DATA MODERNIZATION

DATA+
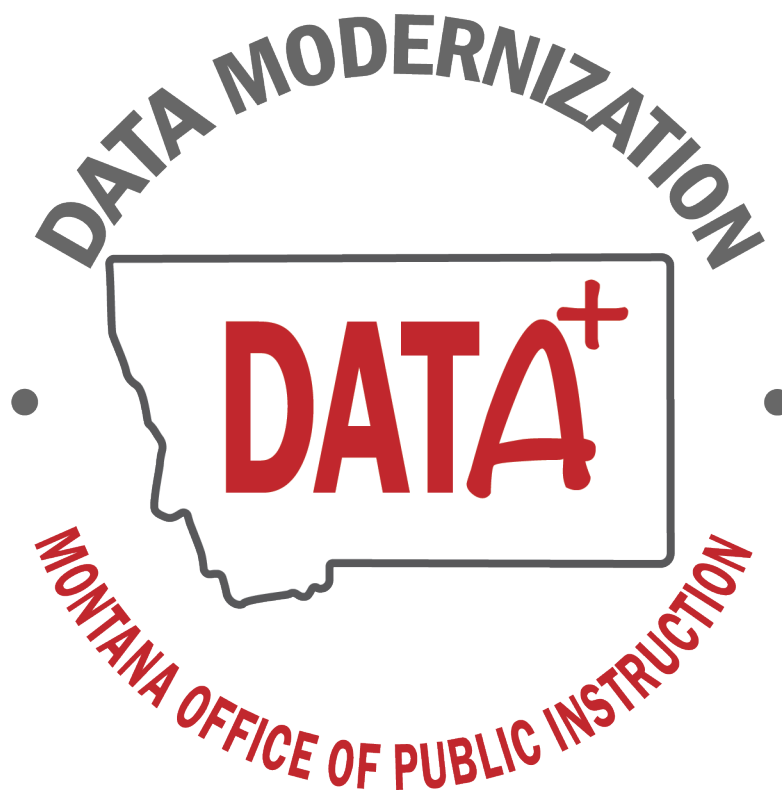
MONTANA OFFICE OF PUBLIC INSTRUCTION

Educational Data Integration

June 13, 2024 (due June 24, 2024)

Office of Public Instruction

HB 367 OPI Data Modernization Status and Overview Report

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Superintendent Elsie Arntzen
June 13, 2024

To:
Legislative Finance Committee

Education Interim Committee

General Government Budget Committee
Education Budget Committee

Subject: Progress Update on Office of Public Instruction Educational Data Integration: Costs, Timeline, and Goals

I am pleased to provide the Office of Public Instruction (OPI) Data Modernization Legislative Report for June 2024 in time for the meeting of the interim committees. This report includes information on the progress we have made since April 29, 2024. We remain committed to transforming Montana's educational landscape through data modernization. This is the sixth legislative report for this project as required by HB 367.

During the last reporting period, we completed the process to set up ongoing replication of data into the data lake. We also completed the custom connector analysis and mapping for how districts using PowerSchool will sync their data to the data lake. Mapping and gap analysis were completed for the data lake to flow into Unified Insights, and provisioning for the Unified Insights public-facing site has begun.

OPI and the vendor are working to meet milestones and are committed to providing the best product for schools, teachers, and families. We have continued to make great progress over this reporting period. Below is a brief list of some of the workstream items taking place:

- Load data into Student Analytics from IC State Edition: 53% complete.
- Partition Database: 100% complete.
- Security Setup and configuration for Unified Insights: 44% complete.
- Assessment Load for Dashboard: 2% complete.
- Community Engagement Implementation: 10% complete.

The OPI team remains committed to communicating progress on this project with internal and external stakeholders. We have hosted several open office hours for district superintendents, given presentations and updates to technology staff, and the Board of Public Education to provide updates on this project. Additionally, we will be presenting at the School Administrators of Montana (SAM) Administrators Institute (AI) in July.

My office is an active participant in the Education and Workforce Data Governance Board and its working groups: Data Governance and Policy, Data Research, and Project Design and Implementation.

OPI has continued monthly meetings with the School Implementation Steering Committee.

In this report, you will find the OPI's ongoing goals for this project, information on the progress during the last reporting period, and the identification of our next steps to continue to move forward.

Please feel free to visit our website to see the most recent progress throughout the implementation of this project. We appreciate your unwavering commitment to our shared goals.

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
www.opi.mt.gov

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Denotes new sections to the report

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
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Introduction Educational Data Integration

In the current reporting period, PowerSchool and OPI continue to work through Milestone 4a: Deployment of Connected Intelligence and Milestone 5a: Base deployment of Unified Insights (secure dashboard) modules. There is continued ongoing replication of the data from the State Edition of Infinite Campus into Connected Intelligence (data lake) and the connector for the dashboards has been built and the database has been partitioned. OPI has worked on a state security solution and it is in the process of testing. An additional data source and connection from OPI has been identified to begin replication of data into Connected Intelligence to feed to Community Engagement (public dashboards). OPI has been working with the vendor and State Information and Technology Service Division (SITSD) to build a Virtual Private Network (VPN) from the state to PowerSchool. OPI provided a demo of GEMS for the PowerSchool team to better understand the current functionality of our public-facing dashboard. The past four years of state assessment data has been provided to PowerSchool to be able to load into the dashboards. Additionally, the steering committee with representatives from schools across the state met twice. This group has provided valuable feedback on the project.

Data Modernization Vendor Partner Role

PowerSchool and the Office of Public Instruction (OPI) continue to meet weekly with progress reports on this project and the project managers meet bi-weekly. The vendor has assisted with the state single sign on security solution of Unified Insights and worked collaboratively with all parties on the Virtual Private Network setup process. OPI has begun exploring the training options for stakeholders. The vendor's expertise and involvement demonstrate their dedication to making the project a success and they are crucial in helping Montana's education system transition to modernized data management, in line with House Bills 367 & 949.

Partnership Foundations

PowerSchool has forged a strategic partnership with Snowflake to establish a robust data lake through their Connected Intelligence product. The connector is set up to allow Connected Intelligence to replicate the data from the State Edition of Infinite Campus into the data lake, which in turn will feed Unified Insights and its modules. PowerSchool is working diligently to create a resilient and agile infrastructure that enables efficient data utilization, sharing, and analysis to ensure the success of Montana's data modernization project.

Contractual Framework

OPI and its vendors established a Contract and Statement of Work to clarify responsibilities, expectations, and deliverables. This framework is broken into seven milestones, with milestones 4 and 5 having two sub-milestones. The milestone and delivery schedule are provided on page 7 of this report.

Unified Direction

OPI and PowerSchool worked together to set clear goals for program management. The team meets weekly with project status updates and the Project Managers from both organizations meet biweekly to touch base. The aim is to improve services, streamline IT and data interactions, make better use of data for everyone involved, cut costs, boost security, and improve overall governance.

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
www.opi.mt.gov

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Preparation and Solutioning

With the ongoing replication of data from Infinite Campus State Edition to Connected Intelligence, work has begun on the implementation of Unified Insights. We have identified the pertinent databases to replicate to make sure that we are utilizing Unified Insights at its full capacity based on the data collected. PowerSchool has completed the mapping of all the data for the dashboarding and is working on getting the data in a warehouse so it is in a format that can feed to the Commercial-off-the-Shelf (COTS) dashboards. Additionally, the work has just begun on mapping data from districts that use PowerSchool as their Student Information System (SIS) to then be able to build the connector to pull the data into Connected Intelligence. The same connector will be used for Districts that have their data on-premises and cloud-based with PowerSchool. The following PowerSchool districts will require a Virtual Private Network (VPN): Belt, Billings, Great Falls, Kalispell, Polson, and Ronan. OPI and PowerSchool are in the beginning phases of getting Community Engagement, the public dashboards, deployed. A data source has been identified, the VPN from OPI to the data lake built, and a reverse demonstration of our current dashboards was completed.

Financial Outlook: Project Expenditures & Future Projections

3-Year PowerSchool Contract Cost by Milestones: Including Implementation, Hosting, Licensing, Professional Services, Maintenance & Operation

Note: Recurring cost encompasses the ongoing costs associated with software and technology solutions utilized in the Montana OPI data modernization project. These costs include software licensing, release management, infrastructure hosting, and data integration. It also incorporates annual price increases, which may be influenced by factors like inflation and expanded usage.

Contract Term 1 - By Milestone	One Time	Recurring	Total	Delivery Date	Completed
Milestone 1				9/8/2023	✓
PS Consulting Services	$73,728.00		$73,728.00		
AWS Consulting Services	$300,000.00		$300,000.00		
Subtotal			$373,728.00		
Milestone 2				9/15/2023	✓
PS Consulting Services	$2,304.00		$2,304.00		
AWS Consulting Services	$20,000.00		$20,000.00		
Subtotal			$22,304.00		
Milestone 3				9/22/2023	✓
PS Consulting Services	$3,456.00		$3,456.00		
AWS Consulting Services	$17,500.00		$17,500.00		
Subtotal			$20,956.00		
Milestone 4				November 2024	
PS Provisioning Services	$18,000.00		$18,000.00		
Subtotal			$18,000.00		

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
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Milestone 5				June 2025
PS Customization Services	$774,000.00		$774,000.00	
PS Provisioning Services	$230,956.00		$230,956.00	
CI - Annual Subscription		$1,351,498.81	$1,351,498.81	
UI - Annual Subscription		$1,231,331.42	$1,231,331.42	
Subtotal	$1,004,956.00	$2,498,795.25	$3,503,751.25	
Initial Term Discount		($1,000,000.00)	($1,000,000.00)	
Total (Contract Term 1)	**$1,489,944.00**	**$1,498,795.25**	**$2,988,739.25**	July 1, 2023
Post-Deployment	One Time	Recurring	Total	
Annual Term 2		$2,633,114.41	$2,633,114.41	July 2024
Annual Term 3		$2,733,172.76	$2,733,172.76	July 2025
Contract Total (All 3 Terms)	**$1,489,944.00**	**$6,865,082.42**	**$8,295,843.48**	

Educational Data Integration Payment Schedule

The 3-year term fixed cost project entails creating a payment schedule table that incorporates several key columns to manage the Educational Data Integration project expenses effectively. The table includes:

1. **Subscription & Deployment Service Cost**: This column captures the initial fixed cost for the project, covering subscription fees and deployment services for each year of the project.

2. **Annual Increase %:** This column represents the annual percentage increase in costs, reflecting any anticipated inflation or adjustments over the three-year period.

3. **Annual Increase $:** This column calculates the dollar amount increase for each year based on the percentage specified in the previous column.

4. **Subtotal**: This column provides the total cost for each year, accounting for both the initial cost and any annual increases.

5. **Managed Services**: This column includes any additional costs associated with managed services or ongoing support throughout the project's duration.

6. **Subtotal**: Similar to the previous subtotal, this column sums up the costs for each year, including managed services.

7. **Invoice Total**: The final column computes the overall project cost by summing up all expenses over the three-year term, providing a comprehensive view of the project's fixed expenses.

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
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3-Year Annual Payment Schedule

Payment Settlement Date	Subscription & Deployment Service Cost	Annual Increase %	Annual Increase $	Subtotal	Managed Services	Annual Increase %	Annual Increase $	Subtotal	Invoice Total
Initial 3 Yr Term 7/1/23 – 6/30/26									
7/1/2023	$2,929,556.31								$2,929,556.31
7/1/2024	$2,304,507.44	1.9%	$43,786.97	$2,348,364.41	$284,750.00			$284,750.00	$2,633,114.41
7/1/2025	$2,348,364.41	3.8%	$89,237.85	$2,437,602.26	$284,750.00	3.8%	$10,820.50	$295,570.50	$2,733,172.76
Total Contract Amount									**$8,295,843.48**
Optional Contract Term 7/1/26 – 6/30/28									
7/1/2026	$2,437,602.26	3.8%	$92,628.89	$2,530,231.14	$295,570.50	3.8%	$11,231.68	$306,802.18	$2,837,033.32
7/1/2027	$2,530,231.14	3.8%	$96,148.78	$2,626,379.93	$306,802.18	3.8%	$11,658.78	$318,460.66	$2,944,840.59

☐ **Paid Invoice**

Core Features of the Vendor Products

PowerSchool Products
1. **Unified Insights** will assist Schools and OPI with data analytic tools:
    - Facilitate schools in making data-informed decisions to enhance student outcomes.
    - Provides technical and data analytic tools.
    - Early warning system using artificial intelligence/predictive analytics to identify at-risk students.

2. **Community Engagement** will enhance OPI's ability to publicly display:
    - Demographic information
    - Enrollment / Attendance
    - Statewide assessment data
    - Graduation and dropout
    - School expenditures data

3. **Connected Intelligence** will facilitate and enhance data sharing with:
    - Data lake technology
    - Data collection and integration tools
    - Data governance tools for data sharing

These applications for data modernization bring forth a range of compelling advantages, including centralized data lake construction for consolidated data storage, improved analytics and data visualization capabilities, and fortified data security measures.

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
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Table of Milestone Delivery Schedule

Milestone #	Deliverable	Delivery Date	Completed
1	Draft Assessment Document	September 8th, 2023	✓
2	Montana Review & Feedback of Assessment Output	September 15th, 2023	✓
3	Delivery of Assessment & Future Solution Document	September 22nd, 2023	✓
4	Organizational Change Management	November -December 2023	✓
4a	Infinite Campus Connector to Data Lake	February 20th 2024	✓
4	Connected Intelligence Application Initial Deployment (with State Infinite Campus data)	March 29, 2024	✓
4a	PowerSchool Connector to Data Lake	March-November, 2024	
5	Unified Insights Application Deployed	November 2024	
6	Post Deployment Assessment	June 2025	
7	Solution Acceptance & Final Project Sign-Off	July 2025	

Project Timeline

Date	Activity	Status
April 07, 2023	Request for Proposal Release	Completed
June 20, 2023	Vendor Tentative Award	Completed
June 30, 2023	Contract & Statement of Work Executed	Completed
July 20, 2023	Project Kick-off Meeting (PowerSchool & OPI)	Completed
July 24-27, 2023	Organizational Change Management Executive Interviews	Completed
August 9-10, 2023	Cloud Assessment Workshops	Completed
August 14-31, 2023	Application Assessment Workshops	Completed
August 24, 2023	Organizational Change Management Assessment Report	Completed
September 1, 2023	Maturity Assessment Report	Completed
September 22, 2023	Commercial off the Shelf Solution, Architecture & Deployment Strategy	Completed
October 31, 2023	OCM Stakeholder Engagement Plan	Completed
February 20, 2024	Connection and replication of data from Infinite Campus to Connected Intelligence (CI)	Completed
March 29, 2024	Connected Intelligence initial data load verified and begin mapping for ongoing replication	Completed
April 24, 2024	Complete Custom Connector Analysis for PowerSchool Districts (Both on Premise Districts and PS cloud-housed districts)	Completed
April 30, 2024	Ongoing replication of Infinite Campus State Edition into Connected Intelligence	Completed

Elsie Arntzen, Superintendent

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Helena, MT 59620-2501
406-444-3680
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May 2024-July 2024	Build Custom connector for PowerSchool Student Information System (SIS) replication into CI	**In Progress (10%)**
January-November 2024	Connection from on-premises PowerSchool Districts to Connected Intelligence (6 VPN connections)	**Not Started**
March 2024-November 2024	Unified Insights Base Module	**In Progress (44%)**
August 2024-November 2024	Replication of all PowerSchool Districts data into CI	**In Progress**
April 2024-Febuary 2025	Risk Analysis Module	**In Progress (10%)**
April 2024-Febuary 2025	Student Readiness Module	**In Progress (10%)**
April 2024-Febuary 2025	Community Engagement Module	**In Progress (10%)**
April 2024-November 2024	Replication of Additional Data Sources into Connected Intelligence	**In Progress (15%)**
November 2024-April 2025	Customizations of Dashboards	**Not Started**
June 2025	Post Deployment Assessment	**Not Started**
July 2025	Solution Acceptance & Sign-Off	**Not Started**

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
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Milestone 1-3 Acceptance Criteria

RUBRIC	SCORE	SCORING SCALE	TOTAL
Product exceptionally addresses project requirements / EXCEPTIONAL	4	EXCEPTIONAL	18 – 20
Product significantly addresses project requirements / STRONG	3	STRONG	14 – 17
Product somewhat addresses project requirements / NEUTRAL	2	NEUTRAL	10 – 13
Product minimally addresses project requirements / INADEQUATE	1	INADEQUATE	0 – 9
Product does not address project requirements at all / UNACCEPTABLE	0		

CRITERIA	MILESTONE 1	MILESTONE 2	MILESTONE 3
Does the document show understanding of the problem and its requirements?	3	3	3
Does the document use appropriate data sources?	3	3	3
Does the document identify an accurate and extensive inventory?	3	3	4
Does the document correctly identify problems and outline appropriate solutions?	2	3	3
Will executing/implementing the document be simple or complex? And will the vendor provide adequate support throughout the project?	2	2	2
Simple = Higher Score; Complex = Lower Score			
TOTAL SCORES	13	14	15

With the delivery of the final assessment product on September 23, 2023, milestones 1, 2, and 3 were completed. Each milestone was scored as noted above and the final product was determined to be strong. The final criterion remains at a "2" due to complexity of the project with required customizations.

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
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Current Activities as of June 13, 2024

Workstream	Activity Overview	Outcomes
Connected Intelligence (CI)	Analysis on the custom connector for PowerSchool Districts was completed. PowerSchool was approved to use KTO hours to review and scope out the custom connector. OPI began to identify additional data sources for replication.	Ongoing replication is occurring for the State Edition of Infinite Campus. Virtual Private Network Built from state network to Connected Intelligence
Unified Insights	Teams are working together on creating the ADFS security solution for district staff log-in. In the process of testing solution for implementation. Completed Customer Education kickoff meeting on May 8.	Assessment files were loaded by OPI and PowerSchool is reviewing before moving them into the environment. Solidifying training plan with input from the Steering Committee and other stakeholders. Completed provisioning the environment, including web domain for eventual public access.
Stakeholder Partnerships	OPI is an active participant on the Education and Workforce Data Governance Board. There have been ongoing working group meetings throughout the months of April, May, and June. OPI has continued to hold meetings with the established Data Modernization Steering Committee. This committee has members from schools across the state. The last meeting was May 15th. The next meeting will be June 19th. OPI holds weekly Office Hours for district Superintendents on Wednesdays at 10 am; the staff working on the Data Modernization project have been providing updates and are available for questions since May 8th.	OPI will continue to participate in the Board's working groups to continue the progress of this group and the data modernization project. The Steering Committee has been meeting monthly and is providing valuable insight into the project, including how we can tailor solutions to help with data collection and reporting. Office hours provide the OPI with a way to connect with more district staff and continue to provide updates throughout the summer.

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
www.opi.mt.gov

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Education Data Integration through Data Modernization

Goals and Vision for Montana OPI

Goal 1: Improve Services
Goal 2: Improve IT/Data Workforce Interactions
Goal 3: Increase the Value of IT/Data for Operations and Business Impacted Audiences
Goal 4: Reduce IT/Data and Other Operating Costs
Goal 5: Security Risk Management and Continuity of Operations
Goal 6: Increase Governance Maturity

Addressing Statutory Compliance for Educational Data Integration

The information in the following section has been previously detailed in the prior report, and there have been no changes or updates for this section.

Montana OPI's Approach in the Data Modernization Project

- Montana's OPI is committed to legislative compliance via its Data Modernization Project, aligning with House Bill 367 and 949.
- The project aims to seamlessly integrate systems, enhance insights, provide academic support, ensure security, and facilitate secure data sharing across education.

Integration: Connected Intelligence
- The Data Modernization Project prioritizes Comprehensive Data Integration, in line with House Bills 367 and 949, to consolidate educational data from diverse sources.
- This approach improves data consolidation efficiency and accuracy, meeting legislative requirements effectively.

Holistic Student Insights: Unified Insights
- Unified Insights, in compliance with House Bill 367, offers educators a comprehensive view of student data, enabling a deep understanding of individual student performance and needs.
- This alignment with legislative intent empowers educators to meet compliance mandates and support students more effectively.

Individualized Academic Enhancement: Unified Insights/Risk Analysis
- Unified Insights and Risk Analysis tools, in line with House Bill 949 objectives, empower educators to utilize student data for personalized academic interventions.
- This approach, focused on identifying at-risk students and customizing interventions, directly supports the bill's intent to enhance student outcomes.

Robust Data Security: Connected Intelligence/Unified Insights
- Montana OPI prioritizes data security in alignment with House Bills 367 and 949, leveraging Connected Intelligence and Unified Insights.
- Robust security measures, including encryption, role-based access controls, audits, and data protection standards, are rigorously enforced to safeguard sensitive student information and fulfill compliance obligations.

Secure Data Sharing: Connected Intelligence
- The Secure Data Sharing component of the Data Modernization Project aligns with the security provisions of House Bills 367 and 949, facilitating controlled and encrypted data sharing for confidentiality and authorized access.

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
406-444-3680
www.opi.mt.gov

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- Montana OPI's Data Modernization Project not only ensures compliance with legislative mandates but also empowers educators with tools to improve student outcomes, all while maintaining high data security and privacy standards.

Enhancing School Customer Experience for Educational Data Integration

Bridging Legacy & Modernization
- Ensuring a smooth link between existing software and new data modernization infrastructure is vital.
- Maintaining uninterrupted compatibility and coordination between older systems and the new framework is essential. This means addressing differences in data formats, communication methods, and operational procedures to ensure seamless connectivity. This collaboration supports ongoing operations and improves functionality, making the transition to modernized data systems seamless.

Elevating Performance
- Leveraging data modernization to streamline processes, optimize data management, and achieve a new level of operational effectiveness, resulting in improved productivity and resource allocation.

Data Integrity
- The data modernization project strengthens data accuracy and reliability, fostering trust in decision-making processes within educational institutions by ensuring data integrity and consistency, enabling confident, data-informed decisions that enhance educational outcomes and organizational effectiveness.

Reduced Downtime
- The data modernization project streamlines operational processes, minimizing system downtime and disruptions, enhancing efficiency, and promoting a resilient educational environment that supports seamless learning experiences and administrative excellence.

Data Modernization Steering Committee

OPI has put together a [Steering Committee](#) of school representatives to help provide oversight, guidance, and strategic direction for the Data Modernization project. The committee has offered valuable insights into both the current data collection practices and makes informed recommendations to ensure alignment with organizational goals. Their advisory role extends to risk assessment, resource allocation, and resolving issues that may arise during the project life cycle. The committee meets monthly to review project progress and provide guidance. The committee includes subject matter experts in educational data systems, data management, and data analysis along with other high-level stakeholders. Members of the committee have been gathered from across the state. For more information and updates on these meetings visit our [website](#).

Currently, the committee is providing feedback on the data collection processes throughout the 2023-2024 school year. They are also going to be critical in testing the security solution currently in development. Furthermore, schools participating in the steering committee at this time will have the opportunity to pilot the PowerSchool custom connections from districts directly into the Connected Intelligence data lake, both through cloud-hosted and on-premise/self-hosted districts through a VPN connection. They will continue to provide feedback throughout the project on the security and connection solutions for districts.

Data Modernization Steering Committee Members List:
- Sandra Rivas, District Clerk, Browning Public Schools
- Kevin Patrick, Business Director, Butte School District
- Jill Swanson, Technology Director, Conrad Public Schools
- Julie Asbeck, Business Manager, Fairview School

Elsie Arntzen, Superintendent

PO Box 202501
Helena, MT 59620-2501
406-444-3680
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- Stacy Montgomery, District Clerk/Business Manager, Forsyth Public Schools
- Janelle Mickelson, Business Manager/District Clerk, Helena Schools
- Eric Miletich, IT Coordinator, Kalispell Public School District
- Paul Kozlowitz, PC/Network Technician, Missoula County Public Schools
- Colleen Drury, Business Manager, Scobey Schools

Charting the Course Forward

Navigating the Next Steps in Educational Data Integration

OPI is using the data modernization project to prioritize and ensure an educational system that is more efficient, transparent, and responsive to the needs of its stakeholders. The project has made significant progress in this reporting period and

We will continue to align with stakeholders as we make progress on this project. PowerSchool has completed analysis on the custom connector for school districts with self-hosted ("on-premise") PowerSchool Student Information Systems and will be working towards building a connector, after which the plan to build the 6 VPNs to the on-premises districts with PowerSchool will come. PowerSchool is also working on the implementation of Unified Insights using the data captured from the State Edition of Infinite Campus to Connected Intelligence. They are also mapping the assessment data that has been loaded separately. The data will need to be put in a data warehouse structure so that the dashboards can be deployed. PowerSchool and OPI will start with pilot districts from the Steering Committee to be able to set up security, access protocols, and early training.

Upcoming Activities and Efforts

- Monthly Executive Vendor Meetings with the Superintendent and OPI IT program team
- Weekly Project Status Update Meetings with Vendor
- Bi-weekly Project Manager meetings
- Monthly Data Modernization Steering Committee meetings
- PowerSchool Connected Intelligence team will continue to meet with OPI to discuss governance, security, and access for all components of this project
- PowerSchool will loading student assessment data into Unified Insights
- Finish Virtual Private Network (VPN) from State Network to Connected Intelligence as a datasource for Community Engagement.
- Replicate data from OPI Database to Connected Intelligence.
- Finish implementation of the security solution and Configuration of UI for State, District, and School Users
- Custom Connector Build for PowerSchool SIS districts.
- VPN build for 6 self-hosted PowerSchool SIS districts
- Replicating data from PowerSchool districts into Connected intelligence (data lake)
- Community Engagement Deployment
- Presentation to Montana PowerSchool User Group meeting on June 18th
- Presentation to School Administrators of Montana Administrators Institute on July 23rd

Elsie Arntzen, Superintendent
PO Box 202501
Helena, MT 59620-2501
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Sustainability of Project

- HB 630 and HB 367 directed and authorized OPI to use federal dollars for this project.
- The funds must be obligated by September 30th, 2024.
- A decision budget package for the 2025 legislative session has been requested to sustain or support this project after the federal dollars are spent.
- OPI will be conducting formal discussions addressing sustainability and ongoing funding for the project.

Communication Plan

OPI is committed to providing ongoing communication about this project to all stakeholders. As part of this goal, we maintain the webpage dedicated to the project with current information. We also provide regular updates in the following venues:

- Weekly Superintendent Office Hours: Wednesdays at 10 am
- Monthly Steering Committee meetings
- Bi-monthly Board of Public Education meetings
- Quarterly Legislative Interim Committee meetings

The data modernization staff are also planning to provide updates on the project to the Montana PowerSchool User Group meeting on June 18th and the School Administrators of Montana Administrators Institute meeting on July 23rd. OPI has met with the PowerSchool Customer Education team to begin planning district training options. We have the opportunity to train district staff in person or virtually using a demo environment. These sessions will be three hours long and will have a maximum of 25 participants to ensure that all participants get adequate training and information. A formal training plan, including dates, times, setting, and recommended courses, is in development. We are also going to be planning webinars for districts for additional training opportunities.

Our team is happy to answer any questions you may have about this project. Please reach out to Ashley Perez, Anna Hoerner, or Chris Bushnell.

Next Report Period:

August 26th, 2024
October 21st, 2024
December 23rd, 2024