Customer Leads	Project Technology Sponsor Project Manager
PowerSchool Leads	Executive Sponsor, Unified Insights Sponsor Practice Lead Technical and Security Manager Lead OCM Lead Lead Architect Connected Intelligence Lead Project Manager Account Owner, Analytics Account Owner CSM Strategic Solutions Consultant AWS Project Manager
Scope	Systems Assessment, Connected Intelligence, Unified Insights (Essentials, Advanced Bundle, Community Engagement), OCM, Customer Education
Budget	KTO 3735.50/3750 and 50/50
Important Note	The content of this document includes confidential information.

Milestones	Milestone	Project Status	Planned /Target Completion Date	Current Forecast	Actual Date
	Milestone 1-Systems Assessment Consulting-Delivery of Draft Assessment Output	In Progress/On Track	09/08/2023	09/08/2023	
	Milestone 2-Systems Assessment Consulting-Montana Review and Feedback	Not Started/On Track	09/15/2023	09/15/2023	
	Milestone 3-Systems Assessment Consulting-Deliverable Updates and Final Approval	Not Started/On Track	09/22/2023	09/22/2023	
	Milestone 4a-Connected Intelligence Deployed with 2 Data Sources	Not Started/Delayed	10/20/2023	10/20/2023	
	Milestone 4b-Replicate up to 6 Additional Connected Intelligence Sources	Not Started	07/20/2025	07/20/2025	
	Milestone 5a-Base Unified Insights Modules Deployed	Not Started	08/20/2024	08/20/2024	
	Milestone 5b-Unified Insights Customizations Complete	Not Started	07/20/2025	07/20/2025	
	Milestone 6-Post-Deployment Assessment Complete	Not Started	6/20/2025	6/20/2025	
	Milestone 7-Solution Acceptance and Signoff	Not Started	07/20/2025	07/20/2025	

General Project Updates	**Achieved This Period**
	• None
	
	Planned for Upcoming Period
	• Resolve risks so the project can move forward more effectively.
	
	Risks
	• **Sharing Documentation Publicly**
	    o Risk Level=High
	    o Responsible: PowerSchool and OPI Legal
	• **Branding of Project Documentation**
	    o Risk Level=Medium
	    o Responsible: PowerSchool and OPI Legal

Organizational Change Management (No Associated Milestones)	**Project Status, Sentiment, and Risks** • Project Status: Green • Last Sentiment Survey Response: No survey yet. • **Risks** • Same as risks noted in the General section of this report. **Achieved This Period** • Interviews completed by PowerSchool 7/27/23. • Synthesis shared internally with PowerSchool team. • Scheduled call with OPI on 9/5 to present/review synthesis. • Reviewed next steps with OPI on OCM Team Formation. **Planned for Upcoming Period** • Review synthesis internally 8/21. • Meet with OPI on 9/5 to present/review synthesis. • Form OCM team. Begin meeting.

Systems Assessment Consulting (Milestones 1, 2, 3)	**Project Status, Sentiment, and Risks**
	• Project Status: Green
	• Last Sentiment Survey Response: No survey yet.
	• **Risks**
	    • Same as risks noted in the General section of this report.
	
	Achieved This Period
	• Application Assessment completed onsite the week of 8/14.
	• Migration Readiness Assessment completed onsite the week of 8/7.
	• Creating draft documents/deliverables related to the migration readiness assessment to deliver to OPI by 9/8.
	• Onsite visits have gone really well and have been very productive and collaborative.
	
	Planned for Upcoming Period
	• Database Assessment planned virtually for the week of 8/21. Decision made to review a representative sample (3 databases).
	    o OPI needs to define a list of (up to) 3 databases for AWS to conduct the virtual workshops. They also need to run an assessment script prior to the workshops. OPI to send invites.

	• Creating draft documents/deliverables related to the application assessment to deliver to OPI by 9/8.

Connected Intelligence (Milestones 4a, 4b)	**Project Status, Sentiment, and Risks**
	• Project Status: Yellow
	• Last Sentiment Survey Response: No survey yet.
	• **Risks**
	    • This project is delayed and blocked due to the following reasons:
	        • District approval is needed from the PS SIS districts to be able to load their data into Connected Intelligence. This has also delayed the VPN setup for Billings.
	    • OPI needs to work with iC to determine how we can connect to the database to pull the data into CI. Because of this the VPN for the iC data source is delayed.
	
	Achieved This Period
	• OPI provided an update on getting approval from PS SIS districts. We do not need approval if we are only going to pull the approved data elements. PowerSchool will meet internally to discuss next steps.
	• OPI shared the AIM Data Dictionary which details out the data elements that OPI can/can't collect from iC districts for reporting.
	• PowerSchool technical team met with OPI on 8/8/23 to discuss options for connecting to iC.
	• OPI met with iC on 8/17/23.
	
	Planned for Upcoming Period
	• OPI to work with iC on next steps.
	• OPI to work with legal team to determine how to get approval from PS SIS districts.
	• PowerSchool to share the requested list of iC tables that we need to populate the data warehouse once the documentation Risk reported in the General section is resolved.

Unified Insights (Milestones 5a, 5b)	**Project Status, Sentiment, and Risks** • Project Status: Essentials Yellow • Project Status: Advanced Bundle; On Hold • Project Status: Community Engagement; On Hold • Last Sentiment Survey Response: No surveys yet. • **Risks** • Same as Connected Intelligence. **Achieved This Period** • None **Planned for Upcoming Period** • None
Project Governance (Milestones 6, 7)	**Achieved This Period** • Project Kickoff completed 7/20/23. • Project plan updated/completed 7/18/23. **Planned for Upcoming Period** • Create project charter.