

# Allovue Proposal

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# About Allovue

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Allovue was founded in 2013 by a team of educators, technologists, education finance experts, and data specialists who realized the impact budgeting decisions could have on student success. Together, they worked to build an innovative education finance solution to maximize student outcomes.

Our mission is to empower educators to strategically and equitably allocate resources to best support the needs of students. Allovue's goal is to help educators make better decisions about their budgets and spending by giving them dynamic, up-to-date, and user-friendly data.

To date, Allovue has worked with districts and state departments of education across the country to budget, manage, and evaluate their spending. Allovue's software suite integrates seamlessly with districts' existing accounting systems and other data systems to help educators allocate, budget, manage, and evaluate spending via three products: *Allocate*, *Budget*, and *Manage*. Allovue also provides additional services such as chart of accounts revisions, strategic consulting, financial management training, executive coaching, and funding formula revisions.



# Allovue Products

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The Allovue team will work with key personnel from your team in order to complete the following deliverables, including Allovue licenses with access to underlying product modules.

# Allovue Allocate

School districts require effective tools that help them make responsible, strategic funding allocations and improve their budgeting process. *Allocate* is a cloud-based application that improves the strategic budgeting process for K-12 districts. Administrators use *Allocate* to select their ideal school funding formula and educate stakeholders and regulators with detailed, student-level reporting.

The screenshot displays the Allovue Allocate interface for 'Allovue County Unified'. The main dashboard is titled 'GenEd Baseline\_FY21' and includes an 'Actions' dropdown menu. Key metrics are shown in three cards: Total Enrollment (14,521), Total FTE (707), and Total Dollars (\$99,271,250.00). Below these is a 'School Summary' table for 84 schools, with the following data:

School	Amount	Characteristics	Enrollment	FTE	
Abraham Lincoln Middle School	\$7,499,000.00	Grades Served: Middle 7-9 Magnet School: Magnet School	1,235	53.5	
Bill Clinton Middle School	\$7,708,000.00	Grades Served: High 10-12 Magnet School: Not a Magnet School	1,060	53.5	
East Springfield High School	\$11,867,500.00	Grades Served: Middle 7-9 Magnet School: Magnet School	2,033	83.5	
Friendship Elementary School	\$5,228,250.00	Grades Served: Elementary K-6 Magnet School: Not a Magnet School	750	39.5	

## Core Features:

**Streamline Administration:** Quickly and efficiently manage calculations and reports for your budget and budget book.

**Strategically Align District Goals:** Align district and school board priorities with student-centered school budget allocations.

**Model Funding Formula Alternatives:** Model unlimited funding scenarios to evaluate alternatives and find the ideal budget allocations.

# Allovue Budget

Allovue *Budget* facilitates site-level budget development in a collaborative online environment. Title I grant managers, teaching and learning departments, operations staff, and school administrators can develop staffing and spending plans aligned to goals.

The screenshot shows the Allovue Budget interface for the fiscal year 2019-20. The top navigation bar includes 'Manage', 'Budget', and 'Admin'. The main header displays 'Fiscal Year 2019-20' and 'Budgets'. A summary table shows: Allocated: \$52,937,081.79; Planned: \$5,167,130.98; Total Remaining: \$47,769,950.81. Below this are tabs for 'Budgets and Allocations', 'Staff Roster', and 'Reports'. Action buttons include 'Create Budget', 'Add Allocation', 'Upload Budgets', 'Upload Allocations', and 'Export'. A 'Collapse All' button is also present. The main content area lists three budgets:

Budget ID	Status	Allocated	Planned	Remaining
3101 - Lincoln Elementary School	In Progress	\$4,632,447.00	\$962,292.85	\$3,670,154.15
3102 - Central Elementary School	In Progress	\$4,538,300.00	\$100,926.29	\$4,437,373.71
3103 - Washington Elementary School	Awaiting Approval	\$8,332,523.00	\$699,202.21	\$7,633,320.79

Below the list, there are options to '+ Add Allocation' and 'Delete Allocations'. A detailed view for 'Discretionary' (Estimated Salaries) shows: Allocated: \$48,200.00; Planned: \$24,120.00; Remaining: \$24,080.00. Funds: 100000000 General Fund.

## Core Features:

**Flexible Staffing Set Up:** Department heads can build their staffing plans with confidence because salaries and benefits are calculated correctly with the right account codes based on FTE and positions.

**Approval Process:** Easily identify which budget are in progress, awaiting approval, or approved in real-time. When a budget is approved, it is locked for editing until an approver moves it back to in progress for adjustments.

**Position Planning:** Our position planning system includes a combination of district defined elements (job type/ employee) and FTE and supports average or actual salary budgeting. Easily view displaced employees and vacancies created in real time as budgets are crafted.

**Up-to-Date Changes:** Across the System Allovue *Budget* provides a central place to make bulk adjustments that immediately apply across the entire system. Last-minute changes are no longer a problem with the ability to change salaries, benefits or allocations just once and know that all budgets are appropriately updated.

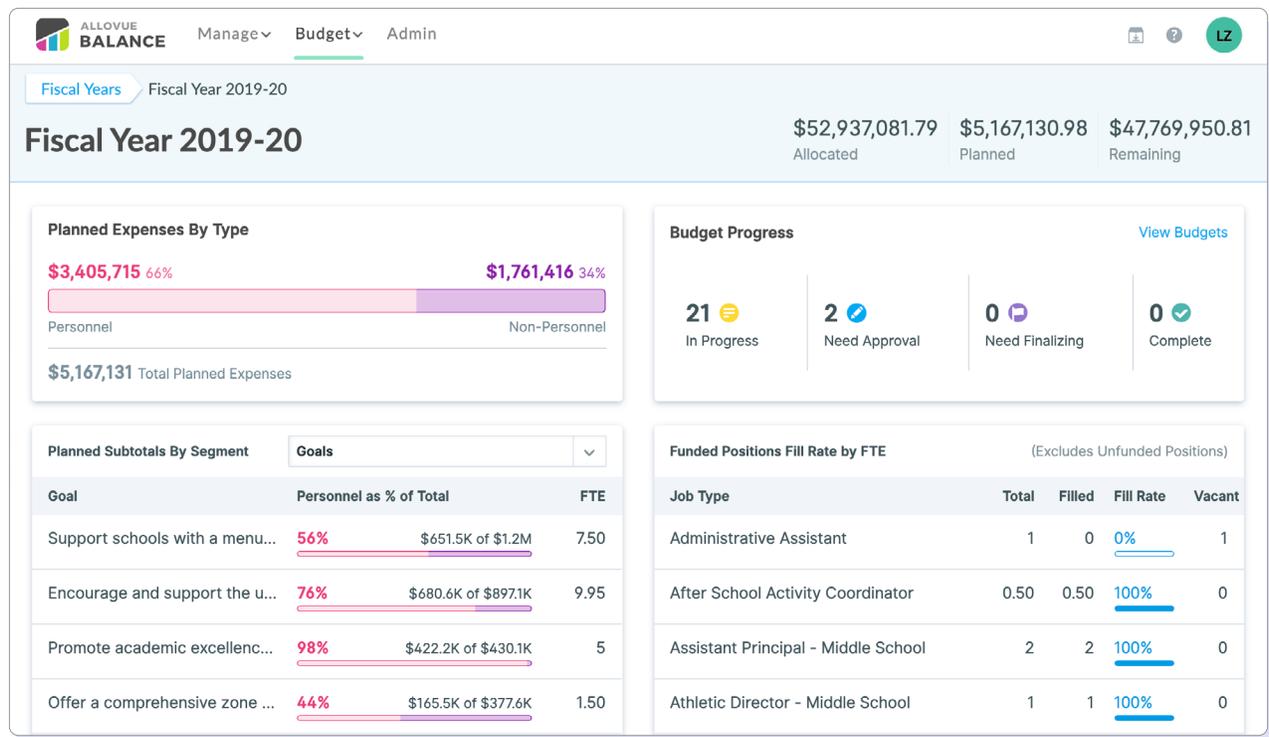
# Allovue Budget

## Core Features (continued):

**Real-time Access to Budget Data:** All budget administrators see their allocations in an online collaborative space across departments or cost-centers, free of duplicate copies or broken formulas. Trust that you're always working with the latest version of your budget—anytime, anywhere.

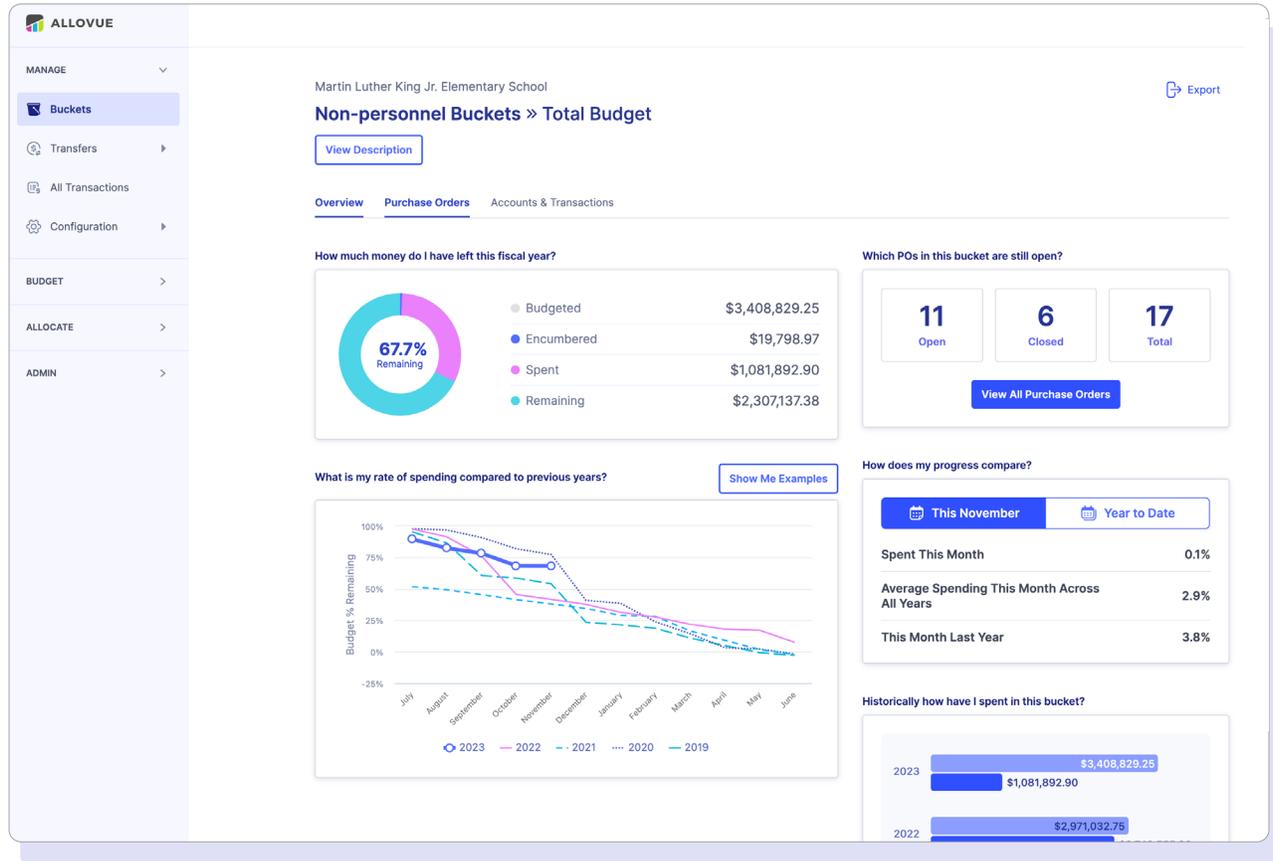
**Collaborative Budgeting:** Allow for additional stakeholders to take part in the process by assigning more than one person to construct any budget and by assigning budget viewers to any budgets for read-only access and strategic planning and review.

**Visibility into the Budgeting Process:** Finance Directors can keep tabs on the budgeting process across your district with summarized data on FTE count and total allocated and planned dollars. Gain early insights on potential hiring needs or offer help to administrators who need extra support.



# Allovue Manage

Allovue *Manage* helps school districts and education organizations to view available account balances and track spending at the transaction level. Budget managers can easily filter accounts and transactions by fund, program, location, or other account level details to view daily updates of their budgets. Financial data can also be correlated with non-financial data to analyze equity and cost-effectiveness.



## Core Features:

**Account Dashboards:** Create spending dashboards to support your non-finance personnel in understanding the financial data that is most important to their jobs. Clear visuals help monitor spending, encumbrances, and fund balances.

**Up-to-Date Data:** Allovue integrates with your existing backend data systems to provide daily updates on accounts and transactions. Find the information you're looking for using account code or plain English.

**Spend Down At-A-Glance:** See spending compared to previous years with easy to understand visuals.

**PO Tracking:** Easily track current and prior year POs without needing to know account-level information.

**Frequently Asked Questions:** Add important context alongside spending data for a particular funding source. Answer questions like, "When do I need to spend these fund by" or "Who should I reach out to if I have questions?"

# Software Implementation

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Our implementation services are designed to help you maximize the value of your investment in Allovue. We believe that our partnership will help usher real change into your district's financial management practices. The following pages detail what we offer as part of our package.

## Implementation Team

Our implementation team will work alongside your district to configure Allovue for your district's needs and support your staff. This team consists of:

- **District Partner:** main point of contact whose focus during implementation will be to consult with your district team on your module specific data requirements as well as prepare each module for launch and continued support.
- **Data Associate:** responsible for Allovue module data integration with your district's ERP system.
- **Account Manager:** point of contact to discuss contract related questions or concerns.

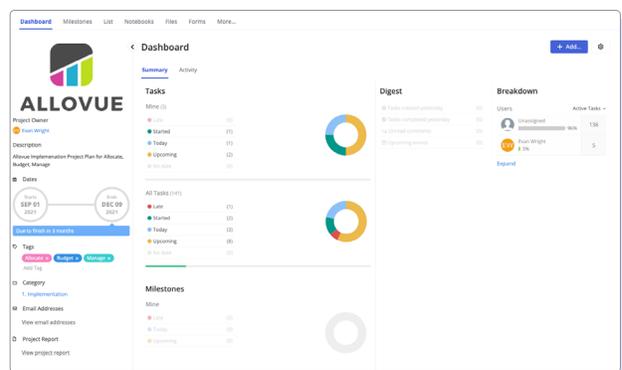
## Project Management

Your implementation team at Allovue will design an implementation approach for you based on your highest priority goals, the size and complexity of your district, the Allovue products you purchased, and your district's current ERP.

Your Allovue implementation will follow a project plan that consists of milestones with meetings and activities for each module. Allovue performs a quality check after each milestone. This involves district participation in a survey to review deliverables and project health. Allovue will meet with your district team to review the upcoming milestone and evaluate any tasks and requirements for milestone completion. Additionally, progress through certain milestones depends upon Allovue receiving certain data from the district. These needs are clearly identified in the project plan to keep the timeline on target!

Milestones are managed through a project management software called Teamwork. Teamwork is used by Allovue and the district for most communication and to review progress on meetings and activities. Each district member associated with the implementation will be granted access to a Teamwork project plan. Teamwork provides the following information:

- Project milestone list and descriptions
- Key dates for milestones, deliverables, and meetings
- Meeting agendas
- Your tasks, including data files to provide to Allovue
- Access to project files
- Ability to comment directly within the project plan for collaborative communication



# Milestones & Deliverables

## IMPLEMENTATION WITH ALLOVUE



Kickoff and  
Project Planning

Data Integration

District Quality  
Assurance

Training and  
Launch

Implementation  
Complete

In addition to milestone meetings outlined below, your Implementation Specialist and District Partner will meet with your district team regularly (bi-weekly or weekly 30 min - 1hr virtual meetings, depending on availability and preference). During these meetings, we'll review the project plan, discuss project updates, and assign next steps.

Implementation activities include meetings (M), work sessions (WS), trainings (TR), and tasks (T).

Meetings and work sessions are between Allovue and the key stakeholders from the district. Meetings typically address administrative and project planning components of implementation, while work sessions advance the progression of implementation within Allovue modules.

Trainings are conducted by Allovue and support all district personnel who will use Allovue. Tasks describe the work that happens in between meetings to move implementation forward. While the full project plan in Teamwork details all of the tasks required for a smooth and timely implementation, only the major tasks are listed here as an overview.

## Milestone 1 | Days 1-21

### Implementation Kick-Off and Project Planning

Major project meetings with Allovue and the district to review the implementation process, project schedule, Allovue module overview, and data requirements

#### Meetings & Activities:

##### For All Modules

- [M] Implementation Kick-Off
- [M] Data Introduction Meeting
- [T] District added to Teamwork project plan by Allovue
- [M] Milestone Quality Check

#### Data Needed from District:

##### For Budget

- Chart of Accounts
- Budget Calendar



## Milestone 2 | Days 22 - 75

### Data Integration

Technical tasks associated with loading and connecting district data to Allovue module(s), including internal quality assurance conducted by Allovue

#### Meetings & Activities:

##### For Allocate

- [M] Allocate Kick-Off
- [T] Funding model and formula data collected and formatted by Allovue with support from district
- [T] Configuration data (Institutions, Jobs Types, Sub-Enrollments, School Characteristics) reviewed and loaded by Allovue with support from district
- [T] District formula and rules added by Allovue with support from district
- [T] Enrollment projections and baseline scenario loaded by Allovue with support from district
- [T] Quality assurance of data completed by Allovue

##### For Budget

- [M] Budget Kick-Off
- [T] Fiscal Year and Segments created by Allovue
- [WS] Budgets & Allocations
- [T] Budgets and Allocations created created by Allovue
- [WS] Non-Personnel Expenses
- [WS] Personnel Data
- [T] Job Types, Employees, and Positions loaded created by Allovue
- [WS] Personnel Data Part II
- [T] Benefits and Supplemental pay loaded created by Allovue
- [WS] Vendors, Strategies, and Priorities

[T] Strategies and Priorities created created by Allovue

[T] Vendors loaded created by Allovue

[T] Quality assurance of data completed by Allovue

##### For Manage

- [M] Manage Kick-Off
- [T] Connection between Manage and district ERP established
- [T] Roles, Buckets, Budget, Users, and Permissions loaded by the district with support from Allovue
- [T] Quality assurance of data completed by Allovue

##### For All Modules

- [M] Milestone Quality Check

#### Data Needed from District:

##### For Allocate

- Funding Model
- Staffing Formula
- Positions
- Enrollment Projections

##### For Budget

- Employees
- Job Types
- Positions
- Benefits
- Vendors
- Supplemental Pay

##### For Manage

- ERP Access granted
- Chart of Accounts



## Milestone 3 | Days 75 - 90

### District Quality Assurance

Quality assurance check of Allovue module(s) by the district, with assistance from the Allovue Implementation Specialist and District Partner

#### Meetings & Activities:

##### For All Modules

- [M] Introductory Key Stakeholder Training and Quality Assurance Review
- [T] Data accuracy approved by the district
- [M] Milestone Quality Check

## Milestone 4 | Days 90- 110

### Training & Launch

Allovue software training for district users and approval of data and module(s) for launch

#### Meetings & Activities:

##### For Allocate

- [TR] Allocate team-wide training to include a full demonstration of the module with a focus on adding and modifying data, generating reports, and reviewing the data inputs needed for next year's formula
- [T] Exports provided to district by Allovue : 1) CSV of scenario and summary of each school, rules applied, and resulting amounts and 2) PDF for each school, scenario, and formula

##### For Budget

- [TR] Budget team-wide training to include a full demonstration for each user role—Architects and Builders. Architect training will focus on understanding user roles, summary views and reporting, and system data setup. Builder training will focus on adding and modifying site-level staffing, expenses, positions, and budgeted line items.

##### For Manage

- [TR] Manage team-wide training to include a full demonstration of the module with a focus on creating and updating roles, buckets, budgets, users, and permissions.

##### For All Modules

- [T] District key stakeholders coached on the Knowledge Center and Live Chat by Allovue
- [M] Module Sign-Off Call & Introduction to Ongoing Support
- [M] Milestone Quality Check

## Milestone 5 | Days 110-120

### Implementation Complete

Launch of all module(s) and final project meetings with Allovue and the district to review change management and lessons learned

#### Meetings & Activities:

##### For All Modules

- [M] Change Management Session
- Allovue is uniquely well-versed in ushering strategic change in school districts. We recognize that new product adoption requires understanding, support, and communication with a variety of stakeholders.

##### [M] Lessons Learned Retrospective

During this evaluation, Allovue meets internally and with the district team to complete a full review of the project implementation including your Allovue team, implementation process, and overall communication. Prior to this meeting, districts are surveyed for input.



# Ongoing Support

**District Partner:** your District Partner will continue to provide strategic support throughout your time with Allovue. This support includes virtual monthly check-in meetings (1 hour) and a six-month virtual check-in meeting (1 hour) focused on Allovue adoption. Additional support by module includes:

**Allocate:** five 1 hour support calls as a forum for strategic planning, formula modification work, advice, and thought partnership. Additional District Partner specialized support with reporting and communication to stakeholders about final allocations.

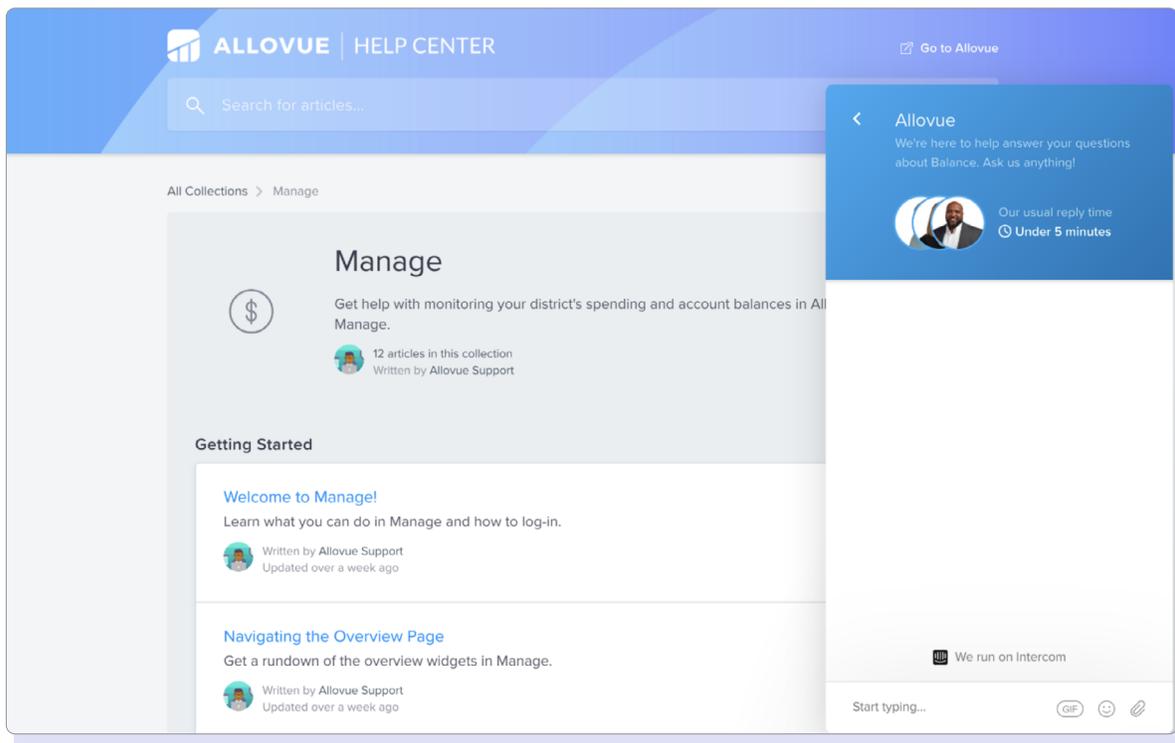
**Budget:** District Partner specialized support to rollover Budget data and assist with building the new Fiscal Year Budget within the Budget module.

**Manage:** District Partner specialized support with the new Fiscal Year changeover within the Manage module.

**Drop-In Training:** Allovue holds group training sessions for all of its customers each month. Training sessions are open to users at all Allovue districts and are run by members of the Customer Success team.

**Live Chat:** all district users have access to Allovue support directly in Allovue modules through live chat. Live chat is staffed by Allovue's Customer Success team from Monday - Friday, 8:00am - 7:00pm EST.

**Knowledge Center:** Allovue's Knowledge Center is accessible through Allovue modules and includes guided video tutorials and how-to documentation for Allovue software.



# Strategic Services

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The following pages detail the variety of strategic services that Allovue offers as part of our package.

# Chart of Accounts

REVISION

Can your district track every dollar that directly contributes to student learning to school sites? Is it easy to distinguish between the people who make decisions about resources and the schools or departments that benefit from those resources? Are you easily able to track dollars that are used for new initiatives or grants?

Accurate, consistent, and well-designed charts of accounts can make this kind of analysis routine and straightforward. But in many districts, expenditures are not recorded with these needs in mind. We will help you adjust your chart of accounts so that you can meet compliance and reporting requirements while also serving the research, analysis, and performance analysis needs of top performing districts.

Our team will begin this work with an in-person kickoff meeting and will then work virtually to review your district's financial data architecture (chart of accounts) conduct interviews with district staff and confer with relevant state and county authorities.

Allovue will provide a summary of recommendations focused on:

- Structural changes to what data is tracked and how it's organized (e.g., segments or code hierarchies)
- Process changes that addresses how your district records and tracks budgets and expenditures to meet all reporting, analysis, and performance management needs of the district
- Evaluation of the strategic plan to identify opportunities to connect spending to district goals.

*"Allovue's chart of accounts work provides more meaningful analysis and reporting of data on a month-to-month basis. This combined with shifting budget/financial responsibility to individual areas allowing MCPS to keep our finger on the pulse of financial information for the district in real-time."*

**Dr. Chris Marczak, Former Superintendent  
Maury County Public Schools**

At the completion of this three-month process, Allovue will provide your district with one draft and one final presentation of recommendations to key district staff who use this data most often. A new or updated chart of accounts manual will also be provided, describing changes from the prior chart of accounts and outlining updated segments and code structure. With this new structure, your district will be able to ensure budgets and expenditures are complete and comparable across schools within your district.

# Hosting, Maintenance, and Support

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## Hosting

Licenses to Allovue include all hosting, maintenance and support. Allovue software is offered as Software as a Service (SaaS) on a subscription basis. It is cloud hosted by Allovue on Amazon Web Services. All customer credentials are encrypted and application accounts passwords are encrypted at rest in our databases. Any Allovue staff accounts on customer systems (VPN or application) required for data encryption are also encrypted at rest and can only be accessed by a limited set of personnel who will be disclosed to the customer. No direct access to production databases is provided to end users and a limited number of Allovue employees are permitted direct database access for maintenance purposes only.

All data communication is encrypted over HTTPS. Allovue conducts nightly backups of all customer data that can be restored in case of failure for any reason.

## Maintenance

Allovue is responsible for all maintenance and upgrades of Allovue software. All customers run the same version of Allovue software and receive all updates to the products they purchased for the duration of their license subscription at no additional cost. Security fixes, bug patches, and additional features are released continuously once they have completed rigorous internal quality assurance and testing. New features may be announced within the application via our application chat or, on occasion, through an emailed announcement. Major changes to the application interface are previewed with senior sponsors prior to release and are accompanied by webinar trainings if appropriate.

**Continuous Product Development and Delivery:** Allovue is offered as Software as a Service, and all customers benefit from having access to all bug fixes, upgrades, and improvements made for the lifetime of their engagement with Allovue. We typically have at least one feature release each month and release bug fixes as they become available. We collect feedback through several channels including:

- Live chat available within the application, where we not only assist individuals but receive valuable feedback that we incorporate directly into our product management process.
- Monthly scheduled check-ins between districts and our District Partners.
- VIP sessions for Allovue customers at the Future of Education Finance Summit.

Each piece of customer feedback is logged in our internal product management tool and tagged with the district and individual who requested a feature or mentioned a bug. This way when we release a new update that reflects that feedback, we're able to directly contact the requesters and let them know that their feedback was addressed. We also provide release notes to districts at their District Partner check-ins that review what features we have released and what bugs have been fixed since the prior check-in.

## Support

**Live Chat:** Our customer success team is available to respond to any question, no matter how big or small. Our hours of operation are from 7am – 8pm ET from Monday through Friday. This is the most popular method of customer outreach to Allovue where a quick question requiring an even quicker answer, or someone at your district in a noisy place (such as a school!) prefers reaching out to us directly in the software.

**Partnership Discussions:** It is important that we work alongside your district staff as partners, helped by scheduled check-ins with your District Partner, including one in 6 months after launching Allovue, and one Year End Business Review. These remote discussions are an opportunity for Allovue to share insights and analyses, and for you to share any news and strategies at your district to inform how we support your staff. Have a major spending deadline coming up? Thinking about a major strategic shift such as student-based budgeting or a 1-to-1 initiative? Just curious about an expense category in your budget and don't have the time to look into it? We can help with any and all of that.

**Insights on Your District's Progress:** One of the benefits of being an Allovue district and having your data integrated into Allovue's software is that it allows us to benchmark every district to the average Allovue district and against our standards for data and process quality. We want to ensure that your district grows and flourishes as a result of our partnership, and we will point out opportunities to advance your district periodically throughout the year.

**Education Finance Learning Opportunities:** As an ever-changing field with a lot at stake, the Allovue team will ensure that you are included in thought leadership events and news. Examples of such opportunities include: Allovue's Future of Education Finance Summit, periodic webinars on key education finance topics, and infographics and data analyses on trends across Allovue districts to inform your thinking about financial strategies at your district.



# Investment

This Scope of Work covers the period of date of signature through three years.

	DELIVERABLE	QUANTITY	TERM	AMOUNT
LICENSES	Allovue License Year 1 Includes: Allocate, Budget, Manage Hosting and Ongoing Support	Unlimited Users	2023-2024	\$14,672
	Allovue License Year 2 Includes: Allocate, Budget, Manage Hosting and Ongoing Support	Unlimited Users	2024-2025	\$14,672
	Allovue License Year 3 Includes: Allocate, Budget, Manage Hosting and Ongoing Support	Unlimited Users	2025-2026	\$14,672
PROFESSIONAL SERVICES	Allovue Implementation	1	2023-2024	\$22,500
	Chart of Accounts - Revision	1	2023-2024	\$10,000
<b>YEAR 1 TOTAL</b>				<b>\$47,172</b>

*Invoice is sent upon contract execution and is payable within 30 days of receipt.  
Pricing is valid through September 30, 2023.*