OUSD Data Program

Appendices

School Board Presentation
January 14, 2015

District Data Challenges

"I can't find the data I need, data is scattered all over the place, **which system is right?**"

"**One-time snapshots are not nearly as accessible, timely, or actionable.**"

"I have to rely on a **data expert** to get the data I need."

"**Within 30 days, (the results) are completely dead, but this can be even 1 week depending on the test. The CST is dead within a month. The benchmarks are dead within two weeks.**"

Background

Core Systems 2014

System	Current System	Planned System	Description
Student Information System	Aeris	Aeries	Contains authoritative source of student information, rosters, demographics, etc.
Special Education System	SEIS	SEIS	Contains specific special education data
Learning Management System	none	tbd	Content management, gradebook, teacher and school portals
Assessment System	Edusoft	tbd	Platform to create, administer and generate state and local assessments.
Business System	iFAS 7.7	iFAS 7.9	Budget & Finance system
Human Capital Data Management System	iFAS	Workday	Provides human capital management to collect, maintain, and analyze HR data.
Portals, Reports, & Dashboards	pdf reports	Web Portals	Custom views of key data measures

Background

System of Systems 2014

OAKLAND UNIFIED SCHOOL DISTRICT
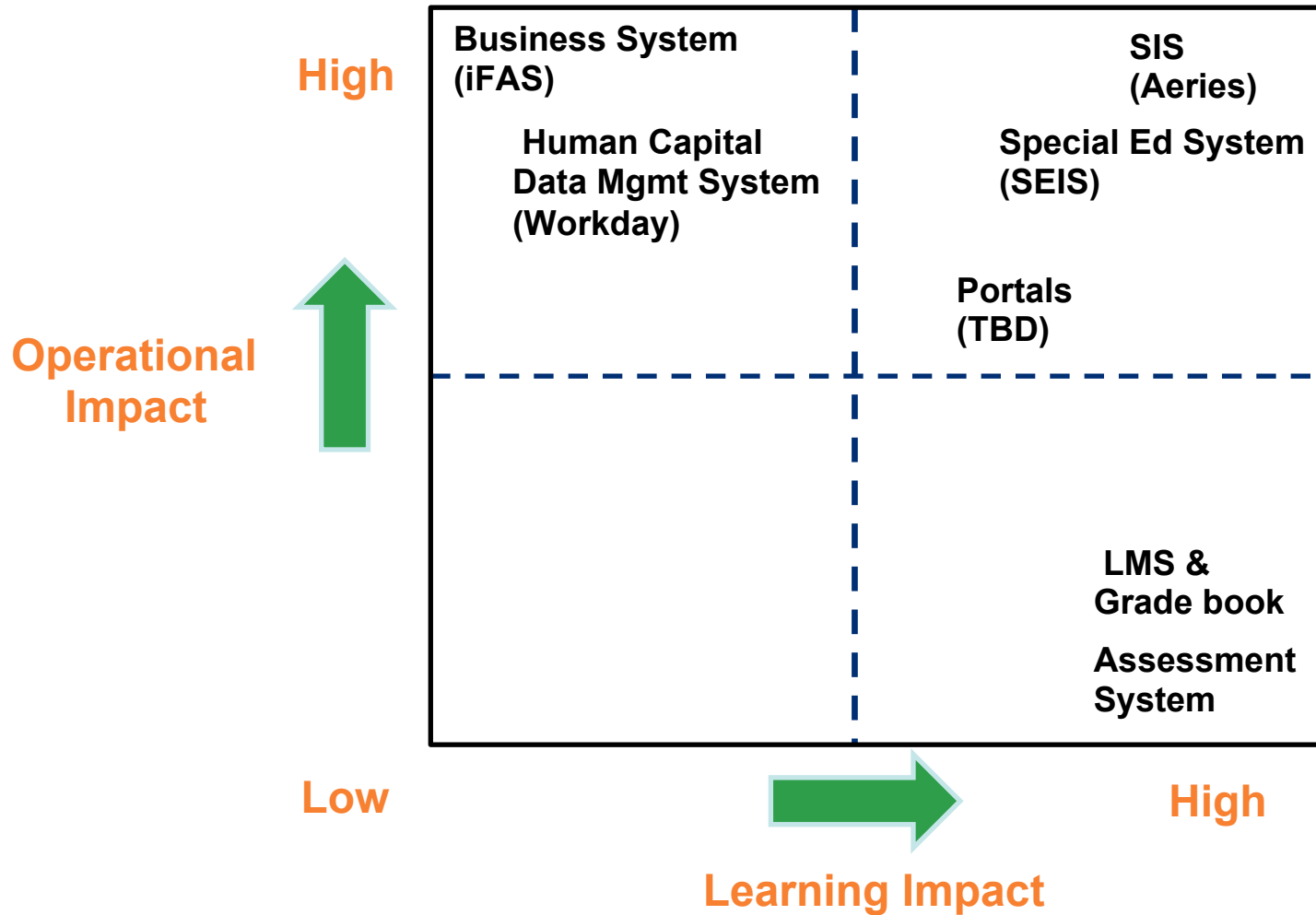
Community Schools, Thriving Students

RAD reports

Assessment System

iFAS (Biz)

SIS

Budget BDT

Substitutes SmartFind Express

SpEd SEIS

Early Childhood CenterTrack

Nutrition WebSMART

CALPADS

Other Key Systems

Identity Mgmt. Active Directory

FSCP Data Various Data Sources

Afterschool Attendance City Span

Federal Time Accounting

Instructional Minutes

Contracts COL

Help Desk Systems

Site Planning CSSSP

Training OnTrack

Google Apps
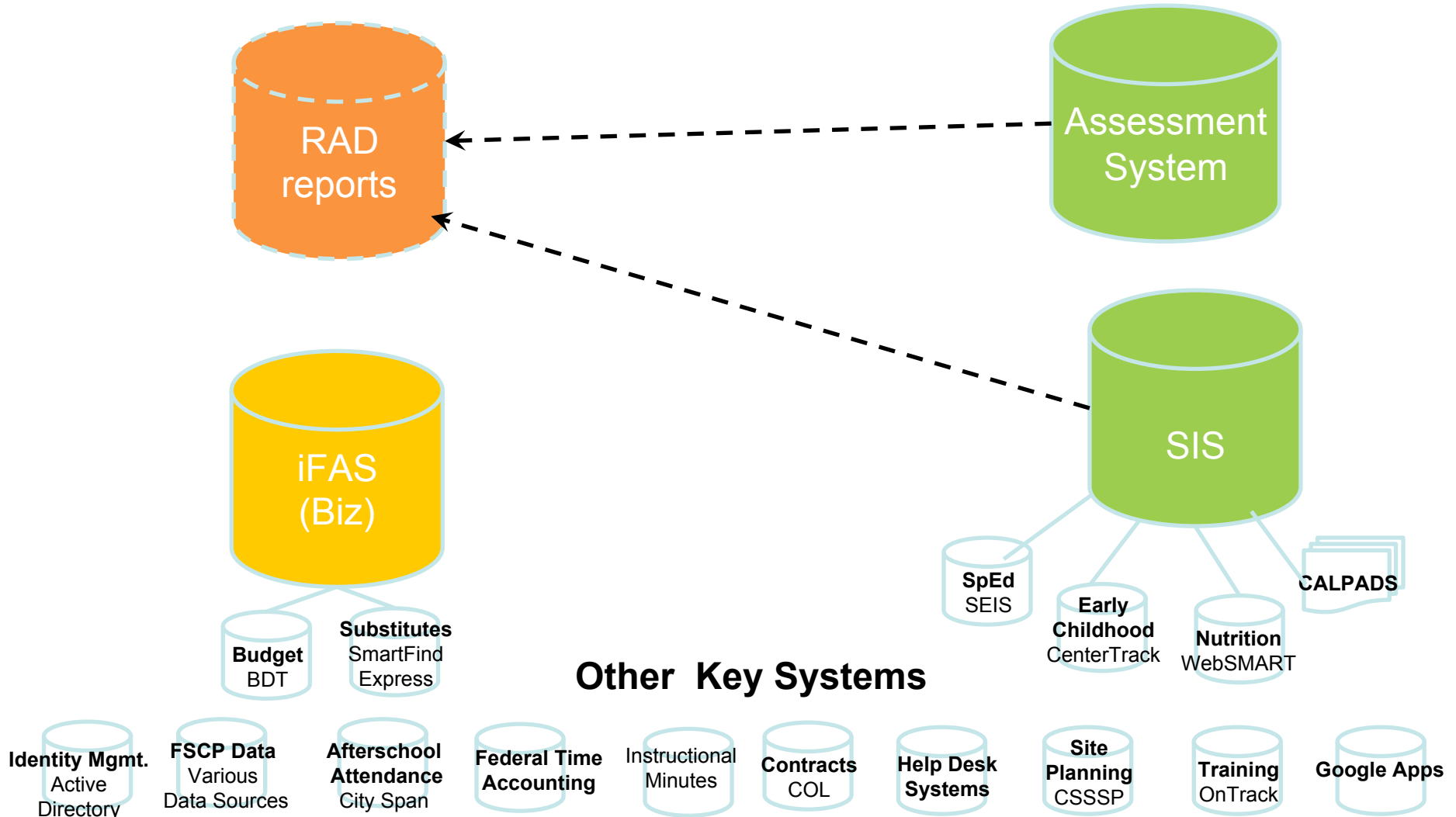
Background

System Impact

High

Business System (iFAS)

Human Capital Data Mgmt System (Workday)

SIS (Aeries)

Special Ed System (SEIS)

Portals (TBD)

Operational Impact

Low

LMS & Grade book

Assessment System

High

Learning Impact

Background

System of Systems 2015

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OUSD1

Tableau "Data Warehouse"

Assessment & Portals

LMS & Gradebook

SIS

Data Validation Certify

SpEd SEIS

Early Childhood CenterTrac

Nutrition WebSMAR

Enrollment Registration

CALPADS

iFAS (Business)

Workday (HR)

Budget BDT

Substitute SmartFind Express

Other Key Systems

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Contracts COL

Help Desk Systems

Site Planning CSSSP

Training OnTrack

Google Apps

Vision

OUSD1

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ASSESSMENTS
include diagnostic, benchmark, formative and summative teacher-made and publisher item banks

INSTRUCTIONAL DESIGN
based on assessment data teacher can group and personalize learning

CONTENT
supports instructional design and includes free, publisher, teacher, and district instructional materials

GRADE BOOK
provides uniform data from multiple sources available to teachers and leaders

PORTALS
provide dashboards, reports, and an Early Warning System inform stakeholders

VISION: "OUSD1" combines our assessment system, learning management system (LMS), gradebook that all sites use, and Portals that have data from all.

Vision

Data Portals

Static PDF's

Online, real time reports with drill downs

Past

Present

Future

Vision

Different Portals for Different Needs

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Community Schools, Thriving Students
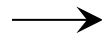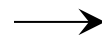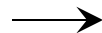
	PRIMARY AUDIENCE	PRIMARY FUNCTION
OUSD1	School instructional leaders (principals, APs, TSAs), teachers, parents, students	Student data Dashboards with benchmark data, grades, attendance, etc.
iFas & Workday	District Leadership, School instructional leaders (principals, APs, TSAs), teachers, and parents	Budget and Talent Data for an Accountable School District and Effective Talent Programs
Tableau "Data Warehouse"	District leadership, central staff, and site leaders	Easy-to-access drill-down reports on summative data on Accountable School District Quality Community Schools

Vision

Data Portals 2015-2016

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Pathways to Excellence

OUSD

ASSMT
SIS
LMS
GRBK

Workday
iFAS 7.9

Tableau "Data Warehouse"

Student & Parent Portal

Teacher Portal

Leadership Portals
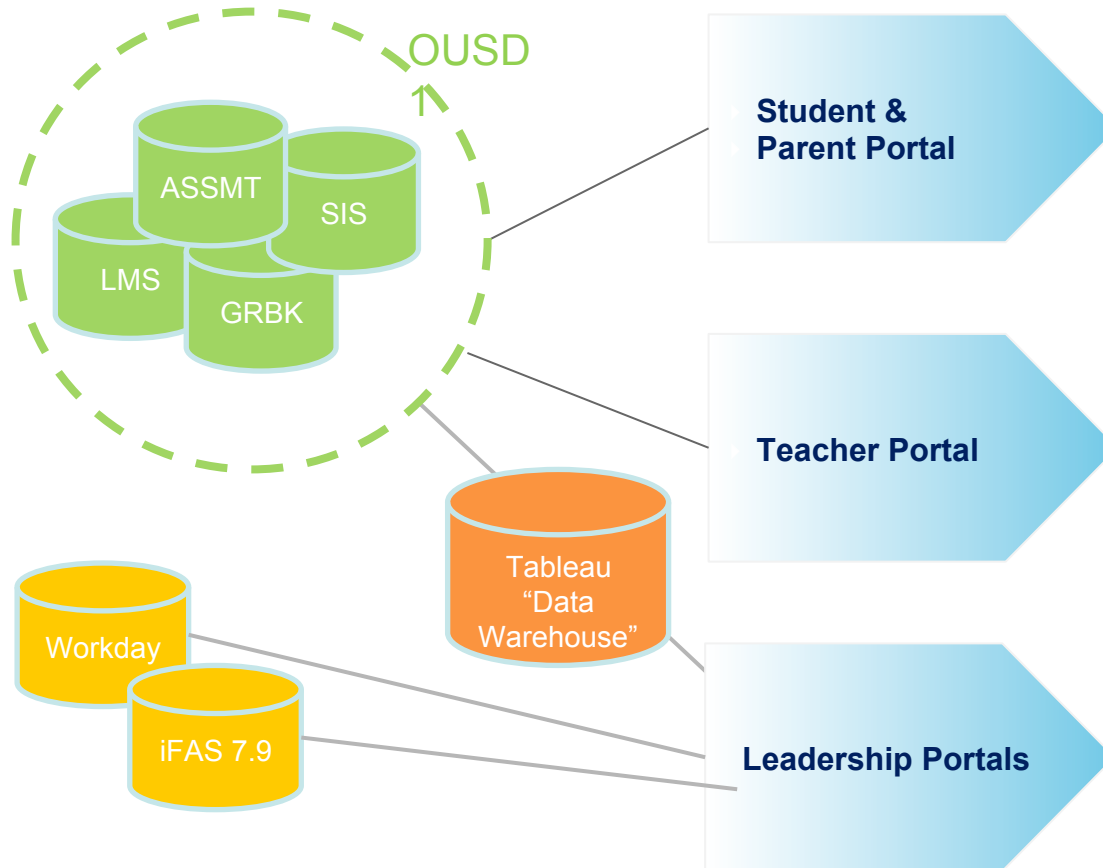
- attendance
- student grades
- benchmark scores
- SRI scores
- discipline
- % Linked Learning
- % UC/CSU eligible
- % ELL reclassified
- % without suspensions
- % reading on grade level
- % high performing schools
- % employees engaged
- etc.

Vision

Data Portal Examples

School Performance Framework Data

Benchmark Data

Student Profile Data

Leadership
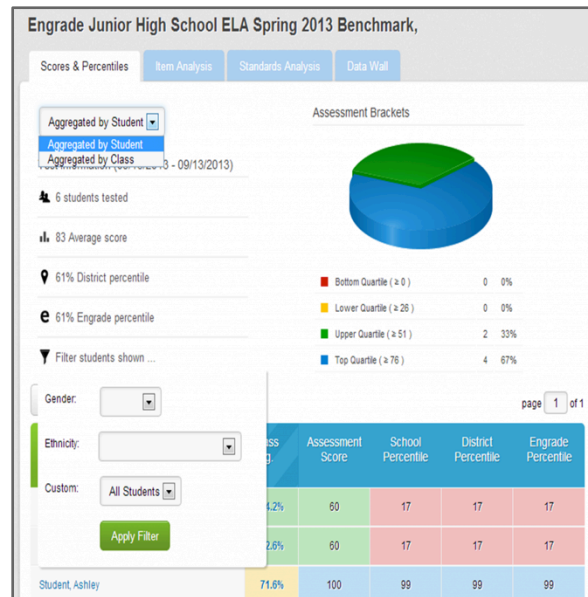
Teacher

Parent/Student

Vision

Data Program Vision

Pathway to Excellence

User Adoption

Input Systems	OUSD Data Portals	Portals	Outcomes
Assessment System		▸Teacher Portal	▸Effective Talent Programs
Student Information System	**OUSD Data Portals**	▸ Student & Parent Portals	▸Quality Community Schools
Learning Mgmt. & Grade Book		▸Leadership Portal	▸Accountable School District
Special Education Information System			
HR System			
Business System			

Data Culture & Governance

Data Vision
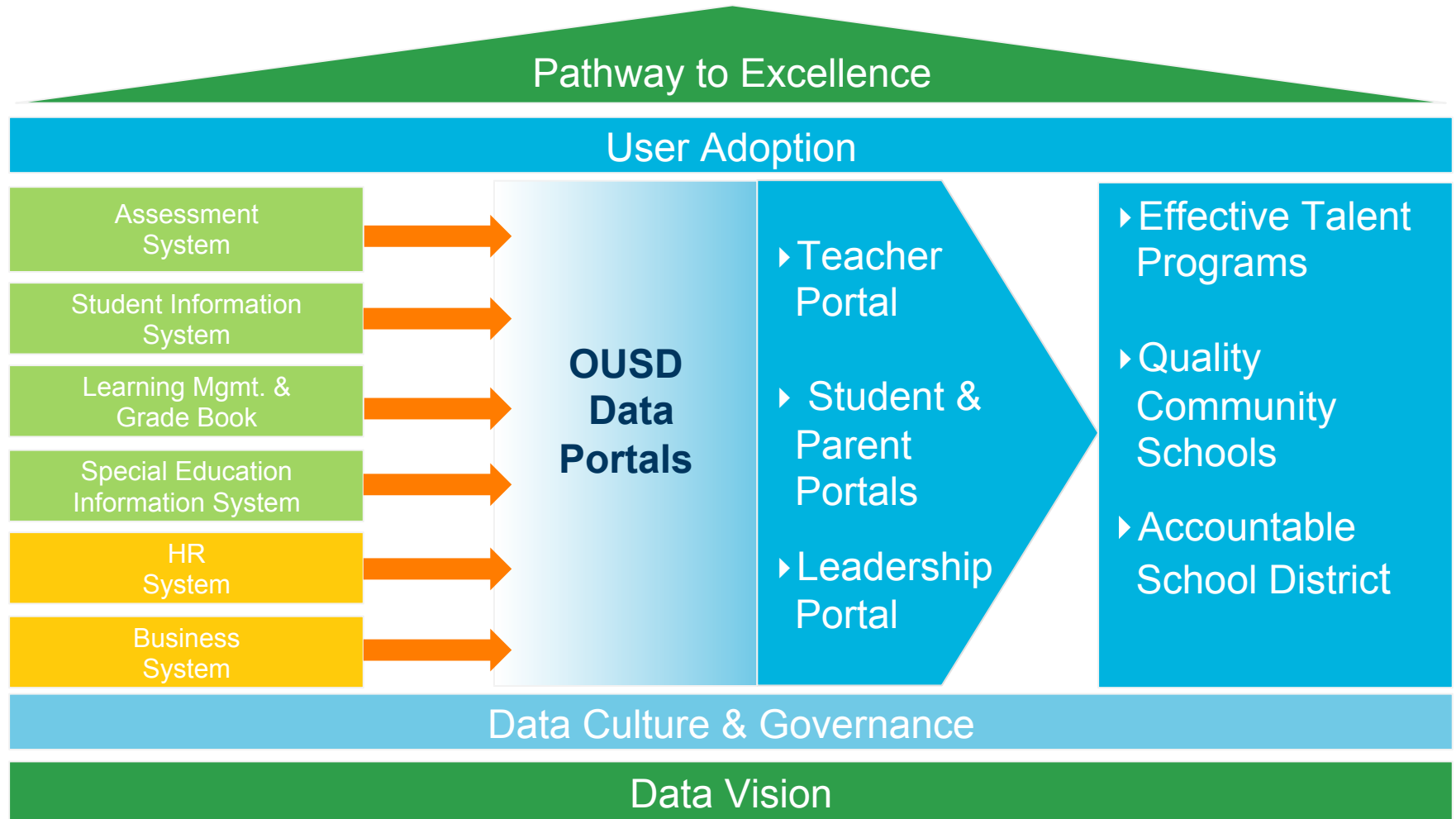
Vision

Program Approach

Success
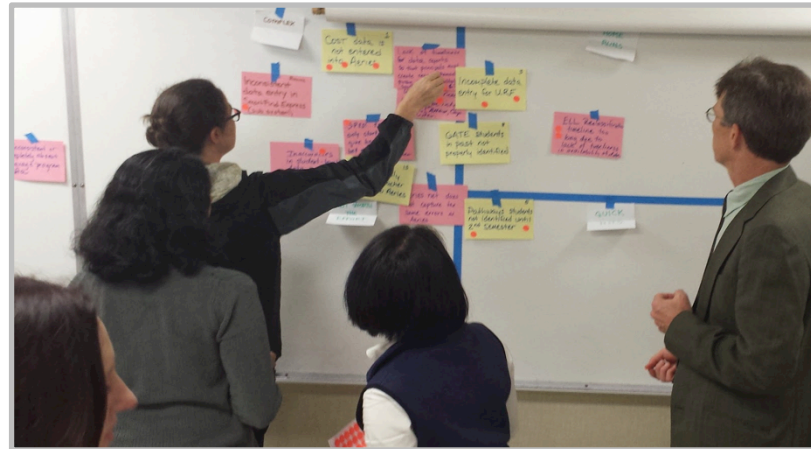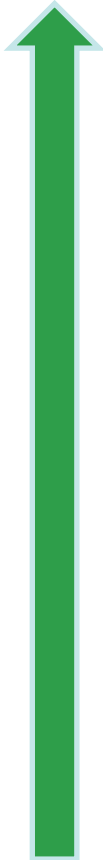
Prioritize & Coordinate:
resources and projects

Manage the overall costs, schedules,
scope and risks

Coordinate change management
& user adoption
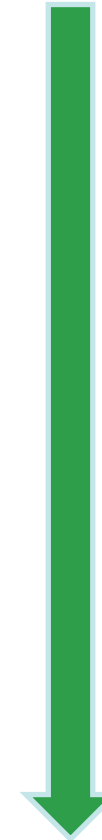
Risk

Plan

System Descriptions

Student Information: Aeries

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Student/Teacher Data

Demographics

Scheduling/Courses

Attendance

Report Cards

Transcripts

Authoritative Source of Student Data

Background

Business Operations: iFAS

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Community Schools, Thriving Students

SUNGARD®
K-12 EDUCATION

What is "iFAS"?

- FINANCE
    - Budget
    - Accounting
    - Procurement
    - Fixed Assets
- PAYROLL
    - Benefits
- HR

Mandatory Upgrade in 2015 from 7.7 to 7.9

HR Data Management: Workday

What is Workday?

- Onboarding
- Organization development and visualization
- Credential Tracking (linked to CTC)
- Compensation (linked to iFAS)
- Goal Setting and Performance (with Bloomboard)

Challenges & Risks

Key Risks

Risk	Prob	Impact	Mitigation
User Adoption	Med	High	- Establish a program approach to ensures a gradual, thoughtful release of tools - Early inclusion by as many staff, as possible - Establish a coordinated change management plan including an iterative, ongoing training plan
Lack of People Skills & Availability	High	High	- Identify needed resources across data projects - Prioritize projects to help secure needed resources - Pursue outside resources to fill gap for short term work and skills
Data Projects Contention	Low	High	- Establish a 'data program' approach - Coordinate interdependencies amongst systems - Create a coordinated change management approach - Assign a program manager to manage initiatives
Available Funds	High	High	- Plan and manage costs in aggregate over 3 years - Secure internal resources and funding - Pursue outside funding to complete funding needs
Leadership Support	Low	High	- Present to cabinet a clear data vision with direct ties to district priorities - Gain support from upper leadership to help drive adoption and funding - Communicate progress regularly with leadership

Data Challenges

One-time snapshots are not nearly as accessible, timely, or actionable.
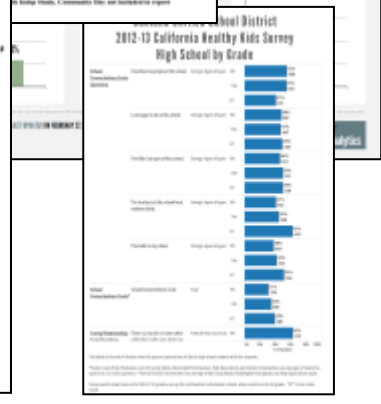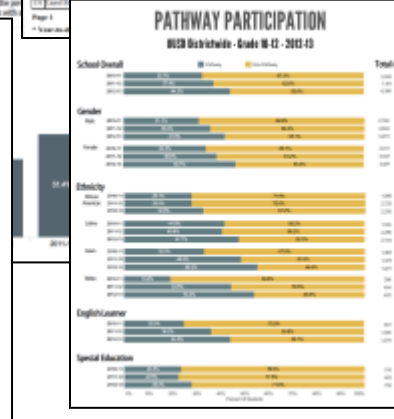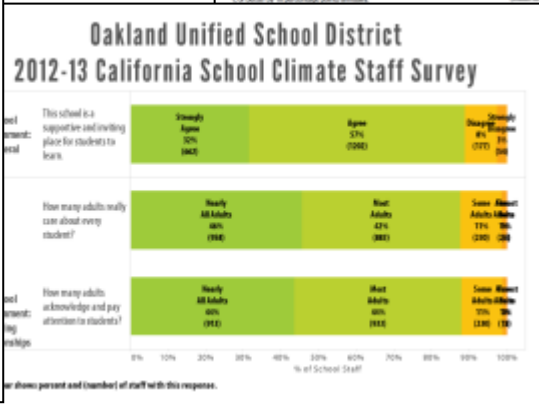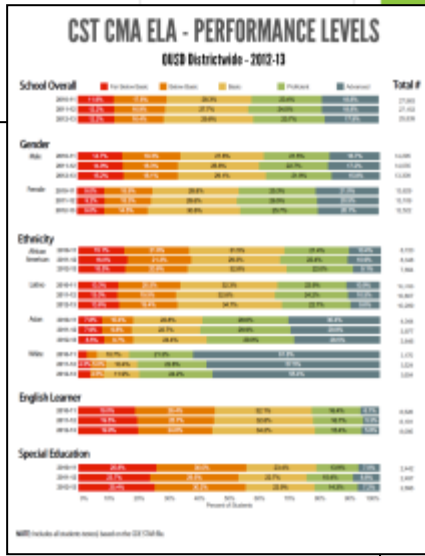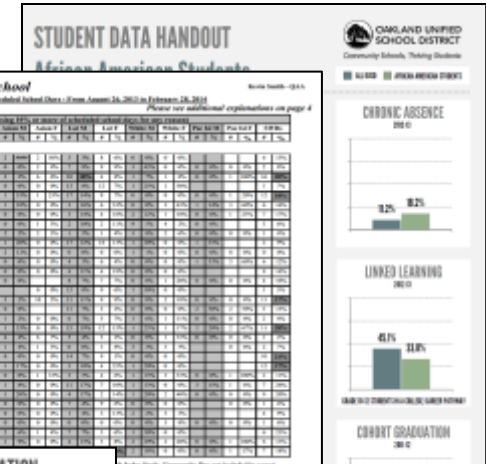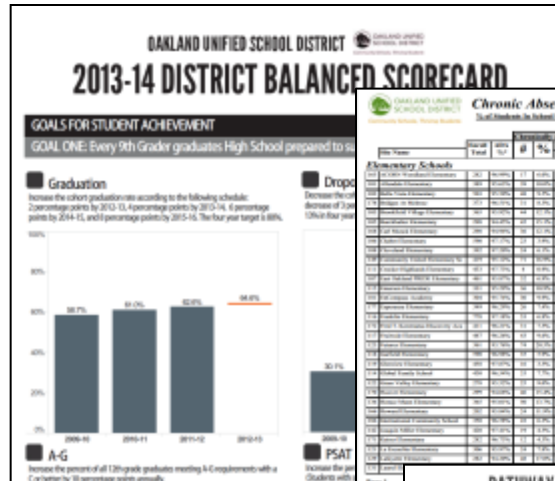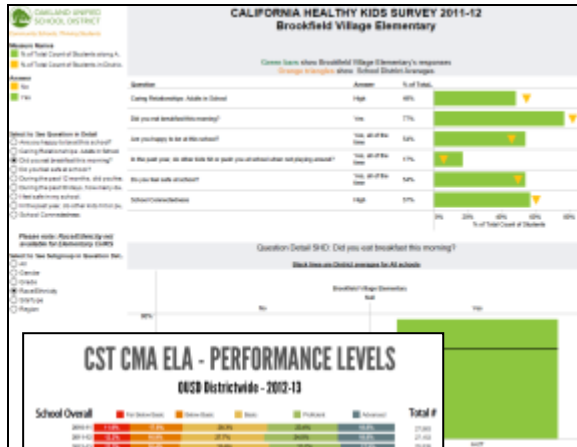
IFAS Upgrade Benefits

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Community Schools, Thriving Students

- Continued Sungard Support; IFAS 7.7 (our current version) support ends Fall 2015

- BusinessPlus (IFAS) 7.9 used by majority of Sungard customers

- Redesigned, modern, web-based interfaces

- New features and modules including:
  - Punch Out - Shop on vendor websites and seamlessly create requisitions (savings of 2% paid on all e-marketplace orders)
  - Fixed Assets - Asset tracking and reporting no longer in a separate system
  - Stores Inventory / Warehouse - Account for assets from receipt until distribution
  - Grant Management - Track projects from initial proposal through closing
  - Web Forms - Enable implementation of online forms for travel requisitions, time off, budget, etc.

- Broad support among stakeholders (Finance, HR, Risk Mgt., Procurement, etc.)

- Business Process Reviews (BPR's) completed with stakeholders document possible process improvements to realize efficiencies

- Subsequent migration from Informix to SQL database modernizes and improves performance

- Integration with identity management solutions to provide streamlined onboarding in 2015-16

Background

IFAS Upgrade Challenges

- OUSD has been using IFAS 7.7 for several years
    - Need to retrain all IFAS users on updated version
    - Need to reevaluate processes to realize efficiencies in the new version
    - Need to update internal documentation to match new version

- Large effort for Technology Services and stakeholders to upgrade to the new version
    - Data cleanup required to be compatible with 7.9
    - Sungard to redevelop existing customizations in 7.9
    - Retesting and update of CDD reports needed for 7.9 compatibility
    - Design and implementation work needed to support changes to security model
    - Retesting of existing integrations (BDT, Employee Master, Contracts Online, etc.) needed
    - Thorough testing of the entire system required prior to launch
        - Includes significant testing by both Technology Services and stakeholders

- Post-upgrade training and support needed to ensure success
    - Users will require support and follow-on training to fully leverage new features / modules
    - Anticipated need for more hands-on support due to interface updates
    - Possibility of lower-severity issues arising post-launch

- Target completion of July 1, 2015 considered aggressive and high-impact, but possible

Background

IFAS-Workday Integration Risks

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- Integration complexity increases potential for errors and time required to resolve them

- Financial data needs to flow from IFAS into Workday

- Workday data, including compensation data, needs to flow from Workday into IFAS

- Integration errors can have a potentially severe impact upon OUSD finances (payroll, etc.)

- No other Sungard customer has separated HR from the core IFAS system

- One-of-a-kind integration takes us outside the mainstream of Sungard customers

- Integrations make support and troubleshooting more complex

- Difficulty in tracing errors through multiple systems to isolate the root cause of the error

- Increased difficulty in obtaining vendor support

- Reduced visibility when troubleshooting errors spanning multiple systems

- Fewer vendor support staff familiar with the specifics of the OUSD implementation

- Difficulty demonstrating issues are within the scope of the vendor provided system

- Integration requires significant testing by Technology Services and stakeholders

- Very difficult to accomplish alongside the aggressive schedule for the IFAS upgrade

- Multiple, nearly-concurrent, large-scale launches add even more complexity

- Much more difficult to determine if an issue is due to the upgrade or the integration

- Potential for upgrade issues is higher as users are still absorbing the new system

- Increased support load post-upgrade reduces capacity to address any integration issues

Background

Revised Workday Implementation Proposal

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	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Workday					■	■	■	■	■	■ ★		
IFAS Upgrade						★						
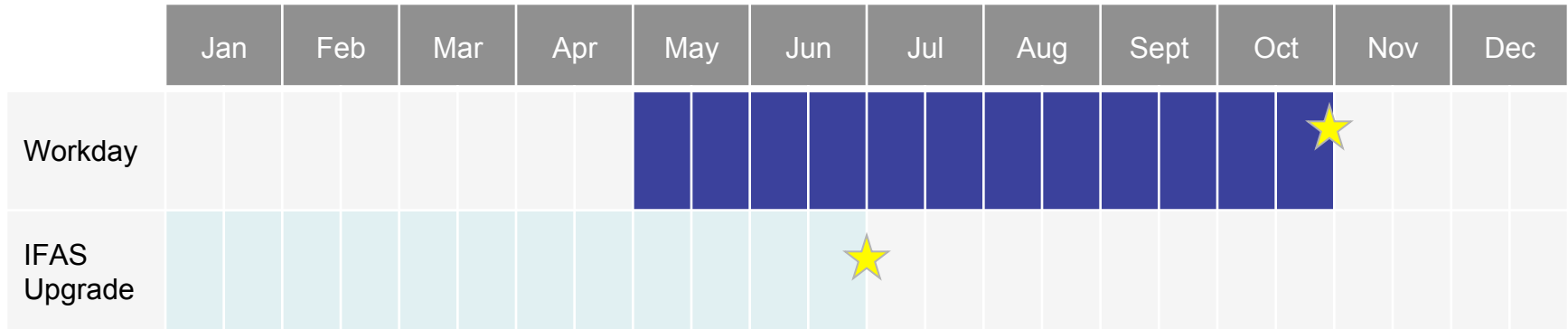
Workday Go-Live in November

Benefits

- Go-live will occur during a slower time of year for the HR department
- HR department will have a high level of familiarity with the system before hiring begins for the following school year
- Go-live will occur ~4 months after the IFAS upgrade, ensuring there is ample time for resolving any payroll issues related to the IFAS upgrade
- IFAS upgrade and Workday implementations will be staggered so high-intensity support from Tech Services will not be needed for both systems at the same time

Risks

- HR will not realize any of the benefits of Workday until November 2015
- Onboarding for the 2015-16 school year will continue to be paper-based
- The HR department will have to adjust to the change of an upgraded IFAS system and then Workday
- The Human Capital Data Team was staffed with two Ed Pioneers who are not guaranteed to continue with the project through November 2015
- We will likely lose access to our current Sierra-Cedar project manager, who is implementing Workday in Douglas County Schools
- The Workday subscription will lay dormant until May 2015

Background

Culture & Governance

- Provides the governance for data quality and guidance working with Program Management identifying prioritizing initiatives

- Works as an advisory body for data projects prior to cabinet and Superintendent approval

Data Governance Executive Board

Policy, Standards, Compliance

Authoritative Sources

Systems Priority

Data Governance

Data Culture

Data Owners

Data Quality

Vision
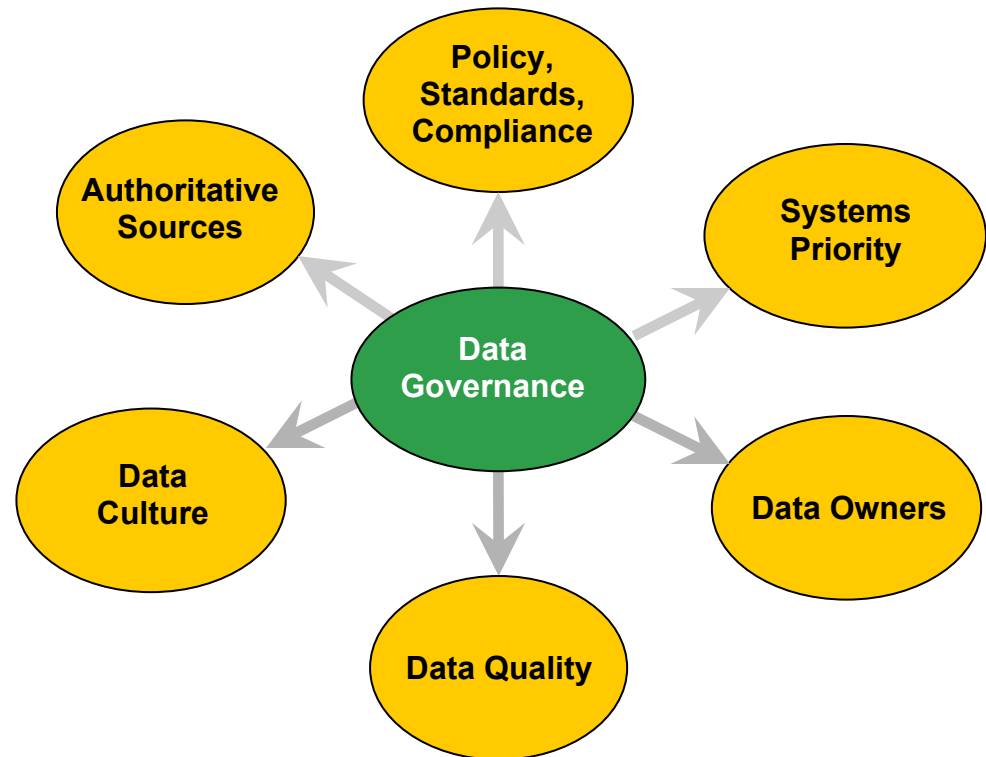
OUSD1: Tools to Optimize Data & Instruction

OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

How OUSD1 Works

Design Instruction
(Assessment System)

Assess Students
(Assessment system)

Personalize Instruction Content
(Learning Management System)

Record Grades
(Gradebook)

View Results
(Portals)

Vision
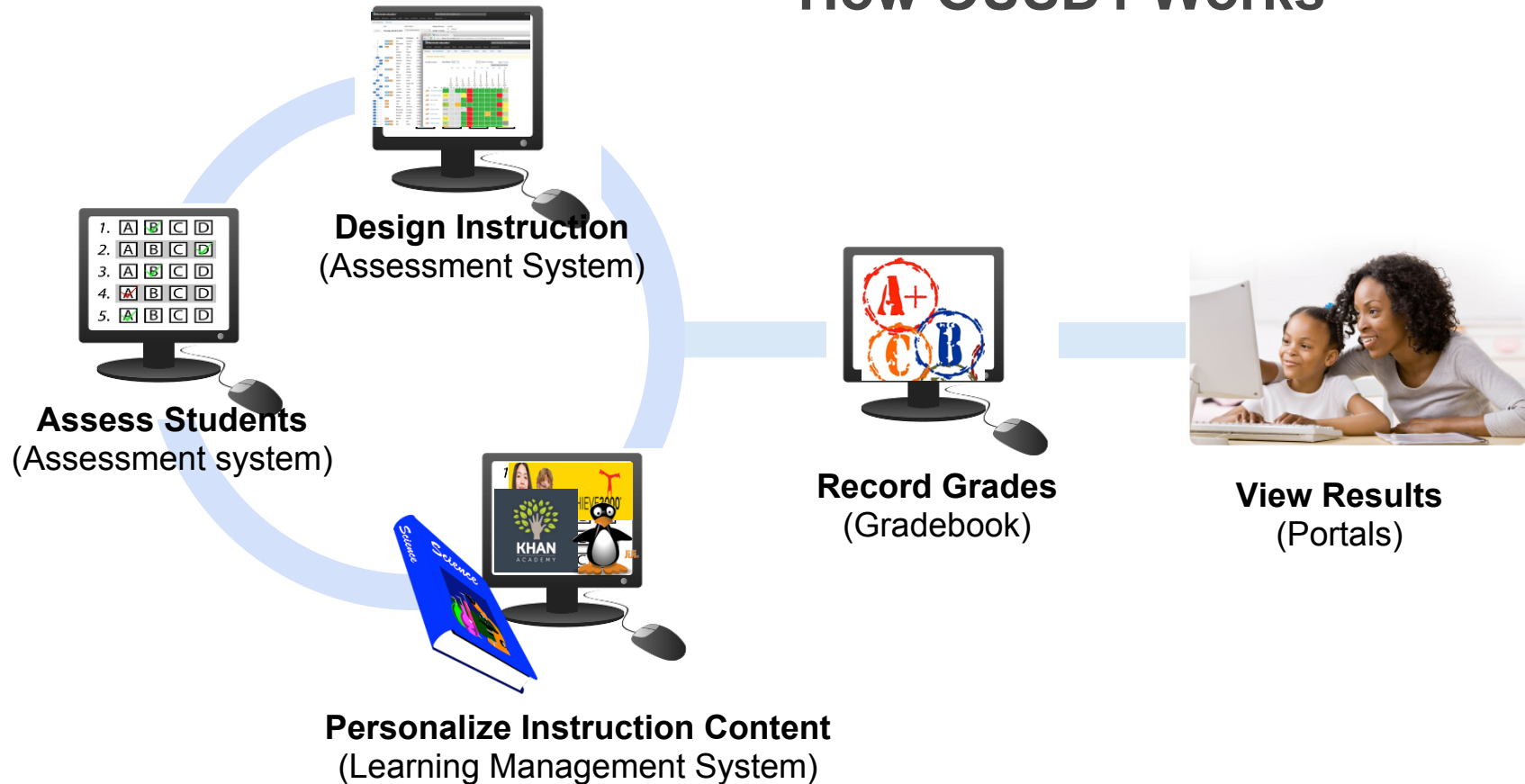
Resources

Data Program Structure

Sponsor
John Krull

Program Advisor & Support
Russ Ballati

Program Manager
Manisha Patel

Data Validation Tool

Business Owner
John Krull

Project Mgr
Russ Ballati

Data Governance

Business Owner
David Montes

Project Mgr
Russ Ballati

SIS ('15-'16)

Business Owner
John Krull

Project Mgr
TBD

iFas Upgrade

Business Owner
Ruth Alahydoian

Project Mgr
Susan Beltz

Leadership Portals

Business Owners
David Montes, Jean Wing

Project Mgr
Manisha Patel

Data Security & Policies

Business Owners
John Krull, Jackie Minor

Project Mgr
Manisha Patel

OUSD1

LMS/ Gradebook

Business Owner
Devin Dillon

Assessment & Reports

Business Owner
Jean Wing

Project Mgr
Russ Ballati

HR System

Business Owner
Brigitte Marshall

Project Mgr
Roxanne Phen

Timelines

Goals & Deliverables 2014-2015

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Goals	Current Systems	Data Solutions Delivered
Rigorous Classroom Instruction • **Increase % of student who pass CAHSEE** • **Increase Linked Learning** • **Increase 4-year cohort graduation** • **Increase A-G completion overall**	Aeries Edusoft SRI, SMI Achieve 3000, ST Math Read 180, etc.	OUSDdata.org portal with all key metrics in static format Edusoft/OUSD1 (teacher/leader data)
Accountable School District • **Increase grade-level proficiency** • **Increase EL reclassification**	Center Track Aeries SRI	OUSDdata.org portal
Quality Community Schools • **Decrease chronic absence** • **Decrease suspensions** • **Increase students reporting feeling safe**	Aeries CA Healthy Kids Survey	OUSDdata.org portal
Effective Talent Programs • **Increase teacher evaluation & improve instruction**	iFas Aeries Bloomboard	HR Reports

Plan

Goals & Deliverables 2015-2016

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Goals	Systems	Data Solutions Delivered
Rigorous Classroom Instruction • **Increase % of student who pass CAHSEE** • **Increase Linked Learning** • **Increase 4-year cohort graduation** • **Increase A-G completion overall**	Aeries, Assessment System, Grade book, Portals, LMS	• Teacher & Leader dashboards • Online Assessment • Unified Grade book with Parent Portal • Early Warning System
Accountable School District • **Increase grade-level proficiency** • **Increase EL reclassification**	Center Track Aeries SRI	• Teacher & Leader dashboards • Early Warning System
Quality Community Schools • **Decrease chronic absence** • **Decrease suspensions** • **Increase students report feeling safe**	Aeries CA Healthy Kids Survey	• Teacher & Leader portals
Effective Talent Programs • **Increase teacher evaluation & improve instruction**	Workday Bloomboard	• Org charts • Observation data • Improved Onboarding

Plan

Engagement Timeline

OAKLAND UNIFIED SCHOOL DISTRICT
Community Schools, Thriving Students

Data Program Engagement & Communication

Sept- Nov

- Cabinet Presentation
- Network Meetings
- Teaching & Learning Teams
- ITTL Meeting
- Announcement via email

Jan- Feb

- Monthly Newsletter
- Monthly Update to Cabinet
- Monthly Review with Data Governance Board
- Bi-weekly or Monthly Sync with User Adoption Team
- Training & User Adoption Activities

- Superintendent & direct reports
- Academic Leadership Team
- TS & RAD Members
- Network 3 and MS
- Data Governance Board
- Personalized Learning Team

Dec

- OUSD 1 Product demos
- ITTL Meeting
- Network Meetings
- Announcement via email
- School Staff Meetings

Ongoing Until Program Completion

Plan

OUSD 1
2014-'15 & 2015-'16

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	2014-'15									2015-'16						
	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar

OUSD1
(Assmt System, LMS, Gradebook, Portals)

Engrade & Illuminate Pilots

Req's & RFP

Tool Evaluation &Selection

Tool Configuration

Launch Planning

Enter Assmts & Content

Summer School Pilot

Training

Post Launch Support

User Adoption

Ongoing Support

⭐ **Launch: Aug 15, 2015**

Legend:
- 🟧 Planning
- 🟪 Implementing
- 🟩 Launch
- 🟨 Support

Plan

Leadership Portals 2014-'15, 2015-'16

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	2014-'15							2015-'16							
Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar

Leadership Portals (BI/DW)

PHASE 1 Portal Design

PHASE 1 Portals Dev

PHASE 1 Launch Planning & Prep

Portals Launch & Training PHASE 1

PHASE 2 Portal Design

PHASE 2 Portals Development

PHASE 1 Post Launch Support

PHASE 2 Launch Planning

Phase 1 Launch: Oct 1, 2016
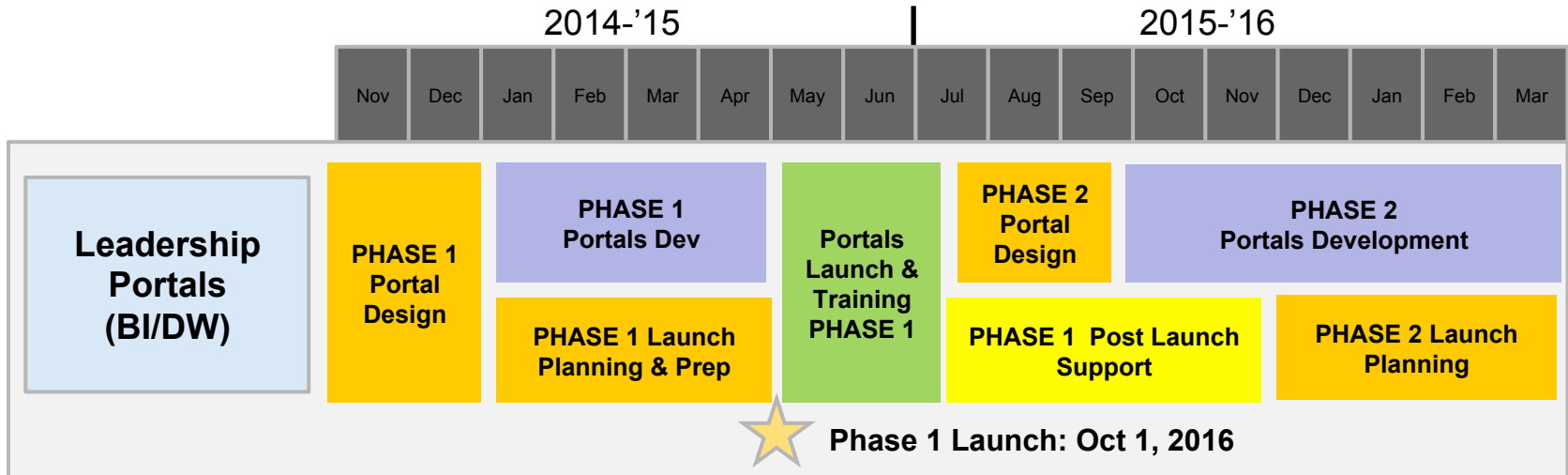
- 🟧 Planning
- 🟪 Implementing
- 🟩 Launch
- 🟨 Support

Plan

IFAS & Workday Timeline

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Community Schools, Thriving Students

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb

IFAS Upgrade

- Contract PM Onboarding Data Cleanup Project Planning
- Installation Data Migration
- Tech Services Testing CDD Customizations
- Port Customizations to 7.9 Set up Role-Based Security in 7.9
- Train Power Users User Testing Process Improvements
- User Training Update Internal Docs
- School Site Training Technical Support

⭐ **Launch: July 1, 2015**

IFAS-Workday Integration

- Design Project Planning Test iFAS instance set up
- Implementation - Data into IFAS (Utilities, Customizations) Implementation - Data into Workday (APIs)
- Beta
- Technology Services Integration Testing HR Workday Team Testing

Workday Implementation

- Pre-implementation: Data Mapping, data clean up,
- Design Project Planning
- Workday Implementation HR Workday Team Testing
- Power User Testing HR Training
- Post-Launch Support

⭐ **Launch: November, 2015**

Plan