Shared School District Data Management System (SSDDMS)

A Project Summary

3/14/25

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Presented by:

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Glossary

- **Enterprise Resource Planning (ERP)**
  - A fancy name for the category of sophisticated and robust business software applications districts use for accounting and human resources

- **Uniform Chart of Accounts (UCOA)**
  - A common system of accounting codes that VT districts use, with consistent definitions and understandings. It is agnostic with respect to which ERP system districts use.

- **Shared School District Data Management System (SSDDMS)**
  - Envisioned as a single statewide ERP system that everyone would use. (eFinancePlus was the system VT procured through a formal RFP process)

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History - UCOA:

- **Education finance stakeholders recognized the benefits of recording and reporting using a UCOA (as early as 2015)**
  - Improved consistency of data
  - Improved comparability of data
  - Improved timeliness of data
  - Improved accuracy of data
  - Improved compliance to business rules
- **Stakeholders:**
  - Legislature
  - Agency of Education
  - SU/SD Business and HR Managers

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History – UCOA (in detail):

- **UCOA segments: (e.g. 1001.401.11.21.0.1101.5.201)**
  - Fund
  - Location – (school buildings, districts)
  - Level – (elementary, secondary, etc.)
  - Program – (regular ed, special ed, etc.)
  - Revenue Source – (state, federal or other funds)
  - Function – (activity categories)
  - Account
    - Expenditure Objects – (salaries, benefits, supports, etc.)
    - Revenue Codes – (grants, etc.)
  - A combination of codes for each and every expenditure or revenue entry

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History - SSDDMS:

- Stakeholders discussed the idea of SSDDMS to facilitate the adoption and implementation of the UCOA, in addition to other potential benefits (ease of reporting, sharing of best practices, cost savings, etc.)

- VT Association of School Business Officials (VASBO) members voted to move forward with SSDDMS. There was some understanding that district participation would be voluntary.

- Legislature adopted language making SSDDMS mandatory for all districts (2018)

- Powerschool eFinancePlus was selected through RFP from a narrow field of bidders

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History – SSDDMS Charter:

The SSDDMS Charter of Feb. 2018 spelled out 3 primary purposes of SSDDMS:

1. Central management of the UCOA will improve data quality and comparability.

2. Management of the UCOA and business rules will reduce resources needed by the state to monitor compliance.

3. A single common system will save taxpayer dollars by leveraging economies of scale.

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History – Legislation:

- Act 11 of 2018 (special session) - The original SSDDMS mandate

- Act 72 of 2019 - Extended deadline from 7/1/20 to 7/1/22

- Act 66 of 2021 – Extended the statutory implementation deadline to 12/31/22, paused implementations until 1/1/22

- Act 185 of 2022 - Extended the deadline to December 31, 2024 for statewide adoption of eFinancePlus SSDDMS and pause until July 1, 2023 the further implementation of eFinancePlus SSDDMS to provide time for further evaluation of the system

- Act 66 of 2023 – Ended mandatory implementation

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History – SSDDMS Implementation and Outcome:

- eFinance implementation was planned for staggered rounds, beginning in 2018

- Many districts opted for later rounds

- Initial rounds experienced frustration with the software and conversion process

- There was increasing general sentiment across districts that productivity losses and other tangible and intangible costs of converting to a system that, at best, did not demonstrate any significant advantages over existing systems outweighed any data reporting benefits at the state level, particularly given that adoption of UCOA would provide the bulk of those benefits with or without SSDDMS

- A 'Path Forward' committee was formed to propose policy options, ultimately requesting that SSDDMS be made voluntary instead of mandatory. Districts focused instead on implementation of UCOA in their existing systems. (2022-23)

- Mandatory implementation was rescinded by the Legislature, 2023

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Current State - Utilization

- **2025 - Out of about 54 SU/SD's:**
  - 21 SU/SD's ultimately converted to eFinance
  - 2 have since gone back to their preferred software
  - 19 SU/SD's remain in eFinance

- **UCOA:**
  - The remaining 2 districts will be recording and reporting using the UCOA by July 1, 2025
  - Not all districts, or ERP systems, record UCOA in an identical manner, but when reporting (non-eFinance) expenditure and revenue data to AOE, data goes through a straightforward crosswalk process to make it 100% uniform

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Current State - Benefits:

- Previously, a dedicated SSDDMS support specialist position within the AOE, still on board but reduced role

- A single point of contact with the vendor (contract, support)

- Formal eFinance users Governance Group:
  - Identifing system enhancement requests
  - Sharing and dissemination of best practices

- Central Management of UCOA within the system

- ODS back-end data access and collection

- Group trainings

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Current State - Challenges:

- AOE now deals with a split data collection landscape – 40% use eFinance, 60% do not

- Even with a single system, variations in implementation/utilization of eFinance features among districts present difficulties when AOE pulling data (e.g. budgets, staffing data, etc.) (one single query does not work for all districts)

- Complexity from multiple contracts/products/integrations with the vendor (eFP at the state level, other Powerschool products at district level, integrations between them)

- Democratic decision-making issues between districts on contract extension strategies, lobbying for legislation, etc.

- Ongoing technical issues with Online Data Store (ODS) (system AOE uses to pull district data) and Powerschool support response times

- Ad-hoc ODS queries require a trained data professional or expensive consulting time with vendor

- Reduced sway with vendor for system enhancement requests

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SSDDMS – Future States:

- There remains some support for the theoretical concept of statewide school district systems, and there are lessons learned that should be applied to any such efforts

- Systems identification, procurements and conversions require long lead-times and implementation periods

- Powerschool eFinance contract expires 7/1/27 – continue with a state supported system? New RFP? Timelines?

- Planning should align with education reform proposals related to governance.

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Shared SIS?

- **Jennifer Hicks – Director Data Management and Analysis Division (DMAD)**

- **State has adopted the EdFi Data Standard to collect information from LEA SISs**

- **EdFi is agnostic with regards to which SIS an LEA uses (similar in concept to the UCOA)**

- **About six years ago AOE explored adopting a statewide SIS. A work group consisting of LEA and AOE representatives was convened.**
  The group met several times, reviewed the options (keep the status quo, adopt a statewide SIS, or move to something like Ed-FI, which would allow for LEAs to use different SISs and AOE would collect and standardize the data from those).

- **The feedback group chose the Ed-Fi option. Major concerns about a Statewide SIS were noted above: cost to maintain system, cost & staff time needed to switch to new SIS (the latter being the largest concern).**

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Questions?

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