

Memorandum of Understanding
Between
[insert school/network name] and Enroll Indy
OneMatch Unified Enrollment System

Memorandum of Understanding

Enroll Indy, Inc. (“Enroll Indy”) and [insert school name] (“School”) enter into this Service Agreement (“Agreement”) to outline mutual responsibilities and understandings regarding the OneMatch unified enrollment system. This Agreement is mutually executed on [insert signature date] and will become effective on [insert signature date] (“Effective Date”). The staffing and financial resources, services and terms outlined in this Agreement will be offered to all schools equitably, and will apply to the School for students enrolling in the 2017/18, 2018/19, and 2019/20 school years.

Background

Enroll Indy is implementing a unified enrollment system (“OneMatch”) that will be utilized for the first time in November 2016 for the 2017/18 school year. The OneMatch system allows all families in Indianapolis to easily participate in the school-choice process by simply stating up to 10 preferred schools on one form, regardless of school type (magnet, innovation, charter, or traditional boundary). The benefits of OneMatch include:

- Schools are able to better predict the number of students attending each year and budgets are more reliable earlier in the planning process
- The OneMatch system is fair and equitable for all students
- All schools, regardless of school type (magnet, innovation, charter, or traditional boundary) are publicized and marketed equitably by Enroll Indy
- Schools’ administrative burden associated with managing school-based lotteries and corresponding communications can be reduced.
- Data is available to better track choice patterns and help the district and charter authorizers clearly identify the relative popularity of programs from the lens of our students and their families.
- Families receive support in making informed, proactive school choices
- All families use a single, streamlined, easy-to-navigate system
- All students are notified of their school assignment at the same time – minimizing the waitlist “domino effect” that has historically occurred

Purpose

The goal of implementing the OneMatch enrollment system is to simplify a complex and confusing set of more than thirty enrollment systems with the IPS boundary into one streamlined system, thereby making it easier and more equitable for all families to understand the choices that are available to them and to exercise that choice.

Agreements

Marketing and Recruiting

Enroll Indy's Responsibilities and Rights

- Enroll Indy will lead a community engagement effort including door-to-door outreach, canvassing, phone banking and/or media placements publicizing the launch of the new OneMatch system in the Fall of 2016.
- The online Enroll Indy School Finder will be funded, created, produced, and hosted by Enroll Indy for all families interested in attending schools in Indianapolis. Enroll Indy will make all reasonable efforts to translate the School Finder into Spanish and will enable Google Translate for any other languages deemed necessary for the Indianapolis population.
- Enroll Indy will train all partner organizations (i.e. community centers, libraries, recreation centers, religious institutions, real estate agents, etc.) on using the School Finder.
- Enroll Indy will ensure the School Finder is accessible and navigable on mobile devices.
- Enroll Indy will include 100% of its schools in its School Finder, communicating school options using a standard template, developed with input from schools and parents, and giving all school types equitable coverage in the Finder.
- Enroll Indy will provide the School with a SchoolForce license through which the School will be able to update its School Finder profile in real time (not including public accountability and demographic data, which will be uploaded centrally as reported by the Indiana Department of Education).
- Enroll Indy will make all reasonable efforts to provide schools notification about the enrollment process and a comprehensive list of planned outreach events 30 days prior to the annual cycle launching each year.
- Enroll Indy will make all reasonable efforts to update the School Finder with public accountability and demographic data in early October each year to inform enrollment choice for the following school year.
- Enroll Indy will maintain an online calendar featuring open houses and recruiting events for all participating schools.
- Enroll Indy will make all reasonable effort to provide schools with adequate notice and access to city-wide recruiting events and school fairs.
- Enroll Indy will provide schools with weekly data on the application completion rate of each school's terminating grade(s) (i.e. current 8th graders who need to apply for 9th grade) to better enable the schools to assist families in selecting future schools.
- Enroll Indy employees will staff three Enrollment Centers in Indianapolis and will provide unbiased information to families seeking schools as well as assist families in completing applications.
- Enroll Indy's Enrollment Centers will be monitored for neutrality through exit surveys with parents as well as "secret shoppers" who will access the Centers at random.

- Enroll Indy will provide a toll-free hotline through which families can get information about schools and how to apply.

The School's Responsibilities and Rights

- The School will be responsible for drafting, reviewing, updating and maintaining its comprehensive school profile that is listed in the online School Finder.
- The School may create, produce and distribute any school-specific marketing materials at its own expense and using its own distribution vehicles.
- The School is responsible for ensuring that its recruitment materials accurately describe the OneMatch process and policies.
- The School will share any public open houses or recruiting events with Enroll Indy, if the School would like those events featured on the city-wide calendar.

OneMatch Application

General Agreements

- Once produced, the Enroll Indy OneMatch Application may be distributed by Enroll Indy and/or by the School, or any other Enroll Indy school, via the Enroll Indy website.
- The OneMatch Application will include any and all fields necessary for the School to accurately prioritize its applicants.
- The OneMatch Application will list only those schools participating in the OneMatch process.

Enroll Indy's Responsibilities and Rights

- The Enroll Indy OneMatch Application will be funded, created, and produced by Enroll Indy, with input from the Executive, Steering, and Parent Advisory Committees.
- The OneMatch Application will be available online and accessible via mobile device.
- Enroll Indy will make every effort to translate the OneMatch Application into Spanish and any other language deemed necessary for the Indianapolis population and will provide translators for families needing assistance during the application process.
- All student/school matching decisions will be made by Enroll Indy, based on the information provided on the student's OneMatch application and the information provided by schools, and governed by the Enroll Indy policies as established under "Assignment of Students" set forth herewith.
- All Enroll Indy schools that participate in the OneMatch process, regardless of type (charter, magnet, traditionally-run), will be included on the OneMatch application and displayed with equitable prominence.

The School's Responsibilities and Rights

- The School may assist families with submitting OneMatch applications on school site.

- The School must submit any programmatic changes, grade level changes or other relevant changes to be incorporated into the OneMatch application website by the deadline specified by Enroll Indy.
- The School will have the ability to recruit prior to the launch of Enroll Indy's OneMatch application through their own school-based processes, as developed and funded by the School.
- The School will not run or participate in a separate lottery process outside of the OneMatch system.

Data Management and Technology

General Agreements

- Count Day Projections and Match Targets: On an annual basis, the school, in consultation with the Enroll Indy, will set the following enrollment targets, which can be adjusted during the enrollment process:
 - Count Day Projection ("CDP"): The number of students that a school wants to have enrolled, per grade, on the October Count Day of the upcoming school year.
 - Match Target: The number of students that a school wants assigned to the school via OneMatch, per grade. The Match Target will be higher than the CDP to account for expected attrition between the time that OneMatch rosters are established and Count Day.
- Demand Reports will be provided by Enroll Indy on a weekly basis. The demand report provides the School with the information they need to understand whether the school is likely to meet its Match Target.
- SchoolForce, a web-based application that utilizes the Salesforce platform, is the enrollment and application management solution developed by Enroll Indy for OneMatch. The historical, current and future enrollment of all students is tracked in SchoolForce, as well as seat availability for all schools.

Enroll Indy Responsibilities:

- Beginning in January, Enroll Indy will prepare a worksheet for each school to assist in the preparation of their CDP and their Match Target.
- Enroll Indy will ensure that the sum total of seats offered by schools is sufficient to accommodate the projected number of students requiring seats for the upcoming year.
- Enroll Indy will afford schools an opportunity to adjust CDP and Match Targets throughout the OneMatch process and until Count Day.
- Beginning a week after the launch of each OneMatch application window, Enroll Indy will send each school a "Demand Report" containing the following information:
 - The number of currently attending students, by grade, that have submitted an application to attend a different school;
 - The number of external applicants to the school, by grade, that have ranked the school #1, #2, #3, etc.;
 - Any other reasonably accessible data requested by schools; and

- Enroll Indy will also make a good faith effort to provide schools with the opportunity to access real-time demand data via SchoolForce.
- Enroll Indy will provide each School with one Salesforce license, which can be used by multiple school users.
- Enroll Indy will provide SchoolForce professional development and trainings in group settings and individually, at the request of a school. These trainings will cover all SchoolForce functionality and policy.
- Enroll Indy will implement and monitor the “SIS Integration” process by which the active roster in a school’s SIS is compared against the active roster in SchoolForce. Schools will not be asked to alter their SIS when they participate in unified enrollment.

School Responsibilities:

- Schools will establish an enrollment Point of Contact (“POC”) who will work directly with Enroll Indy to establish CDP and Match Targets, as well as monitor demand reports and attend relevant meetings/check-ins with Enroll Indy.
- The School will provide Enroll Indy with grade-by-grade CDP and Match Targets by the communicated deadline.
- The School will collaborate with Enroll Indy to finalize these projections and targets.
- The School will follow the communicated protocol and provide Enroll Indy with changes to the grade-by-grade CDP and Match Targets by the communicated deadlines.
- The School should use the data contained in the Demand Reports as one data point to make decisions about class structures and staffing for the upcoming school year. This may result in an adjustment to the school’s Match Targets between rounds of OneMatch.
- The School is responsible for following all policies related to SchoolForce, which will be communicated via email and via professional development trainings.
- The School’s enrollment POC will attend SchoolForce professional development trainings organized by the Enroll Indy. Training topics include day-to-day system management and may include customized support as necessary. POCs will have multiple opportunities to attend these trainings.
- The School’s enrollment POC will request ad hoc trainings on an “as needed” basis.
- The School is responsible for participating in the “SIS Integration” process, as mutually agreed upon by Enroll Indy and the School prior to the launch of OneMatch. These responsibilities may include any of the following:
 - Populating each student’s OneMatch ID (available in SchoolForce) into the school’s SIS (if state STN number is not able to be attached to the OneMatch application).
 - Setting up exports from the School’s SIS (in a format provided by Enroll Indy) and sending that export to a pre-determined FTP site.
 - Reviewing the daily “Error Reports” that are generated as a result of the SIS Integration project and working to resolve those errors in a timely fashion.

- In an effort to establish “before state” data baselines for the unified enrollment implementation, the School will work with Enroll Indy to identify current metrics prior to the initial implementation of the OneMatch Application window.

Assignment of Students – OneMatch Rounds 1, 2 and 3

General Agreements

- “1st Round Participant” will be defined as any student who submits a OneMatch Application online no later than 11:59 PM on the last business day of the month of February.
- “2nd Round Participant” will be defined as any student who submits a OneMatch Application online no later than 11:59 PM on the last business day of the month of April.
- “3rd Round Participant” will be defined as any student who submits a OneMatch Application online no later than 11:59 PM on June 15th.

Enroll Indy’s Responsibilities and Rights

- Enroll Indy will be responsible for matching each student’s preferences with open seats and priorities defined by the School. This will be accomplished using the OneMatch Assignment Tool. Each year, Enroll Indy and the School will agree to the enrollment priorities in a separate addendum to this agreement. The only variables Enroll Indy will consider when matching students to schools are as follows:
 1. Each individual school’s Match Target as defined by the School.
 2. Each individual school’s list of prioritization groupings, as well as any other criteria used for student selection, provided these priorities are consistent with the Indiana Charter Law (IC 20-24). The School will be expected to adhere to the selection priorities as stated to Enroll Indy, as long as it does not conflict with the School’s current contract.
 3. Each student’s list of his/her top 10 preferred schools, as stated on his/her OneMatch Application.
 4. Contractual maximum enrollment for the School.
- Enroll Indy will provide schools with a weekly demand report throughout Round 1 of the OneMatch Application, including the numbers of applications submitted by grade; the school rank of applications submitted by grade; when applicable, historical reference points of year-to-date applications, and system-wide information about application.
- Enroll Indy will make its best effort to provide schools with the opportunity to access demand data in real-time through SchoolForce.
- Enroll Indy will make its best effort to support schools with ongoing check-ins, supporting schools in setting match targets, offers, and any other variables as determined by school need.
- Enroll Indy will provide schools with access to their assigned students prior to families being notified of their student’s placement.
- Enroll Indy will make all reasonable efforts to mail an initial school assignment letter via postal mail and electronic mail to each student no later than March 31st.

- Enroll Indy will upload all of the school's assigned students ("future students") into SchoolForce at the culmination of each round of OneMatch.

The School's Responsibilities and Rights

- The School will communicate their admissions priorities to Enroll Indy no later than the first business day in the month of December, and will update Enroll Indy with any revisions to such priorities in subsequent years by the first business day in November (except where impossible due to new schools being authorized, in which case the school will provide their admissions priorities at least two weeks prior to the opening of OneMatch Round 1).
- The School will communicate their grade-by-grade Match Targets and Match Offers to Enroll Indy no later than the 20th day in the month of February each year.
- The School may send any additional notification or correspondence to their assigned students any time after the 31st of March (Round 1), the 31st of May (Round 2), or the 1st of July (Round 3), which is when families will be notified of their placement from Enroll Indy.
- The School will not accept or enroll any student *not* assigned via the OneMatch Assignment Tool.

Assignment of Students – Post OneMatch Rounds

General Agreements:

- All enrollment of students will occur at an Enroll Indy Enrollment Center ("Enrollment Center").
- Beginning in July (exact date to be set annually) and continuing until October 1, families new to Indianapolis, or families seeking a transfer to a school other than the one they have been assigned, can visit an Enrollment Center to enroll in a school.
- After October 1, families seeking to transfer must apply for a transfer at an Enrollment Center, providing documentation of an exit interview with their current school.

Enroll Indy Responsibilities:

- Before the Fall Average Daily Membership ("ADM") Count Day, Enroll Indy is responsible for abiding by the grade-level enrollment targets set by each school.
- After Fall ADM Count Day, Enroll Indy is responsible for enrolling new or transferring students in schools with available seats, and for making contact with the new school. For students exiting a different OneMatch school, Enroll Indy is also responsible for making contact with the exiting school.
- Enroll Indy is responsible for abiding by process set forth by the Enroll Indy Executive Committee to determine seat availability for approved transfers and new students.
- Enrollment Center staff are responsible for meeting with families who visit the Enrollment Center to discuss available school options and to enroll the student in the appropriate school in SchoolForce.

School Responsibilities:

- For schools without eligibility requirements, the School is responsible for enrolling all students who receive a placement via an Enrollment Center.
- For schools with eligibility requirements, the School is responsible for meeting with all referred students to determine eligibility and, if a student is determined ineligible, to document the reason for ineligibility on the official Referral Form that the family will bring back to the Enrollment Center.
- For students transferring out of a school, schools will “exit” the student in the SchoolForce system.
- The school is responsible for contacting all families assigned / referred via the Enrollment Center.
- The school is responsible for collecting all documents required for registration.
- The school is responsible for maintaining an accurate roster in SchoolForce (see below, under Data Management, for more information).

Financial Commitment of Parties

- Enroll Indy will be responsible for all costs associated with implementation and ongoing execution of the OneMatch system through the term of this service agreement. Enroll Indy is undergoing analysis of the operating costs of OneMatch. For 2016/17, 2017/18, and 2018/19 there will not be any fees for Schools. Enroll Indy will provide appropriate notice to schools if there will be an additional fee in subsequent years, and any such fee will be mutually agreed upon by a group of OneMatch stakeholders and the Enroll Indy Board of Directors.

Cancellation Clause

The School and Enroll Indy both retain the right to cancel this service agreement annually between now and June 30, 2020 after reasonable attempts to seek remedy based on any of the following reasons:

- Enroll Indy proposes changes in the assignment tool that prioritizes students using priorities other than those listed above.
- Either party fails to uphold one of the material rights and responsibilities outlined in this agreement and, having had the opportunity to seek remedy, the parties are unable to do so.