



FACTS → SYCAMORE

# The Switching Playbook

A decision guide for heads of school and business offices evaluating a move from FACTS Management to Sycamore. Nine sections, designed to print and forward.

TODAY

## FACTS

SIS · Tuition · Aid · Family App  
Quoted separately, surcharged to parents

VS

TOMORROW

## Sycamore

One platform, one login, one bill  
\$4 per student per month, all included

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Inside: the decision framework, week-by-week migration timeline, side-by-side cost worksheet, questions to ask FACTS before you cancel, a one-page board summary, and a migration FAQ for your business office.

# 1 Why heads of school are switching

Most schools moving from FACTS Management to Sycamore are looking for three things: a parent experience their families actually like, predictable pricing that does not balloon with module add-ons, and an onboarding team that picks up the phone in their time zone.

Across the 14 categories that private school leaders score during platform reviews, Sycamore wins on 12. FACTS holds the lead on two: raw credit card surcharge rate and the depth of its Sage Intacct enterprise GL integration. Everything else, from family experience to pricing transparency to international reach to support, sits with Sycamore.

**\$4**

per student per month, all modules included

**4.8 / 5**

parent app rating  
(Sycamore + TuitionEP combined)

**46+**

countries served  
on 6 continents

**4-8**

weeks to switch  
and go live

## The three reasons that come up in every kickoff call

1. Families want one app, not two. Sycamore's Parent App holds a 4.8-star combined rating with TuitionEP. FACTS Family App sits at 3.1 on Google Play. Families on FACTS regularly say the SIS and tuition halves feel like two separate products.
2. Pricing should be predictable. Sycamore publishes its plan at \$4 per student per month with everything included. FACTS quotes per school, per module. Schools that adopt the full FACTS suite carry multiple line items that grow as the school grows.
3. Support should answer when called. Sycamore's support and onboarding teams are based in the United States and pair with Sycamore Academy for on-demand training. The hard tickets reach a person quickly.

## 2 When to switch

Schools switch from FACTS at three common moments. Pick the one that fits your school year and contract; Sycamore's onboarding team adapts to all three.

Window	Best for	Watch out for
<b>End of school year</b>	Schools whose FACTS contract renews mid-summer. Plenty of runway for staff training before fall.	Confirm FACTS data exports are available after your contract end date.
<b>Mid-year cutover</b>	Schools that want to be on Sycamore before re-enrollment season opens. Cutover at the start of a term or grading period.	Coordinate the cutover with payroll and tuition draft schedules.
<b>Summer</b>	Schools running summer programs or year-round calendars. Compresses training into July and August.	Plan around staff vacation; lock kickoff before mid-June.

Whichever window you pick, Sycamore typically takes 4 to 8 weeks from kickoff to your first tuition cycle on the new platform.

# 3 What changes for your families

For most schools, parents are the most frequent users of the platform. Here is what shifts the day Sycamore goes live.

## One app instead of two

Families currently install the FACTS Family App for SIS data and a separate flow for tuition. After the switch, they install the Sycamore Parent App once. Tuition balance, cafeteria balance, grades, attendance alerts, and class announcements live behind the same login.

## Payment methods, depending on the processor

Whether saved cards and ACH details transfer depends on FACTS' current payment processor. When secure token portability is supported, families see no change. When it is not, families re-add their payment method through a one-screen flow in the Sycamore Parent App. Sycamore drafts the parent communications either way.

## Tuition plans are reset and recreated

Active payment plans are rebuilt in Sycamore at the same amount, cadence, and remaining balance, then reconciled against FACTS so nothing is double-charged or missed. Families see the same payment schedule they already expected.

## Fee handling becomes your choice

On FACTS, the credit card convenience fee is passed through to parents by default. On Sycamore, the school decides per transaction type: absorb the fee, pass it through, or split it. Many schools use this flexibility to reduce the friction families feel at checkout.

## Communications consolidate

Class messages, school-wide announcements, and teacher-parent threads route through Sycamore. There is no separate community app to install.

# 4 Migration timeline, week by week

Most schools complete a full switch in 4 to 8 weeks. The schedule below assumes a standard FACTS migration; mid-year and summer cutovers compress to the same shape with tighter validation windows.



Phase	Phase name	What happens
Week 1	Discovery	<ul style="list-style-type: none"> <li>• Kickoff call with the head of school and business office</li> <li>• Inventory of current FACTS modules and contract end dates</li> <li>• Source-of-truth audit for student, family, and tuition data</li> <li>• Switching plan with named dates, owners, and risks</li> </ul>
Weeks 2-3	Data + setup	<ul style="list-style-type: none"> <li>• Joint data extraction from FACTS SIS, Tuition, Aid, and Family App</li> <li>• Normalize and load into Sycamore staging environment</li> <li>• Side-by-side validation against the source system</li> <li>• Payment processor connect and test transactions</li> </ul>
Weeks 4-6	Training	<ul style="list-style-type: none"> <li>• Role-based courses for admins, teachers, and counselors</li> <li>• Two live working sessions with the client success team</li> <li>• Parent communication drafts, scheduled and approved</li> <li>• Cutover dry-run on a representative subset of data</li> </ul>
Weeks 7-8	Go live	<ul style="list-style-type: none"> <li>• Production cutover and final data reconciliation</li> <li>• Parents install the Sycamore Parent App, one balance live</li> <li>• First tuition cycle on Sycamore, monitored end-to-end</li> <li>• 30-day post-launch review with the school's leadership</li> </ul>

# 5 Side-by-side cost worksheet

Fill the left column with what your school pays FACTS today. Use the right column to capture the Sycamore plan. The bottom row is the annual difference your board will care about.

Line item	FACTS today	Sycamore
Per-student license (annual)	_____ × ___ students = _____ _____	\$4 × students × 12 = _____
FACTS SIS module	_____	Included
FACTS Tuition Management	_____	Included
FACTS Grant + Aid Assessment	_____	Included or not needed
FACTS Application + Enrollment	_____	Included
FACTS Family App (\$4.99/family/yr)	_____	Included
FACTS Financial Intelligence	_____	Standard reporting included
Implementation / customization fees	_____	\$2,500 minimum onboarding
Card convenience fee passed to parents	2.95% × _____	School chooses; can be \$0 to parents
Other modules in scope	_____	_____
Annual subtotal	_____	_____
Annual difference (Sycamore vs FACTS)		_____

Industry-reported FACTS pricing of \$5 to \$6 per student per month is directional; actual quotes vary. Use your real FACTS invoices in the left column for the most accurate comparison.

# 6 Questions to ask FACTS before you cancel

Send this list to your FACTS account manager before notifying cancellation. The answers protect your data, your families, and your renewal terms.

#	Question to send FACTS	Why it matters
1	<b>What is my exact contract end date for each FACTS module, and what is the cancellation notice window?</b>	Most FACTS contracts auto-renew. Confirm the notice deadline in writing before you set a Sycamore go-live date.
2	<b>Will I retain read or export access to FACTS SIS, Tuition, and Aid data after my contract ends, and for how long?</b>	Data export windows vary. You want exports available through the final reconciliation, not just the go-live date.
3	<b>What is the format and field coverage of standard FACTS data exports?</b>	Knowing the export format upfront lets Sycamore's onboarding team plan validation. Ask for sample exports if possible.
4	<b>What happens to in-progress tuition payment plans on the day my contract ends?</b>	Plans, autopay schedules, and saved payment methods need a clean handoff. Confirm whether FACTS continues to process or stops.
5	<b>Are there any modules, integrations, or contracts on a different renewal cycle that I should know about?</b>	Family App subscriptions, Sage Intacct connections, and Pro Learning engagements can run on separate cycles.
6	<b>What is the process for transferring saved payment methods (tokens) to a new payment processor?</b>	Confirm whether tokenized payment data can be transferred securely. This avoids forcing families to re-enter card details.
7	<b>Is there a fee for cancellation, mid-term termination, or data export?</b>	Some contracts include early-termination clauses. Get the exact dollar figure in writing.

# 7 One-page board summary

Copy or adapt the block below for your next board packet. Replace the bracketed figures with your school's specifics.

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## BOARD SUMMARY · SWITCHING FROM FACTS TO SYCAMORE

### Recommendation

Adopt Sycamore as the school's K-12 platform of record, replacing FACTS Management. Sycamore consolidates SIS, gradebook, attendance, admissions, tuition, payments, communications, and the parent mobile app under one license at \$4 per student per month. Sycamore's onboarding team will run the full migration in 4 to 8 weeks, so the school can pick a go-live date that aligns with the start of the next term, the re-enrollment window, or the end of the current FACTS contract.

### Financial impact (annual)

Current annual cost of FACTS modules in scope: \$ \_\_\_\_\_. Projected annual cost of Sycamore at \$4 per student per month: \$ \_\_\_\_\_. Estimated net annual savings: \$ \_\_\_\_\_. One-time onboarding investment: \$2,500 minimum, covering the dedicated migration lead, data validation, training, and parent communications. Recurring Sycamore cost is the published plan with no separate module fees as the school grows.

### Operational impact

Families move from two FACTS apps (Family App + Community App) to a single Sycamore Parent App, which today holds a 4.8-star combined rating (Sycamore + TuitionEP). The school gains tuition refund protection (via Vertical Insure), native donations with AI donor intelligence (rolling out 2026), and US-based onboarding and support. Tuition payment plans, saved payment methods, and student history transfer without interruption to families.

### Risk and mitigation

Switching SIS and tuition together at a single cutover is the largest operational risk. Sycamore's standard migration includes side-by-side validation against the FACTS source of truth and a 30-day post-launch monitoring window. Mid-year cutover is supported; in-progress tuition plans continue at the same amount and cadence.

### Timeline

4 to 8 weeks from kickoff to first tuition cycle on Sycamore. The school selects the go-live date that fits the calendar, and Sycamore plans backward from it.

# 8 Migration FAQ for the business office

## Will family history transfer cleanly?

Yes. Student, family, grade, attendance, and tuition history transfer in full from FACTS SIS. Sycamore validates imported records against your FACTS exports before go-live.

## Can we switch mid-year?

Yes, but it is the harder path. Mid-year cutovers require more coordination than summer or end-of-year switches, especially around in-progress tuition plans and grading periods. Schools that need to do it still do, most often at the start of a term.

## Do parents have to re-enter payment information?

Sometimes. Whether saved cards and ACH details transfer depends on FACTS' current payment processor. When secure token portability is supported, families see no change. When it is not, families re-add their payment method through a one-screen flow in the Sycamore Parent App.

## What happens to tuition plans already in progress?

Plans are reset and recreated in Sycamore. Sycamore's team rebuilds each active plan at the same amount, cadence, and remaining balance, then reconciles against FACTS so nothing is double-charged or missed. Families see the same schedule they already expected.

## What does the switch cost?

The minimum onboarding investment is \$2,500. That covers the dedicated migration lead, data validation, training, and parent communications. After go-live, the school's recurring invoice is the published \$4 per student per month plan with no separate module fees.

## When do we cancel FACTS?

On your schedule. Some schools cancel FACTS as soon as Sycamore's staging environment passes validation. Others run both in parallel for weeks or months, especially when the FACTS contract overlaps go-live. Sycamore will not push you to cancel until you are ready.

## Where is Sycamore's support team based?

In the United States. The same team handles onboarding, migration, and ongoing support, and pairs with Sycamore Academy for on-demand training.

## Does Sycamore integrate with our accounting system?

Yes, through standard exports compatible with common school accounting platforms. If your school uses Sage Intacct today via the FACTS connected suite, plan a dedicated discussion during week 1.

# 9 Next steps

Three ways to move forward, ordered by how ready you are. Pick the one that fits where you are in the decision.

## Get a switch-now quote

Send Sycamore your current FACTS modules and student count. We return a tailored Sycamore quote, a switching timeline, and a line-item comparison against what you pay FACTS today, typically within two business days. This is the fastest path if you already know you want to move and you need a number to take to the board.

[sycamoreleaf.com/switch-now/](https://sycamoreleaf.com/switch-now/)

## View testimonials

Read what heads of school and business offices say about Sycamore after switching. Real schools, real outcomes, real implementation timelines, not curated marketing soundbites. Helpful if you want to validate the playbook against operators who have already lived it.

[sycamoreleaf.com/testimonials/](https://sycamoreleaf.com/testimonials/)

## Send your account executive a data export

Send your Sycamore account executive a sanitized export of your FACTS data. We will run it through staging and walk you through exactly how easy it is to get going on Sycamore. No commitment required. Best for schools that want to see their own student, family, and tuition records living on the new platform before making a final call.

Reach out to your assigned Sycamore AE directly.

<b>\$4</b>	<b>4-8</b>	<b>\$2.5K</b>	<b>100%</b>
per student per month, all modules included	weeks to first tuition cycle on Sycamore	minimum onboarding, dedicated migration lead	US-based onboarding and support

Companion to this Playbook: the live comparison page at [sycamoreleaf.com/compare/facts-vs-sycamore](https://sycamoreleaf.com/compare/facts-vs-sycamore).