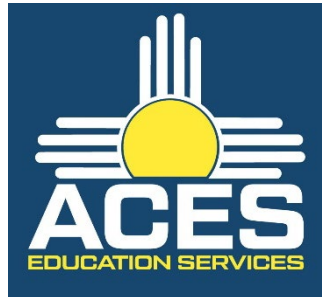


**NEW MEXICO
ASSOCIATION OF CHARTER SCHOOLS EDUCATION SERVICES**



**AGENCY AGREEMENT AND
INCORPORATING CONTRACT**

ACES Contract Number: RFP 23-05

Commodity: Software: SIS, LMS, ERP Systems and Related Services

Established by: Cooperative Procurement Price Agreement

CONTRACT TERM (subject to annual renewal):

July 1, 2023 to June 30, 2027

Number of contracts: 2

Contractors:

PowerSchool Group LLC
schoolAbility LLC

ACES approved by:

A handwritten signature in cursive script, appearing to read "Christy Takacs".

Date: 12/06/2024

Christy Takacs
Executive Director, Chief Procurement Officer

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FOR AGENCIES

To become established as an ACES Participating Agency, or for questions regarding ACES in general, membership, contracts, etc.:

Christy Takacs, Executive Director
575-468-ACES (2237) ext. 100;
Email: ed@nmaces.org

For questions regarding purchase orders, invoices or payments:

Katherine Moore, Business Manager
575-468-ACES (2237) ext. 101
Email: businessoffice@nmaces.org

For questions regarding procurement, use of contracts, vendor performance, etc.:

Tammy West, Procurement Manager
575-468-ACES (2237) ext. 102
Email: procurement1@nmaces.org

PURCHASE ORDER AND PAYMENT INSTRUCTIONS:

- ✓ A PURCHASE ORDER WITH ALL REQUIRED INFORMATION **MUST** BE RECEIVED BY ACES **PRIOR TO** THE DELIVERY OF ITEMS AND/OR COMMENCEMENT OF SERVICES BY THE CONTRACTOR.
- ✓ ALL PURCHASE ORDERS ISSUED UNDER THIS AGREEMENT MUST REFERENCE THE **CONTRACTOR'S NAME, CORRESPONDING ACES CONTRACT NUMBER AND COMMODITY TITLE** FOUND ON THE FIRST PAGE OF THIS AGREEMENT DOCUMENT.
- ✓ PURCHASE ORDERS SHALL BE SENT TO ACES BY EMAIL AT:
businessoffice@nmaces.org.
- ✓ PAYMENT SHALL BE MADE TO ACES ***WITHIN 15 DAYS*** AFTER RECEIPT OF ACES INVOICE, SUBJECT TO LATE FEES.

FAILURE TO DO ANY OF THE ABOVE PURCHASE ORDER INSTRUCTIONS MAY RESULT IN THE PARTICIPATING AGENCY BEING RESPONSIBLE FOR DIRECT PAYMENT TO THE CONTRACTOR AND/OR MAY CONSTITUTE A FAILURE TO COMPLY WITH NEW MEXICO PROCUREMENT CODE AND/OR BE CAUSE FOR AUDIT FINDING.

FOR CONTRACTORS

For general questions, information regarding this contract, questions or issues regarding provision of products and/or services or to refer a school or public agency for membership:

Christy Takacs, Executive Director
575-468-ACES (2237) ext. 100;
Email: ed@nmaces.org

For procurement related assistance, questions regarding this contract, or for assistance related to the provision of product and/or services and anything related:

Tammy West, Procurement Manager
575-468-ACES (2237) ext. 102
Email: procurement1@nmaces.org

For questions regarding purchase orders, invoices or payments:

Katherine Moore, Business Manager
575-468-ACES (2237) ext. 101
Email: businessoffice@nmaces.org

PURCHASE ORDER/INVOICING/PAYMENT INSTRUCTIONS:

PAYMENT TERMS: NET 30 *after certification* that goods/services have been received and meet specifications.
(PER NM LAW, ALL PUBLIC AGENCIES HAVE 15 DAYS TO CERTIFY AFTER RECEIPT OF INVOICE)

- ✓ A PURCHASE ORDER WITH ALL REQUIRED INFORMATION **MUST** BE SENT FROM THE USING AGENCY TO ACES* **PRIOR TO** THE DELIVERY OF ITEMS AND/OR COMMENCEMENT OF SERVICES BY THE CONTRACTOR.
*UNLESS A WAIVER HAS BEEN GRANTED FOR DIRECT INVOICING/PAYMENT
- ✓ ONCE A VALID PURCHASE ORDER IS RECEIVED FROM THE USING AGENCY, ACES WILL ISSUE A PURCHASE ORDER TO THE CONTRACTOR. UPON RECEIPT OF AN ACES PURCHASE ORDER, THE CONTRACTOR MAY PROCEED TO DELIVER ITEMS AND/OR PERFORM SERVICES.
- ✓ ALL INVOICES SHALL CONTAIN THE FOLLOWING INFORMATION:
 - **ACES PURCHASE ORDER NUMBER**
 - **NAME OF USING AGENCY**
- ✓ INVOICES SHALL BE SENT TO ACES BY EMAIL TO: businessoffice@nmaces.org.

AWARDED CONTRACTORS

COMPANY INFORMATION

SERVICE AREA

POWERSCHOOL GROUP

150 PARKSHORE DRIVE
FOLSOM, CA 95630

CONTACT: Ashley Perez

PHONE: 916-220-9361

EMAIL: ashley.perez@powerschool.com

WEB ADDRESS: www.powerschool.com

NM STATEWIDE

PRIMARY SERVICES OFFERED: Student Information Systems; Learning Management Systems; Enterprise Resource Planning Solutions and Consulting

SCHOOLABILITY

PO BOX 21565
ALBUQUERQUE, NM 87154

CONTACT: ALFREDO DIAZ

PHONE: 520-780-1375

EMAIL: alfredo@schoolAbility.com

WEB ADDRESS: www.schoolAbility.com

NM STATEWIDE

PRIMARY SERVICES OFFERED: Enterprise Resource Planning (ERP) Systems

<END>

AGREEMENT

This AGREEMENT is made and entered into as of the last date signed by both parties, by and between the New Mexico Charter School Education Services Association (“ACES”), a public entity, existing under the laws of the State of New Mexico with a mailing address of P.O. Box 16326, Albuquerque, NM, 87191 and the CONTRACTOR, as identified and signed under paragraph 27 of this Agreement. Further, any ACES Participating Agency may become party to this agreement by issuing a valid purchase order based on the CONTRACTOR’S quote, referencing this ACES contract number and the Contractor name.

RECITALS

WHEREAS, the Joint Powers Agreement (JPA) that created ACES, indicates one of its lawful purposes is, “Purchase of professional services, construction services, and tangible personal property for local public bodies and state agencies when so requested and in accordance with the requirements of the Procurement Code”, and

WHEREAS ACES Members are charter schools party to the JPA as approved by Secretary of the New Mexico Department of Finance and Administration or an ACES Participating Agency, and

WHEREAS the CONTRACTOR was awarded a contract in response to ACES RFP 23-05, and

WHEREAS the parties agree that it is desirable to participate in the cooperative procurement of, or use of an established price agreement for Student Information (SIS), Learning Management (LMS) and Enterprise Resource Planning (ERP) systems and related services, to avoid duplicate procurement efforts and obtain the benefits of volume purchasing; and

WHEREAS, ACES, pursuant to the powers vested in it through the JPA, has awarded an Acceptance of Offer and Contract Award to CONTRACTOR to provide Special Education Support Services and Case Management to schools that are parties to the JPA and to Participating Entities that have an Agreement with ACES and represents to its members that said services are for a price that provides economic and other advantages for its members, and

WHEREAS, ACES has initiated a contract for Student Information (SIS), Learning Management (LMS) and Enterprise Resource Planning (ERP) systems and related services and provides it to Participating Agencies in accordance with the Procurement Code NMSA 1978, §§ 13-1-21 to 199 and the New Mexico School Personnel Act NMSA 1978, §§ 22-10A-1, *et seq.*, and such other laws and regulations applicable to this contract, and

WHEREAS, ACES Participating Agencies participate in the solicitation, evaluation and/or use of cooperative contracts managed by ACES, or utilize established price agreements formally solicited by ACES, and become parties to this contract by issuing a valid purchase order referencing this contract, and

WHEREAS, the following documents are hereby incorporated into this contract by reference and made part of this contract:

- RFP 23-05 document with all addenda
- CONTRACTOR'S response to RFP 23-05 as amended and/or otherwise negotiated and awarded by ACES, and as summarized in Attachment A.

NOW, THEREFORE, the parties hereto, in consideration of mutual covenants and promises contained herein,

IT IS MUTUALLY AGREED BETWEEN THE PARTIES:

1. PURPOSE

The purpose of the Agreement is to authorize the parties' mutual participation in RFP 23-05 with the CONTRACTOR.

2. TERM OF THE AGREEMENT

A. Effective Date.

- 1) This Agreement shall be deemed effective between ACES and the CONTRACTOR as of July 1, 2023, and shall remain in effect through June 30, 2027, unless ACES exercises the right of non-renewal during any subsequent term, or unless termination otherwise occurs by either party. The Contractor may terminate this Agreement with written notice delivered to ACES at least sixty (60) days prior to the intended date of termination. ACES may terminate this Agreement with written notice delivered to the Contractor specifying the effective date and cause of termination. In terminating, neither party may nullify obligations already incurred for performance or failure to perform prior to the date of termination.
- 2) This Agreement shall be deemed effective between the CONTRACTOR and the ACES Participating Agency upon issuance of a valid purchase order referencing this contract. The date of the agreement commencement between the ACES Participating Agency shall be the date of the purchase order. The purchase order must be dated prior to the final termination date of the total contract term. The term of the agreement between the CONTRACTOR and the ACES Participating Agency is subject to §13-1-150 NMSA 1978.

B. Termination Notice. This Agreement may be terminated immediately with written notice to ACES Participating Agency if ACES or CONTRACTOR determines that immediate termination is in the best interest of ACES and CONTRACTOR or written note to CONTRACTOR if it determines that immediate termination is in the best interest of ACES and/or ACES Participating Agency. This provision is not exclusive and does not waive each party's other legal rights and remedies caused by the ACES Participating Agency or ACES default/breach of this agreement.

C. Termination Management. Immediately upon receipt by either ACES Participating Agency, CONTRACTOR or ACES of Notice of Termination of this Agreement, none of the parties shall: 1) incur any further obligations for salaries, services, or any other expenditure of funds, 2) shall enter any additional requests for services,

3) parties shall comply with all directives issued by the other parties in the notice of termination as included in this Agreement, and 3) all parties shall take such action as ACES Participating Agency, CONTRACTOR or ACES shall direct for protection, preservation, retention or transfer of all property and all records generated under this Agreement. Within ten (10) days of Notice of Termination is received, CONTRACTOR shall furnish ACES with final Invoice, and within an additional five (5), ACES shall furnish the ACES Participating Agency with final Invoice. Within thirty (30) days of receipt of Notice of Termination the ACES Participating Agency shall pay ACES according to the terms of Section 5, below.

3. RELATIONSHIP OF THE PARTIES

- A. This Agreement is between ACES and the CONTRACTOR. Whenever an ACES Participating Agency issues a purchase order in response to CONTRACTOR'S written or verbal quote, based on and referencing this contract, the ACES Participating Agency then becomes party to this agreement and a binding contract between the three parties is created.
- B. CONTRACTOR acknowledges and agrees that ACES' purpose and function is to act as a cooperative procurement agent on behalf of its Participating Agencies so that they may take advantage of these procurement efforts. ACES does not have any subsequent responsibility relating to the quality and fitness of any Products, or the performance of any Services and Construction Services by Contract Holder. Any purchase orders placed by an ACES Participating Agency with Contract Holder directly or through ACES and any resulting contract between the CONTRACTOR and an ACES Participating Agency do not create any additional obligations on the part of ACES.
- C. For transactions which involve ACES transmitting purchase orders on behalf of an ACES Participating Agency to CONTRACTOR, ACES volunteers to act as a payment facilitator to make payments to CONTRACTOR with funds transferred to ACES by the ACES Participating Agency in accordance with the Participating Agency's written instructions and to provide an accounting of all monies paid or received by ACES pursuant to this Agreement. ACES also volunteers to provide informal mediation services between CONTRACTOR and ACES Participating Agency in the event any dispute arises between them.
- D. CONTRACTOR understands and agrees that upon ACES' receipt of funds from the ACES Participating Agency, ACES has no right or authority to thereafter apply those funds to any purpose other than as instructed by the ACES Participating Agency. ACES shall incur no liability to the CONTRACTOR except for liability arising from ACES' own gross negligence or willful misconduct to the extent allowed by New Mexico law. Through this procurement process and subsequent contract, CONTRACTOR is authorized to provide the described products or services. ACES has no obligation or right to involve itself with the manner or method by which CONTRACTOR provides the products or services.

- E. It is not the intent of the parties to this Agreement, nor shall this Agreement be interpreted to create a new or separate legal entity for the performance of this Agreement.
- F. Each party shall maintain its own respective records and documents associated with the Agreement in accordance with the records retention requirement applicable to public records or as otherwise specified in the contract documents.
- G. CONTRACTOR is responsible for the quality and delivery of the goods and services provided under the Agreement.

4. SCOPE OF WORK

- A. *Services Provided.* Services and/or items shall be provided as stated in the contract documents, including Attachment A.
- B. Under the terms and conditions of this Agreement an ACES Participating Agency as allowed by law may issue orders for items and/or services described herein. The terms and conditions of this contract shall form a part of each order issued hereunder. The items and/or services to be ordered shall be as listed herein and as otherwise quoted to the ACES Participating Agency by the CONTRACTOR in reference to this contract. All orders issued hereunder will bear both an order number and this ACES contract number. It is understood that no guarantee or warranty is made or implied by ACES or the user that any order for any definite quantity will be issued under this contract. The Vendor is required to accept the order and furnish the items and/or services in accordance with the articles contained hereunder for the quantity of each order.
- C. ACES Participating Agencies may negotiate with the CONTRACTOR certain additional terms and conditions relating to the scope of services and other performance details. However, the terms and conditions of this contract may not be altered or amended except with the approval of ACES and in accordance with the State Procurement Code.
- D. *Compliance with Law/Policies.* ACES, CONTRACTOR and ACES Participating Agency shall adhere to all applicable state and federal laws, policies and regulations applicable to ACES or the ACES Participating Agency, including privacy, confidentiality, and security requirements.

5. COMPENSATION

- A. *Prices.* Prices as listed in this contract cannot be exceeded. CONTRACTOR and using agency may negotiate lower prices where in agreement to do so.
- B. *Rate of Pay.* The ACES Participating Agency shall pay CONTRACTOR in full for services satisfactorily performed pursuant to this agreement. If the ACES Participating Agency finds that the services are not acceptable, it shall, within ten (10) days after receipt of CONTRACTOR's invoice, provide to CONTRACTOR and ACES a letter of exception explaining the objection to the services along with

details of how ACES may provide remediation action.

C. *Payment Procedure.* The ACES Participating Agency using this ACES contract shall provide a Purchase Order to ACES* referencing the ACES Contract Number and a specific dollar amount or a “not to exceed amount” for the products and/or services to be ordered. It is recommended that the amount be based on written quote provided by the CONTRACTOR. The Purchase Order shall include the shipping address(s) of the ACES Participating Agency receiving the order. CONTRACTOR shall invoice ACES* and ACES will invoice the ACES Participating Agency. ***Invoiced amounts shall include the ACES fee embedded in the cost of items/services and not listed separately on the invoice.*** Payments not received within 15 days of receipt of invoice shall be delinquent. Payments 15 days delinquent shall be assessed a 1.5% per month *administrative fee (Procurement Code 13-1-158 (c) NMSA 1978).* *The ACES Participating Agency agrees to these specific terms of payment. ACES will render payment to the CONTRACTOR* after receipt of payment by the ACES Participating Agency, less the 1.5% ACES fee based on total invoice amount.*

*Unless a waiver has been granted by ACES authorizing direct invoicing/payment between Contractor and the Participating Agency.

6. ORDERING AGENCY RESPONSIBILITY

Receipt, inspection, acceptance and payment for materials and services ordered under this Agreement shall be the exclusive obligation of the ACES Participating Agency.

A complete copy of the ACES contract relied upon for purchase shall be downloaded and kept by the ACES Participating Agency at the time of purchase for audit purposes.

ACES shall not be held liable for payments not made or late payments made by ACES Participating Agencies.

7. INSPECTION

Final inspection and acceptance will be made by the ACES Participating Agency at the destination. Supplies/items rejected at the destination for nonconformance with the terms and conditions of this contract shall be removed at the CONTRACTOR'S risk and expense, promptly after notice of rejection by the ACES Participating Agency. Services rejected for nonconformance with the terms and conditions of the contract and/or requirements of the order shall be corrected by the CONTRACTOR promptly after notice of rejection. Items or services not corrected after notice shall not be paid for pursuant to NM state law.

8. RESPONSIBILITY

CONTRACTOR shall pay the assigned staff wages and benefits in accordance with its policies and all applicable state and federal laws. The CONTRACTOR shall

withhold and transmit payroll taxes, provide unemployment insurance and workers' compensation benefits for the assigned staff. The CONTRACTOR represents that it has informed all assigned staff that they are not entitled to be paid by the ACES Participating Agency for holidays, vacations, disability benefits, insurance, pensions, or retirement plans, or any other benefits offered by the ACES Participating Agency to its employees.

ACES, the CONTRACTOR, and the ACES Participating Agency shall adhere to all applicable state and federal laws, policies, and regulations applicable to privacy, confidentiality, and security requirements and of all data during the term of this Agreement.

9. COOPERATION

ACES, the CONTRACTOR, and the ACES Participating Agency agree to cooperate fully and to provide assistance to the other parties in the investigation and resolution of any complaints, claims, actions, or proceedings that may be brought or involve ACES Participating Agency staff or the CONTRACTOR staff under this Agreement.

10. AGENCY FURNISHED PROPERTY

Any agency furnished property owned by the ACES Participating Agency shall be returned to the agency upon request or otherwise at the end of the contract term, in the same condition as received except for ordinary wear, tear and modifications order through this contract.

11. NON-SOLICITATION

During the term of this Agreement and for a period of one (1) year immediately following the expiration or termination of this Agreement, the ACES Participating Agency shall not hire, solicit for employment, or engage any employee of the CONTRACTOR that has provided services to the ACES Participating Agency under this Agreement.

12. AMENDMENT

This Agreement may be amended, changed, or altered only in writing by an instrument executed by ACES and the CONTRACTOR. All fully executed amendments are effective as of the last date signed.

13. MERGER

This Agreement incorporates all such covenants, agreements and understandings, including ACES RFP 23-05 and the CONTRACTOR'S responding Proposal as awarded or as otherwise amended, hereto concerning the subject matter hereof have been merged into this written Agreement. No prior agreements or understandings, oral or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement, with the exception of any properly authorized purchase order for services that pre-date the execution of this Agreement.

14. APPROPRIATIONS AND CONTINUATION OF CHARTER

- A. *Funding.* Pursuant to 13-1-152, NMSA, 1978, this Agreement is contingent upon sufficient appropriations and authorizations being made to or by the ACES Participating Agency for the performance of this Agreement under a multi-term agreement with the Contractor. If sufficient appropriations and authorizations are not made in any subsequent fiscal period following the initial term of a multi-term agreement with the Contractor, the Participating Agency shall provide (at a minimum) 30 days' notice to the Contractor. The Agreement shall terminate on the first day of the next fiscal period, or upon the 31st day after written notice is given if less than 30 days to the next fiscal period. The ACES Participating Agency's decision as to whether sufficient appropriations are available shall be accepted by the CONTRACTOR and shall be final. The Participating Agency agrees to provide their best effort to ensure continued funding for the entire term.
- B. *Charter Continuation.* When applicable, this Agreement is contingent upon the continuation of the ACES Member Charter. If the charter is revoked during the term of this Agreement, the Agreement shall terminate immediately upon written notice of such by the ACES Participating Agency to ACES and CONTRACTOR.

15. INSURANCE

CONTRACTOR shall provide proof of Insurance as set forth in RFP 23-05. Inadequate insurance or inadequate proof of insurance may be cause for termination of this Agreement. A certificate of insurance shall be provided, if required, to ACES on or before the effective date of this Agreement and annually at renewal when applicable.

16. SEVERABILITY

If any provision or provisions of this Agreement shall be held to be invalid, illegal, unenforceable or in conflict with the law of any jurisdiction, the validity, legality and enforceability of the remaining provisions shall not in any way be affected or impaired thereby.

17. APPLICABLE LAW

The laws of the State of New Mexico shall govern this Agreement.

18. ASSIGNMENT and SUBSTITUTION

ACES or CONTRACTOR shall not assign or transfer any interest in the Agreement or assign any claims for money due or to become due under this Agreement without prior written approval of the ACES Participating Agency.

19. PURCHASE OF GOODS AND SERVICES

The ACES Participating Agency may issue an order for goods and/or services as set

forth in this contract. The procurement of goods and services subject to this Agreement shall be conducted in accordance with and subject to the relevant statutes, ordinances, rules, and regulations that govern each party's procurement practices.

20. CONFIDENTIALITY

Any confidential information provided to or developed by CONTRACTOR or ACES or its employees in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization without the prior written approval of the ACES Participating Agency, except as provided in the New Mexico Inspection of Public Records Act. ACES agrees to comply with all federal and state privacy laws relating to records and information maintained by the ACES Participating Agency, including, but not limited to Family Educational Records Privacy Act.

21. CONFLICT OF INTEREST

CONTRACTOR, ACES and the ACES Participating Agency warrants respectfully that they do not have an interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance or services required under the Agreement. The CONTRACTOR, ACES, and the ACES Participating Agency, certifies that it and its employees have complied with and will continue to comply with the requirements of the Governmental Conduct Act, NMSA, 1978 §§10-16-1 *et seq.* or any other applicable conflict of interest provisions.

22. PENALTIES

The Procurement Code, NMSA 1978 §§ 13-1-28 through 13-1-199 imposes civil and criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for illegal bribes, gratuities, and kickbacks. All parties agree to not participate in unlawful use of this Agreement.

23. EQUAL OPPORTUNITY COMPLIANCE

The CONTRACTOR, ACES and the ACES Participating Agency, agree to abide by all federal and state laws and rules and regulations, and the executive orders of the Governor of the State of New Mexico, pertaining to equal employment opportunity. In accordance with all such laws of the State of New Mexico, CONTRACTOR, ACES and the ACES Participating Agency agree to assure that no person in the United States shall, on the grounds of race, religion, color, national origin, ancestry, sex, age or handicap, be excluded from employment with or participation in, be denied the benefits of, or be otherwise subjected to, discrimination under any program or activity performed under this Agreement. If the CONTRACTOR, ACES or the ACES Participating Agency is found not to be in compliance with these requirements during the life of this Agreement, they agree to take appropriate steps to correct these deficiencies.

24. RECORDS and FINANCIAL AUDIT

The CONTRACTOR shall maintain detailed time and expenditure records that indicate the date, time, nature, and cost of services rendered during the Agreement's term and effect and retain them for a period of three (3) years from the date of final payment under this Agreement. The records shall be subject to inspection by ACES, ACES Participating Agency, the State Department of Finance and Administration and the State Auditor. The ACES Participating Agency and ACES shall have the right to audit billings both before and after payment. Payment under this Agreement shall not foreclose the right of the ACES Participating Agency and ACES to recover excessive or illegal payments.

25. INDEMNIFICATION

Any liability incurred in connection with this Agreement shall be subject to the immunities and limitations of the New Mexico Tort Claims Act, §§ 41-4-1 et seq, NMSA 1978, as amended. To the extent permitted by law, the parties shall defend, indemnify and hold harmless the others from all actions, proceedings, claims, demands, costs, damages, unpaid taxes and associated penalties and interest, attorneys' fees and all other liabilities and expenses of any kind from any source which may arise out of the performance of this Agreement, caused by the party's negligent act or failure to act, or if caused by the actions of the party's employees, subcontractors, or agents resulting in injury or damage to persons, property of the other party's financial interests during the time when the CONTRACTOR or any employee, agent, or subcontractor thereof has or is performing services pursuant to this Agreement. In the event that any action, suit or proceeding related to the services performed by the CONTRACTOR or any CONTRACTOR employee, agent or subcontractor of ACES under this Agreement is brought against ACES, CONTRACTOR or the ACES Participating Agency, the notified party shall, as soon as practical, but no later than two (2) days after he/she/it receives notice thereof, notify the other Parties and their legal counsel by email and certified mail.

26. NOTICES.

Any notice required to be given to either party by this Agreement shall be in writing and shall be delivered in person, or by certified, return receipt requested U.S.P.S. either by first class or certified mail as follows (unless delivery by email is agreed to):

ACES

Christy Takacs, Executive Director
P.O. Box 16326
Albuquerque, NM 87191

CONTRACTOR

*Specified under paragraph 27 of this agreement

The ACES Participating Agency shall be given notice to the individual who signed the ACES Member JPA and/or Participating Agency Agreement.

27. AUTHORITY

Each party signing below represents that they have all required authority to execute this Agreement.

In WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed by their authorized officers. This Agreement may be executed in several counterparts and each executed counterpart shall constitute one Agreement, binding on all the parties hereto even though all the parties are not signatories to the original or the same counterpart.

ACES

By: Christy Takacs

Signature: *Christy Takacs*

Title: Executive Director

Date: 12/11/2024

CONTRACTOR

By: Alfredo Diaz
Printed Name

Signature: *[Handwritten Signature]*

Title: Manager & CEO

Date: 12/19/2024

Mailing Address:

PO Box 21565

Albuquerque, NM 87154

ACES prefers to send all communications under this contract via designated email. Please indicate below if you agree to communicate using this method (optional).

AD I hereby agree to receive communications and notices by email at the following email address instead of through USPS mail:

alfredo@schoolAbility.com

ATTACHMENT A

CONTRACTOR: SCHOOLABILITY

1.1. Scope of Services and Products:

schoolAbility is a top-tier provider of school ERP software and solutions for schools in California, Arizona, New Mexico, Nevada, Colorado, and Texas. schoolAbility provides a comprehensive suite of products and services to manage school district and charter school business office operations using state-of-the-art financial management, human resources, and payroll ERP software and services. The schoolAbility team includes highly qualified individuals with extensive school ERP software experience. Core competencies include project management, process analysis and optimization, data conversion, implementation, training, value-added support, consulting, payroll processing, and full business office management consulting services. schoolAbility is uniquely qualified because it is the only organization that combines the expertise of financial management software architects and developers with top-tier business managers and the hands-on experience of using various financial management systems to deliver business office and payroll services to charter schools and school districts across multiple states. This rare combination of expertise and experience, along with an unrelenting passion for delivering the highest quality of service, enables schoolAbility to provide top-tier school ERP software, and business office and outsourced payroll services to its customers.

(See flyer at the end of this attachment for more information.)

1.2. Business Hours

Monday through Friday 8am to 5pm

1.3. Contract Timeframe.

July 1, 2023, through June 30, 2027 (subject to annual renewals)

1.4. Pricing.

Please contact the contractor directly for pricing quote specific to the desired scope of work.

- **Basic package/infrastructure (Cloud-Hosted)**
 - Core Business Modules: \$100.00 per W2 per year (min of \$24,000.00 per year)
 - Finance
 - Employee Access
 - Staff Planning
 - Payroll
 - Position Management
 - Professional Development Center
 - Cloud Hosting: 10% of Core Business Modules Fee (min of \$2,400.00 per year)
- **Add-ons**
 - Each Add-on module: 10% of Core Business Modules Fee (min of \$2,400.00 per year)
 - Time Tracking & Time Off (Recommended)
 - Substitute Tracking

- Assets
 - Warehouse
 - Activity Accounting
- **Implementation, Training, and Consulting**
 - \$200.00 per hour
- **Extra Storage**
 - N/A
- **Technical Support**
 - Included in Core Business Modules fee.
- **Warranty**
 - Included in Core Business Modules fee.
- **Upgrades**
 - Included in Core Business Modules fee.
- **Other costs**
 - Travel & Lodging: Actual cost reimbursed.
 - Mileage: IRS reimbursement rate.
 - Travel Hourly Rate: \$100 per hour.
- **Five-year maintenance plain**
 - All systems maintenance and upgrades are included in the annual fee.

1.5. Payment.

1.5.1. Payment Terms: Net 30 (ACES to Contractor); Net 15 (Participating Agency to ACES)

1.5.2. Payment Requests.

(This section does not apply to Contractors who have been granted an ACES waiver allowing direct invoicing/payment.)

1.5.2.1. Payment requests/invoices shall be sent to ACES Business Office by email at businessoffice@nmaces.org (preferred) or by mail to P.O. Box 16326, Albuquerque, NM 87191.

1.5.2.2. The Contractor shall furnish an original invoice with the ACES Purchase Order Number clearly indicated on each invoice.

1.5.2.3. ACES will bill the Participating Agency and will remit payment to Contractor after receipt of payment from Participating Agency, less 1.5% ACES fee.

1.5.3. Payment Dispute. An invoice may not be processed if there is a dispute between ACES or the ACES Participating Agency and the Contractor as to the services or items provided and included on the invoice. Payment will be made after, and according to, dispute resolution achieved between the parties.

SCHOOL^{A+}ABILITY

Business office software and solutions for schools

Skyward Qmlativ

- Financial Management
- Budgeting
- Purchasing
- Accounts Payable
- Bank Reconciliation
- Human Resources
- Payroll
- Federal & State Compliance
- Employee Access
- Time & Attendance
- Substitute Tracking

Value-Added Services

- Implementation & Training
- Consulting & Support
- Custom Reports
- Systems Integration

Payroll Services

- Human Resources Support
 - Employee Contracts
 - Calendars
 - Salary Schedules
 - Position Control
- Payroll Services
 - Health & Welfare
 - Direct Deposit
 - Paystubs
 - W2's
 - Payroll Liabilities
- Retirement Reporting
 - TRS
 - SSA

Employee Online Portal

- 24/7 Employee Access
- Self-Service Administration
 - Paystubs, W2, 1095, W4
 - Employee Reimbursements
 - Electronic Timesheets
 - Electronic Documents
 - Demographics
 - Health & Welfare

Business Office Software & Services

• Peace of Mind

Imagine the peace of mind that comes from knowing that your business office software and payroll processing operations are managed by experienced professionals so you and your administrative team can focus exclusively on student achievement.

• Cost Effective

schoolAbility delivers business office software and payroll services at a lower total cost of ownership when compared to other options.

• Skyward Qmlativ Business Office Software for Schools

schoolAbility takes full advantage of Qmlativ's advanced business office software features and functionality. No need to deal with third-party vendors or multiple software systems, schoolAbility can support your business office operations with Skyward's fully-integrated, state-of-the-art business office software developed specifically for schools.

• Expertise in School Payroll Processing and Reporting

schoolAbility's team has over 100 years of combined experience processing school payroll, including TRS retirement reporting. During FY2022, schoolAbility managed the payroll processing operations for several charter schools in California and Texas with over 1,500 combined employees .

• Employee Online Portal

Employees have visibility into their HR/Payroll information including paychecks, W2, 1095, positions, leave history, etc. Employees can submit updates for W4 and demographic changes electronically for school approval.

• Elimination of Risk

Payroll in-house processing creates multiple points-of-failure for the school. Many of our clients approach us in a moment of crisis triggered by an unexpected event affecting their payroll department staff or third-party vendors. schoolAbility eliminates this risk because it has personnel redundancies built into its business model.

• Segregation of Duties

The lack of robust segregation of duties exposes the school to errors that may lead to audit findings, substantial penalties, and loss of revenue. schoolAbility implements multiple layers of oversight, checks and balances, and robust segregation of duties to protect its clients.

Because Students Deserve Your Undivided Attention

Charter school leaders are educational entrepreneurs, passionate about delivering innovative curriculum that has a positive, long-term impact on the lives of their students.

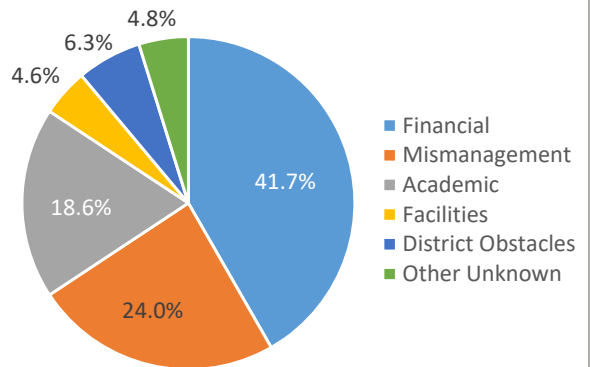
But if you are like most charter school leaders, you are frustrated by the burden associated with managing the day-to-day business office operations of your school. You want to focus your efforts on your core mission: delivering high-quality education and improving student achievement, but it seems like every day there's another "emergency" in the business office. If it's not an employee or vendor who did not get paid correctly, or a rejected request for reimbursement, it's another report due to a local, state, or Federal agency. It never seems to stop!

Managing the day-to-day business office operations has nothing to do with delivering quality education and it gets in the way of pursuing your educational vision.

According to "The State of Charter Schools," a study published by the Center for Education Reform, over 40% of charter school failures are due to financial deficiencies, followed by 24% due to mismanagement, including ethical violations and embezzlement. Less than 19% of charter school failures are due to poor academic performance. It's no wonder that business office operations take up so much of the school leadership's time and effort.

This is where schoolAbility can help. Imagine the peace of mind that comes from knowing your day-to-day business office operations are supported by experienced professionals so you can focus on pursuing your educational vision and delivering high-quality education to your students.

National Percentage of Charter Closures



Source: Center for Education Reform, 2011.

schoolAbility's data analytics empower administrators and governing council members to make informed decisions based on accurate graphical representations of the school's financial position.

