Great Barrington Rudolf Steiner School
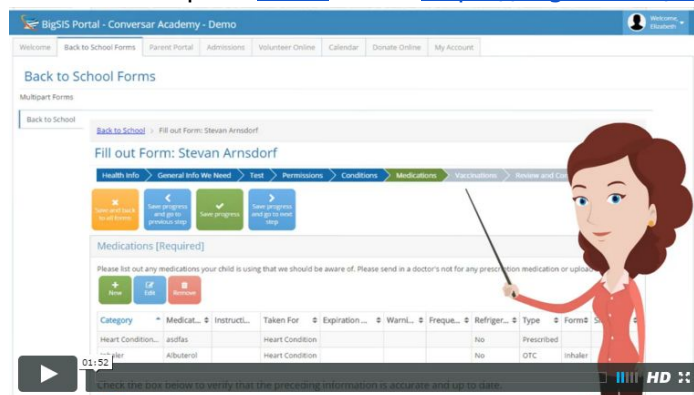## Database Proposal
July 3rd, 2019
(pricing valid through August 31st, 2019)

This is a proposal for BigSIS, Inc. of Boulder, Colorado to implement its 100% Web-based Student Information System (SIS) for the Great Barrington Rudolf Steiner School (GBRSS) in Great Barrington, MA. BigSIS gets its name from being a "big" student information system (SIS) that is full featured, elegant and easy-to-use. It was designed from the ground up to be an integrated solution, that handles all your data in a single, hassle-free database. And because it's cloud-based, all you need is a browser! We handle security, backups, upgrades and offer amazing customer support. Let us worry about all the technical aspects, leaving you free to access and work with your data from anywhere, at any time. These are just some of the features of BigSIS:

- Inquiry, admissions and enrollment management for potential families and students
- Registrar tools
- Reporting system (for student evaluations, donations, transcripts, attendance, and other data)
- Web portal for all users that grows based on roles (teachers, parents, students, donors, etc.)
- Task management
- Integrated email
- Donation management
- School calendars
- Online applications and contracts
- Online payments
- And much more

BigSIS was designed for you! It was designed to meet the specific needs of Waldorf schools. Learn more at www.Waldorfsis.org

Watch our new quick video here: https://bigsis.com/video

This proposal is broken into 3 parts: BigSIS Modules, Free Features, Supplemental Services, and Investment & Implementation.

BIGSIS FEATURES:

BigSIS is broken into various "modules" (or sub-systems) that seamlessly interact with each other. We have bundled these modules into 3 packages (see Investment and Implementation below). This allows you to select a package that is right for your school and avoid paying for features you don't need. It also allows you to upgrade to a larger package at any time and begin using new functionality once you are ready for it. **Visit bigsis.com/features to learn more**.

SUPPLEMENTAL SERVICES:

In addition to the modules and free features above, BigSIS offers some additional services that can be added at any time. Below is a list of these services, along with their corresponding fees. Included in our Comprehensive package comes a 10% discount that applies to these services as well as all future modules we release.

1. **ParentSquare Automation Service:**
   - **Description:** BigSIS has partnered with ParentSquare and we now offer nightly synching of your data with ParentSquare completely free of charge! This means that all of your students, parents and teachers will be up-to-date in ParentSquare at all times.
   - **Requires: All Contacts & Common Features, Student Management**

2. **Hassle-free Import Service:**
   - **Description:** The **Hassle-free Import Service** allows you to concentrate on what you do best and leave it to us to get your data into BigSIS! You provide us with all your data files and we do the rest. If you are interested in this service, please let us know and we will review your current data with you and give you a custom quote.
   - **Rate (hourly or fixed):**   **$CALL**

3. **Additional Training and Support Service:**
   - **Description:** The **Additional Training and Support Service** covers new employees who need training or coverage for the rare times you may go over your quarterly support hours. We do our best to give you all the support you need and it is our goal to not have to charge extra for support, but sometimes a little additional assistance is needed.
   - **Requires: All Contacts & Common Features**
   - **Hourly Rate:**   **$100**

PRICING & IMPLEMENTATION:

BigSIS pricing is based on the package (groups of modules) chosen. This fee covers you for the use of the modules and all development done to date, as well as for support and future upgrades. When the system is updated, you will automatically receive the latest version. You will be billed quarterly for the package you select.

BigSIS Packages:

We offer 3 packages of varying sizes, each containing a different set of modules. These packages are designed to meet the needs of schools of all sizes with different budgets. You may even decide to start with a smaller package and grow into the system over time. Below is a chart that lists out the various modules along with the fees for each package.

À la carte Package:

We understand that an off-the-shelf package might not be the best fit for Great Barrington Rudolf Steiner School. Therefore we can work with GBRSS to create a custom package based on the modules you need. À la carte packages don't have quite as high of a discount as our set packages, but may still be the best option for GBRSS.

Setup Fees:

There is a one-time setup fee to cover the initial setup of the database, all the required training you will receive (conducted remotely), and assistance walking you through the import process. Setup fees for BigSIS depend on the package that is chosen (see pricing chart below). All packages require this setup fee at signing, or you may opt to roll it into your first 4 quarterly payments (subject to a 10% "convenience charge," see our $0 Out-The-Door Option below).

Pick Your Package:

The prices are "locked in" for as long as you continue to use BigSIS and you can change packages or add/remove modules at any time. We have also included a special Custom package just for you for the requested add-on modules.

Modules / Packages	GBRSS Special
All Contacts & Common Features	
Student Management	
Student Reports & Grades	
Attendance & Truancy Management	
Leads Management with Tasks	
Back to School Forms	
Volunteer Management	⭐
Calendars & Events	
DocumentCenter	
Integrated Email	
Donations & Fundraising	
Online Applications	⭐
Online Contracts	⭐
Lead Reporting	
Gradebook	
Mail Merge	
Authorize.net Payments	
10% Discount on Supplemental Services	
Support Hours (per quarter)	9
Full Yearly License	$ ~~1,950~~
Lifetime Discount (PreK- 12)	30%
Lifetime Yearly License	$1,375
One-Time Setup Fee	$ 650

Tuition Management:

BigSIS Tuition Management is a great way for schools to collect tuition from parents at almost no cost! BigSIS allows parents who are completing their tuition contracts to select a payment plan or pay the entire contract in one lump sum. BigSIS will work with the school to set up different payment plans (such as monthly, quarterly or semi-annually). BigSIS will cover the management of the invoices, including reminders emails, as well as all processing each payment. We also plan to include a free tool to facilitate synchronization of families, invoices and payments to QuickBooks at no additional cost. Our fee structure will be as follows:

1. Free for the school with families paying based on selected payment plan (based on the number of payments chosen per family per year)
2. Families Pay:
   a. 1 Payment (lump sum paid up-front): **$0 fee**
   b. 1-2 Payments (deposit plus 2 payments): **$25/family fee**
   c. 4+ Payments (quarterly, monthly, etc.): **$49/family fee**
3. The school may offer tuition discounts for any of the above options as an incentive for early payment and may also opt to pay all or part of the BigSIS fees
4. Families must pay by ACH, check or credit card
   a. Families who send in checks will mail those to the school directly
      The school will then deposit the checks and update the family's account
   b. Credit cards will incur a 3% surcharge

Extended Care, Summer Camp & Enrichment Programs:

A new service to be released this fall is built-in management for the afterschool programs, such as extended care and enrichment, as well as a new and easy way to manage summer camps for summer 2020. This service, like our new tuition service, will cover the management of the invoices, including reminders emails, as well as all processing fees. We also plan to include a tool to facilitate synchronization to QuickBooks at no additional fee. We will charge a flat 1% on all transactions run through this service.

Lower Your Annual License Fees:

Two basic principles drive our pricing model: affordability and control. We want BigSIS to be affordable for schools both large and small. We also want you to be in total control of how you decide to budget for BigSIS now and in the long term. In that spirit, BigSIS not only comes in packages of different sizes (see BigSIS Packages above) but it is also offered to you with a very flexible pricing model. Our primary model is a straight yearly license with a small setup fee but no up-front investment.

Some schools have a budget surplus or are able to fundraise a substantial amount that they can put toward the "purchase" of BigSIS. The more you can invest in BigSIS up-front, the lower your ongoing annual fees will be.

OPTION 2X: If you can put down 2 times (2X) your chosen package's annual license fee at signing, your ongoing annual fee will be reduced by 20%!

OPTION 4X: If you can put down 4 times (4X) your chosen package's annual license fee at signing, your ongoing **annual fee will be reduced by 60%!** This means your annual fee, which will start in year two, will be just 10% of what you put down up-front.

$0 Out-The-Door Option:

We understand that despite how incredibly useful BigSIS might be for you, sometimes schools may need even more budget flexibility to really ease into the system. This is why we offer a $0 out-the-door option which lets you get set up, begin using BigSIS, and even do your first training before your first bill is due. What's more, this option conveniently lets you roll your one-time setup fee into your first year's fees,[1] which are spread out over your first year so you aren't stuck paying for the whole thing at once. This can ease the financial burden that we know many schools may experience when adopting new technology, even when they realize the urgent need for it.[2] Get up and running with BigSIS right away and pay the upfront costs over the first year.

Price Increases:

The prices quoted in this proposal are the current package prices and are valid if the software is purchased by the Great Barrington Rudolf Steiner School by *August 31st, 2019*. If not purchased by that date, the prices will be re-quoted based on current pricing. As our product continues to mature, prices are subject to a slight "inflationary increase" based on new development of the product and inflation rates. The price increase will not exceed US inflation or 3% (whichever is greater). This means you are essentially "locking in" today's prices, which will add up to significant savings as our product grows and our prices continue to rise for new clients.

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[1] We will add an additional 10% "convenience charge" to the setup fee when we roll it into the first year's licensing if you choose this option.

[2] The $0 out-the-door option requires a 1-year commitment. Subsequent years require no such commitment. If you do opt for the $0 out-the-door option, early termination during the first year will **not** incur any penalty, but it will require immediate payment for the balance of the setup fee.

Hourly Fees:

In most cases, our yearly license fees cover all the required training and support. Occasionally, though, there will be some additional support needed. Examples include writing custom reports, hiring us to do data importing for you, and additional training for employees who begin after the original training has concluded (note: we provide you video copies of all trainings we conduct with you so you always have the option to have new employees watch the original training videos rather than pay for new training). Our hourly fee is $150 per hour and can be purchased as needed (see Supplemental Services).

Support Hours:

Our goal at BigSIS is to offer great support to each client via the most convenient method for them. You are welcome to contact us via phone or email at any time with any questions and we will do our best to support you. When needed, we can also do remote screen sharing sessions to help you through any issues. As much as we would love to spend hours and hours with every client going over any questions they may have, we do have other clients and therefore we sometimes need to put a limit on the total hours we can spend with any given client. We offer a different number of support hours based on your chosen package and our Comprehensive package comes with unlimited[3] support.

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[3] Unlimited support does not include the following: (a) training hours in excess of those covered by the standard setup fees or going over things already covered in recorded sessions (including to new users), (b) creating custom reports, queries and modifications to the system, (c) troubleshooting and correcting data when the assistance of a developer is required, (d) creating customizations, interfaces or changes to existing customizations or interfaces, (e) troubleshooting and correcting issues with customizations, interfaces, modifications, custom reports, queries, integrations or third-party software, (f) implementation, training or installation of additional module functionality not currently in use, (g) administrative functions such as creation of new users and security roles, (h) after-hours support.