these questions at all levels. Through the Unify platform, the guiding questions can easily be applied for an intuitive understanding of the data to inform instruction.

Unify is a collaborative assessment and analytics platform that allows educators to author, administer, analyze and act on student assessments. Performance Matters is redesigning assessment as a catalyst for student success with an approach that not only makes data integration and analysis easy, but also provides a platform to develop your own assessments with or without collaboration with educators in other organizations. Unify is designed to combine the ability to build assessments that energize learning with analytics that power instruction.

With Unify, educators can:

- **Author** and review item banks and instructional materials from others
- **Administer** assessments online or via plain paper scanning
- **Analyze** student and educator data through clear dashboards and reports
- **Act** on the information to improve learning

Performance Matters offers an open assessment platform for teacher or division level testing for any subject and in all grade levels. The platform is content neutral, allowing the division to author locally created items with graphics, math equations and formulas; use content provided by Performance Matters; and have Performance Matters load licensed items and item banks.

Performance Matters takes system security seriously. From user authentication to the actual location of the servers, nothing is left to chance. Data encryption methods are state-of-the-art to ensure that data is never compromised while in transit. Performance Matters' servers are hosted at a Level 3 facility. Arguably, Performance Matters provides the most secure solution commercially available today.

All test data generated through either scanning or online testing is loaded near real time. All core files from the student information system are loaded nightly. Exports can run nightly.

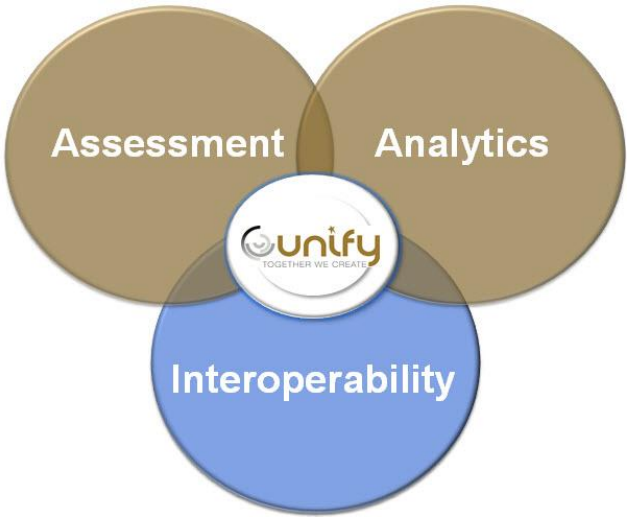
The reporting and analysis capabilities of the Unify platform enable administrators and teachers to view student data by assessment or by item. Item analysis gives teachers the ability to make informed decisions instructionally.

Data can be viewed longitudinally whether it is benchmark/division assessments, LEAP 2025 and ECO or national test data: NWEA/MAP, STAR (Renaissance Learning), Dibels, SAT, ACT, Plan, SAT10, Fountas and Pinnell, etc. This data can be viewed by student or aggregated by any subgroup cohort, including teacher and school, as well as many other groups.

The Unify platform has been engineered to meet the IMS Global standards of Question Tool Interoperability (QTI) and Learning Tool Interoperability (LTI). This allows Unify to work with other platforms that meet these standards to maximize the teaching and learning experience.

Assessment for Personalized Learning

To carry out Performance Matters' mission to redesign assessment as a catalyst for student success, the core competency and product road map is centered in assessment and analytics. PM subscribes to the good-to-great philosophy. While some of the features and functions that support the product road map will bleed into other functional areas, assessment and analytics will continue to be the strategic focus of Performance Matters.



To support education in a comprehensive way, there are other educational technologies that teachers and administrators need. In order to support integrated solutions, PM invests engineering resources in the IMS Global standards for interoperability. In addition, PM serves on the IMS Technical Advisory Board and on the Executive Board on Assessment in order to stay current and to provide our voice and the voice of our customers in the IMS road map. Performance Matters has engineered with QTI and LTI being foundational standards within the PM Unify platform.

Performance Matters holds the belief that like-minded partners in education technology who focus on deep and rich functionality within their product sets and who invest in these open standards will be uniquely capable of meeting future challenges.

IMS enables a plug and play architecture and ecosystem that provide a foundation on which innovative products are rapidly deployed and work together. IMS suppliers like Performance Matters are the market leaders in innovation. For those requirements that are not core to our assessment and analytics focus, Performance Matters will implement IMS standards like LTI (Learning Tools Interoperability). PM supports LTI and has successfully implemented LTI with Digital Curriculum providers.

Taking a best-of-class approach, districts can select systems that best meet the needs of all stakeholders while maintaining the integrity of the overall goals and vision of the district. This allows a state-of-the-art assessment and reporting platform that integrates with strong, innovative digital learning tools that enhance personalized learning for all students.

Author Assessments

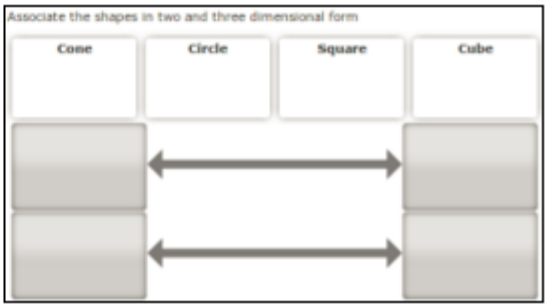
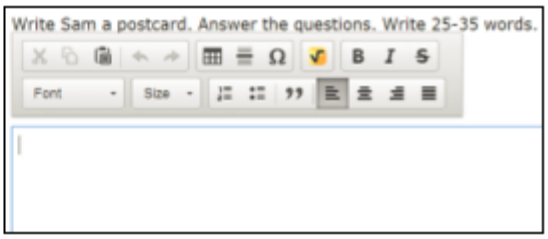
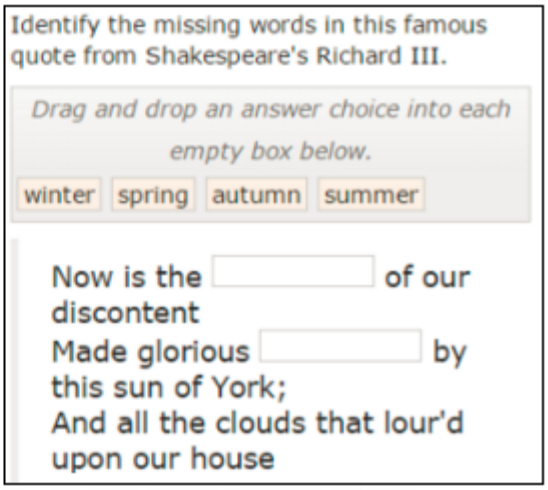
Performance Matters offers an open assessment platform for teacher or district level testing for any subject and in all grade levels. The platform is content neutral, allowing the district to author locally created items with graphics, math equations and formulas, load licensed items and item banks, and use content provided by Performance Matters.

With Unify authoring tools, the District can author technology enhanced items and create both formative, benchmark and summative assessments. Additionally, districts can utilize QTI 2.1 compliant third party item banks and tests to supplement any authoring initiatives. Unify has loaded third-party assessment items and prebuilt tests from publishers for optional purchase such as Consulting Services and Solutions Group, Inc. (CSSG), Certica, Key Data Systems, Measured Progress and Progress Testing, thus giving districts additional options to meet their specific goals.

Item Types Available Within Unify

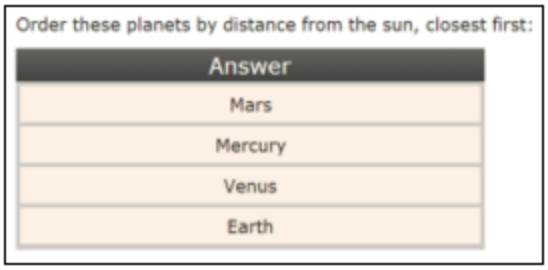
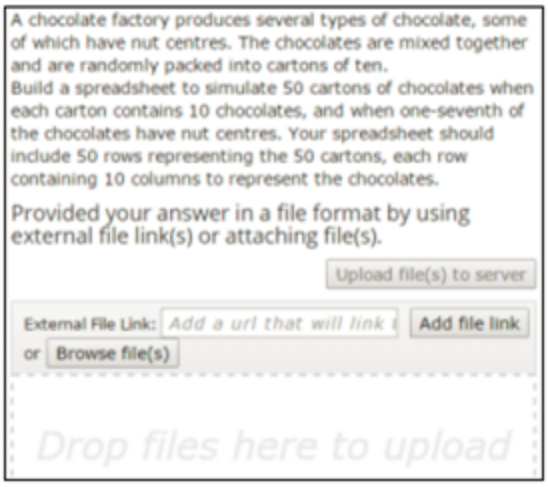
Performance Matters currently supports 15 various item types, 11 of which are Technology-Enhanced Interaction (TEI) item types, which allow users to better gauge student performance and understanding. Through continuous improvement and collaboration with clients, additional TEIs will be evaluated for future expansions as needs are explored. For those items associated to a holistic or analytic scoring rubric, our revolutionary Performance Task Scoring capabilities enable users to see a student's work and any artifacts associated with that work, alongside of the scoring rubric itself.

The Unify assessment platform offers multiple item types including, but not limited to, multiple choice and open ended/constructed response. The platform also offers the building and administering of technology-enhanced items that allow students more interaction with the content as well as increasing its rigor. Students will encounter many of these item types on the state assessments. Most questions contain exact descriptions of what is required for each rubric and examples of point responses. Item Types and examples are shown on the following pages.

Overview		
Interaction Type	**Description**	**Example**
Associate	Drag and drop text objects to create matched associations between available answer choices	
Draw[1] (Drawing)	Draw the answer response on a canvas (blank or pre-selected image) with a set of drawing tools	
Extended Text (Open Response) (Brief Constructed Response) (Equation Response)	Enter a response into a text field - word and equation editor toolbar available	
Gap Match	Drag and drop text objects to defined gap elements located within the context of the content area text	

Overview		
Interaction Type	**Description**	**Example**
Graphic Gap Match	Drag and drop image objects to defined gap elements located within the context of a larger image	
Hotspot	Select region(s) of a static image as answer choice(s)	The picture illustrates four of the most popular destinations for air travellers arriving in the United Kingdom: London, Manchester, Edinburgh and Glasgow. Which one is Glasgow?
Hottext	Select response(s) from presented choices located within the context of the content text	Select the error in the following passage of text (or *No Error* if there is none). Sponsors of the Olympic Games who bought advertising time on United States television includes at least a dozen international firms whose names are familiar to American consumers. No error.
Inline Choice (Inline Response)	Select a choice from a drop-down menu located within the context of the prompt text	The capital of Georgia is Atlanta. Savannah Macon Atlanta Augusta

Overview		
Interaction Type	**Description**	**Example**
Instructions	Allows addition of resources, rubrics, and other information for test administrators, students, and/or scorers	Scores should consider equally • Sentence Variation • Word Choice • Grammar, Usage, and Mechanics
Match (Matching Item Response)	Select checkboxes at the intersections of columns and rows to show answer choices	Match the following characters to the Shakespeare play they appeared in: The Tempest / A Midsummer-Night's Dream / Romeo and Juliet Lysander Capulet Prospero Demetrius
Multiple Choice/Response (Multiple Choice) (Multi-Select)	Select response(s) from presented choices	The gas law $\frac{V_1}{T_1} = \frac{V_2}{T_2}$ is known as Gay-Lussac's Law Charles' Law Boyle's Law The Ideal Gas Law
Numeric Grid (Gridded Response)	Enter a numerical response one digit at a time in a grid format	What is the decimal value of pi ?

Overview		
Interaction Type	**Description**	**Example**
Order	Drag and drop text objects in the correct order	
Text Entry (Editing Task) (Inline Text)	Enter a response into a text box located within the context of the prompt text	
Upload	Upload a file (image, audio, video, etc.) containing a piece of work to be scored	

Item Creation

Unify's item creation menu and explanations are shown below:

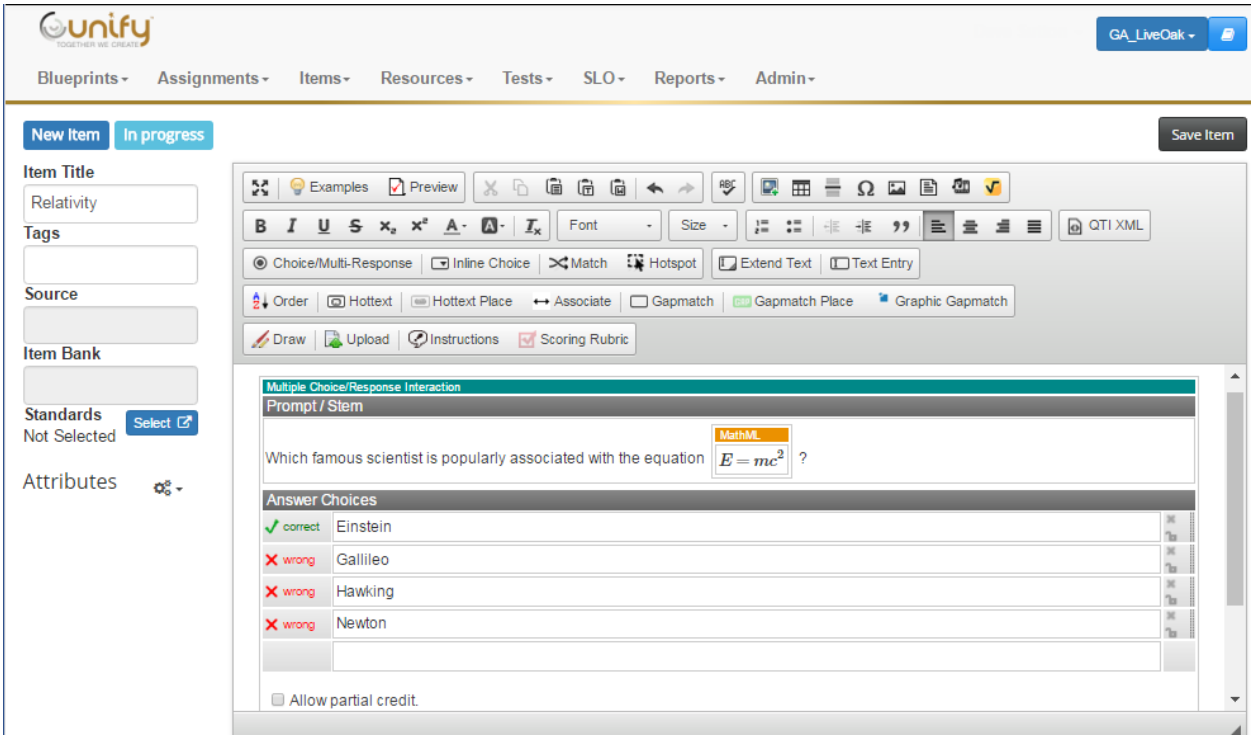


Figure 1 – Item Creation Menu – Proprietary Information

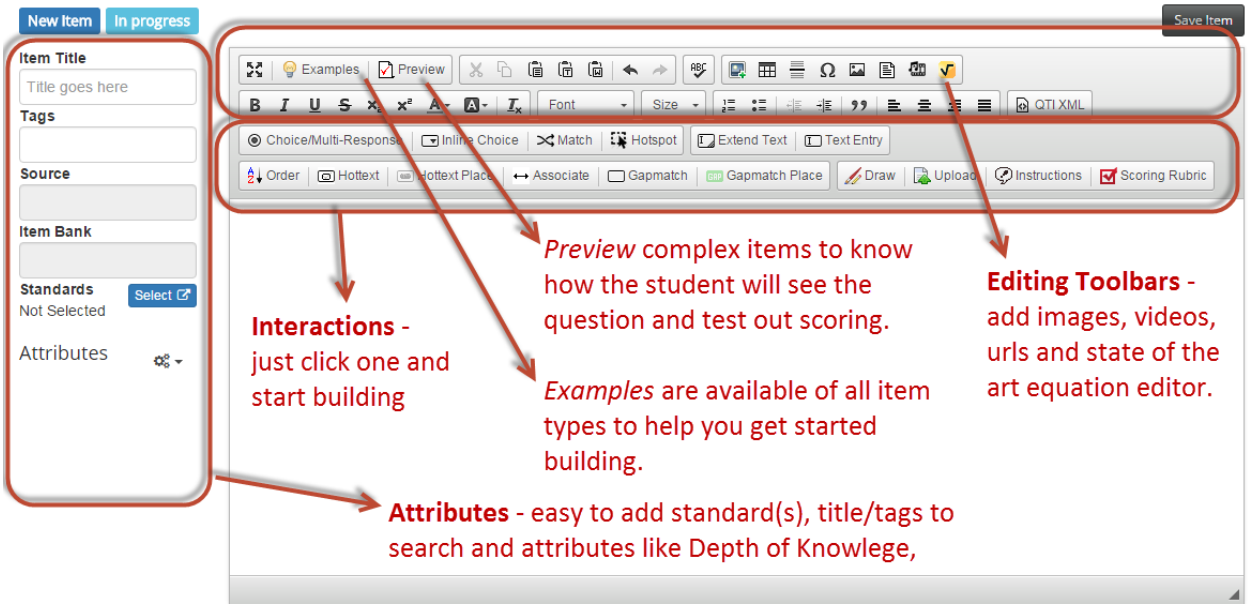


Figure 2 – Explanation of Item Creation Menu – Proprietary Information

Through the Unify platform, educators can use the blueprint feature to build assessments with their district specifications, if desired. Assessment creators can select important attributes in advance, such as standards, assessment difficulty, and item type, to align the quality of the assessment with ensuring it measures the intended results. Blueprints can be developed for a single assessment or an entire

course utilizing its scope and sequence. Once a blueprint is completed, it is available to build the assessment that meets the needs of teachers and students.

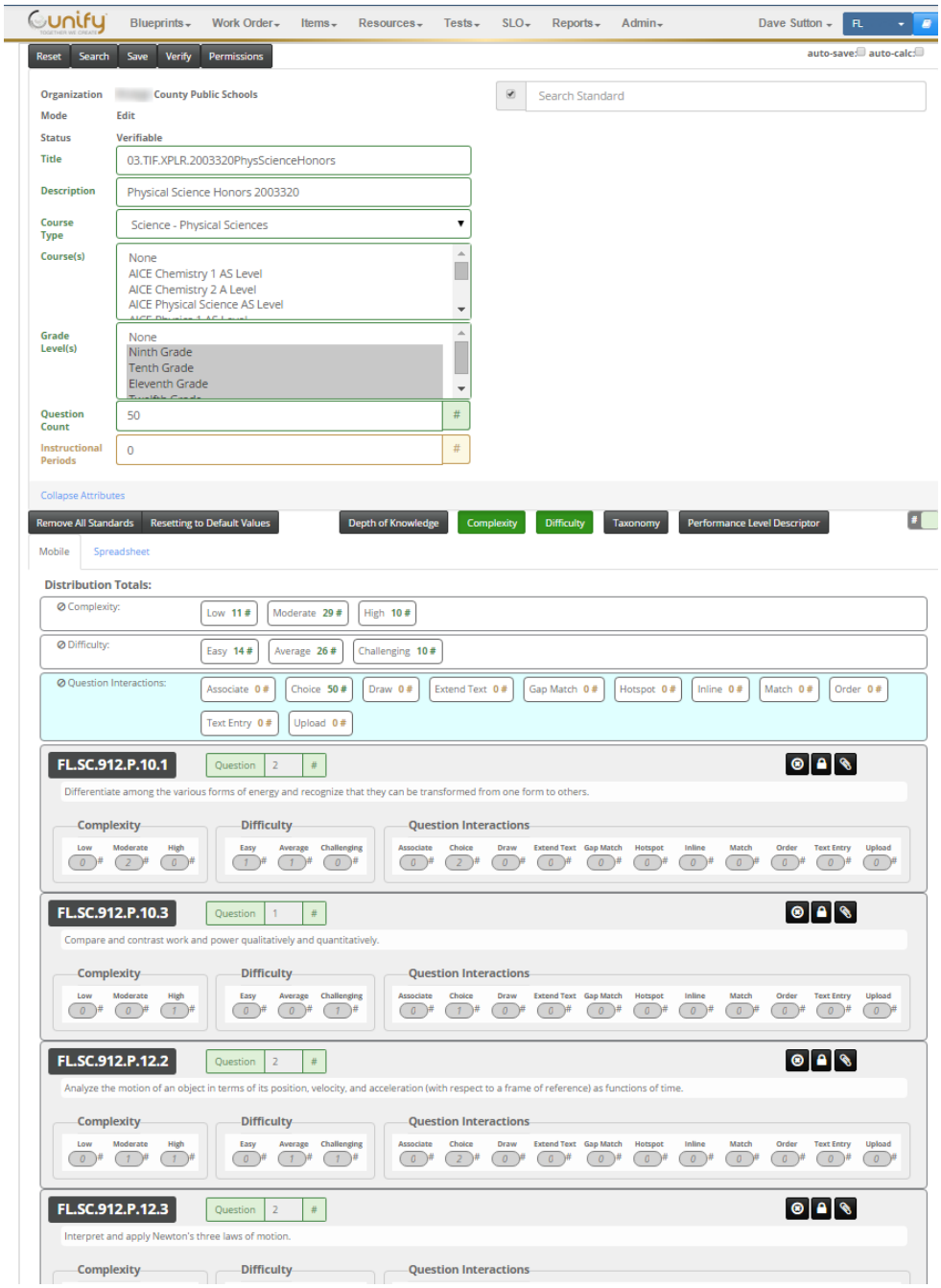


Figure 3 – Blueprint Menu – Proprietary Information

Performance Matters incorporates many sets of standards including all states, so that educators can monitor student achievement among any combination of standards assessed. Standards are available within a menu system so that users can align items when entering them and choose items aligned to standards when creating assessments. Thus, local assessment items may be aligned to state standards.

Unify is a uniquely designed social assessment platform that allows for the development of a shared community where partner districts can create and share assessments in a cloud-based environment.

The community can be established within the district to include multiple teachers and schools, or extended to include other Performance Matters-partnered districts. “Trust Relationships” are set between districts. Sharing between districts can be limited to an item bank or banks, assessments, item creation, item review, or even blind scoring of performance assessments.

Unify allows each district to set parameters for item development and review prior to usage on both district and classroom assessments. Item writing and reviewing protocols can be established and modified as needed to meet the assessment goals. Administrators can also set parameters for item and assessment sharing and distribution, both within the district and through trust relationships with other districts.

Performance Matters’ Unify includes an enterprise assessment platform used by school districts and classroom teachers across the country to author hundreds of thousands of items and assessments in collaboration, and to administer millions of those assessments online or via plain paper.

Administer Assessments

Authoring and administering assessments is a very simple process, whether for formative or summative assessments or a simple quiz. Individual test administration attributes can be assigned for each individual test within the administration tab. Options include administration windows (dates and times), numerous online assessment settings, scan sheet options, and other features related to reporting and test security. Administrating multiple assessments from one screen is accomplished through Test Center.

Test Center

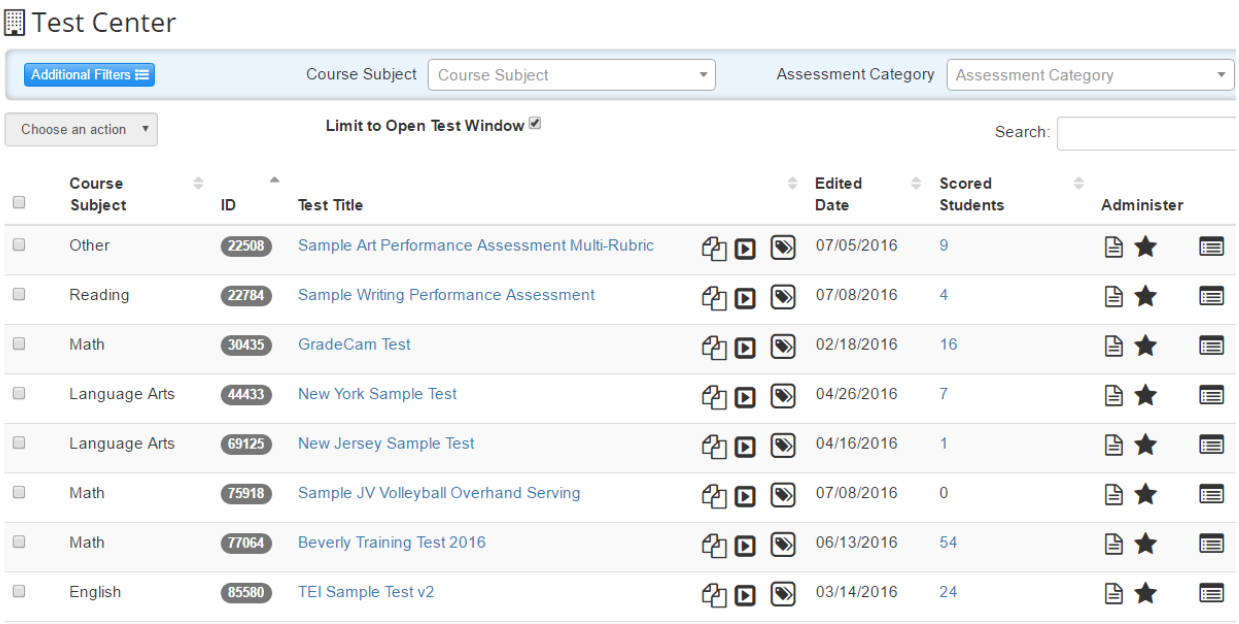


Figure 4 – Test Center Menu – Proprietary Information

The following tasks can all be accomplished via Test Center:

- Search for, preview, edit, copy, or delete tests to which you have the appropriate permissions.
- Download tests and scan sheets for all of your students, one class, or for a filtered set of students.
- Make tests available for selected students to take via OLA (online assessment).
- Download a test answer key.
- Access the Student Item Analysis report for tests that have student results.

For each test in your list, one or more of the following options will be available depending on your permissions and the test settings.

Test Title	Edit Test	Click on the test title to open the test editor, allowing you to make changes and add test windows.
	Copy Test	Use this to make a copy of the test.
	Preview OLA Test	Use this to see a preview of the test in OLA format.
	View Test Summary	Use this to view the test properties, settings, and attributes summary.
Scored Students	View SIA Report	Click on a blue number to view the Student Item Analysis report for the scored students.
	Download Test	Use this to download a PDF of the test questions and answer choices.
	Release Test	Use this to select student test population, download scan sheets, and release or unrelease the test for OLA.
	Score Test	Use this to access performance scoring for this test.
	Download Answer Key	Use this to download a PDF of the test answer key. See **Downloading the Answer Key** for more information.

In addition, you may have the option to perform the following actions on one or more tests in the list. Simply select the desired test(s) using the corresponding checkboxes, then choose the action from the drop-down menu provided.

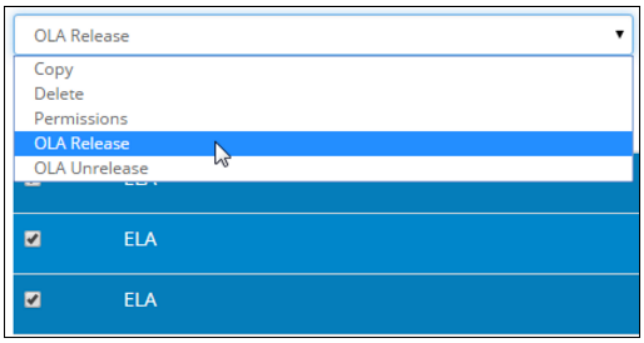


Figure 5 – Test Center Detailed Options – Proprietary Information

Based on test permissions, many options are available to provide users a way to efficiently perform test actions for one or multiple tests.

Selecting the student population

Whenever you click the Release button, a pop-up window will appear. Initially, the window will display the full student population based on the test settings for course type and grade level. All students will be selected by default.

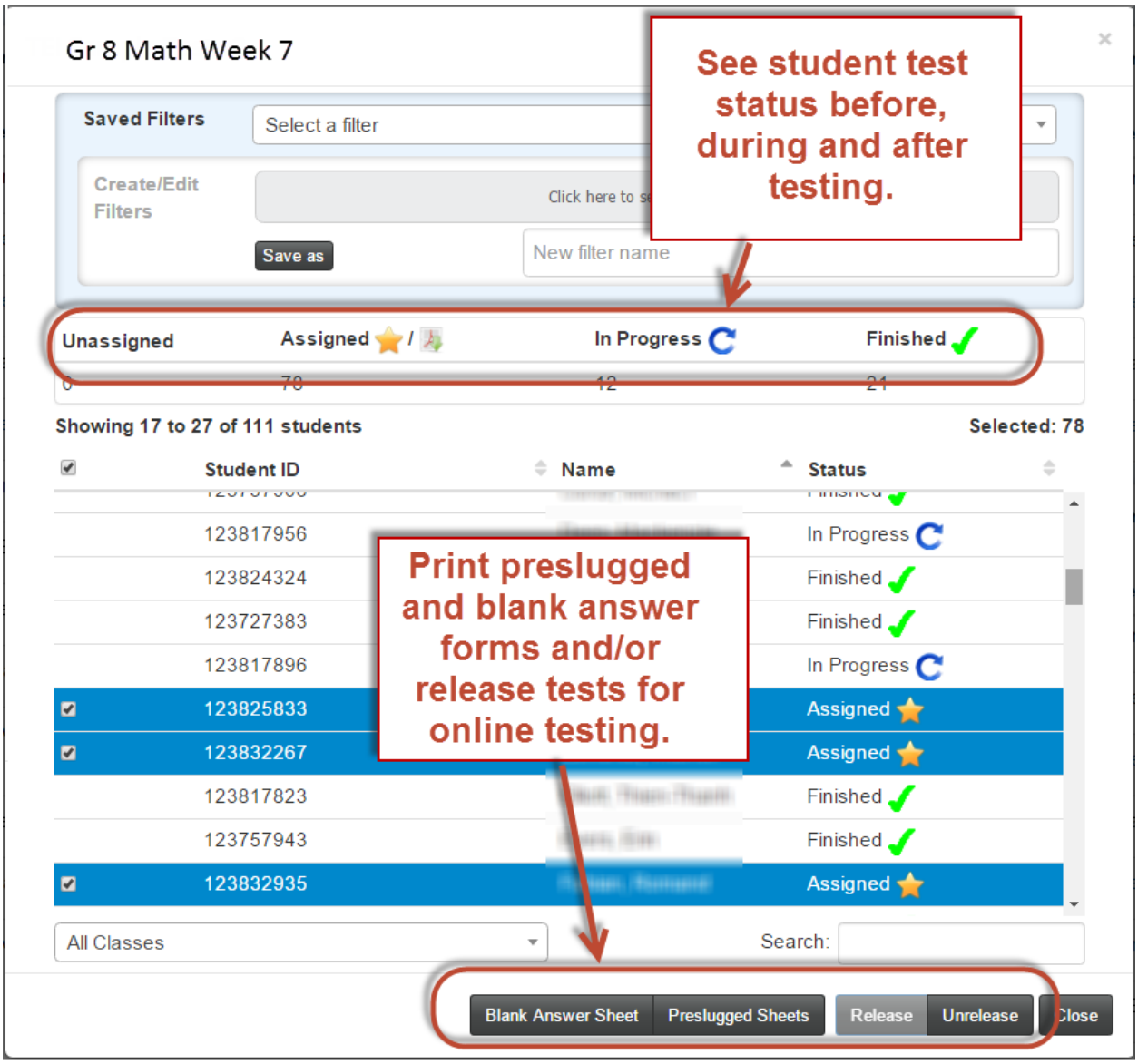


Figure 6 – Test Center: Selecting the Student Population – Proprietary Information

The student population list can be further refined through numerous filters embedded directly into the student population screen, thereby providing great flexibility in test administration options based upon the district, school, classroom, group, and individual levels.

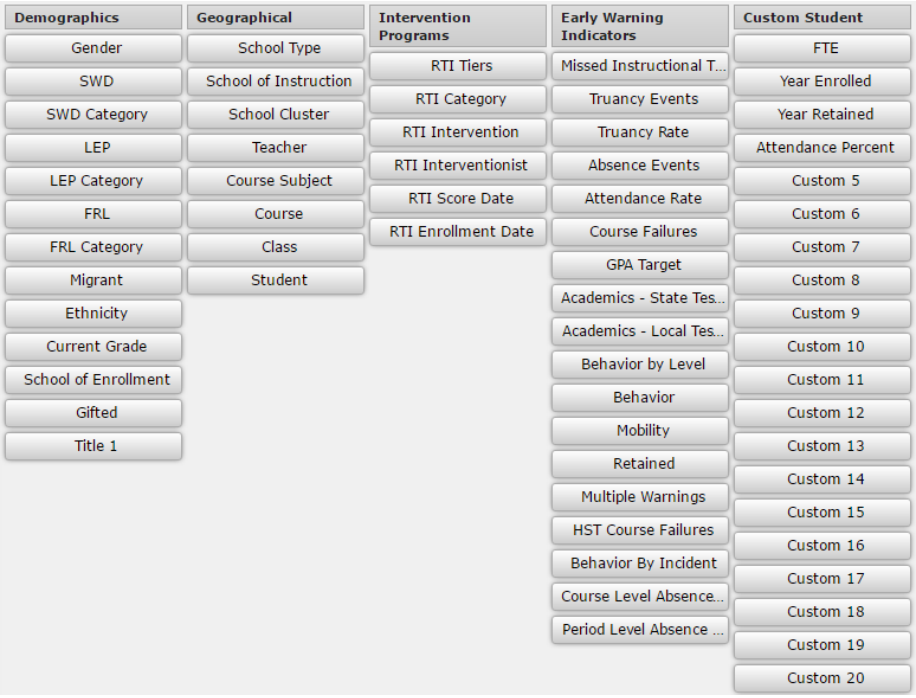


Figure 7 – Test Center: Refining the Student Population – Proprietary Information

NOTE: the following information on Performance Scoring is marked Proprietary Information

Performance Scoring

Performance Matters revolutionary Performance Task Scoring capabilities enables users to see a student's work and any artifacts associated with that work, alongside of the scoring rubric itself.

The Unify Performance Application provides visibility into student work and is ideally suited for Performance Tasks.

- **Exemplars and rubric descriptions** allow teachers and assigned scorers to view student work within this context which encourages consistent scoring.
- **Blind Scoring** can be engaged to remove bias.
- **Rubric Scores** provide visualization of different score levels available as scroll-through with just a click, so teachers can appropriately score the student's work.
- **Next Step** information can be included so that students can receive reports that illustrate how they can progress to the next level.

The Performance Scoring App can be utilized for a variety of applications. A few examples are shown below:

Writing prompt utilizing a 4-point Holistic Rubric:

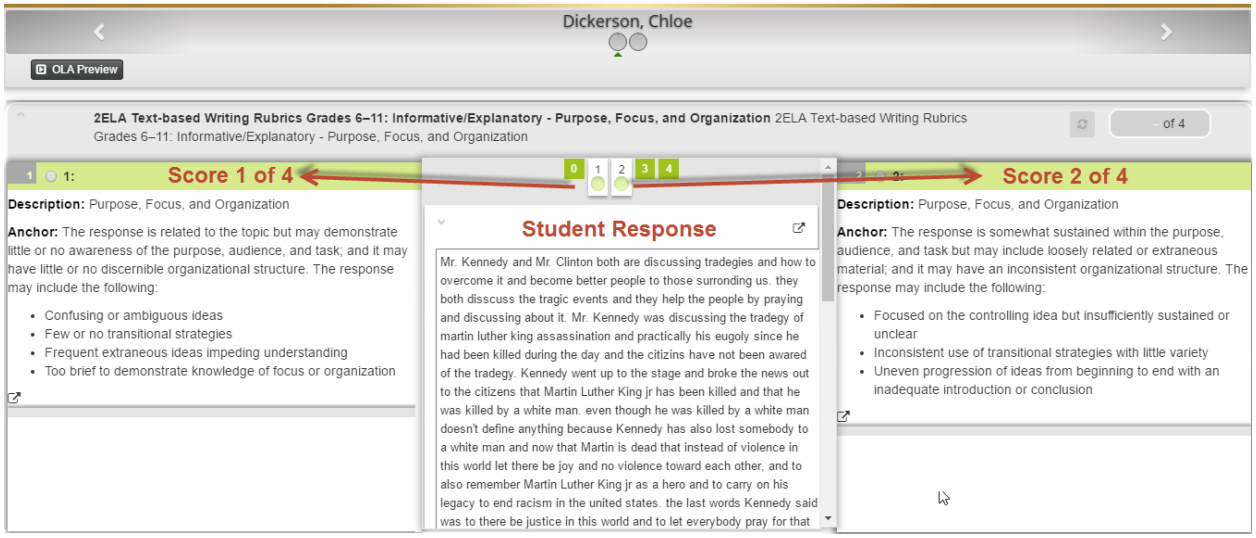


Figure 8 – Performance Scoring: Writing Prompt utilizing a 4-point Holistic Rubric – Proprietary Information

- By clicking a rubric score in the middle (1, 2, 3 or 4), the associated rubric definitions scroll, while the Student Response which remains centered.
- Scores can also be applied to multiple criteria Analytic rubrics, whereby the user would scroll down the page to score the different criteria rows.

Still Art utilizing a 10-point Holistic Rubric:

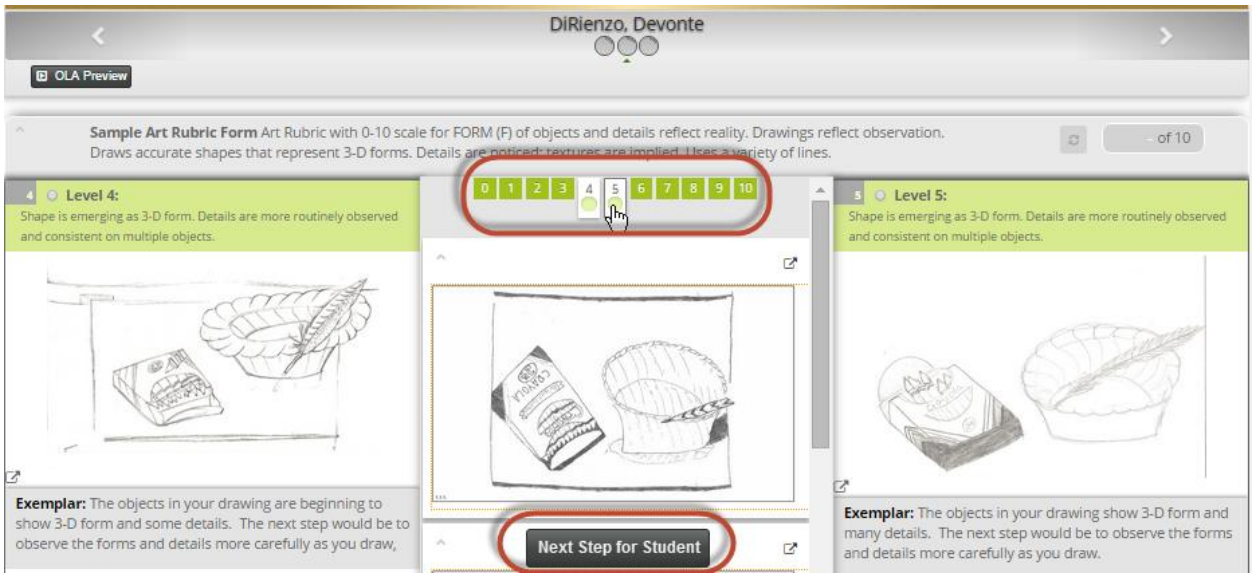
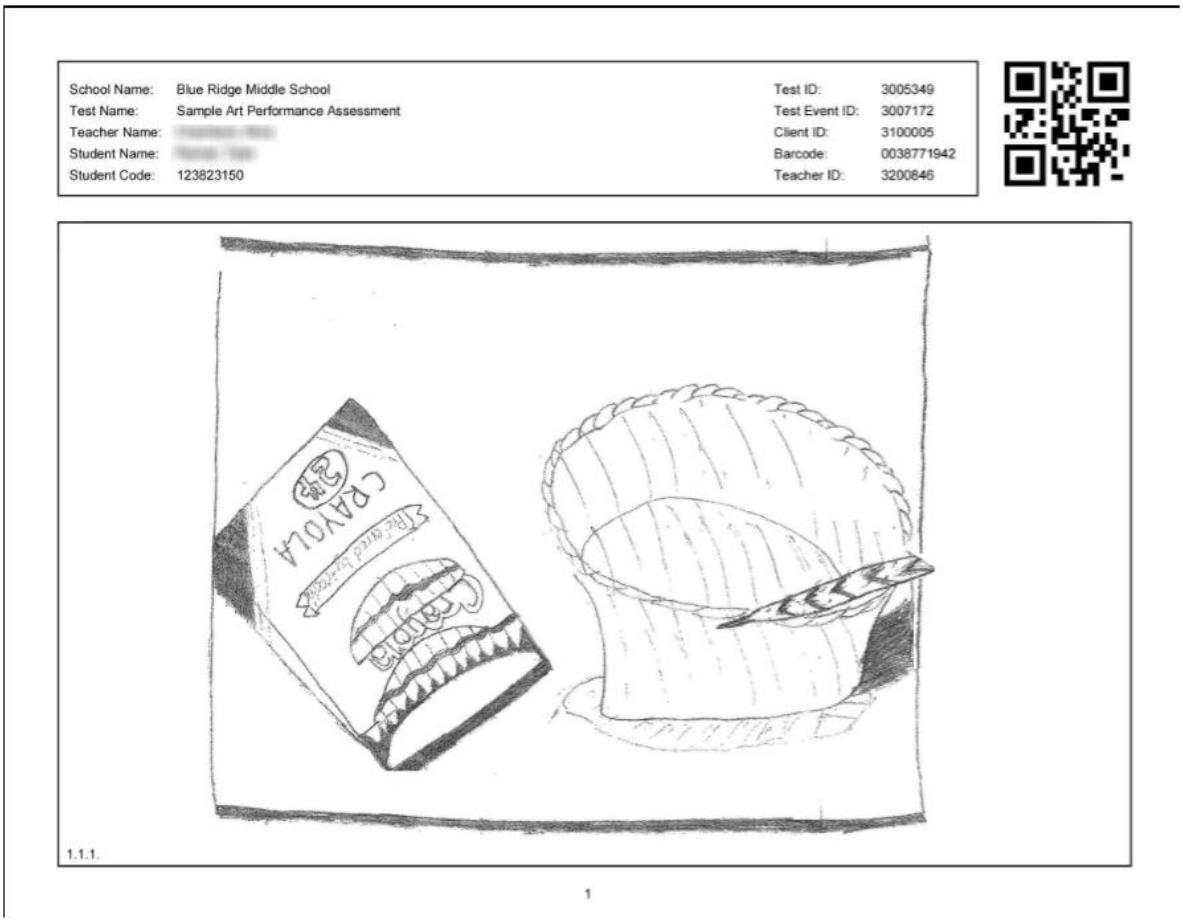


Figure 9 – Performance Scoring: Still Art utilizing a 10-point Holistic Rubric – Proprietary Information

Still Art student response originating from a scan sheet:



School Name: Blue Ridge Middle School
Test Name: Sample Art Performance Assessment
Teacher Name:
Student Name:
Student Code: 123823150

Test ID: 3005349
Test Event ID: 3007172
Client ID: 3100005
Barcode: 0038771942
Teacher ID: 3200846

1.1.1.

1

Figure 10 – Performance Scoring: Still Art student response from scan sheet – Proprietary Information

Performance Video Recording

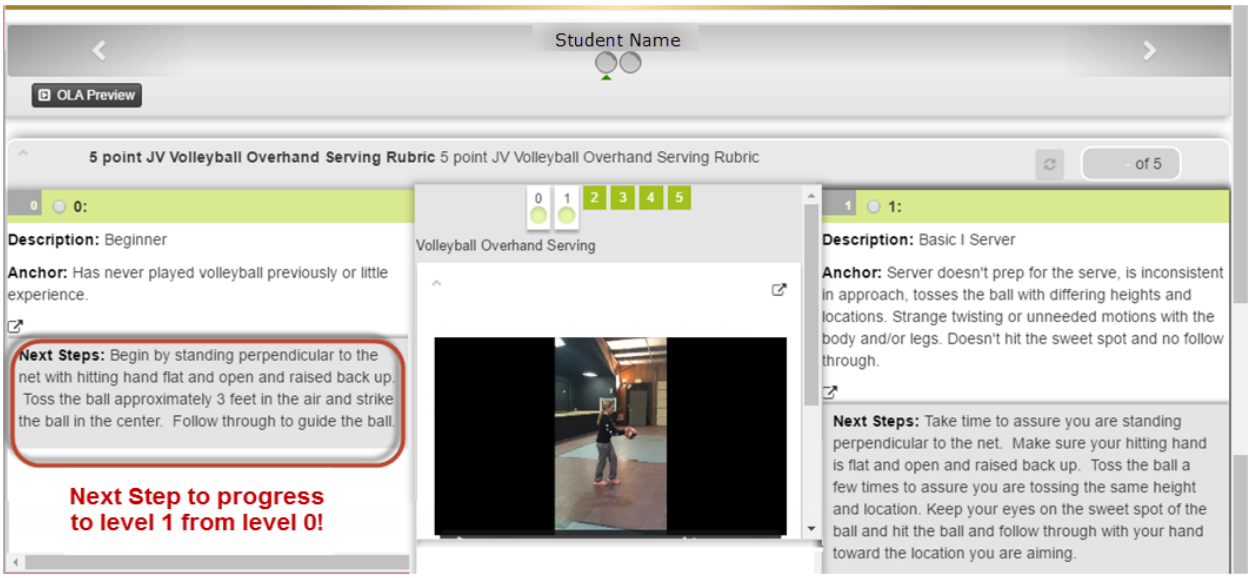


Figure 11 – Performance Scoring: Performance Video Recording originating from iPhone recording – Proprietary Information

- Video originated from iPhone recording and can be viewed in full screen mode

Figure 12 – Performance Scoring: Performance Video Recording– Proprietary Information

Online Testing and Plain Paper Scanning

Performance Matters supports both plain paper scanning and online/computer based assessment. Because of the integration with the District's Student Information System, blank bubble sheets, pre-slugged bubble sheets (with student name, student ID, teacher name, assessment name and test ID) and assessment booklets can be created with secure student ID information and printed from the test administration portal.

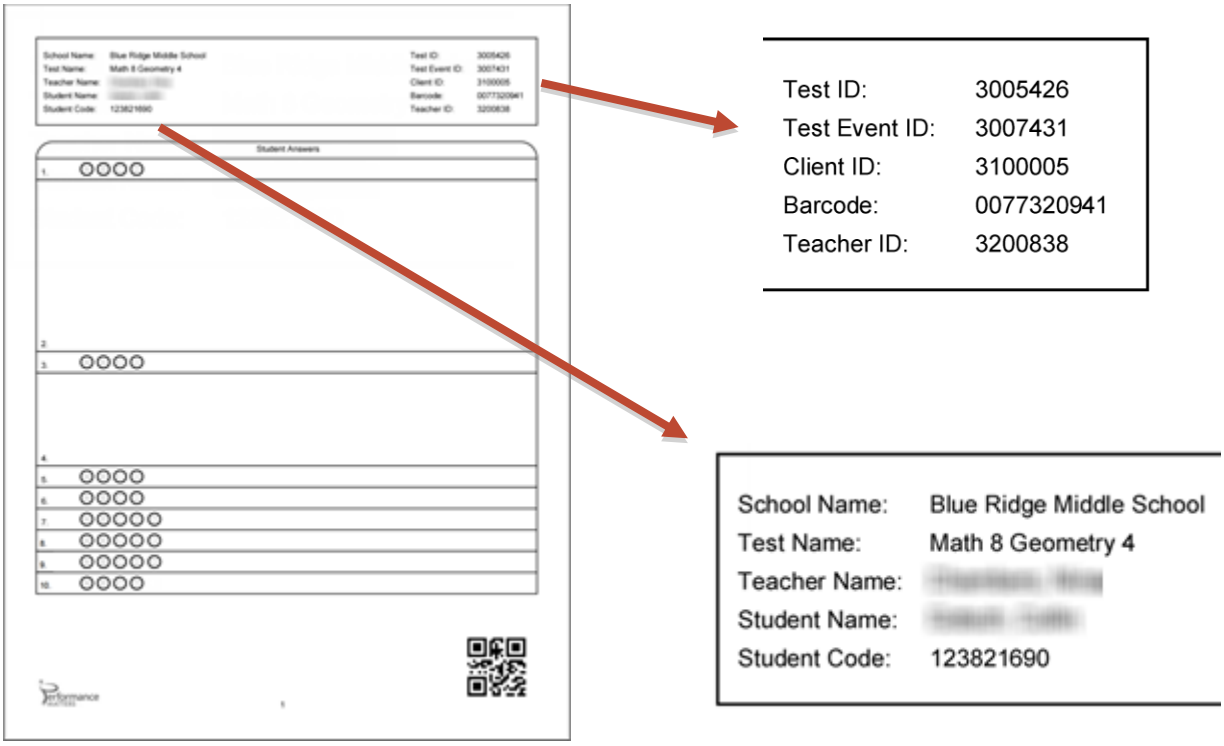


Figure 13 – Proprietary Scanning Software– Proprietary Information

Online Assessments (OLA) provides an easy-to-navigate interface with tools selectable by test. New releases of OLA are tested on iPads, Chromebooks, Macs, PCs and the last two versions of the four major browsers – Chrome, Firefox, Safari and Internet Explorer.

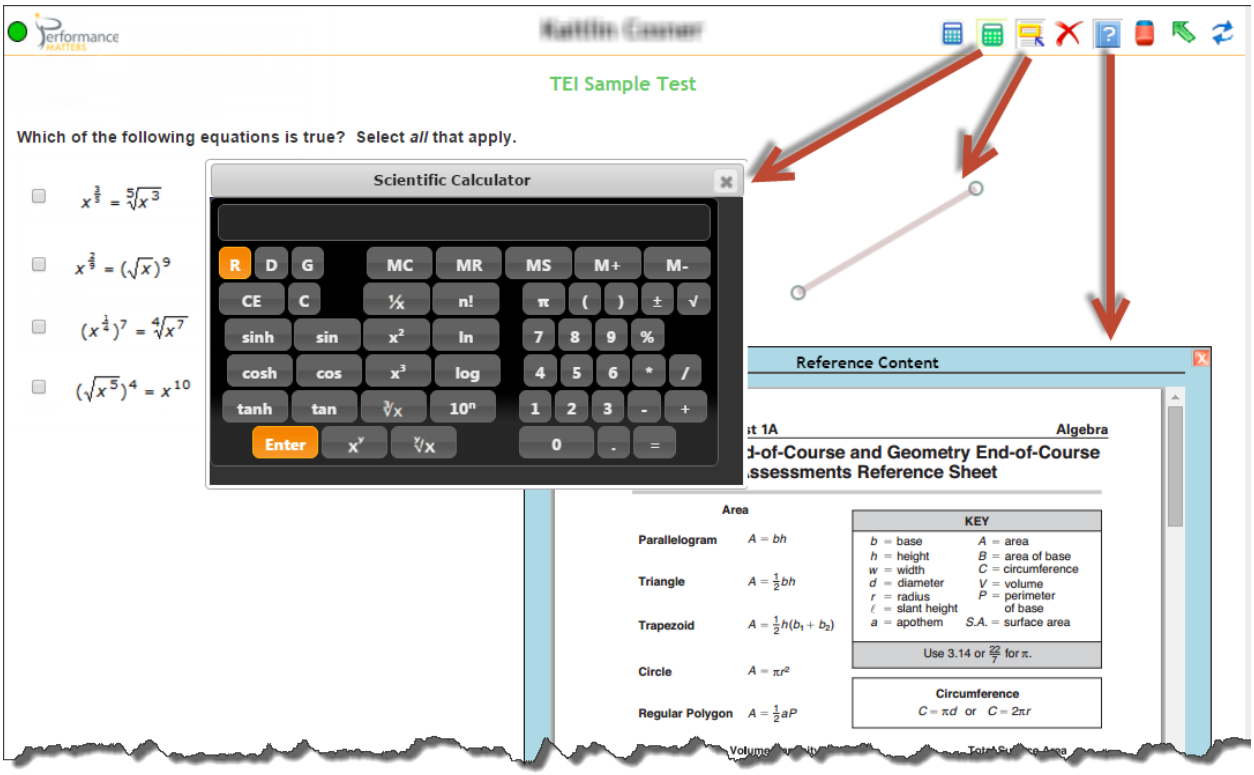


Figure 14 – Online Assessment Tools – Proprietary Information

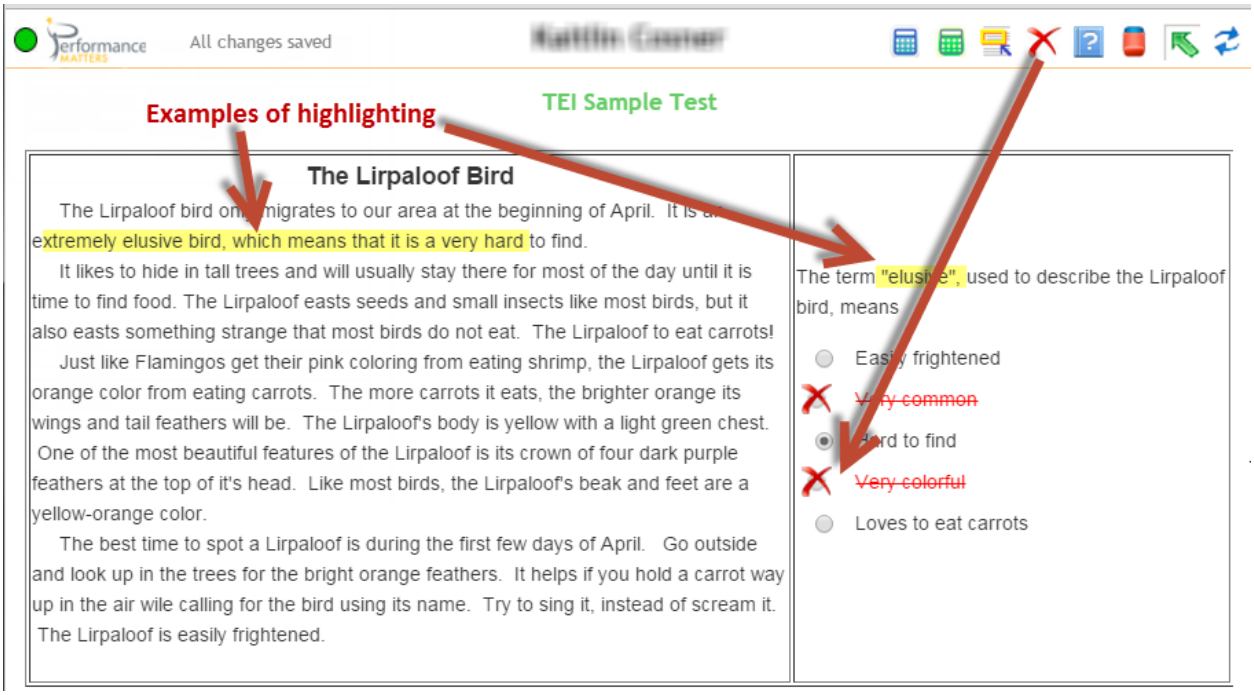


Figure 15 – Online Assessment Tools – Examples of Use in Platform – Proprietary Information

Assessments are available to students only during assessment windows as defined by the creator or administrator with permissions to modify the assessment. Other teachers or users cannot see the assessments within Unify with security placed on them for limited access by role or by user.

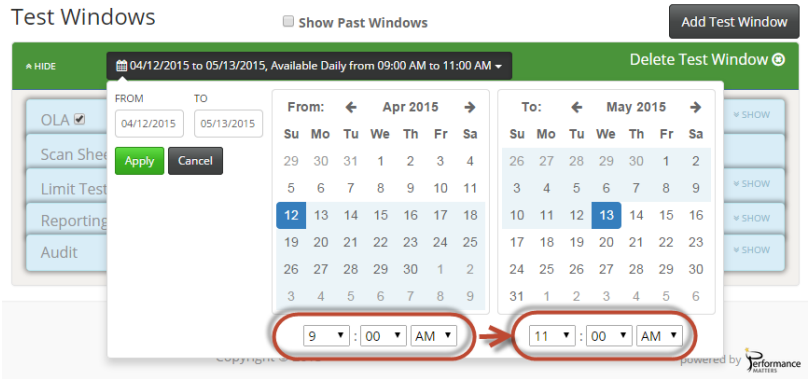


Figure 16 – Online Assessment – Selecting the Test Windows – Proprietary Information

Whether a test is given online or paper-pencil, the results are available near real time. Online availability is nearly instantaneous. Scanning generally requires 5 minutes to process, but may require up to 15 minutes processing time during high volume testing times. Scores for scanning are captured as processed. Item and student item analysis reports are available within minutes of scanning. Aggregated reports are available within 15 minutes, as results for locally scanned tests will be made fully available to users in near real time (every 15 minutes throughout the day).

All paper-based tests can be scanned by the designated school or district personnel. Network copiers/scanners will be configured with an easy-to-use button identified “Scan to Performance Matters” that easily allows anyone to simply stack tests on the copier/scanner, press the button and the rest is completed by Unify.

Unify provides testing to 9 of the largest 50 school districts in the nation. Optimization and scaling for both online and plain-paper scanning are keys to Performance Matters’ success. In the first 45 days of the 2015-16 school year, Performance Matters processed over 2.7 million assessments.

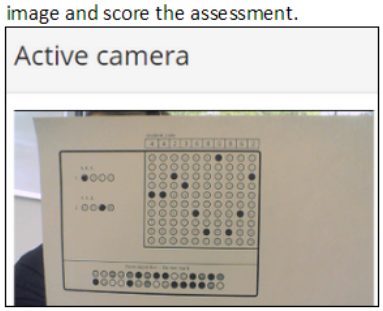
Performance Matters has conducted a multitude of scalability and performance testing to ensure that the user experience maintains appropriate response times. Performance Matters has successfully completed concurrency testing up to 100,000 students and has proven to be a reliable partner for over 13 years, from the company’s inception in 2003. With the proven ability to scale larger as student enrollment increases, Performance Matters can consistently support the demands of districts, both now and in the future.

GradeCam *Note: Optional Module Not Included in Pricing*

GradeCam interface to capture and score scan sheets

GradeCam is a third-party scan sheet and scoring tool that has an easy integration with Unify.

Once you've selected an option, the camera will become active. Simply hold each completed scan sheet in view of the camera to capture its image and score the assessment.



The results will appear in the Scan results section, with incorrect answers highlighted. The student names and scores will appear in the Scanned Tests section.

Analyze Assessments

PLEASE NOTE:

Performance Matters highly values and protects personally identifiable information (PII). Performance Matters partners with School Districts to protect all student and teacher personally identifiable information by employing security practices and monitoring to ensure the confidentiality and integrity of your information.

Although the data shown in reporting examples included in this response is strictly fictitious demonstration data not associated with any teacher, student, school or district, Performance Matters has chosen to blur all screenshots that would display such information in an effort to demonstrate our commitment to protection of PII. All names and images are fictitious; no identification with actual persons is intended or should be inferred.

Performance Matters loads district common assessments and teacher created assessment results into the Unify platform. This data provides an industry leading, rich and robust analytics to immediately enhance understanding of the data through drill down capability to subgroups from all user role levels. PM has great confidence that Unify offers the best in class and the most comprehensive assessment delivery and reporting system available for school districts.

Data such as benchmark/district assessment can be viewed longitudinally. All tests created within Unify can have cut scores set by the role or owner group. These can be changed by owners, if needed, even after testing takes place. This data can be viewed by student or aggregated by any sub-group cohort, teacher, school, etc.

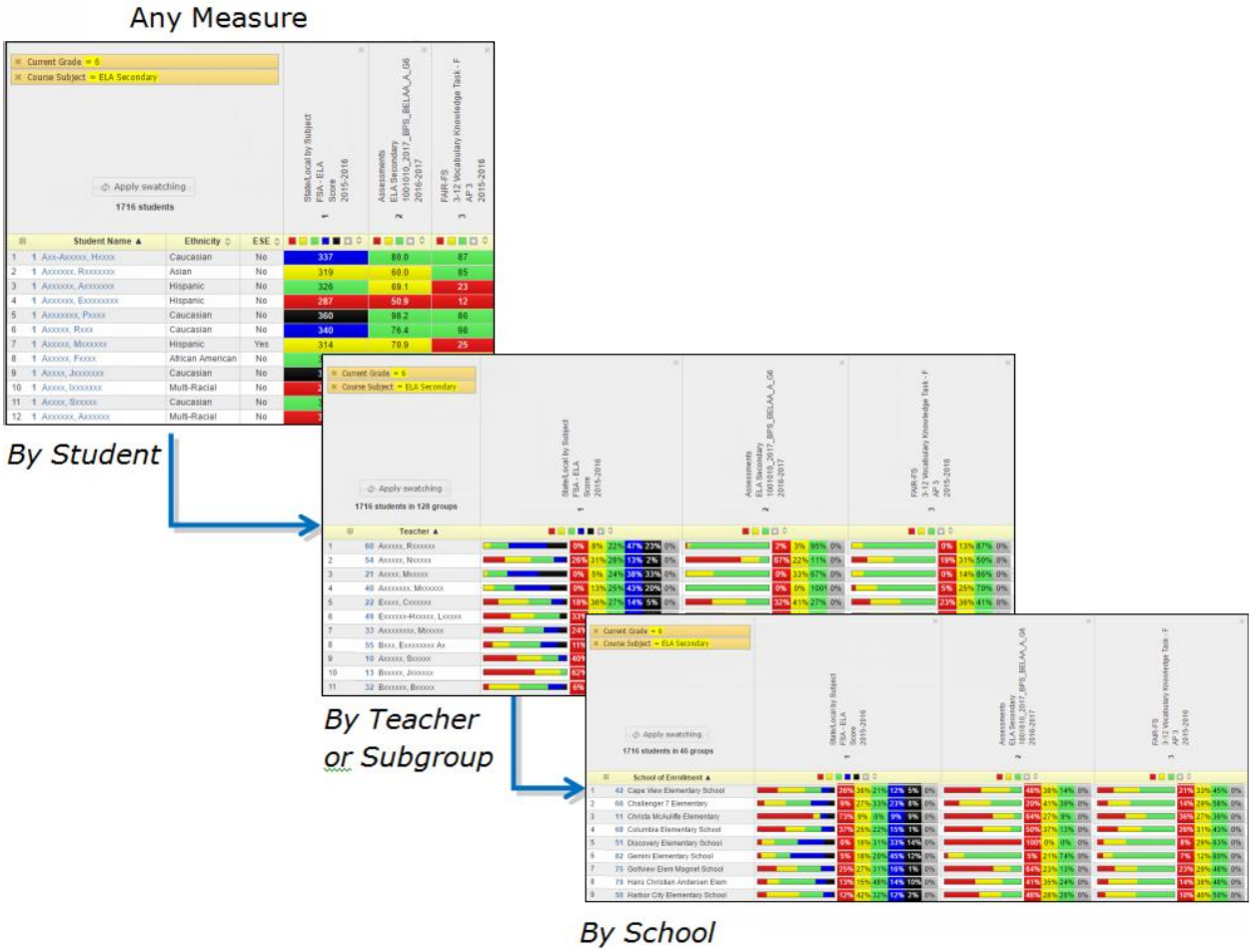


Figure 17 – Unify Analytics – Baseball Card View – Proprietary Information

On-Demand Reporting

Performance Matter's build-your-own reporting tool, Baseball Card (BBCard) on-demand report, can utilize any data measure that is loaded into the Unify system and can group by class, teacher, ethnicity, school, gender, as well as a number of other choices or combination of choices. In conjunction with student information system data, users can query on grades and proficiencies together.

After a report is generated, it can be shared by using a live link that can be emailed or setup on a website page. Any recipient of the report link simply clicks the link and can view the report that was previously generated. This feature also provides complete security because the recipient will be prompted to login to view the report if not currently logged in. The report will automatically show only the data allowed to be viewed by that given user. For example, if a district user creates and shares the report, then a principal will only see the students in their school, and a teacher will only see students assigned to them.

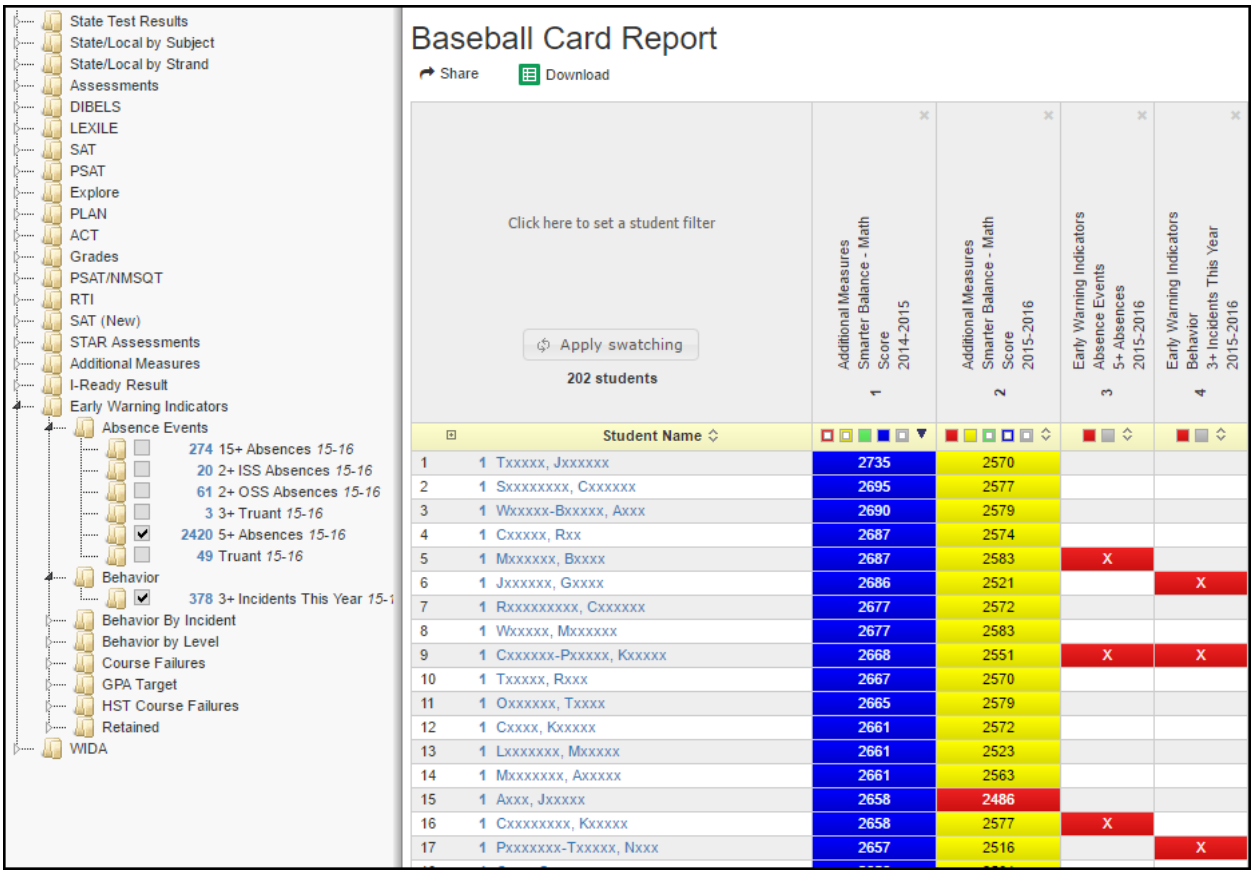


Figure 18 – Unify Analytics – Baseball Card Example of Disaggregated Data – Proprietary Information

Scenario: Identify students that scored in the top two ranges on the Smarter Balanced math assessment within the 2014-15 school year, but regressed into the bottom two ranges on the Smarter Balanced math assessment within the 2015-16 school year. Early Warning Indicators are added to identify possible additional reasons why students regressed, including those students with 5+ absences and 3+ behavior incidents during the year.

Disaggregate Data based upon Identified Subgroups (Ethnicity, SE, RtI)

A comprehensive set of pre-configured reports are available, as well as the build-your-own reporting tool, Baseball Card (BBCard). Reports are available for individual students containing multiple measures such as benchmark or local tests. There are many options for reports to compare class, school, teacher and districts by tests and to show growth. The BBCard is another example of a tool used in test scoring monitoring over time with the ability to track a standard all the way from pretest to district benchmark test, to teacher created tests, to an end-of-course or post benchmark test. Optional dimension columns are shown on the right side that can be added to the BBCard to make grouped data display by subgroup or other groupings.

All reports can be disaggregated by any filter or combination of filters, whether they are demographic, subgroups or custom filters. The system includes a filtering feature that allows the analysis of data demographically and geographically. Filters can also be customized to view data for specialized groups of teachers and students. Any combination of filters can be used to disaggregate reports. Custom Student filters are defined by the district.

The Baseball Card on-demand report can utilize any data measure that is loaded into the Unify system and can be grouped by class, teacher, ethnicity, school, gender, as well as a number of other choices or any combination of these choices. The Baseball Card report supports all local assessments.

An example of how students performed, by subgroup for a state EOC in Algebra compared to ACT Math.

Click here to set a student filter

Apply swatching

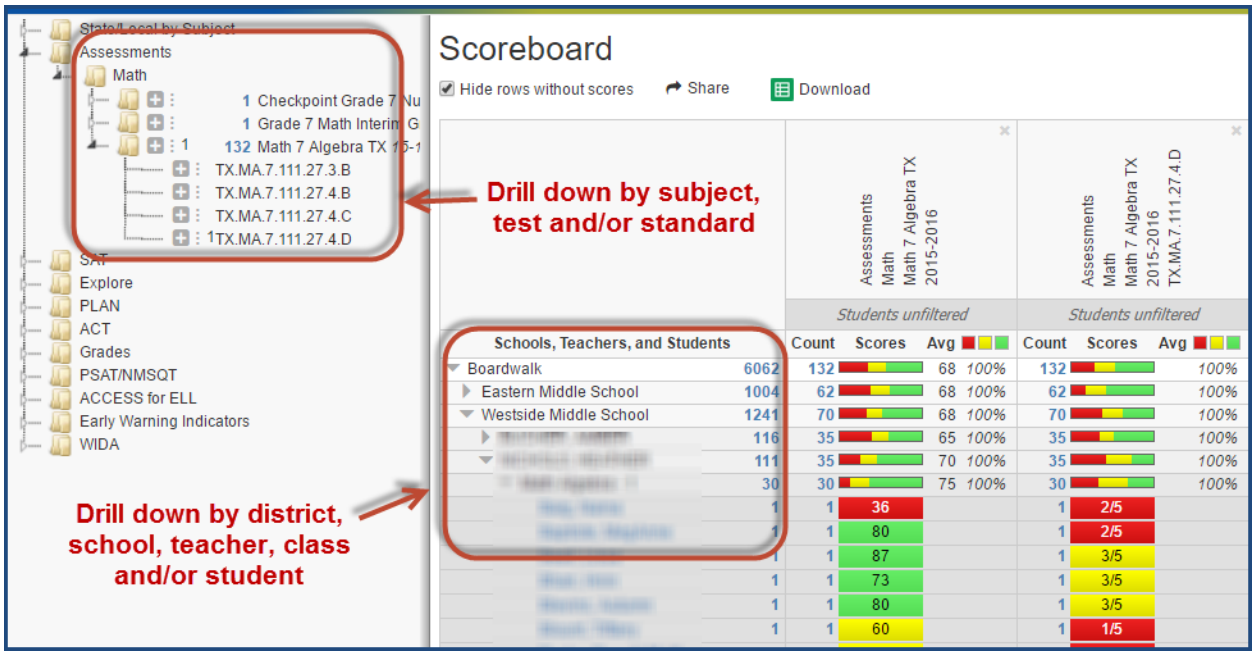
525 students in 7 groups

		Ethnicity	1 ACT Math Best Score All Years			2 State/Local by Subject EOC - Algebra 1 Scale Score 2014-2015					
1	123	African American	94%	6%	0%	12%	63%	19%	4%	2%	0%
2	2	American Indian	100%	0%	0%	0%	50%	50%	0%	0%	0%
3	12	Asian	83%	17%	0%	0%	33%	33%	17%	17%	0%
4	270	Caucasian	90%	10%	0%	11%	51%	29%	6%	3%	0%
5	2	Hawaiian / PI	100%	0%	0%	100%	0%	0%	0%	0%	0%
6	81	Hispanic	99%	1%	0%	23%	57%	17%	1%	1%	0%
7	35	Multi-Racial	86%	14%	0%	6%	54%	29%	0%	11%	0%

Figure 19 – Unify Analytics – Baseball Card Example of Disaggregated Data – Proprietary Information

Scoreboard Report

The Scoreboard Report has a similar structure as the Baseball Card report, but its primary purpose is to compare course, teacher, school, and district averages for all students as well as their demographic groups. Utilizing the same filtering capabilities found throughout Unify, users can monitor proficiency levels by school, course, teacher, student and subgroup.



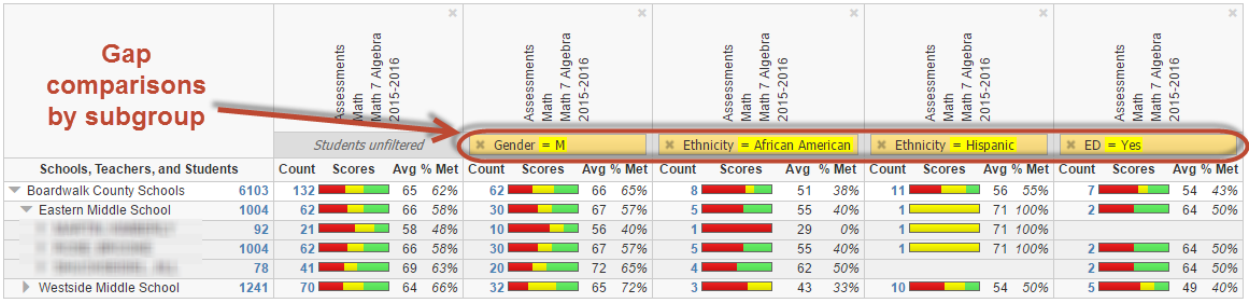
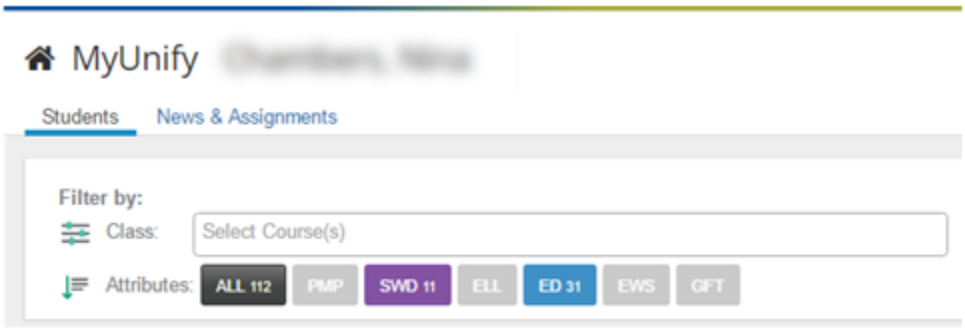


Figure 20 – Unify Analytics – Scoreboard View and Details of Use – Proprietary Information

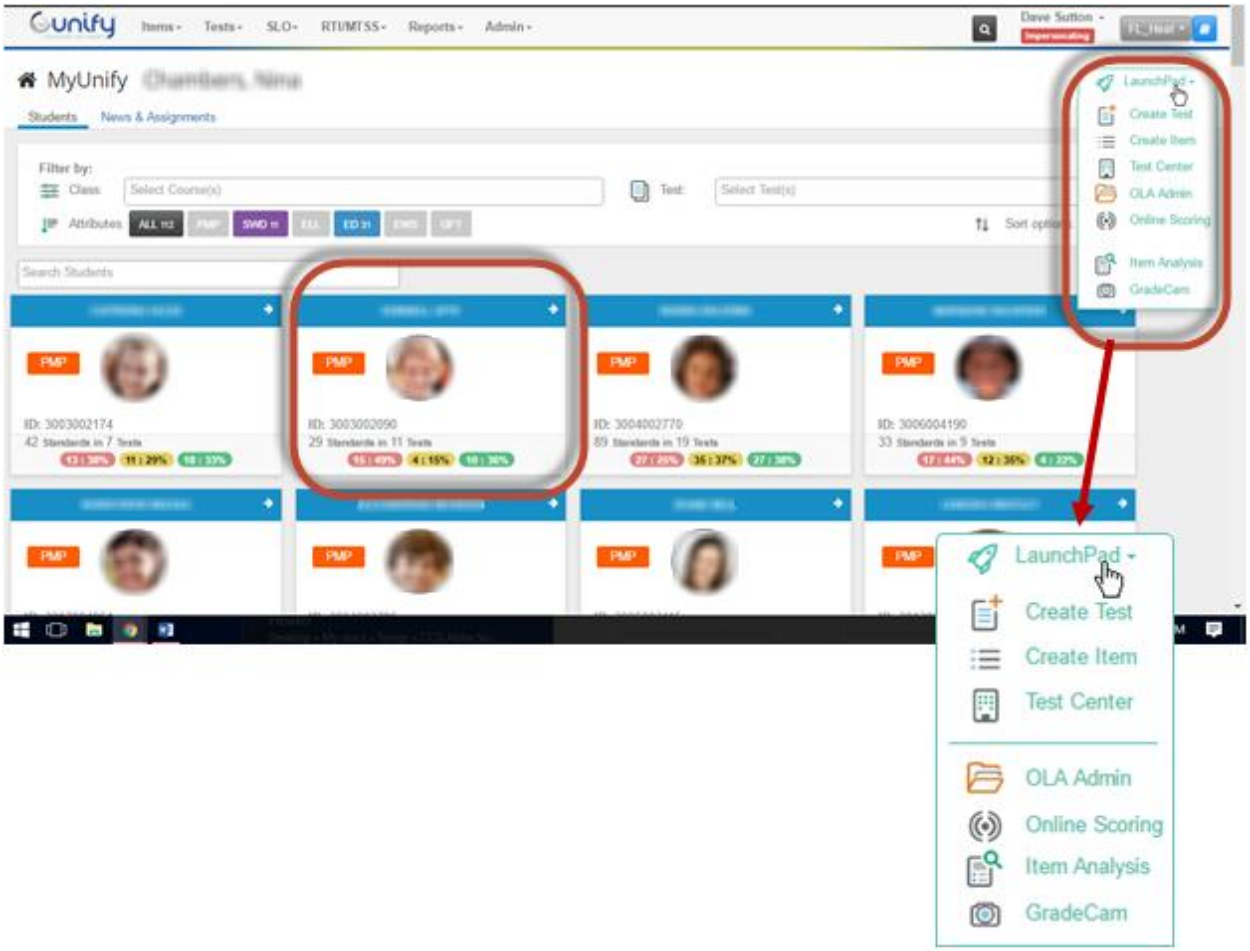
MyUnify Dashboards

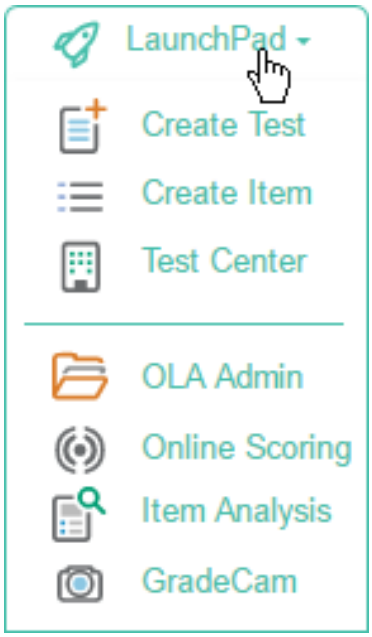
From MyUnify, a teacher is one click away from student details such as grades, attendance, test scores, personal monitoring plans or test creation, item analysis or any other commonly used function. Each Teacher's first glimpse is an easily navigable and maneuverable teacher portal page that provides a view of all students in their class or classes. Simply clicking on a student allows immediate access to state test results, local assessments and other pertinent information for that student.



The MyUnify page is a very simple, yet powerfully relevant, information store for teachers. As illustrated above, the aggregated information for a class is displayed at the top of the page with detailed student information below. By clicking on any aggregate measure choice from the demographics, the student listing is immediately limited to that selected population. For example, for a teacher to view all only their SWD students, click the purple SWD button to see only those 11 students, in the above example.

The “LaunchPad” is only “one-click away” for teachers to any action.





Create a test from items or manual answer key

Easily create any type of item, including technology enhanced items

Print answer sheets, test booklets, release tests for online consumption or score performance assessments

OLA Admin provides viewing student online testing progress in real time, including number and percentage of correctly answered questions as the students answer.

Score Tests Online

View student results as soon as the test is complete

Score homework or weekly tests from within the classroom using a document camera or web cam

From MyUnify, click on any student to see all of their data:

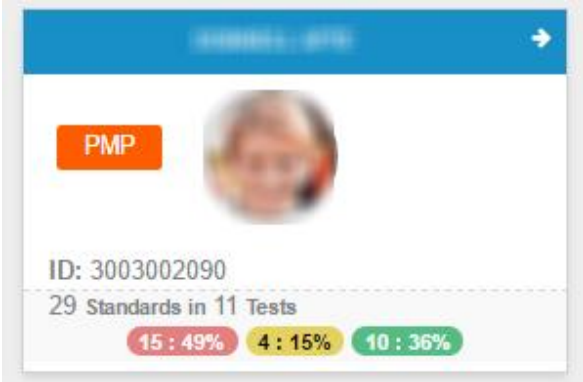


Figure 24 – MyUnify – Student Information – Proprietary Information

The following page displays:

- Current schedule
- Disciple
- Attendance
- Early Warning Indicators
- Grades

Note: Unify has role-based security allowing options to be set so that certain student information, such as discipline, may be viewed by school administrators and counselors, but not teachers. These are all district level decisions that are set up during implementation and can be changed at any time.

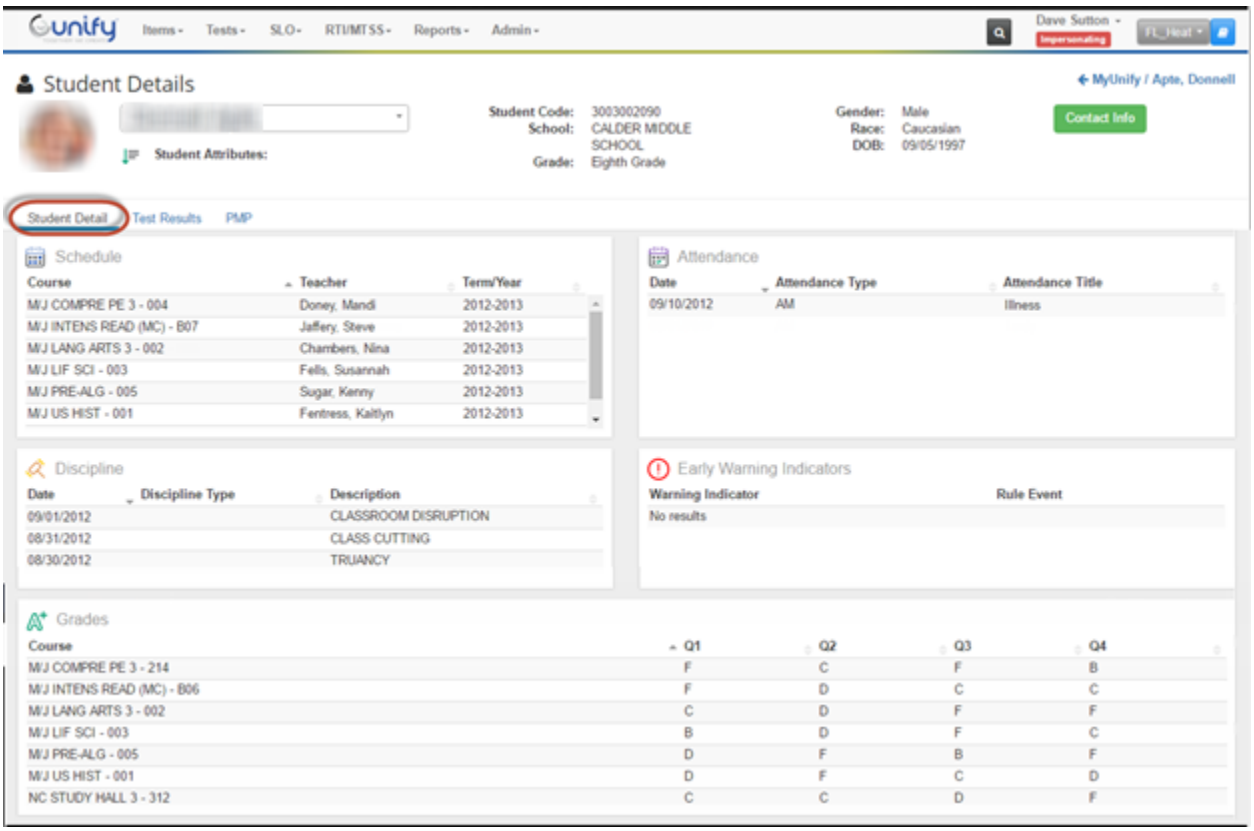


Figure 25 – MyUnify – Student Details – Proprietary Information

All test results are available from the same page via a different navigation tab.

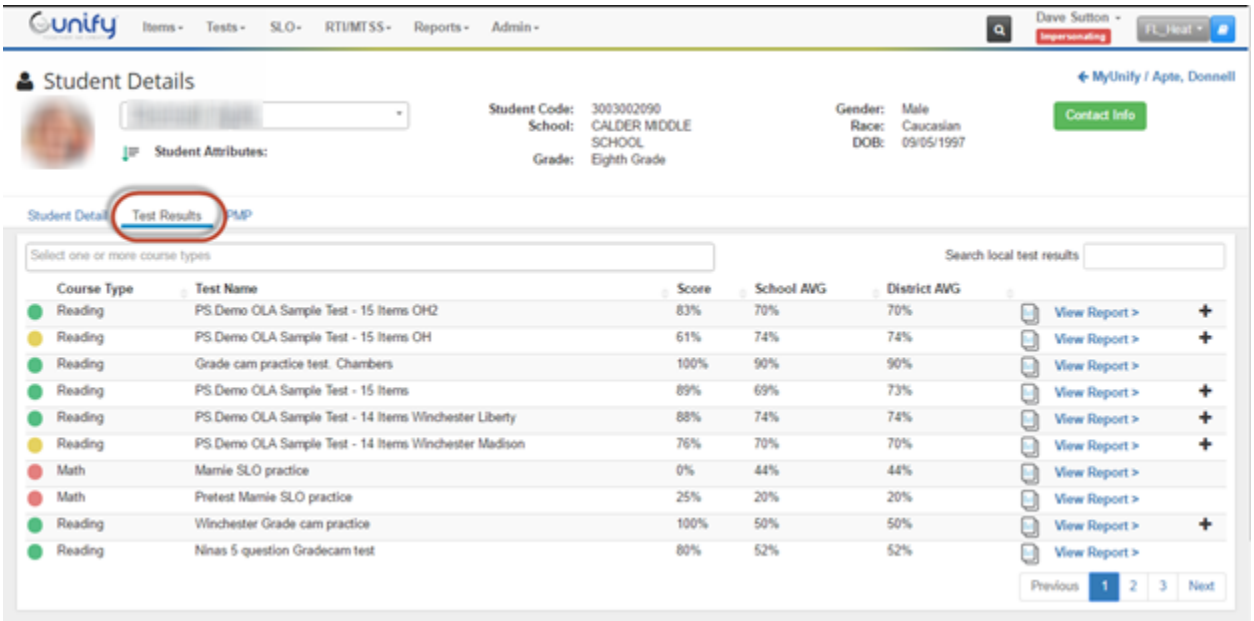


Figure 26 – MyUnify – Student Test Results – Proprietary Information

Student Item Analysis (SIA)

Student Item Analysis, shown below, is used to dive into the results of any division, building level or teacher created test. The next two images explain each area of the report.

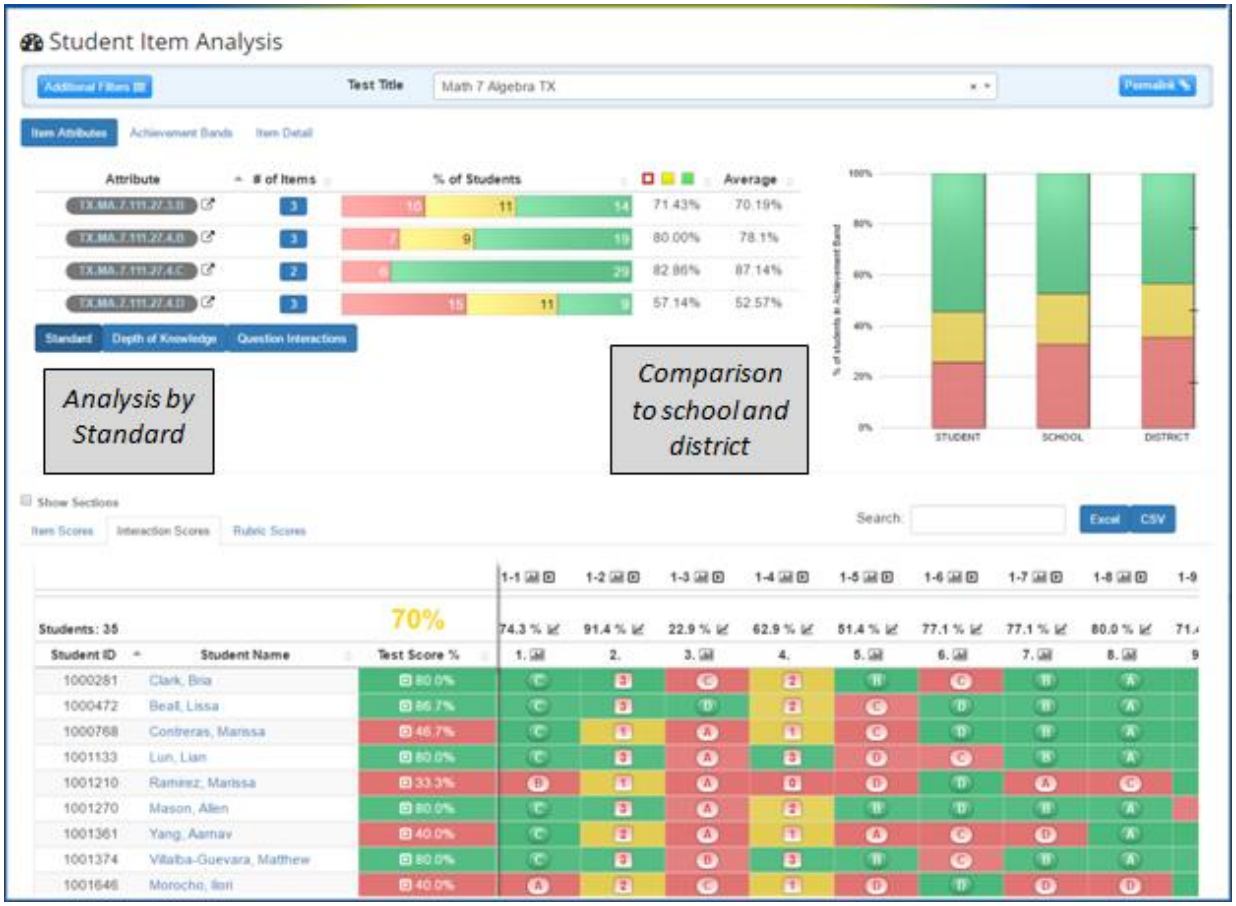


Figure 27 – Student Item Analysis – Proprietary Information

More information about an item is provided by just hovering over any item.

- The example below shows information for question 1-4.
- Information about the item, including points possible, weight, and other factors are displayed.
- Click the play button to preview the question, answers, passage and distractor analysis, if applicable.

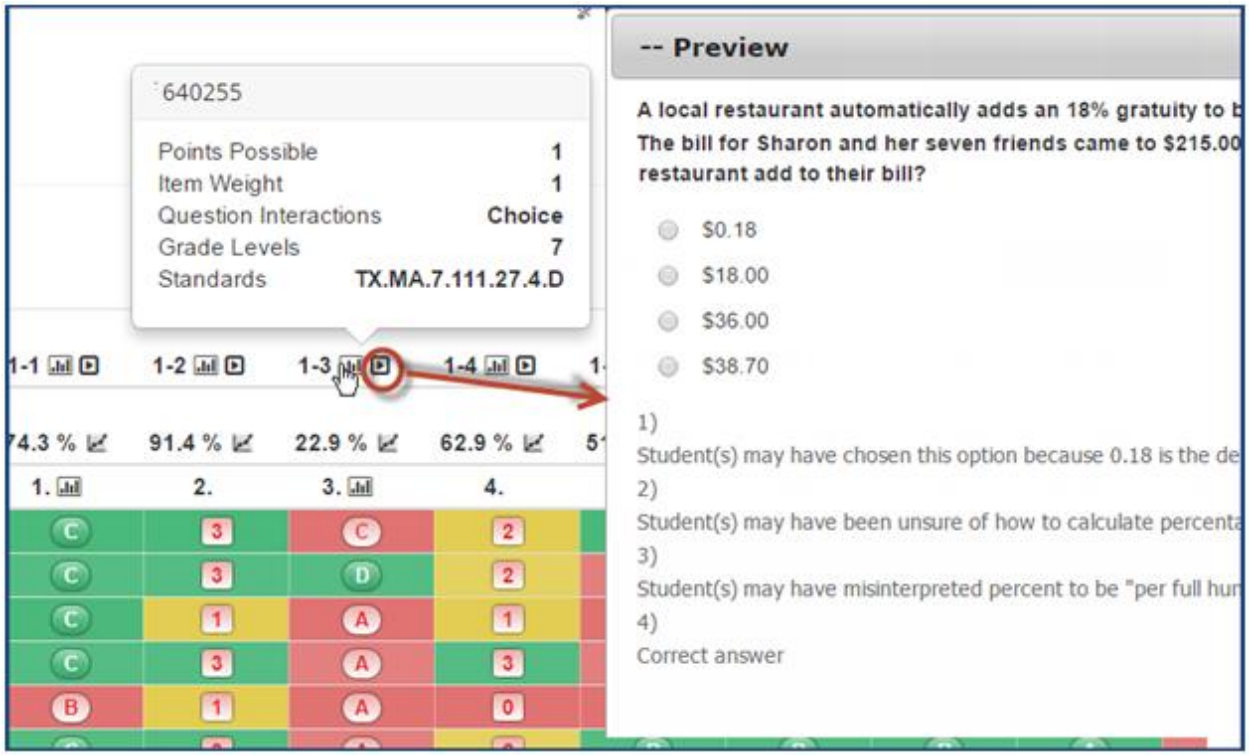


Figure 28 – Student Item Analysis: Item Details – Proprietary Information

MyReports

MyReports allows users access to run pre-canned reports that pull from all of the various Unify data sources. These reports generate data exports in the form of PDF, Excel, or CSV. MyReports will store the historically generated reports for later access, and allows users to share the generated exports. The various reports carry their own security, and the division may determine who should have access to what reports. When a user generates a report, the system will ensure the user only has access to data that is applicable for their role and permissions. Each report has a defined template, and both tabular data representations and/or graphical representations are used.

A few report examples include:

- Standard Performance Feedback, which allows users to select multiple assessments and view aggregated standard performance.
- Test Performance Feedback, which provides a by-student performance view on a selected assessment. This type of report could be useful to share with parents.

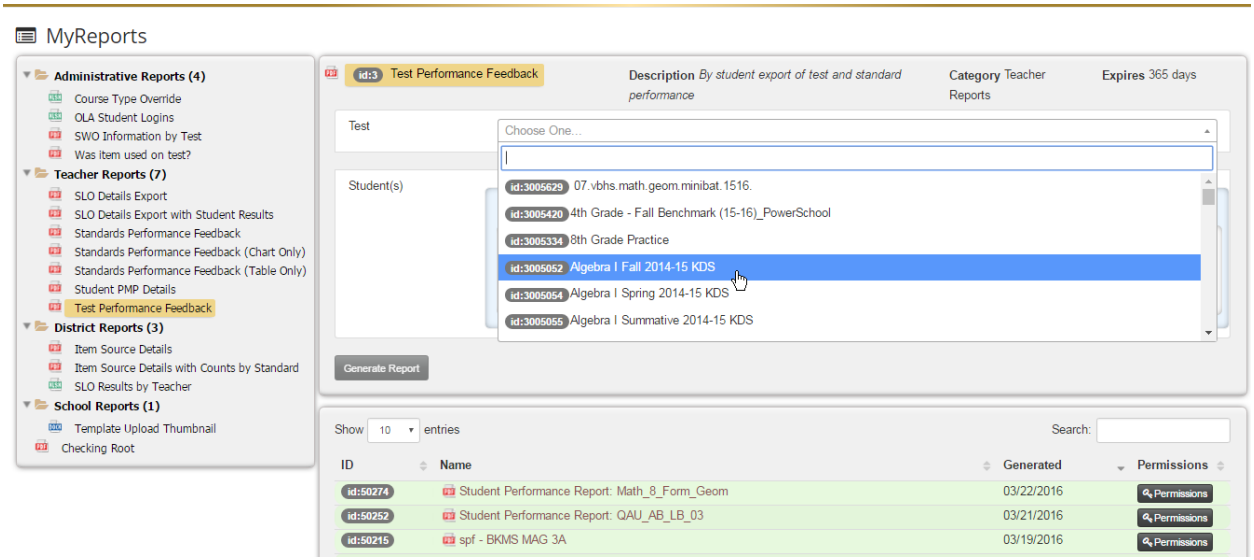


Figure 29 – MyReports – Proprietary Information

Early Warning System (EWS)

A centerpiece of the Performance Matters' road map from inception in 2003 is built upon the ability to track the progress of student learning. This has led a broad range of reporting and analytics that support progress monitoring. Integrated with these progress monitoring tools are complimentary modules that support the data driven actions our customers take like Early Warning, MTSS/RTI, PMP and Student Learning Objectives modules.

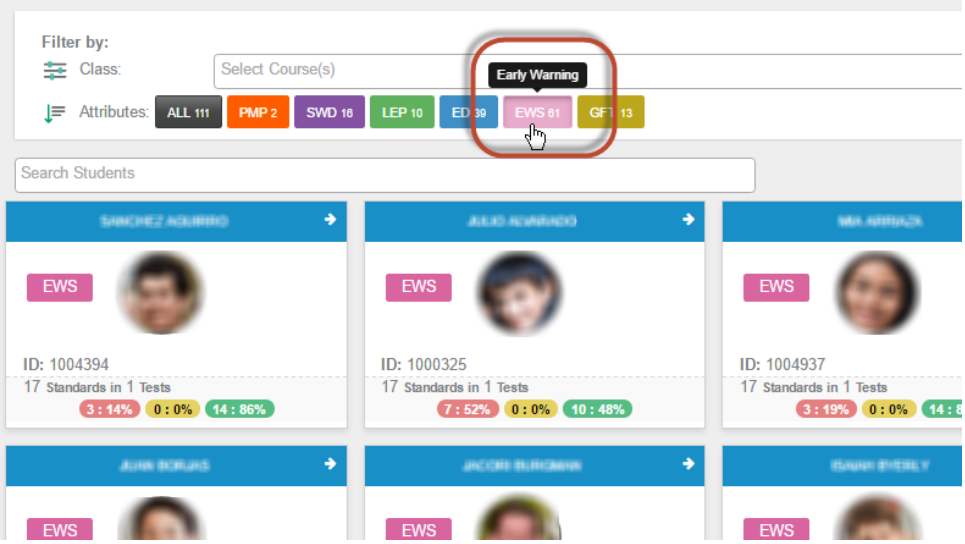


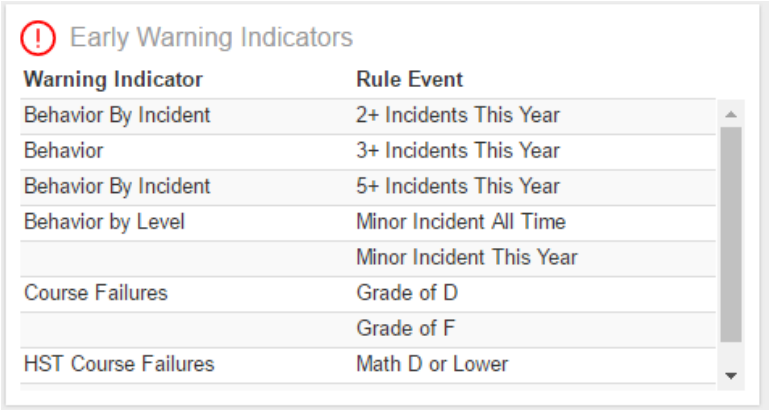
Figure 30 – Early Warning System (EWS) – Proprietary Information

From MyUnify, selecting the EWS filter at the top of the class focuses only on students with EWS. Individual students may be selected to view details.

The following detailed information is displayed on the Student Detail page that loads:

- Course Schedule
- Discipline
- Grades
- Attendance
- Early Warning Indicators

Early Warning indicators for the selected student are shown.



Early Warning Indicators

Warning Indicator	Rule Event
Behavior By Incident	2+ Incidents This Year
Behavior	3+ Incidents This Year
Behavior By Incident	5+ Incidents This Year
Behavior by Level	Minor Incident All Time
	Minor Incident This Year
Course Failures	Grade of D
	Grade of F
HST Course Failures	Math D or Lower

Figure 31 – EWS Details – Proprietary Information

Personal Monitoring Plan (PMP) information for this student is only a click away.

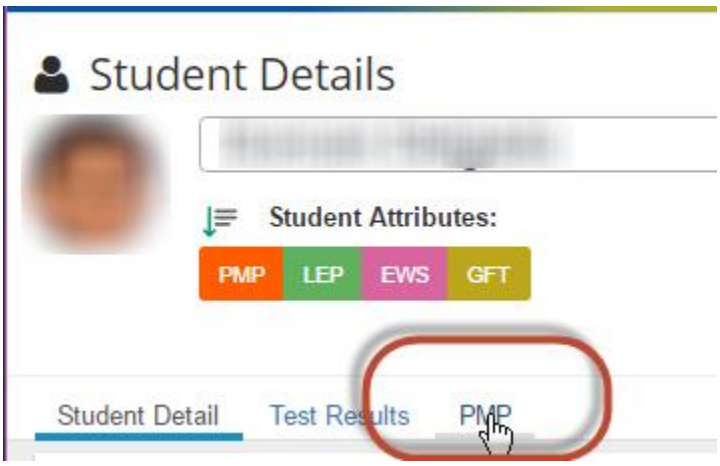


Figure 32 – PMP – Proprietary Information

This tab displays the student history of progress monitoring plans.

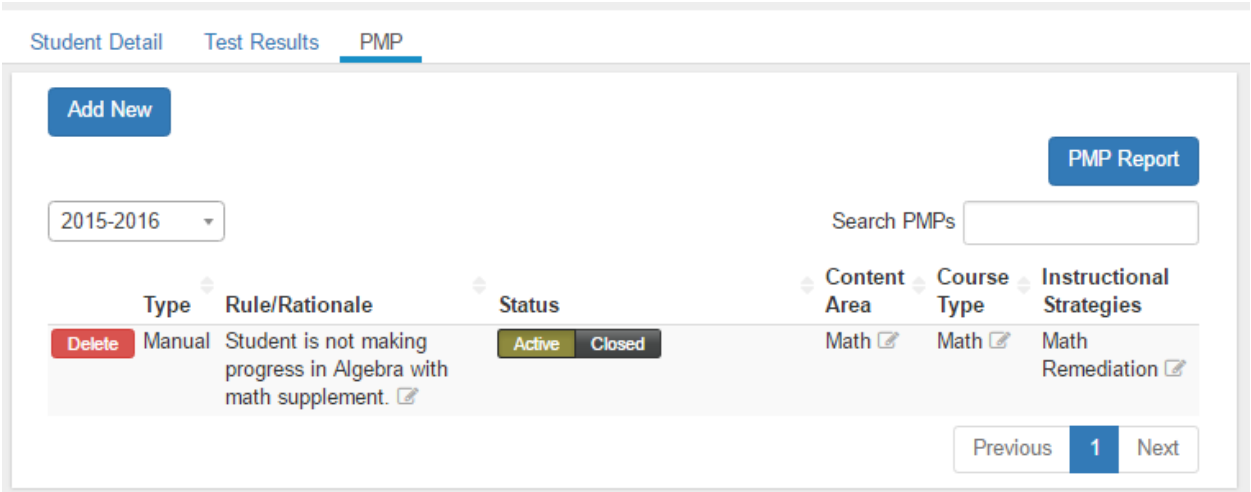


Figure 33 – EWS – Proprietary Information

New plans can be added and auto shared with other teachers/coaches/administrators who are interested in plans for the student. A PMP is generally the first step before a formal RTI/MTSS plan is in place.

A PMP can be in one of four states:

Eligible – the student has been flagged as eligible for this PMP

Active – click the Active button to enable the PMP for the student

Dismissed – click the Dismissed button to reject the PMP suggestion

Closed – Click Closed when the requirements of the PMP have been met or it is determined that the PMP should end

Technology Recommendations

Performance Matters provides these technology recommendations as guidelines for all products, including online assessment. All Performance Matters applications are compatible with machines / devices that utilize Internet Explorer, Google Chrome, Safari, and Firefox web browsers. Performance Matters supports the current and prior major release of these browsers.

Browser Requirements

For web applications to spring even further ahead of traditional software, our teams make use of new capabilities available in modern browser versions. Older browser versions do not have the ability to provide the same high-quality experience.

For this reason, Performance Matters supports the current and prior major release of Chrome, Firefox, Internet Explorer, and Safari browsers on a rolling basis. Each time a new version is released, Performance Matters begins supporting the update and stops supporting the third-oldest version after nine months. Using older versions of the browsers may cause incompatibility with new features.

Network Requirements

Because all Performance Matters products are web-hosted, the primary technology requirements center on internet readiness. Device (desktop, notebook, tablet) specifications can vary, but the device must support the browser and network requirements. Devices that use older technologies may be compatible with the Performance Matters platform, but will be more likely to experience poorer performance and may not provide access to all available features of the platform.

Devices must be able to connect to the Internet via wired or wireless networks. Broadband cable, high-speed DSL, fiber optic, or other equivalent is recommended. Stable Wi-Fi and access points can be used.

Network bandwidth must support pulling multimedia files and large passages without packet loss or delayed ping response. Network should not be above 65% utilization during peak use. Failure to meet these requirements can create sustained errors in communication of tests or items.

On Line Assessment (OLA) Considerations

On Line Assessment (OLA) for students is supported on a variety of computers and devices. OLA provides an easy-to-navigate interface with tools selectable by test. New releases of OLA are tested on iPads, Chromebooks, Macs, PCs and the last two versions of the four major browsers – Chrome, Firefox, Safari and Internet Explorer.

Please make sure the devices used to take tests via OLA meet the minimum requirements detailed below:

	PC	MAC	iPAD*
Memory	1 GB RAM (minimum)		iPad defaults
Processor	1.6 GHz +	1.8 GHz +	
Screen Resolution	1024 x 768 pixels (minimum)		
Screen Size	15 inch (larger recommended)		
Operating System	Windows XP or newer Two most recent versions of Chrome OS	OS X 10.6 or newer	iOS 7 or 8
Browser	Most recent version of Chrome, Firefox, or Internet Explorer	Most recent version of Chrome, Firefox, or Safari	Most recent version of Safari
Browser Requirements	Enable/allow in browser: Javascript, cookies		
Internet Connection	Broadband cable, high-speed DSL, fiber optic, or other equivalent is recommended. Stable WiFi and access points can be used. Network bandwidth must support pulling multimedia files and large passages without packet loss or delayed ping response. Network should not be above 65% utilization during peak use. Failure to meet these requirements can create sustained errors in communication of tests or items.		

Additional Considerations

Here are some additional requirements and considerations:

- ✓ The browser settings must enable/allow JavaScript, cookies, and pop-ups.
- ✓ Devices should have installed Adobe Acrobat Reader and Adobe Flash Player current versions.
- ✓ Assistive technologies, such as screen readers, may be needed for students requiring accommodations.
- ✓ Headphones may be needed for students who receive the screen reader accommodation.

Assessment Content Options in Unify

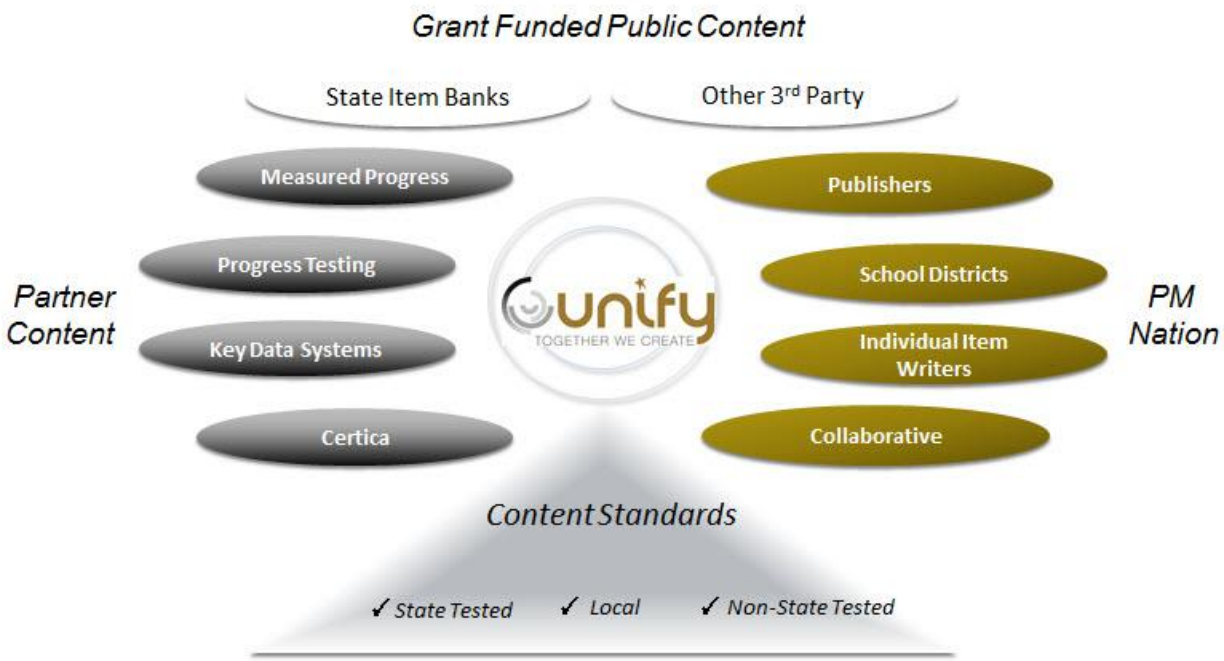
Performance Matters offers an open assessment platform for teacher or district level testing for any subject and in all grade levels. The platform is content neutral, allowing the district to author locally created items with graphics, math equations and formulas, load licensed items and item banks, and use content provided by Performance Matters.

Unify is certified for QTIv2.1 final. This specification is used to ingest content from third party sources. PM has been processing QTI packages for over two years, and has deep domain expertise and a variety of methods to deal with the anomalies faced with non standard QTI integration. PM customers have the following content options:

- Licensed third party item banks
- Access to publicly available items
- Access to PM Nation, the Unify crowdsourcing assessment initiative

Unify provides a robust security and permissions platform for securing items among the wide range of user roles and in accordance with the nature of the assessment to be administered.

The diagram below illustrates the various sources for assessment content available via Unify. The platform incorporates the curriculum standards as well as a wide range of other item metadata that may be associated with the items stored within the banks.



PM Nation

Performance Matters' Bold Vision for PM Nation

"With Unify, all participating PM Customers will have access to PM Nation, a comprehensive, quality formative and interim assessment item and test bank in all courses for free!"

The Unify platform is uniquely designed to produce a vast amount of high quality assessment content through crowdsourcing. This is because Unify incorporates the ability for collaborative item review and revision at item inception, and additionally provides item statistics based upon student outcomes to further improve item quality.

The PM Nation machine is in motion. Within a short time, the PM Nation content has grown dramatically and PM customers are in the process of adding thousands of more items that will be available to all members. Passages are reviewed by content experts and tagged with a wide variety of important attributes including Lexile, reading maturity, Flesh-Kincaid, meaning, and structure, to name a few.

A real world example for the power of collaboration in assessment development can be found in the Northeast Florida Educational Association where several small school districts crowd sourced the development of hundreds of end-of-course exams via Unify.

http://thejournal.com/articles/2015/04/08/10-florida-districts-crowdsource-assessment-tools.aspx?m=1

Information and Literary Passages

PM Nation members have immediate access to hundreds of quality passages.

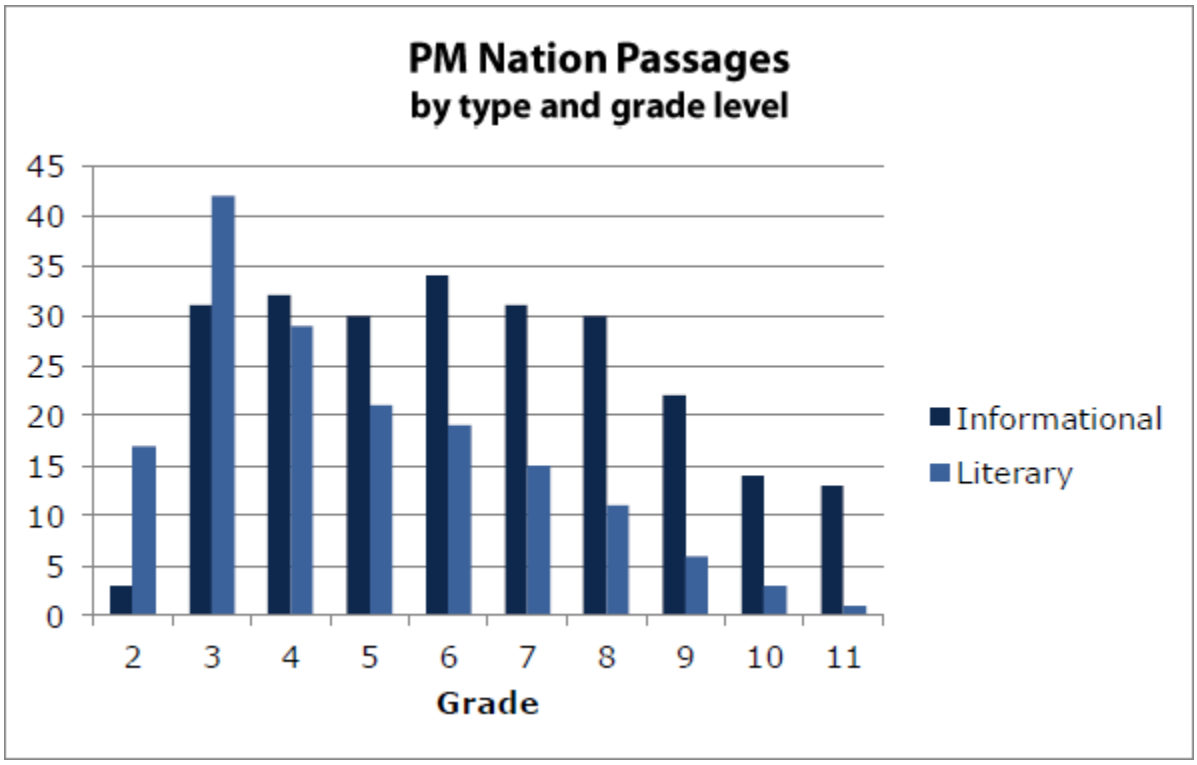
- ✓ 400+ passages across ten grade levels: 240+ informational and 160+ literary
- ✓ Passages support multiple subject areas including: Art, Language Arts, Science, Social Studies
- ✓ Passages have been reviewed, edited and approved by content experts.

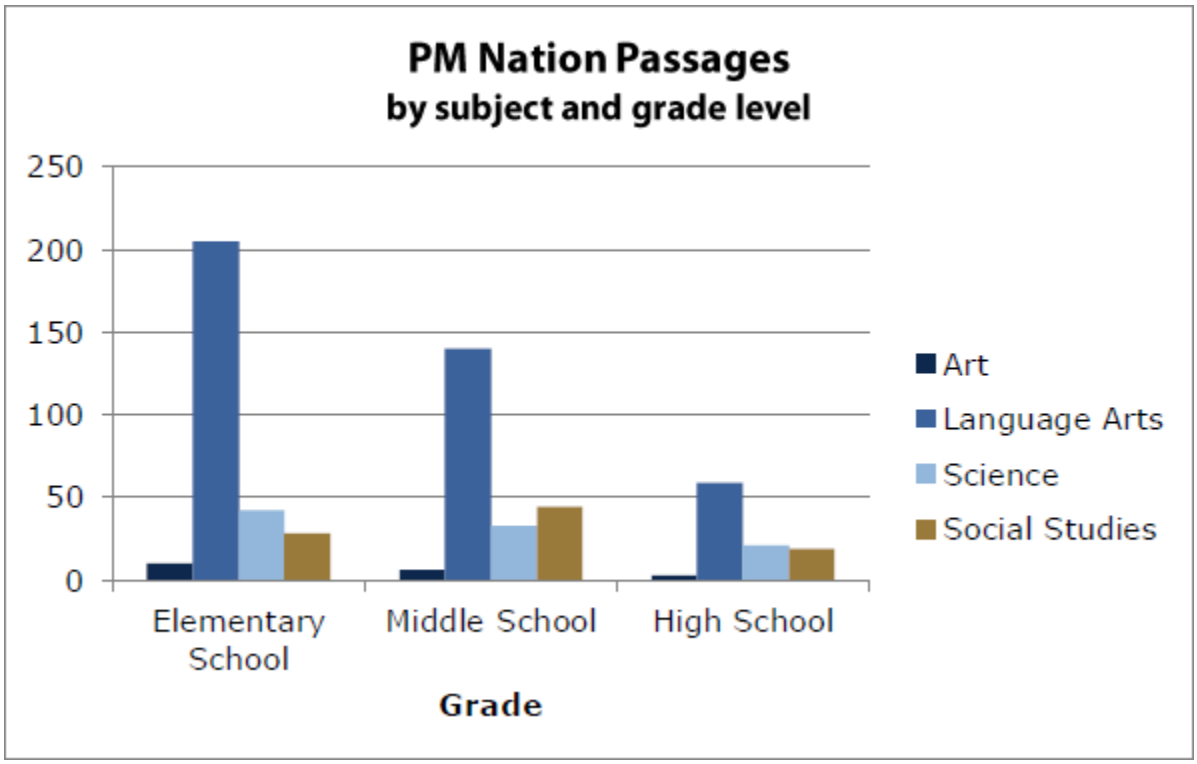
Thousands of Items Covering Every Grade Level

PM Nation members have access to thousands of items, vetted by grade and subject.

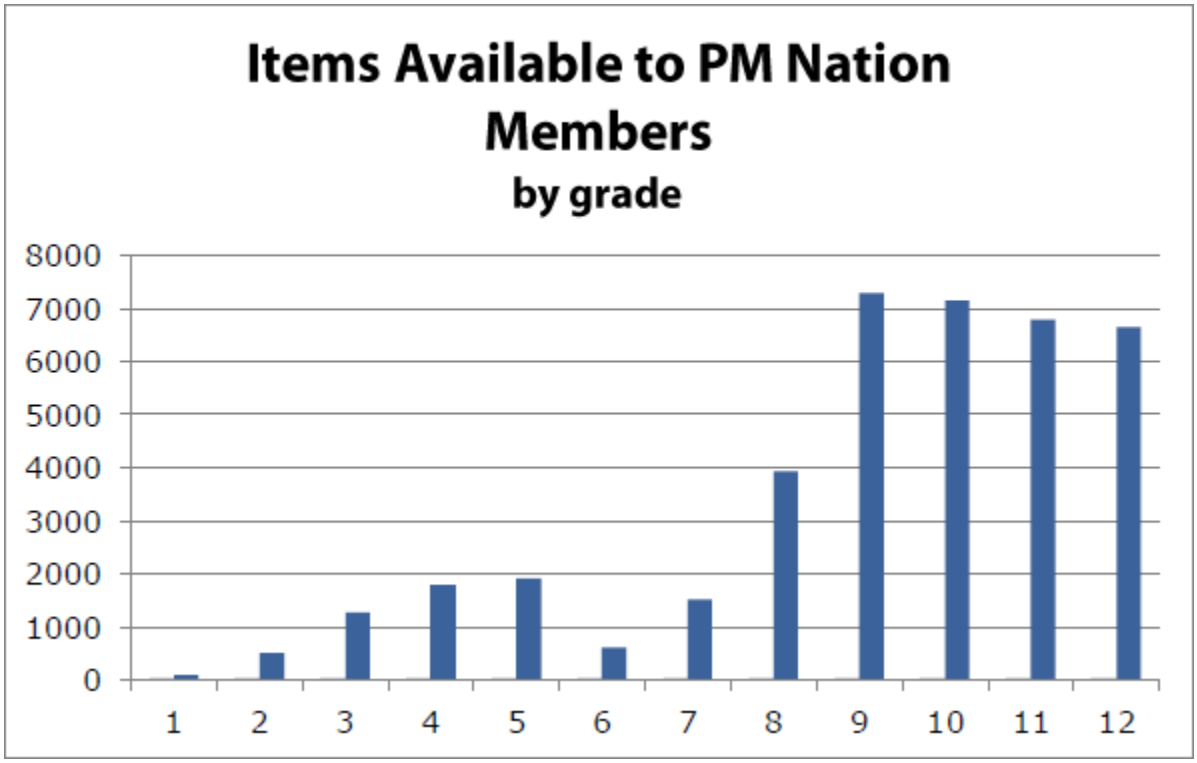
- ✓ Additional items contributed regularly by PM member districts
- ✓ Member districts contribute by reviewing items on a regular basis
- ✓ Includes items from released state tests

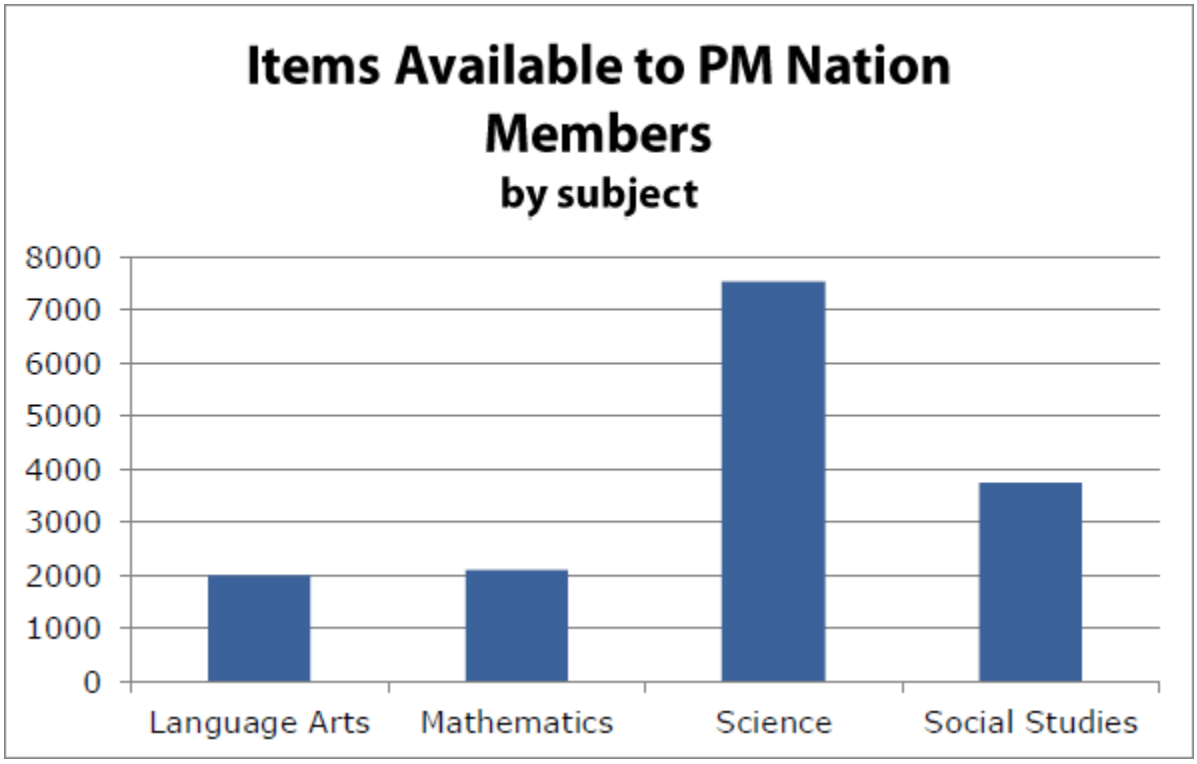
PM Nation Information and Literary Passages – Spring 2016





PM Nation Items Covering Every Grade Level – Spring 2016





Third Party Item Bank Partners

With Unify authoring tools, the District can author technology enhanced items and create both formative, benchmark and summative assessments. Additionally, districts can utilize QTI 2.1 compliant third party item banks and tests to supplement any authoring initiatives. Unify has loaded third-party assessment items and prebuilt tests from publishers such as Certica and Key Data Systems for optional purchase, thus giving districts additional options to meet their specific goals. More details are provided below for your convenience.

Certica FAIB

Certica 's Formative Assessment Item Bank (FAIB) is a repository of high-quality, standards based items that gives educators the ability to create a range of custom, formative assessments and provides variety and flexibility that allows educators to select items that closely reflect their curriculum and instruction. The Formative Assessment Item Bank is designed for use at both the district and classroom level to help guide and inform instruction.

The items in the Item Bank were developed using a rigorous item development process that includes multiple rounds of review to help ensure that the items adhere to best practices, are grade appropriate, are free of potential bias and sensitivity concerns, and follow the principles of universal design.

Navigate Item Bank™
Louisiana Coverage Report
Summary

All counts are as of October 15, 2016. Due to the dynamic nature of the bank and ongoing work, totals may shift as additional work is completed. The totals reflected in this summary report represent unique aligned items within the Louisiana standards. Items that are aligned to more than one standard, such as writing prompts that assess multiple writing standards, are counted only once under their primary subject. In addition, Technology-Enhanced Items (TEIs) are new item types, and the availability and appearance of the TEIs is subject to the functionality available in the data management platform.

English Language Arts

Grades/Course	Total
Kindergarten	919
Grade 1	1,794
Grade 2	1,613
Grade 3	3,231
Grade 4	3,738
Grade 5	3,521
Grade 6	3,555
Grade 7	3,218
Grade 8	3,221
Grades: 9-10	4,650
Grades: 11-12	4,006
Total	33,466

Mathematics

Grades/Course	Total
Kindergarten	825
Grade 1	1,008
Grade 2	875
Grade 3	1,516
Grade 4	2,881
Grade 5	1,488
Grade 6	3,068
Grade 7	4,359
Grade 8	2,159
Algebra I	2,815
Geometry	1,558
Algebra II	1,717
Total	24,269

Science

Grades/Course	Total
Grade 3	329
Grade 4	882
Grade 5	1,602
Grade 6	969
Grade 7	1,449
Grade 8	2,124
Physical Science	1,052
Biology	1,180
Chemistry	764
Earth Science	384
Physics	338
Total	11,073

Social Studies

Grades/Course	Total
Grade 6	182
Grade 7	696
Grade 8	20
High School World Geography	343
High School Civics	918
High School United States History	671
High School World History	625
Total	3,455

Total Louisiana Aligned Items	72,263

INSPECT by Key Data Systems

Key Data Systems (KDS) is a formative assessment solution company providing standards-based assessment and psychometric services to K-12 school districts throughout the United States. KDS was founded by educators and psychometricians to provide research-based tools that properly inform, drive, and impact instruction.

The Inspect® Formative Assessment Item Bank by Key Data Systems features over 42,000 ELA, Math and Science items written to assess and align with the state standards. Inspect® is based on the principles of evidence-centered design and includes innovative item types that require deeper thinking, such as constructed response, selected response (including those with more than one correct answer), and technology-enhanced items.

All items within the Inspect® Item Bank are tagged with numerous metadata including but not limited to Webb's Depth of Knowledge, Bloom's Revised Taxonomy, Difficulty, and Mathematical Practice Standards. Items within the Inspect® Item Bank are flagged with a degree of difficulty. All items within Inspect® are flagged as either "easy," medium," or "hard" based upon measures of evaluation. In addition to evaluating each item for a degree of difficulty, multiple quality assurance measures are taken in order to ensure the reliability and validity of each Inspect® item. This level of quality control begins with the initial writing of items and continues well after each item has been administered. For details on the measures of quality assurance evaluated with each Inspect® item, please review the Inspect Technical Report Brief document attached.

The Inspect® Item Bank is a comprehensive assessment solution including an item bank available for assessment creation as well as pre-built performance-based full-length performance tasks. Customized assessments are also available to be created at an additional fee.

On an annual basis, Key Data Systems conducts a series of statistical analyses on the items within the Inspect® Item Bank. These analyses include determining the reliability and validity of the items as well as providing evidence for predictability on high-stakes assessment scores. For a complete report of the statistical analyses, the Inspect® Technical Report is available from Performance Matters upon request.

An explanation of the Key Data Systems Integrity Process for the Inspect® Item Bank is detailed in the following images. The Key Data Systems Inspect® Item Bank Coverage Report Summary follows the Integrity Process graphics.

inspect®
Instruct. Inform. Increase.

INTEGRITY PROCESS

Statistical data are collected for items to ensure the bank remains valid and accurate. Our item development process ensures that our items have the highest level of integrity before they go into the item bank. In addition to our item development process, our psychometricians continually monitor items using statistical approaches to determine if an item should be re-evaluated and potentially revised or removed from the bank. This ensures the items within the item bank are psychometrically sound. [*Note: The item below is an item that was revised.*]

1 Analyze Assessment Data

Statistic	Value
Maximum Score	100%
Minimum Score	18%
Median Score	59%
Range of Scores	17
Percentile (25)	45.50%
Percentile (75)	63.60%
Interquartile Range	6
Mean Score	47%
Variance	11.9
Standard Deviation	3.45
Confidence Interval (1%)	10.94
Confidence Interval (5%)	11.02
Confidence Interval (95%)	11.53
Confidence Interval (99%)	11.61
Standard Error of Measurement	1.98
Kuder-Richardson Formula 20; KR-20 (Goal ≥ 0.70)	0.77
Correlation Coefficient (Goal ≥ .80)	0.93

2 Analyze Item Data

Item-Level Analysis: Item #23

Statistic	Standard	Value
P-Value (CTT)	0.2-0.8	0.22
Point-Biserial (CTT)	>0.3	0.24
Discrimination (IRT)	>0.7	0.84
Difficulty (IRT)	-2.9	0.16

✗ Revise or Remove
C Evaluate for Potentail Problems
✓ Exceeds Acceptable Standard

Answer Distribution

A	8.5%
B	64.7%
C	21.5%
D	4.6%

3 Review Items

23. Which sentence from the passage best supports the idea that many people who came to search for gold did not trust others?

A Within my first week in the territory, I labored to understand the tongues of others who were searching for the same gold as I was.

B When I found kernels of gold, I hid them from others, fearing the chance that they would steal my gold or find more in the area where I found.

C I hated myself for doubting the integrity of others, yet others did the same when I asked of their findings.

D The curse of poverty continues to encompass our lives even though we exist in the land of treasure and hope.

4 Validate, Revise, or Remove?

Based upon the point-biserial value of this item, it was found that it did not discriminate well between high-performing and low-performing students. After looking at the distribution of responses, we found that a large majority of the students chose option B. Because this option could be misleading, this item has been updated and replaced within the item bank. The revised item will be re-evaluated each time it is administered to 500 students or more.

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ITEM DEVELOPMENT PROCESS

Inspect® employs the most demanding item writing process in the industry. Each item must be unanimously approved by three seperate content experts for acceptance. Item writers must maintain an 85% acceptance rate to continue contributing to the item bank. See an example of this process below. This item was not accepted originally. The item was added to the bank after revision and unanimous approval.

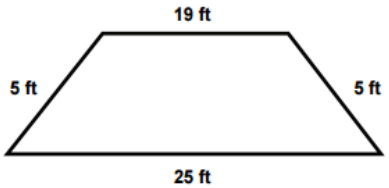
Content Area: Mathematics **Grade:** 06

Standard: G.1- Find the area of right triangles, other triangles, special quadrilaterals, and polygons by composing into rectangles or decomposing into triangles and other shapes; apply these techniques in the context of solving real-world and mathematical problems.

DOK: 1 Recall **Revised Bloom's Taxonomy:** 2 Understand **Standards for Mathematical Practice:** 1, 5, 6, 7

ORIGINAL

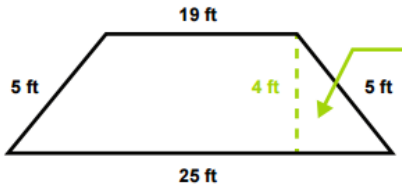
Find the area of this isosceles trapezoid:



Option		Rationale
A	54 ft²	Student(s) may have found the perimeter instead of the area.
B	82 ft²	Student(s) may have only found the area of one trianglular piece instead of two.
C	88 ft²	Correct answer
D	91 ft²	Student(s) may have multiplied the triangle base of three by the hypotenuse of five instead of the height of four.

REVISED

Find the area of this isosceles trapezoid:



Option		Rationale
A	54 ft²	Student(s) may have found the perimeter instead of the area.
B	82 ft²	Student(s) may have only found the area of the rectangle and one triangular piece instead of two.
C	88 ft²	Correct answer
D	91 ft²	Student(s) may have correctly found the area of the rectangular portion of the trapezoid but may have made a mistake when calculating the areas of the triangles. Student(s) may have multiplied the base of the triangles by the hypotenuse instead of the height.

Height added: Original item required the use of the Pythagorean Theorem. This concept is not assessed until grade 8 Geometry.

Rationales were updated to provide a more specific explanation of the likely cognitive disconnects students may have made when selecting specific distractor options.

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Louisiana Coverage Report Summary

The counts within this document are current as of Oct 13, 2016 and reflect the items aligned specifically to the Louisiana state standards. Because Inspect® is a growing item bank, item counts will fluctuate as items are added and alterations are made to standards. Please note, items that contain more than one standard alignment are only counted once. This count is subject to variability based upon the functionality of item types within the data management platform.

English Language Arts	
Grade	**Item Count**
00	1,119
01	1,521
02	1,338
03	2,104
04	2,303
05	1,742
06	1,490
07	1,301
08	1,220
09-10	1,926
11-12	792
Total	**16,856**

Math	
Grade	**Item Count**
00	1,054
01	1,504
02	1,716
03	2,275
04	3,184
05	2,315
06	3,055
07	1,977
08	1,541
09-12	4,345
Total	**22,966**

Science	
Grade	**Item Count**
04	605
05	877
06	536
07	527
08	535
09	705
10	465
11-12	811
Total	**5,061**

Total Item Count	**44,883**