Agency of Education

Shared School District Data Management System

Project Rollforward

February 28, 2020

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Agenda

- Historical Summary

- Prior Period as Reported

- Current Period Accomplishments

- Plans for Next Period

- Deployment Schedule

- Development Roadmap

- Helpdesk Statistics

- Questions

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Historical Summary

- Legislature has sought more consistent and comparable school finance data.
- As part of the 2018 budget bill the AOE was required to implement:
  - Uniform Chart of Accounts (UCOA) and
  - Shared School District Data Management System (SSDDMS) to process and manage finance and HR information using the UCOA format established.

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Prior Period as Reported

- 3 SUs/SDs went live on Phase-1 in 1/19
- Training Videos with nested subjects made system learning/training challenging
- Self reported progress made readiness validation difficult
- Unknown Act 46 outcomes caused delay requests
- Resource constraints impacted schedule
- 3 SUs/SDs highlighted functionality shortfalls
- Deadline for UCOA extended 1 year and SSDDMS implementation by 2 years, (7/20 & 7/22)

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Current Period Accomplishments

1. Another 11 SUs/SDs went live on Phase-1

2. Improved training approach
   - Added $1.2M for additional remote, onsite and conversion support

3. Published Handbook-II and updated Best Practice Guide with references to UCOA

4. Improved validation & tracking

5. Adjusted schedule to reflect 2 year extension

Current Period Accomplishments

6) Established Governance and Change Advisory Board to assist in
   - prioritizing enhancement/report requests
   - providing new enhancement requirements
   - testing enhancements and version releases
   - collaboration with Team to enable improved outcomes for all SUs/SDs

7) Expanded VT Team participation
   - Engaged Vendor to support completion of Handbook-II and added 2 BA resources

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Current Period Accomplishments

8) Improved System Performance using dedicated cloud hosted environment

9) Inventoried System and Report Requests

   – Developed top 50% of custom reports

   – Prioritized list of system enhancement requests

   – Defined requirements for 50% of requested enhancements

10) Joined SNUG. The eFin+ user group

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Plans for Next Period

1. Continue SSDDMS implementations
    –   5 more SUs/SDs go live on Phase-1 7/20
2. Continued SU/SD support and training
    –   Simplified request and scheduling process
    –   Increased onsite Group Trainings
    –   Technical Assistance for those SUs/SDs that experience unplanned challenges, for example turnover in key staff

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Plans for Next Period

3. Continuous Improvement
    –   Business Management Handbook-II Training
    –   Adjustments to Cognos Report training
4. Continued Validation & Tracking
    –   Helpdesk metrics and recurring surveys
    –   ROI Tracking

Plans for Next Period

5) Continue evolving the Governance Group

   - Host 1st User Group Conference
   - Support additional system enhancements and report requests
   - Collaborate on version V20.11 upgrade – deployment and testing details

6) Expand Team resources

   - Extend Contractor BA support to Dec 2020
   - Hire School Finance System Specialist

Plans for Next Period

7) Implement more Contract Deliverables & Enhancements

- Upgrading all implementing and live districts on latest version of eFP V19.11

- Develop Roadmap for planned enhancements over next several years

- Evaluate costs of new development and request additional funding as needed

- Plan and complete development work for V20.11 (i.e. Statbook Report, Supplemental Worksheets)

Deployment Schedule

Round/Group	SU/SD Count	Databases	Phase 1: Baseline Live	Phase 2: Edge Apps Live
Round 1/Group 1A	3	9	January 2019	December 2020
Round 2	1	8	January 2019/July 2019	December 2020
Round 4/Group 4A	3	3	July 2019	December 2020
Round 4/Group 4B	4	12	July 2019	December 2020
Round 4/Group 4C	3	5	January 2020	July 2020
Round 5	5	5	July 2020	December 2020
Round 6/Group 6A & 6B	16	60	July 2021	December 2021
Round 7	8	12	January 2022	July 2022
Round 8/Group 8A & 8B	11	31	July 2022	December 2022
TOTALS	**54**	**146**		

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Development Roadmap

V19.11

- Central Management of UCOA & Bus Rules
- Improved Printing
- Add/Sort AP by Vendor Name
- Generate Teacher Contracts
- SchoolSpring Interface enhancement

V20.11

- Interfund accounting
- Display budget unit / account titles on distribution screens when approving requisition / PO's
- Track next check number for each bank account and print on checks
- Student Activities

V21.11

- Check Recon, (June '21)
- Void AP check enhancement
- Step up Employee Records
- Payroll Position Budgeting interface with Payroll Module

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Helpdesk Statistics

- System hosting uptime in excess of 99%
- 495 cases were logged during 2019
  - 473 or (96%) met SLA requirement
- High frequency of "User Education / How To" cases:
  - 1/1/19 Go Lives: 38% (104/272)
  - 7/1/19 Go Lives: 36% (80/223)
- Many more Go Lives (8) on 7/1/19, and much lower number of cases per entity, than with 1/1/19 Go Lives (3).

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Questions