

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



**Meeting Date: November 9, 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 3705/3750 and 50/50				
<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	Completed	09/08/2023	09/08/2023	09/08/2023
	<b>Milestone 2</b> -Systems Assessment Consulting-Montana Review and Feedback	Completed	09/15/2023	09/18/2023	09/18/2023
	<b>Milestone 3</b> -Systems Assessment Consulting-Deliverable Updates and Final Approval	Completed	09/22/2023	09/22/2023	09/22/2023
	<b>Milestone 4a</b> -Connected Intelligence Deployed with 2 Data Sources	In Progress/Delayed	10/20/2023	01/20/2024	
	<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	
<b>General Project Updates</b>	<b>Achieved This Period</b>				

	<ul style="list-style-type: none"> <li>A demo of the products purchased was requested by the project team. PM is following up internally to schedule this. This came up recently in the OCM conversations but this is a new request for the PM.</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>Review VPNs needed.</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><b>Risks:</b> None</li> </ul> <p><b>Achieved This Period</b></p> <ul style="list-style-type: none"> <li>N/A</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>Remaining deliverables: Vision document: 11/20, Communication plan: 12/20</li> <li>Next OCM meeting scheduled for 11/17.</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 response.</li> <li><b>Risks-</b>This project is delayed and blocked due to the following reasons:             <ul style="list-style-type: none"> <li>We need to determine a path forward for loading the PS SIS data to CI. (R-2648)</li> <li>Delay in setting up the iC connection. (R-2649)</li> </ul> </li> </ul> <p><b>Achieved This Period</b></p> <ul style="list-style-type: none"> <li>OPI met with iC Friday 11/3. Discussed secure connection requirement. No follow-ups or feedback for the PS team ahead of our discussion on Monday.</li> <li>OPI and PowerSchool will meet 11/13 to talk about the iC connection and CI. Then we may need a meeting with OPI, iC, and PS.</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>PowerSchool will continue to work to map required data elements to PS SIS connector to determine which custom option we can go with to load data to CI from PS SIS districts since we cannot use our standard connector to bring in all data elements from the SIS.</li> </ul> <p><b>Outstanding Items for OPI</b></p> <ul style="list-style-type: none"> <li>Need confirmation from OPI on if the iC State Edition has all iC SIS data elements or just those required for reporting.</li> <li>OPI has the connection information for us for both the state edition and Kalispell. This needs to be shared.</li> <li>Need an email from OPI stating approval to move forward with using a secured ODBC connection as long as the following criteria are met: 1) That the data is being encrypted in transit. 2) That OPI confirms that they are ok with not using a secure tunnel to gain access and that they agree with iC's proposal to go the ODBC route.</li> </ul>

	<ul style="list-style-type: none"> <li>• Team has questions on the secured connection setup and would like to meet with a technical team to review the data flow details. Would like to see a network diagram. Tech meeting scheduled for 11/13.</li> </ul>
<p><b>Unified Insights</b> (Milestones 5a, 5b)</p>	<p><b>Project Status, Sentiment, and Risks</b></p> <ul style="list-style-type: none"> <li>• Project Status: Essentials; Yellow; On Hold; CI needs to be completed first.</li> <li>• Project Status: Advanced Bundle; On Hold; Essentials needs to be deployed first.</li> <li>• Project Status: Community Engagement; On Hold</li> <li>• Last Sentiment Survey Response: 9/11 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>• No Updates</li> </ul> <p><b>Planned for Upcoming Period</b></p> <ul style="list-style-type: none"> <li>• None</li> </ul>
<p><b>Project Governance</b> (Milestones 6, 7)</p>	<ul style="list-style-type: none"> <li>• Future Milestones; No updates</li> </ul>