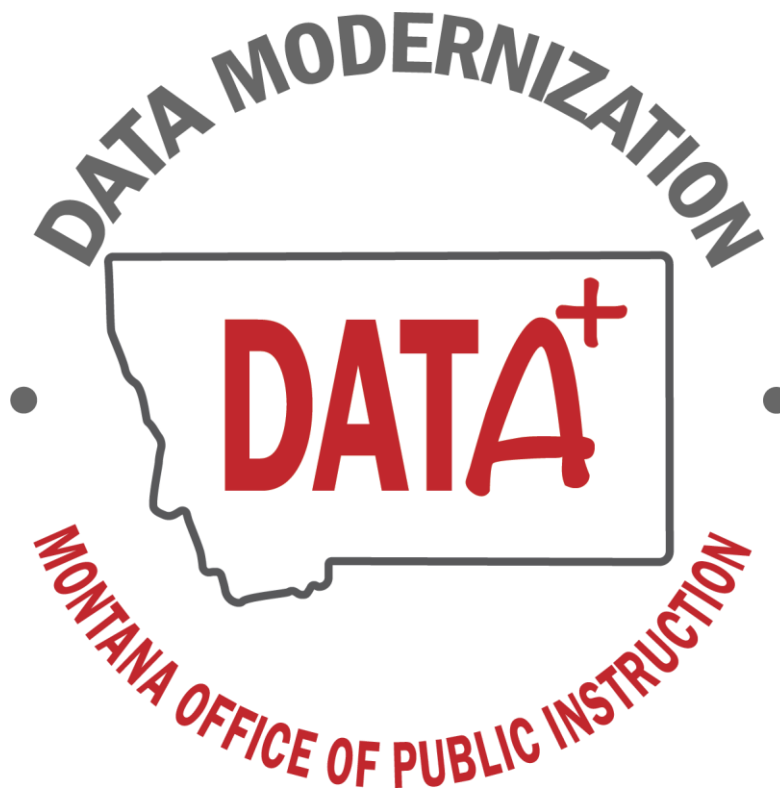


Educational Data Integration Weekly Meeting
MT Office of Public Instruction and PowerSchool



Meeting Date: September 22, 2023

Materials:
PowerSchool Executive Summary

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 3729.75/3750 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	Completed	09/08/2023	09/08/2023	09/08/2023
	Milestone 2 -Systems Assessment Consulting-Montana Review and Feedback	Completed	09/15/2023	09/18/2023	09/18/2023
	Milestone 3 -Systems Assessment Consulting-Deliverable Updates and Final Approval	Completed	09/22/2023	09/22/2023	09/22/2023
	Milestone 4a -Connected Intelligence Deployed with 2 Data Sources	In Progress/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	

<p>General Project Updates</p>	<p>Achieved This Period</p> <ul style="list-style-type: none"> PowerSchool attended (virtually) a Governing Board meeting with OPI on 9/22. Met on project charter next steps. <p>Planned for Upcoming Period</p> <ul style="list-style-type: none"> N/A <p>Risks: None</p>
<p>Organizational Change Management (No Associated Milestones)</p>	<p>Project Status, Sentiment, and Risks</p> <ul style="list-style-type: none"> Project Status: Green Last Sentiment Survey Response: No survey yet. Risks: None <p>Achieved This Period</p> <ul style="list-style-type: none"> First OCM meeting completed 9/18. Stakeholder assessment in progress. <p>Planned for Upcoming Period</p> <ul style="list-style-type: none"> Next meeting scheduled for 10/3. OPI to fill out stakeholder assessment form by 10/2. Collaborate on documentation that can be shared to communicate more about Unified Insights.
<p>Systems Assessment Consulting (Milestones 1, 2, 3)</p>	<p>Project Status, Sentiment, and Risks</p> <ul style="list-style-type: none"> Project Status: Green Last Sentiment Survey Response: No survey yet. Risks: None. <p>Achieved This Period</p> <ul style="list-style-type: none"> OPI reviewed draft documents and provided feedback on 9/18. Labor estimates were shared with OPI 9/18. No feedback on the estimates. Final documents were shared on 9/22 via Datto. All deliverables for this workstream are complete. <p>Planned for Upcoming Period</p> <ul style="list-style-type: none"> N/A
<p>Connected Intelligence (Milestones 4a, 4b)</p>	<p>Project Status, Sentiment, and Risks</p> <ul style="list-style-type: none"> Project Status: Yellow Last Sentiment Survey Response: No survey yet. Risks <ul style="list-style-type: none"> This project is delayed and blocked due to the following reasons: <ul style="list-style-type: none"> We need to determine a path forward for loading the PS SIS data to CI. Delay in setting up the iC connection. <p>Achieved This Period</p> <ul style="list-style-type: none"> OPI submitted form for connection request to iC. PowerSchool shared the requested list of tables. Met to discuss plan for communicating to PS SIS districts regarding solution and next steps for CI integration. <p>Planned for Upcoming Period</p> <ul style="list-style-type: none"> Move iC connection work forward. Continue planning for PS SIS district meeting.

	<ul style="list-style-type: none"> Finalize district list.
<p>Unified Insights (Milestones 5a, 5b)</p>	<p>Project Status, Sentiment, and Risks</p> <ul style="list-style-type: none"> Project Status: Essentials Yellow Project Status: Advanced Bundle; On Hold Project Status: Community Engagement; On Hold Last Sentiment Survey Response: 8/21 Neutral Risks: Same as Connected Intelligence. <p>Achieved This Period</p> <ul style="list-style-type: none"> None <p>Planned for Upcoming Period</p> <ul style="list-style-type: none"> None
<p>Project Governance (Milestones 6, 7)</p>	<p>Achieved This Period</p> <ul style="list-style-type: none"> None <p>Planned for Upcoming Period</p> <ul style="list-style-type: none"> None