

Shared School District Data Management System (SSDDMS)

Path Forward Recommendation to the Vermont General Assembly

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Background

- Conversations about a Universal Chart of Accounts (UCOA) and a shared financial data system go back to 2009
- Development of the SSDDMS started in 2016 as a voluntary program.
- Made a requirement in Act 11 of 2018 (Special Session) – the 2018 Big Bill
- General Assembly has delayed implementation twice (in 2019 and 2021), most recently imposing a six-month implementation “pause”

Goals of SSDDMS

- Pursuant to Act 11 of 2018, to ensure all SU/SDs:
 - Conform to the UCOA
 - Improve the comparability, consistency and timeliness of school financial data
- SSDDMS Project Charter – February of 2018 (pre Act 11):
 - Central Management of UCOA will improve data quality and comparability
 - Management of the UCOA and business rules reduce resources by the state
 - Common system will leverage economies of scale >> save taxpayer money

Current Status

- Implementation “Paused” from July 1, 2021 – Jan. 1, 2022 (Act 66 of 2021)
 - 20 of 54 districts have adopted eFinancePlus
 - First group went live Jan. 2019
 - Most recent went live July 2020
- Power School (contractor) was supposed to deliver improvements in five areas:
 - System stability and outages
 - Enhanced training
 - Improved Reports
 - Improved Bank Reconciliation
 - A Due to/Due from Interfund system included in upgrade 20.11

Current Status (cont.)

- Quarterly Status updates from AOE to General Assembly (Act 66 of 2021)
- “Pause” now ended
 - AOE not moving forward with additional implementations
 - Presenting “path forward” recommendations to the General Assembly

Costs

| | Total IT-Activity (Total Project) | Total Spent to Date (Actuals) | % |
|----------------------------|--|--------------------------------------|------------|
| Implementation Cost | \$3,340,514 | \$1,688,514 | 51% |
| Ongoing Maintenance | \$4,284,311 | \$2,043,055 | 48% |
| Totals | \$7,624,825 | \$3,731,569 | 49% |

Formation of Stakeholder Group

- Representatives from State of Vermont (AOE and ADS), Business Managers (VASBO) and Human Resources staff (VSHRP)
- School reps included members from both “implemented” (using eFinancePlus) and “not implemented” (using legacy systems) districts.
- Group began meeting in October 2021 (six times overall)
- Unanimous recommendation, presented to VASBO and VSHRP for approval votes

Field Concerns with Current System

- Many users believe the current SSDDMS system (eFinancePlus) lacks “sophistication”
- Shortcomings include:
 - Internal systems/modules integrations (e.g. bank reconciliation)
 - System automation and efficiencies (too many screens, clicks, etc.)
 - Internal accounting, security and audit controls
 - System reporting and documentation
 - Overall user interface experience (inconsistent displays or functionality between modules, etc.)

Field Concerns with Current System (cont.)

- Significant deficiencies with customer support experience provided by contractor (PowerSchool):
 - Lack of quality controls during recent 20.11 update
 - Slow response times
 - Outstanding requested improvements
- Recent improvements have been mixed, benefits of new functionality do not outweigh the costs

Problem Statement

“We agree that the SSDDMS strategy is worthwhile. However, PowerSchool, through eFinance, has so far been unable to efficiently or satisfactorily provide all of the features and functionality needed by the AOE and the SU/SDs, making it difficult to meet the established success criteria or satisfy the statutory requirements.”

Options Considered

1. No change – preserve SSDDMS mandate. Continue implementation \
2. Suspend SSDDMS mandate. Form study committee. Evaluate and recommend final path forward by January 2023.
 - During this period, allow SU/SDs to switch systems if desired, after consultation with AOE
3. End SSDDMS permanently.
 - SU/SDs switch systems at will
 - AOE maintains current contract (through March 31, 2025) to support implemented SU/SDs

Recommendation

- Unanimous support by stakeholder group for Option 2:
 - Potential benefits for common system that should not be discarded without additional study
 - Another software product may provide desired results
- Review by VASBO and VSHRP:
 - Option 2 Endorsed by VASBO (48 / 2)
 - Option 2 Endorsed by VSHRP (24 / 2)

Recommendation (cont.)

- Requested Legislative Action:
 - Codify Option 2, providing time for study committee to prepare final recommendation
 - Extend deadline of December 31, 2022 to January 1, 2024
 - Extend implementation pause to January 1, 2023
 - Allow SU/SDs to join or leave eFinancePlus, after consultation with AOE
 - Replace references in statute to “eFinancePlus” with “SSDDMS”