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**PROJECT BRIEF**

**Grantee Name: New Teacher Center (NTC); Phil Lee, & Darby Nadeau**

**Volunteers: Patricia Eastburn and Jerome Wi**

**Customer #: 3497100**

**Account Manager Name: Charlie Cave**

**Project Type: General Coaching for Experts**

**Part One: Background**

*Organization Mission Statement*

NTCs mission is to improve student learning by accelerating the effectiveness of new teachers and school leaders.

*Social Impact*

NTC’s work is focused on accelerating the effectiveness of new teachers so that students achieve at high levels. NTC measures its impact, based on an “Impact Spectrum” that includes five key data categories of: Counting, Program Quality, Retention, Practice, Student Learning. NTC uses a combination of measures, data sources and methodologies to draw inferences about impact related to each of the above categories including student test scores, observations of teacher practice, interviews and surveys of beginning teachers and mentors, and demographic data.

NTC works with its partners to create and implement an impact plan that measures results accurately. The information is used to drive a continuous improvement cycle whereby NTC routinely examines its work and constantly innovates to increase impact on teachers and students.

* Grantee contacts

Phil Lee: Controller

Darby Nadeau: IT Systems Support Specialist

* Grantee NetSuite background

They implemented NetSuite beginning in February 2012. 2 years of hands on experience with day to day transactions and financial reporting.

**Part Two: Project Specifications**

* Goals to achieve in this project General Coaching (for Experts)

NTC is always looking for new opportunities to build their internal capacity and comfort levels with the NetSuite system, particularly with regards to administration.

NTC wants to be able to setup and configure their NetSuite account’s roles and permissions based on best practices as they bring in new cross-functional employees into the NetSuite application as users.

* Key challenge that this project will help overcome

NTC is in need of best practices related to NetSuite administration: from roles and permissions to employee onboarding / offboarding and end user training.

NTC hopes to reduce risk around sharing sensitive information, and smooth out the process by which new employees become acquainted with the system.

* Expected outcome from this project

NTC expects to come away with a clearer view of NetSuite administration standards, allowing them to both maximize security and user experience.

**Part Three: Communication - Working Relationship**

* Medium of communication and conduct of project

Email and WebEx are the chosen mediums to communicate and conduct sessions

* Agreed on working times for check-ins and sessions

Interchangeable as needed

1000-1100 PACIFIC

Wednesday

* Agreed upon timezone

Pacific

* Reasonable turnaround time for replies

48 hours is fine in most cases, possibly sooner if it’s a request around scheduling.

**Part Four: Scope**

New Teacher Center wants to be able to setup and configure their NetSuite account’s roles and permissions based on best practices as they bring in new cross-functional employees into the NetSuite application as users.

The NetSuite team will work with the grantee in coaching sessions which will be driven by the following tools and methodologies: Powerpoint slide sharing, NetSuite application walkthroughs using the grantee’s sandbox environment, and configuration session for knowledge transfer about best practices around role and permission configuration.

Key deliverables

* NetSuite learning sessions to cover standard and best practices for role and permission setup

The NetSuite team will aid in the configuration of roles and permissions by the grantee through online sessions and if needed, offline research sharing.

The project will be complete once the NetSuite team delivers the coaching sessions and reference documents for best practices in configuring NetSuite roles and permissions.

Finally, to close out the project, the project team has agreed to have a final session where the learnings and NetSuite improvements are validated in a WebEx session.

**Project Schedule**

**New Teacher Center**

**TIMELINE/DELIVERABLES:**

|  |  |  |
| --- | --- | --- |
| ***Date***  | ***Responsible***  | ***Item***  |
| 5/21/2014 | New Teacher Center and NetSuite | *Project Kick-Off*  |
| 5/21/2014 | New Teacher Center and NetSuite | *Sign-off and approval of Project Scope and Timeline*  |
| Start By 5/21/2014 | NetSuite led | *Walkthroughs*  |
| 5/25/2014 | New Teacher Center and NetSuite | *Final check-in and project wrap up*  |
| ***By May 25*** |  | *Project Completion*  |
| New Teacher Center | *Survey/ feedback given to NS.org* ***Within 30 days of project completion***  |