



**MONTANA
DEPARTMENT OF
ADMINISTRATION**

Director's Office

Greg Gianforte, Governor
Misty Ann Giles, Director

June 7, 2023

To: Legislative Finance Committee
Education Interim Committee
General Government Budget Committee
Education Budget Committee

Subject: Report on Office of Public Instruction Data Modernization RFP Process

I am writing to report on the recent procurement process for the Office of Public Instruction Data Modernization project, as outlined in HB 367. As the Director of the Department of Administration, I am privileged to present this report to the legislative committee members.

This report offers a detailed overview of the procurement activities undertaken to secure a vendor for the critical Office of Public Instruction Data Modernization project. This project aims to enhance the data management systems within the Office of Public Instruction, ultimately improving the efficiency and effectiveness of education-related processes across our state.

The report outlines the procurement process's key objectives, methodologies, and outcomes. It delves into the evaluation criteria for assessing potential vendors, ensuring that only the most qualified and capable organizations were considered. Additionally, the report highlights the various stages of the procurement process, from soliciting proposals to conducting vendor demonstrations and finalizing the award decision.

One of our primary goals throughout this procurement process was to promote transparency and accountability. We have strived to ensure that the entire process adhered to the highest standards of integrity and fairness. To that end, the report includes details of the Notice of Intent to Award (NOIA) process, allowing public comment on the award decision and incorporating valuable insights and feedback from stakeholders, as part of the implementation of SB 51.

Further reports on this project will be completed by the Office of Public Instruction, as outlined in HB 367. Should you have any questions or require further clarification, please do not hesitate to reach out to me or my team. We stand ready to assist you in any way possible.

Thank you for your time and attention to this matter. I greatly appreciate your ongoing support and commitment to this project's successful procurement and implementation.

Respectfully,



Misty Ann Giles, Director



OPI Data Modernization

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Introduction

During the 68th Legislature, HB 367 was successfully enacted into law. This legislation requires the Department of Administration (DOA) and the Office of Public Instruction (OPI) to furnish a comprehensive written report to multiple committees: the Legislative Finance Committee, Education Interim Committee, General Government Budget Committee, and the Education Budget Committee. This report defines the collaborative efforts between DOA and OPI in procuring a reliable resource to enhance the efficiency, accuracy, and accessibility of OPI's vital data system. The efficacy of Montana's education system relies heavily on the smooth operation of this data system, which serves both students and educators.

To fulfill this objective, DOA and OPI have diligently joined forces to solicit requests for proposals that aim to modernize OPI's data system. This collaborative partnership has enabled us to leverage both agencies' combined expertise and resources, facilitating the identification of the most suitable solution to meet OPI's specific requirements. Furthermore, this approach ensures a competitive bidding process that yields the most cost-effective and superior-quality solution.

To guarantee compliance with the Montana Procurement Act, the State Procurement Bureau, in conjunction with the Office of Public Instruction, has diligently overseen every stage of the procurement process.

With the goal of enhancing the accuracy, accessibility, and efficiency of OPI's data system, this collaborative endeavor holds great promise for the betterment of Montana's education landscape. This report, prepared for various legislative committees, demonstrates a commitment to transparency and accountability. Furthermore, adherence to the Montana Procurement Act underscores the commitment to upholding ethical and legal standards in the procurement process.

As Montana's education system evolves, the successful implementation of the collaborative partnership and the subsequent modernization of OPI's data system will undoubtedly contribute to improved student and educator outcomes. By leveraging the combined strengths of OPI and DOA, Montana is taking crucial steps towards ensuring a robust and effective education data reporting system that meets the needs of its users and the constituents of the State of Montana.

Estimated Procurement Timeline

COMPLETED:

Request for Proposals Opened: 4/7/2023

Request for Proposals Closed: 5/4/2023

RFPs provided to members of the Evaluation Committee for review: 5/9/2023

Technical Evaluation Committee Meeting: 5/19/2023

Interviews & Demonstrations: 6/1/2023 & 6/2/2023

IN PROGRESS:

Notice of Intent to Award Period: 6/6/2023 – 6/13/2023

Negotiations & Contract Execution: 6/6/2023 – 6/30/2023

The timeline is based on best-case scenarios; adjustments will be made as necessary.

Submittals and Project Cost Proposals

Offeror	Total Project Cost
Crocus, LLC	\$6,625,867.00
Data Catalog Solutions, LLC	\$4,350,000.00
Edwise Group, LLC	\$3,600,000.00
Plante and Moran, PLLC	\$4,998,700.00
PowerSchool Group, LLC	\$8,352,559.61
Resultant Group, LLC	\$4,638,900.00
Slalom, LLC	\$10,248,595.00

For this project, the scoring matrix employed by the evaluation committee encompasses a comprehensive set of criteria to assess the RFP submissions. These criteria include factors such as functionality, scalability, user interface, data security, implementation timeline, technical support, and cost. HB 367 also stipulated that commercial off-the-shelf information technology resources must be used whenever feasible. Each committee member provided individual evaluations for these specific aspects, assigning scores based on the merit and alignment of each proposal.

The evaluation committee decided that based on the entirely custom-built solution proposed by Slalom, the submission failed to meet the COTS requirement and was subsequently removed from the evaluation process.

It is crucial to note that while costs are a component of the evaluation process, the selection of the winning vendor is not solely determined by the lowest project cost. Instead, the committee takes a holistic approach, considering all evaluation criteria and seeking a solution that offers the most favorable combination of functionality, quality, cost-effectiveness, and overall value for the project.

Evaluation Committee

The RFP review committee consists of the following:

1. Adam Carpenter, Chief Data Officer
State of Montana
2. Chris Sinrud, Chief Information Officer
Office of Public Instruction
3. Linda Reksten, Representative HD 12
Subject Matter Expert – Former Superintendent of Schools

Staff assisting the committee:

1. John Thomas, Acting Bureau Chief
State Procurement Bureau
2. Grace Gibney, Executive Assistant
Department of Administration
3. Kyler Baker, Project Manager
State Financial Services Division

The RFP evaluation committee convened on May 19, 2023, with the purpose of assessing the seven received Request for Proposal submissions. This rigorous process entailed thoroughly examining each offer, during which every committee member provided individual evaluations for each subsection of the criteria. The committee arrived at unified scores for each proposal through deliberation and consensus scoring.

Following meticulous evaluation, the committee unanimously agreed to extend product demonstration invitations to the three highest-scoring vendors, Edwise, PlanteMoran, and PowerSchool. These demonstrations took place on June 1, 2023, and June 2, 2023. At the conclusion of the demonstrations, the evaluation committee finalized their scoring and unanimously selected PowerSchool to be awarded the contract.

During the Request for Proposal (RFP) process, the Department of Administration (DOA) played a supervisory role in the effective execution of SB 51. This legislation brought about modifications to various aspects of the procurement process, aiming to enhance

negotiations, restrict public access to vendor demonstrations, and introduce greater transparency to proposals. One significant change involves implementing a seven-day Notice of Intent to Award process (NOIA), which allows for public comment on the award decision, thereby increasing openness and accountability.

Based on the projected timeline, subsequent negotiations and the execution of the contract are expected to be completed by June 30, 2023. This timeframe reflects a conscientious effort to adhere to the outlined schedule and ensure a fast and efficient procurement process.

Project Milestone Timeline

OPI initiated procurement of database modernization services in the fall of 2022, which was canceled due to the change in requirements in HB 367.

OPI has established a timeline of anticipated milestones, as follows, which will be adjusted as necessary:

MILESTONE TIMELINE:

- September 13, 2023: Milestone 1 -First draft delivery of current inventory/data scoping
- September 20, 2023: Milestone 2 – Draft: all deliverables reviewed by OPI project team
- September 22, 2023: Milestone 3 – Final delivery of all documentation for review and approval by OPI program team
- September 22, 2023: Milestone 4 – COTS Solutions, Data Modernization Architecture & Deployment Strategy
- June 15, 2024: Milestone 5 – Full Production Deployment
- November 30, 2024: Milestone 6 - Post Deployment Analysis and Assessment
- February 28, 2025: Milestone 7 – Approval & Sign-off of Data Modernization Fully Deployed Environment by OPI Leadership & Program Team

In conclusion, the Department of Administration acknowledges the significance of a comprehensive approach to the Data Modernization Request for Proposal (RFP) for the Office of Public Instruction, as mandated by HB 367. DOA and OPI are committed to ensuring a successful candidate selection process while upholding the principles outlined in the Montana Procurement Act. DOA appreciates the opportunity to collaborate with the Office of Public Instruction and remains dedicated to fulfilling our responsibilities in this endeavor.