

## **K-12 Data Task Force Meeting Minutes November 16, 2016**

### **Attendees:**

#### **Legislators**

- Representative Debra Lamm, Vice Chair, House Education Committee
- Representative Sarah Laszloffy, Chair, House Education Committee
- Senator Taylor Brown, Chair, Senate Education Committee
- Senator Mark Blasdel, Vice Chair, Senate Education Committee
- Representative Edie McClafferty, Vice Chair, House Education Committee (via phone for appointment of new members)

#### **Task Force Members:**

- Pam Birkeland, Superintendent, Madison County
- Heather Davis Schmidt, Superintendent, Whitefish
- Greg Trangmoe, Trustee, Stevensville
- Jacklyn Young, Business Manager, Fairview
- Elizabeth Campbell, Teacher, Rudyard
- Tom Hering – Technology, Great Falls
- Jill Rocksund, Trustee, Columbia Falls
- Susan Quinn, Teacher, Great Falls
- Robert DoBell, Superintendent, Three Forks

#### **OPI Staff:**

- Sue Mohr, Division Administrator Measurement and Accountability
- Jamey Ereth, Data Collections Bureau Chief
- Madalyn Quinlan, Chief of Staff
- Joe Hamilton, Business Analyst
- Brett Carter, Project Manager
- Ken Bailey, Assistant Superintendent of Operations

#### **Member of the Public:**

- Dennis Parman – Executive Director, Montana Rural Education Association

### **Welcome and Introductions**

- Ken provided each member a book and introduced contents. The book consists of the following:
  - Agenda
  - OPI recommendation for Appointment of New Members
  - Listing of Appointed Task Force Members
  - Statutes Creating K-12 Data Task Force
  - Agenda and Notes – January 15, 2014
  - OPI Collections and Reporting Analysis
  - SJR 10 and resulting Data Collection Audit
  - List of School Information Systems by District
  - Reimbursement for Travel Expenses

- Section 4 of notebook are statutes related to k12 data task force and provide direction. Section 20-7-104 include better of use of data, transparency, what kind of elements are required to collect.
- Emphasis of local control is important while choosing the SIS that works best for the schools.
- Potential topics to discuss include transparency, duplication, reporting burden from public schools, privacy rights of students and families and protection of data at state level.
- How can OPI help schools and districts protect their data?
- The 2015 Legislature requested that a performance audit of the school data collections system be prioritized by the Legislative Audit Committee. One recommendation from that audit required that OPI continues to work with the K-12 data task force to continue discussion and serve as an advisory role.

### **Appointment of Members by Legislators**

- According to statute, the legislators on the committee have the responsibility to appoint new members. Prior to the meeting, copies of each application and OPI's recommendations were sent to the legislators. These were discussed during a phone conference on November 2, 2016, but a quorum was not present to appoint members. A late application for Mindy Obert was also sent to the legislators prior to this meeting.
- There are eight legislative members of the task force. The four legislators present were joined by Representative McClafferty via phone to form a quorum.
- Senator Brown moved that Mindy Obert be appointed to the task force. Representative McClafferty seconded. The motion passed unanimously.
- Senator Brown moved the all applicants recommended by OPI be appointed to the task force. Representative McClafferty seconded. The motion passed unanimously.

### **K-12 Data Task Force Purpose, Madalyn Quinlan**

- Section 4 of notebooks are statutes related to K12 data task force.
- Section 20-7-104 provides for legislative intent of the committee, specifically, to make better use of data to improve transparency.
- Sections 6 and 8 refer to the task force: enhance ability of state and other users to collect and share data between schools and state.
- OPI asks to collect input from committee and how to resolve data entry duplications.

- Emphasis of the committee is to provide transparency of data collections and reporting at OPI and discuss effective and efficient reporting to public, schools, legislators and policy makers.
- Committee also emphasizes the privacy right of students and families; both protection of data at state level and how to help school districts protect their own data.
- The 2015 legislative session concluded a need for an audit. Review of the audit highlighted the need to reconvene this task force. The task force serves to continue discussion and efficient use of data and school systems across Montana.
- School representatives addressed their concerns of data redundancy and burden to their staff's time.
- School representatives also commented on time constraints for schools who do not have dedicated staff to report so many superintendents have this responsibility, which is burdensome.

#### **SJR 10 – Audit of OPI Data Collection Practices, Presentation provided by Ken Bailey**

- Ken was named as the primary contact for the audit. A copy of the audit is in the tab 7 of the notebook. Ken's presentation of the timeline and key findings of the audit is in tab 10 of the notebook.
- Ken's presentation focused on three main areas:
  - **Burden:** The auditors surveyed schools and confirmed that school districts view OPI data collections to be a burden and to distract staff from their mission. The auditors reviewed 1577 data elements from the 37 data collections considered to be "major" and found only six data elements that are not required by rule, statute, or regulation. OPI has discontinued collecting these elements but was not able to eliminate any collections. The audit did not recommend any actions to reduce the number of data collections.
  - **Redundancy:** The most cited issue by schools regarding data collections is "redundancy". However, the auditors did not find any duplicate data elements collected by OPI. The redundancy cited by schools is in the form of data entered into the local school system and then re-entered into an OPI application.
  - **Privacy:** The audit uncovered instances of identifiable student data sent between OPI staff via unprotected email. Also, identifiable student data was found lying on an employee's desk after hours. The OPI has taken corrective actions.
- Ken asked for questions or comments. Comments received included:
  - One school points out the 37 collections by month for AIM uploads and AIM reports alone, which is a lot.
  - A school asked for ability "to push a button" and have it go to OPI. Ken asked to turn to tab 8 SIS (student information system) summary table of the book. Of the 307 total school systems, 45% use Infinite Campus (IC) as an SIS vendor. Schools with IC have the easiest time transferring data because the state SIS uses IC also. The state IC and Power School interface has to be developed. Reporting is not as easy with PowerSchool because the Powerschool software is

highly configurable to each school's needs. This means that each Powerschool school is unique and therefore finding consistent ways to facilitate the transfer of data to the state from Powerschool schools is difficult.

- Another school representative mentioned that renewal and training costs are great. It would help to create financial assistance to more schools so they may switch systems to accommodate their reporting to OPI.
- Schools addressed redundancy, how many times they must give the same information to AIM, the school nutrition program, and for grants.
- Rural schools are prohibited by limited human and financial resources which make things burdensome to meet OPI reporting requirements.
- At Great Falls Public School it takes tremendous amount of technical expertise to correlate systems. Suggests there may be an opportunity to do this through the vendors themselves. Developing standard interfaces would be really helpful for schools. A potential option is working with vendors to develop interfaces.
- Schools would like the ability to push button and send to OPI rather than input redundant data. (I.e. duplication of Black Mountain financial software and MAEFAIRS).

### **Role of the Task Force in OPI Data Governance, Presentation provided by Sue Mohr**

- Sue's presentation is included in tab 10 of the notebook.
- Data governance is a fairly new process to ensure appropriate handling of data. As data systems have grown so has the need for securing student data.
- Montana was among the last of the states to develop a Statewide Longitudinal Database. When inputting data in the data warehouse OPI first ensures it is consistent and accurate. That creates need for a review process through data governance.
- OPI's current data governance structure was adopted from the Kansas Department of Education's data governance process and encompasses the lifecycle of data.
- Creating effective organizational structure is the biggest challenge in data governance.
- The OPI Data Governance Committee is the policy making committee.
- The OPI Core Data Stewards Committee is the workhorse committee. This committee consists of DBAs, programmers, program managers. When core data stewards get a new request they review the impact on their own data systems and other division's systems. Often, ad-hoc committees are formed to review procedures on how to handle data changes.
- Interoperability is a continuous issue especially between schools. PowerSchool works great for many schools because it is customizable for the school. However it makes it difficult for OPI because of these differing school customizations.
- All schools define data elements differently. Most schools have standardized their definitions (i.e. cohort graduation data). Training continues to help schools to understand these definitions.

- The OPI accepted all recommendations provided by the audit and found the audit process was useful in reviewing inefficiencies in data collections. Jamey Ereth, OPI Bureau Chief is responsible for implementing many of the areas identified in the audit.
- Sue asked the K-12 task force what role they would prefer to assume in data governance:
  - Taskforce agreed that data is an integral part of curriculum development and an important tool.
  - Task force asked how schools would pay for annual subscription costs when making the switch to another student information system (SIS).
  - Task force Infinite Campus users agreed that OPI has been helpful in assistance and providing support.
- Task force addressed the need for every educator having security training. OPI has provided video training that has been successful in training schools and frequently assists schools in this training effort.
- Sue and Jamey provided current costs of Infinite Campus to task force - If a Montana public school district purchases the full Infinite Campus District Edition, the district will receive from Infinite Campus a \$3.75 per student credit in lieu of its use of the AIM Montana Edition. This annual credit of \$3.75 per student count will be calculated and applied to the district's renewal costs based on its individual contract renewal dates with Infinite Campus. The credit will be calculated on a prorated basis for those districts that have purchased the Infinite Campus District Edition and go live after the beginning of the state fiscal year.

### **Breakout Session – Recommendations for Issues the OPI Should Address**

#### **Class 1 Working Group:**

- Ensuring data collections meet all statutory requirements.
- More transparency with GEMs, specifically more training.
- CISP same time preparing TEAMS files – the perception is that OPI never reviews and is this data even meaningful?
- Attendance and aggregate collections lead to new ESSA. Guide schools in new definitions.
- Help schools identify related absences and kids missing school and impact to student learning.
- Collect chronic absenteeism, real-time, to inform educators on instruction.
- One student information system and uploading process would be useful.
- Reduce burdens identified on schools.
- These schools were all for accountability. Really like the SBAC Interim test, which is aligned to SBAC and also saves the schools money that they don't have to spend on other tests such as MAPS or STARS.

#### **Class 2 Working Group:**

- Data quality control.
- More effective communication.
- Improving terms of employment collections – project vs actual salary.
- SIS – single system or statewide.
- SIS Costs and lack of financial resources may prohibit schools from changing SIS.

- Agreement for one system among districts.
- PowerSchool Users group – Ask PowerSchool to develop method to extract data for OPI reporting.
- OPI operates in silos – i.e. school nutrition asking for data collected when in AIM.
- Ensuring data collection deadlines are reasonable and provide enough time for schools to respond.
- Lack of training for new SIS users and MAEFAIRS

### **Discuss Task Force Norms, Ken Bailey**

#### ***Consensus on Task Force Purpose***

- Serve as advisory role to improve data governance. OPI brings suggestions to task force on things to do, questions.
- Taskforce provides criteria for data collections: how does it improve student learning: ask ourselves that question about every data collection.
- Recommendations should be shared so that schools see we are working on the burden, etc.
- OPI has a duty to ensure that they have acted on recommendations which will help schools across the state.
- “This taskforce will be valuable for us coming from this group instead of just on behalf of your school.”
- "We understand we have to report this but we are asking for help from OPI to get it done."
- Outcome of this taskforce is ongoing and evolving process.

#### ***Membership – term of service?***

- Membership – term of service – If on the task force and no longer associated to the responsibilities of task force, task force agreed should not be on task force.
- Attendance shows commitment and factor for continued membership.
- Term limits suggested for class 1 schools but not for class 2 or 3.
- Legislative responsibility to appoint to task force.
- Legislators look to this committee to recommend appointment and will approve.

#### ***Frequency of Meetings***

- Quarterly meetings
- Twice a year live meetings at alternative locations.
- Twice a year via alternative means (i.e. Adobe Connect, phone conference, Web Meeting).
- Meeting times sent out a month in advance.
- MDUC conference is another meeting avenue.

#### ***Communication between Meetings***

- Website will be available with information.

### **Public Comment**

- Dennis: Superintendent Arntzen had coffee with all the interest groups yesterday.

- This was the first topic that came up.
- A lot has been done last 8 years; can't drop this under new leadership.
- Dennis will provide a brief on the Performance Audit and then go talk to OPI staff.
- Audit does not provide for the whole story.
- The federal U.S. Department of Education level: under a Trump administration, OCR reporting could be minimized or eliminated.
- The fact that legislators are represented in this conversation is powerful.
- Interim committees are a great time to do reporting on these topics and OPI can carry that.
- Dennis would like to see a study bill to study what is in statute that could be revised and help with the data burden/data collections.

### **Wrap Up/Adjournment/General Comments**

- “This meeting for me today provided crystallization for the significance of data accuracy and the importance of it. It also address issues I am now better informed on including data inconsistencies between systems, the impacts and the associated financial burden”.
- “OPI needs to communicate to new legislators about the need for data for the purposes of measuring student outcomes and school quality for accountability purposes.”
- “This committee makes us more accountable. Schools want to be accountable but want to ensure that reporting and data is something meaningful and has meaningful results.”
- “Important for school districts to understand that if a district uses its own customized SIS, then they are stuck with paying for the cost of having to send the data to the state.
- “Legislative session...proposals from Legislature that have an impact on the district, this committee should be a sounding board for that piece.”
- “All legislators here today are going to be off. Recommend getting on agenda with legislative committees and ask them for help/hearing. Maybe to interim committee perhaps.”
- We should invite all the special interests (e.g. MEA/MFT, Rural Schools Assn, Montana Indian Education Assn, SAM) to weigh in on a statewide SIS and other issues discussed by this group. These groups should also have a seat at this meeting.