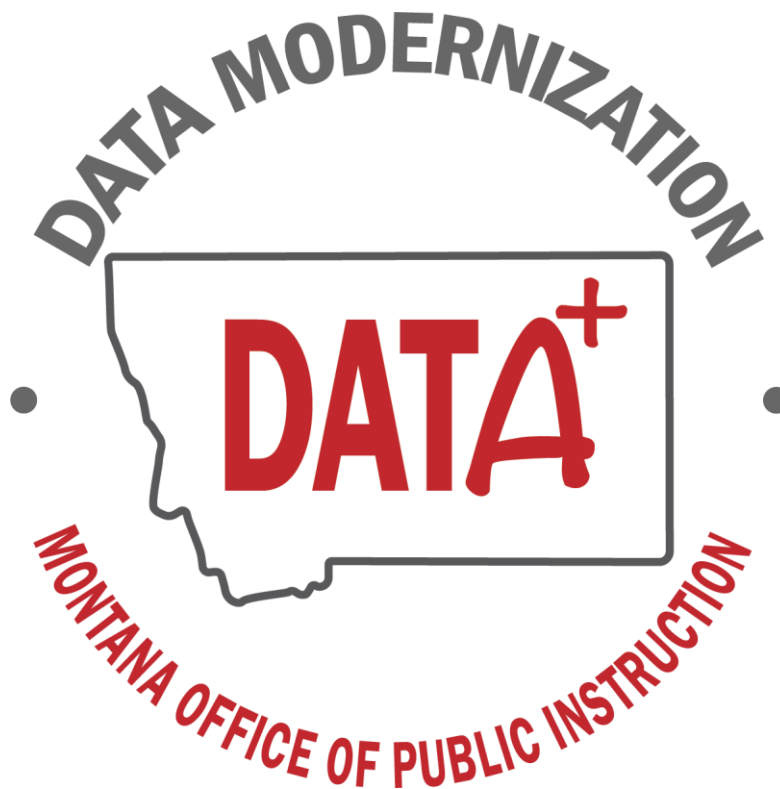


**Educational Data Integration Weekly Meeting**  
**MT Office of Public Instruction and PowerSchool**



**Meeting Date: August 25, 2023**

**Materials:**  
**PowerSchool Executive Summary**

<b>Customer Leads</b>	Project Technology Sponsor Project Manager				
<b>PowerSchool Leads</b>	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				
<b>Scope</b>	Systems Assessment, Connected Intelligence, Unified Insights (Essentials, Advanced Bundle, Community Engagement), OCM, Customer Education				
<b>Budget</b>	KTO 3735.50/3750 and 50/50				
<b>Important Note</b>	The content of this document includes confidential information.				
<b>Milestones</b>	<b>Milestone</b>	<b>Project Status</b>	<b>Planned /Target Completion Date</b>	<b>Current Forecast</b>	<b>Actual Date</b>
	<b>Milestone 1</b> -Systems Assessment Consulting-Delivery of Draft Assessment Output	In Progress/On Track	09/08/2023	09/08/2023	
	<b>Milestone 2</b> -Systems Assessment Consulting-Montana Review and Feedback	Not Started/On Track	09/15/2023	09/15/2023	
	<b>Milestone 3</b> -Systems Assessment Consulting-Deliverable Updates and Final Approval	Not Started/On Track	09/22/2023	09/22/2023	
	<b>Milestone 4a</b> -Connected Intelligence Deployed with 2 Data Sources	Not Started/Delayed	10/20/2023	10/20/2023	
	<b>Milestone 4b</b> -Replicate up to 6 Additional Connected Intelligence Sources	Not Started	07/20/2025	07/20/2025	
	<b>Milestone 5a</b> -Base Unified Insights Modules Deployed	Not Started	08/20/2024	08/20/2024	
	<b>Milestone 5b</b> -Unified Insights Customizations Complete	Not Started	07/20/2025	07/20/2025	
	<b>Milestone 6</b> -Post-Deployment Assessment Complete	Not Started	6/20/2025	6/20/2025	
	<b>Milestone 7</b> -Solution Acceptance and Signoff	Not Started	07/20/2025	07/20/2025	

<p><b>General Project Updates</b></p>	<p><b>Achieved This Period</b></p> <ul style="list-style-type: none"> <li>• None</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>• Resolve risks so the project can move forward more effectively.</li> </ul> <p><b>Risks</b></p> <ul style="list-style-type: none"> <li>• <b>Sharing Documentation Publicly</b> <ul style="list-style-type: none"> <li>○ Risk Level=High</li> <li>○ Responsible: PowerSchool and OPI Legal</li> </ul> </li> <li>• <b>Branding of Project Documentation</b> <ul style="list-style-type: none"> <li>○ Risk Level=Medium</li> <li>○ Responsible: PowerSchool and OPI Legal</li> </ul> </li> </ul>
<p><b>Organizational Change Management (No Associated Milestones)</b></p>	<p><b>Project Status, Sentiment, and Risks</b></p> <ul style="list-style-type: none"> <li>• Project Status: Green</li> <li>• Last Sentiment Survey Response: No survey yet.</li> <li>• <b>Risks:</b> Same as risks noted in the General section of this report.</li> </ul> <p><b>Achieved This Period</b></p> <ul style="list-style-type: none"> <li>• Reviewed synthesis internally 8/21.</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>• Meet with OPI on 9/5 to present/review synthesis.</li> <li>• Waiting for participant list from OPI to form OCM team; schedule meetings.</li> </ul>
<p><b>Systems Assessment Consulting (Milestones 1, 2, 3)</b></p>	<p><b>Project Status, Sentiment, and Risks</b></p> <ul style="list-style-type: none"> <li>• Project Status: Green</li> <li>• Last Sentiment Survey Response: No survey yet.</li> <li>• <b>Risks:</b> Same as risks noted in the General section of this report.</li> </ul> <p><b>Achieved This Period</b></p> <ul style="list-style-type: none"> <li>• Database Assessment completed virtually the week of 8/21.</li> <li>• Requested documentation received from OPI.</li> <li>• AWS creating draft documents/deliverables related to the migration readiness assessment and application assessment to deliver to OPI by 9/8.</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>• Start creating draft documents/deliverables related to the database assessment to deliver to OPI by 9/8.</li> </ul>
<p><b>Connected Intelligence (Milestones 4a, 4b)</b></p>	<p><b>Project Status, Sentiment, and Risks</b></p> <ul style="list-style-type: none"> <li>• Project Status: Yellow</li> <li>• Last Sentiment Survey Response: No survey yet.</li> <li>• <b>Risks</b> <ul style="list-style-type: none"> <li>• This project is delayed and blocked due to the following reasons:           <ul style="list-style-type: none"> <li>• 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.               <ul style="list-style-type: none"> <li>• This risk is closed. We do not need approval if we are only going to pull the approved data elements. PowerSchool will meet internally to discuss next steps.</li> </ul> </li> </ul> </li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>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.</li> </ul> <p><b>Achieved This Period</b></p> <ul style="list-style-type: none"> <li>Next steps shared from OPIs meeting with iC. Have narrowed down options for connecting. OPI need to meet with the PowerSchool technical team to discuss further.</li> <li>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.</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>Meet with PowerSchool technical team to discuss iC connection options.</li> <li>PowerSchool to meet internally to discuss next steps for loading PS SIS data to CI.</li> <li>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.</li> </ul>
<p><b>Unified Insights (Milestones 5a, 5b)</b></p>	<p><b>Project Status, Sentiment, and Risks</b></p> <ul style="list-style-type: none"> <li>Project Status: Essentials Yellow</li> <li>Project Status: Advanced Bundle; On Hold</li> <li>Project Status: Community Engagement; On Hold</li> <li>Last Sentiment Survey Response: 8/21 Neutral</li> <li><b>Risks:</b> Same as Connected Intelligence.</li> </ul> <p><b>Achieved This Period</b></p> <ul style="list-style-type: none"> <li>None</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>None</li> </ul>
<p><b>Project Governance (Milestones 6, 7)</b></p>	<p><b>Achieved This Period</b></p> <ul style="list-style-type: none"> <li>None</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>Create project charter once OPI shares outline.</li> </ul>