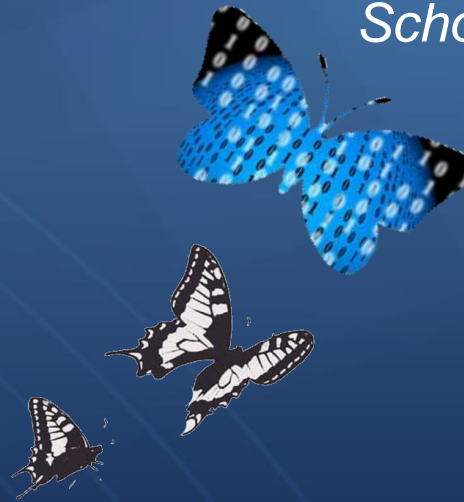


SBSM Modernization Status March 2021

*Dr Michael R Spano
Program Director
Office of Education Technology & Data Services*

*Dr Mark Samberg
Director
School Business Systems Modernization*

*Office of the Superintendent
Department of Public Instruction*



AGENDA

Legislation

LEA Modernization

Agency Modernization

Data Transparency

SBSM Next Steps

Budget Request



Data is the Foundation we will build our modern future upon.

SBSM Legislation and Workstreams

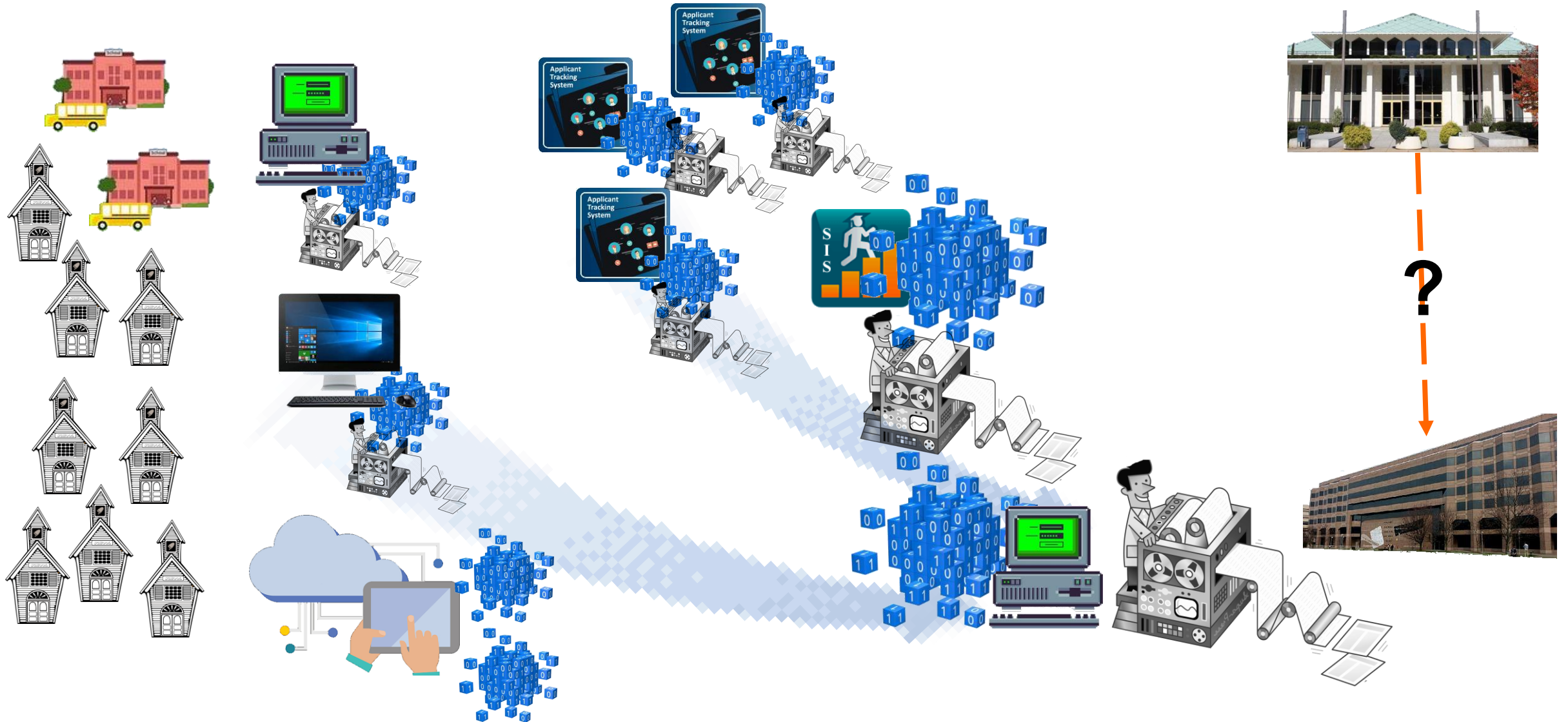
S.L. 2016-94 § 8.15

S.L. 2017-57 § 7.16

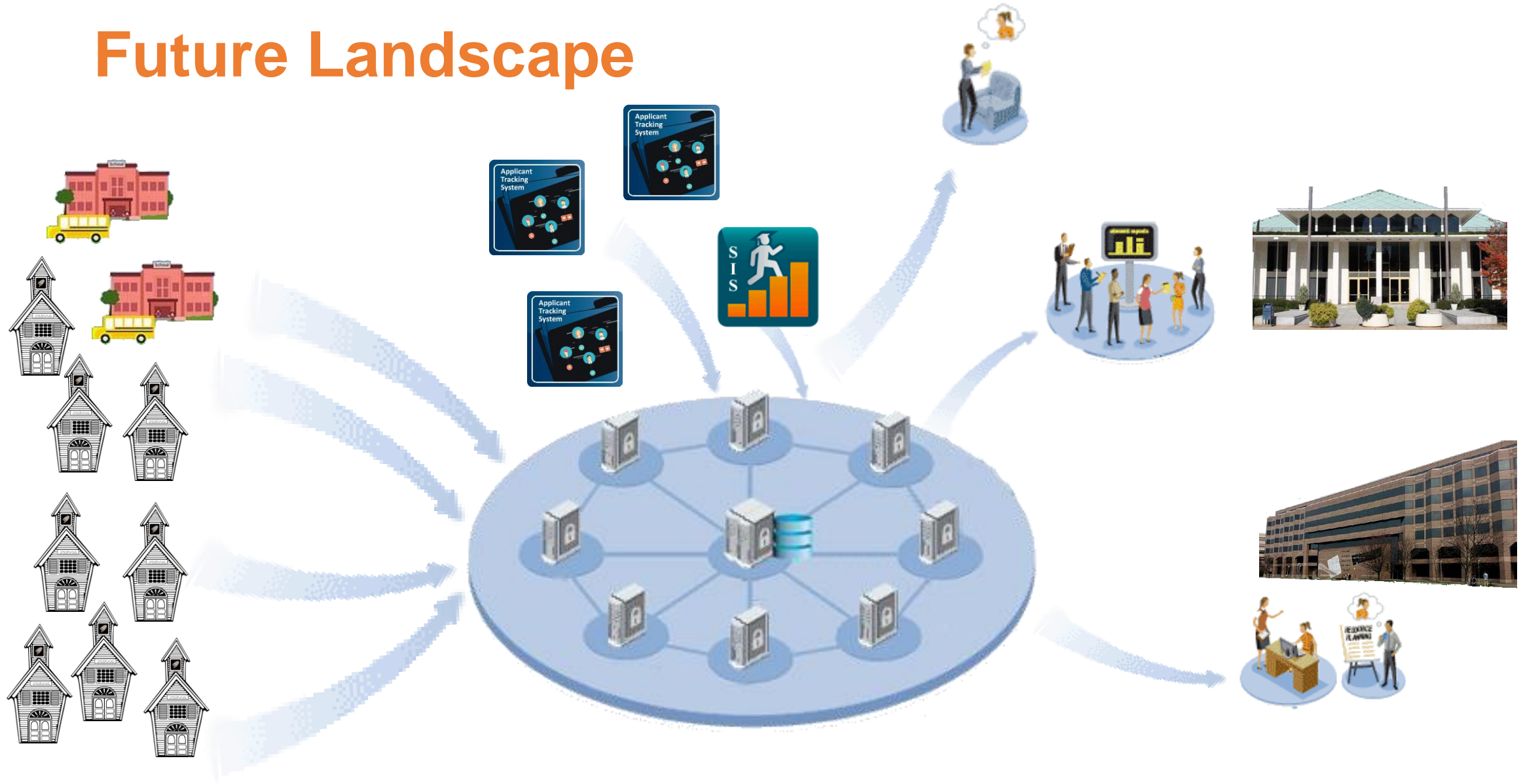
S.L. 2018-97 § 7.6



Current Landscape



Future Landscape



School Business Systems Modernization

LEA Modernization

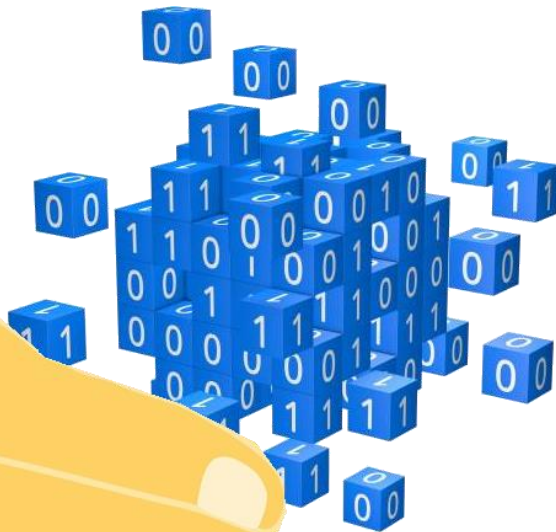


PUBLIC SCHOOLS OF NORTH CAROLINA

State Board of Education | Department of Public Instruction

LEA Modernization Overview

- LEAs and charter schools are the source of most of the data that feeds DPI systems; their HR, finance, payroll systems must be modernized
- DPI business systems are at or near the end of their useful life
- Uniform Education Reporting System (UERS) policies and specifications need to be updated
- School Business Systems Modernization has:
 - Been comprised of LEA **Enterprise Resource Planning (ERP)** systems, **statewide reporting, licensure, Student Information Systems** and related systems;
 - Provided **comprehensive planning**, design and implementation support;
 - Projected to cost **between \$150M and \$250M** in one-time funding and take **6-8 years** to implement.



SBSM PSU Pilots In Flight

CherryRoad Technologies IMPLEMENTATION SCHEDULES (PROJECTED GO LIVES)												
LEA	Legacy System	CherryRoad "Projected"										
		Imp. Phase	1/1/21	4/1/21	7/1/21	10/1/21	1/1/22	4/1/22	7/1/22	10/1/22	1/1/23	4/1/23
Charlotte Mecklenberg	Lawson	HCM-PR-FIN+CORE			HCM-PR + CORE	FIN						
		EXT. Functions					EXT. Fnctns					
Gaston	SunPac & HRMS	HCM-PR-FIN+CORE			HCM-PR-FIN +CORE							
		EXT. Functions					EXT. Fnctns					
Guilford (Self Funded)	SunPac & HRMS	HCM-PR-FIN+CORE					HCM-PR-FIN +CORE					
		EXT. Functions						EXT. Fnctns				
Cumberland (Self Funded)	SunPac & HRMS	HCM-PR-FIN+CORE						HCM-PR-FIN +CORE				
		EXT. Functions							EXT. Fnctns			
Tyler Technologies IMPLEMENTATION SCHEDULES (PROJECTED GO LIVES)												
LEA	Legacy System	Tyler Technology "Projected"										
		Imp. Phase	1/1/21	4/1/21	7/1/21	10/1/21	1/1/22	4/1/22	7/1/22	10/1/22	1/1/23	4/1/23
New Hanover County	SunPac & HRMS	FIN			FIN							
		HCM-PR			HCM-PR							
Craven County	SunPac & HRMS	FIN			FIN							
		HCM-PR			HCM-PR							
Union County	SunPac & HRMS	FIN		FIN								
		HCM-PR			HCM-PR							
Swain County	SunPac & HRMS	FIN		FIN								
		HCM-PR			HCM-PR							
TMSA CHARTER (Self Funded)	Linq	FIN			FIN							
	Linq HR	HCM-PR			HCM-PR							
Macon County	SunPac & HRMS	FIN			FIN							
		HCM-PR				HCM-PR						

SBSM PSUs Waiting on Funding to Start

CherryRoad LEAs Awaiting Funds to Begin (Ready to Start the SOW Process)												
LEA	Legacy System	CherryRoad										
		Imp. Phase	T-0	T-1	T-2	T-3	T-4	T-5	T-6	T-7	T-8	T-9
Mitchell County	SunPac & HRMS	FIN										
		HCM-PR										
Haywood County	SunPac & HRMS	FIN										
		HCM-PR										
Gates County	SunPac & HRMS	FIN										
		HCM-PR										
Washington County	SunPac & HRMS	FIN										
		HCM-PR										
Yancey County	SunPac & HRMS	FIN										
		HCM-PR										
Hyde County	Linq & Linq HR	FIN										
		HCM-PR										
Tyrell County	Linq & Linq HR	FIN										
		HCM-PR										
Chatham County	Linq & Linq HR	FIN										
		HCM-PR										
Duplin County	Linq & Linq HR	FIN										
		HCM-PR										
Buncombe County	Linq & Linq HR	FIN										
		HCM-PR										

Tyler Technologies LEAs Awaiting Funds to Begin (Signed SOW's between LEA and Tyler)												
LEA	Legacy System	TYLER										
		Imp. Phase	T-0	T-1	T-2	T-3	T-4	T-5	T-6	T-7	T-8	T-9
Weldon City Schools	SunPac & HRMS	FIN										
		HCM-PR										
Forsyth County	SunPac & HRMS	FIN										
		HCM-PR										
Pitt County	SunPac & HRMS	FIN										
		HCM-PR										
Stanly County	SunPac & HRMS	FIN										
		HCM-PR										
Sampson County	SunPac & HRMS	FIN										
		HCM-PR										
Currituck County	SunPac & HRMS	FIN										
		HCM-PR										
Rockingham County	SunPac & HRMS	FIN										
		HCM-PR										
Rutherford County	Linq & Linq HR	FIN										
		HCM-PR										
Beaufort County	Linq & Linq HR	FIN										
		HCM-PR										
ABSS	Linq & Linq HR	FIN										
		HCM-PR										
Randolph County	Linq & Linq HR	FIN										
		HCM-PR										
Chapel Hill - Carrboro City	Linq & Linq HR	FIN										
		HCM-PR										

School Business Systems Modernization

Agency Modernization

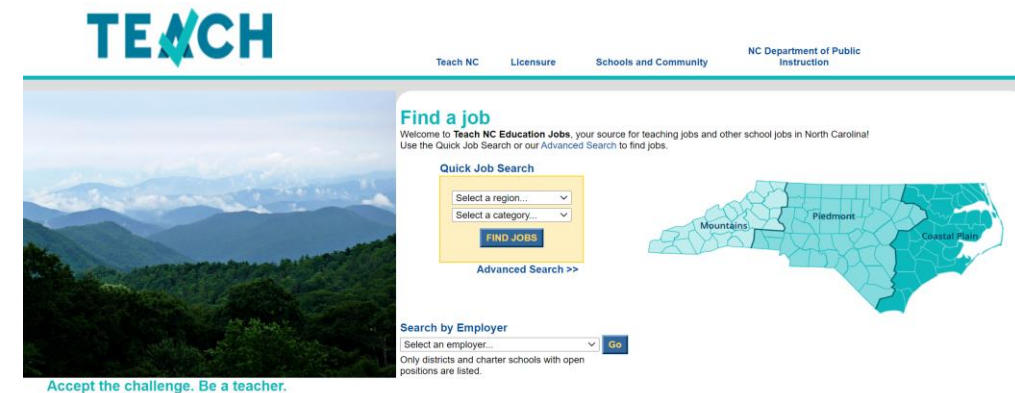
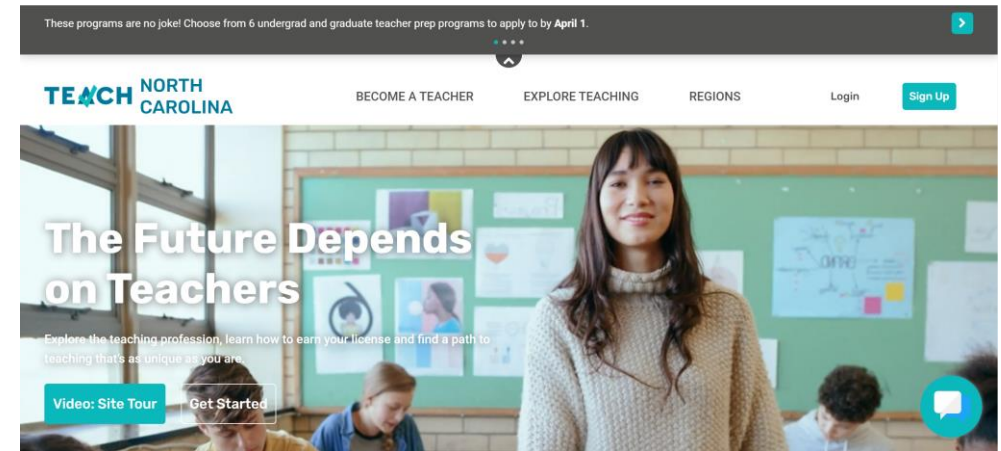


PUBLIC SCHOOLS OF NORTH CAROLINA

State Board of Education | Department of Public Instruction

Agency Modernization Accomplishments

- Moved all grants, including paper to single system
 - EC
 - CTE
 - Safer Schools
 - CCIP
- Safer School Application online and moved to Safer Schools Group
- Expanded Educator Recruitment Toolset
 - Educator Preparation Dashboard (covered in Data Transparency)
 - Teacher Recruitment Portal (Single entry to Profession)
 - www.teachnc.org
 - Single visibility to Statewide PSU opportunities
 - <https://teachnc.schoolspring.com/>
- Program for Licensure System Replacement started
- SIS RFP In BAFO
- Legacy Budgeting and Accounting System (BAAS} System sunset underway



School Business Systems Modernization

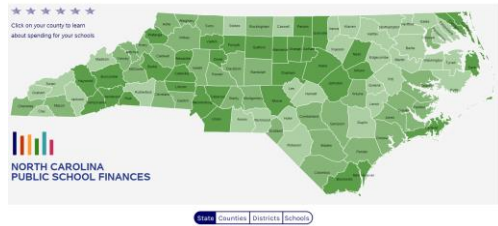
Data Transparency



PUBLIC SCHOOLS OF NORTH CAROLINA

State Board of Education | Department of Public Instruction

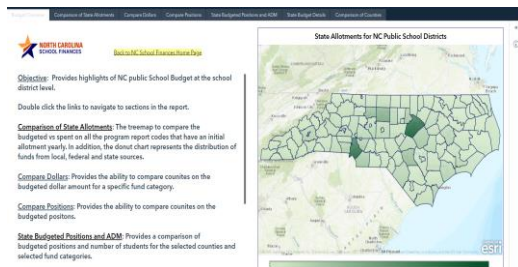
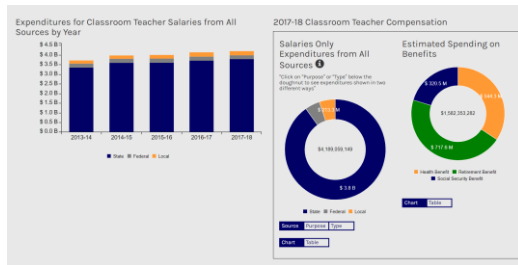
Data Transparency Accomplishments



- Release 1 & 2 of School Finances Report Card Complete www.schoolfinance.nc.gov
- State ODS online for SIS, Financials and all other domains being scheduled over the coming year
- UERS Expansion begun to ensure Data Availability and Governance (SIS, Finance and Applicants added to date)

https://dpincgov.sharepoint.com/sites/dpi_ext/bsm_a/Pages/Data-Mapping.aspx

- Integrated Operational Data Store (IODS) in final design phase. This will replace the “Lift and Shift” ODS moved from SIS.
- Reporting Data Warehouse (RDW) contract in final signoff. This will be the internal and external source of all reporting.
- Pilot for DIT Integration Service (Dell Boomi) complete and LEA Pilots targeted to go live in April & July
- Educator Preparation Program Dashboard online www.bit.ly/nceppdashboard.



Data Transparency - Educator Preparation Dashboard

Single EPP Detail

EPP Dashboard

EPP Directory

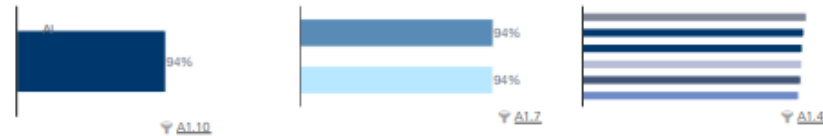
- ☒ All EPPs
- ☐ ASU
- ☐ Barton
- ☐ Belmont
- ☐ Bennett
- ☐ Brevard
- ☐ Campbell
- ☐ Catawba
- ☐ Chowan
- ☐ Duke
- ☐ ECSU
- ☐ ECU
- ☐ Elon
- ☐ FSU
- ☐ GCS
- ☐ Greensbor...
- ☐ Guilford
- ☐ GWU
- ☐ HPU
- ☐ Lees-McR...
- ☐ Lenoir-Rh...
- ☐ Livingstone
- ☐ MACU
- ☐ Mars Hill
- ☐ Meredith
- ☐ Methodist
- ☐ Montreat
- ☐ Mt Olive
- ☐ NC A&T
- ☐ NCCU
- ☐ NCSU
- ☐ NCWC
- ☐ Peace
- ☐ Pfeiffer
- ☐ Queens
- ☐ Salem

EPP Accountability Measures: Single EPP Detail

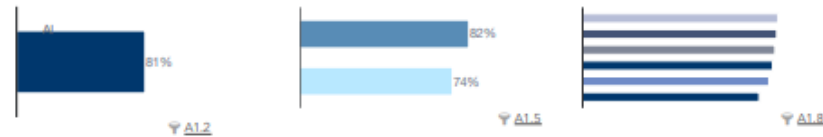
Select an EPP from the list on the left to see its performance levels on the three measures of the state accountability model. You can use the "EPP Directory" link if you are unsure of an EPP's abbreviation. For each measure, you can see the percentage of beginning teachers from the EPP who meet the measure's target. The colors of the bars identify the same subgroups across all of the graphs. To protect anonymity, results of 0% or 100%, as well as any results from subgroups of fewer than 10 beginning teachers, will display as missing. Click here for help reading the chart.

2016-18 2015-17

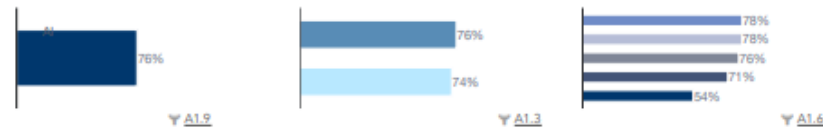
All EPPs: Teacher Evaluation - % of EPP's beginning teachers rated proficient or higher on state evaluation system



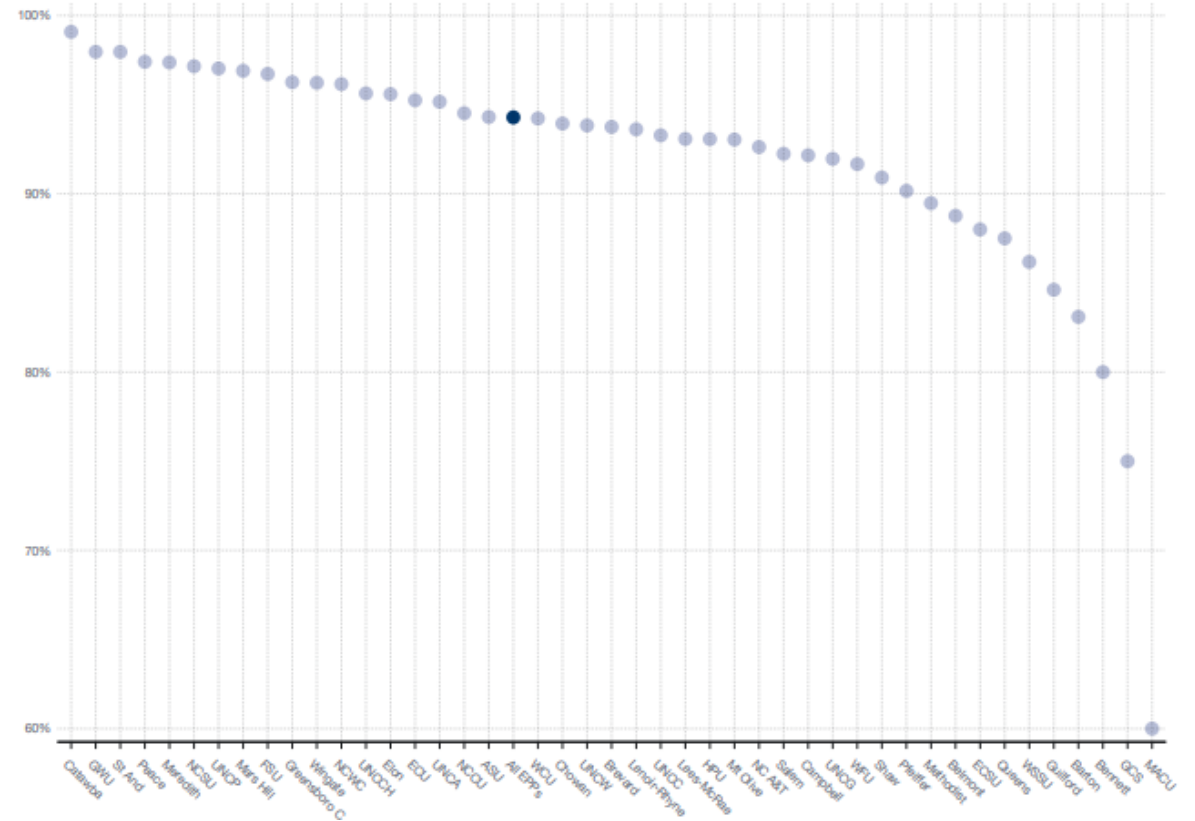
All EPPs: Student Growth - % of EPP's beginning teachers whose students met growth targets



All EPPs: Candidate Satisfaction - % of EPP's beginning teachers reporting being "well" or "very well" prepared by their EPP



Teacher Evaluation: % of Beginning Teachers Rated Proficient or Above



Why is Data Transparency Important to the State

REPORT → ANALYZE → PREDICT → PRESCRIBE



SBSM Next Steps

- Secure Biennium Funding for LEA Modernization
 - Reduces State Security Risk
 - Reduces overall cost caused by budget delays assessed by current ERP providers
 - Reduces LEA risk and cost in follow-on years
 - Reduces Planning & Staffing cost and risk
- Secure Biennium Funding for Agency Modernization & Data Transparency
 - Develop single Report Card for Attendance & Financial Data
 - Complete transition to GDAC Production Infrastructure
 - Migrate all Agency Data Domains
 - Complete UERS version 2.0

School Business Systems Modernization

Budget Request Model



SBSM Program Budget Overview

- Program was mandated by legislation S.L. 2017-57 and committed funded to \$200M+.
- With last budget vetoed has caused us to fall way behind, and if current contracted vendors pull out, DPI and the SBE will be forced to go back to square one.
- 8 LEAs and 1 Charter School currently in-flight with over 26 still on unsupported platforms.

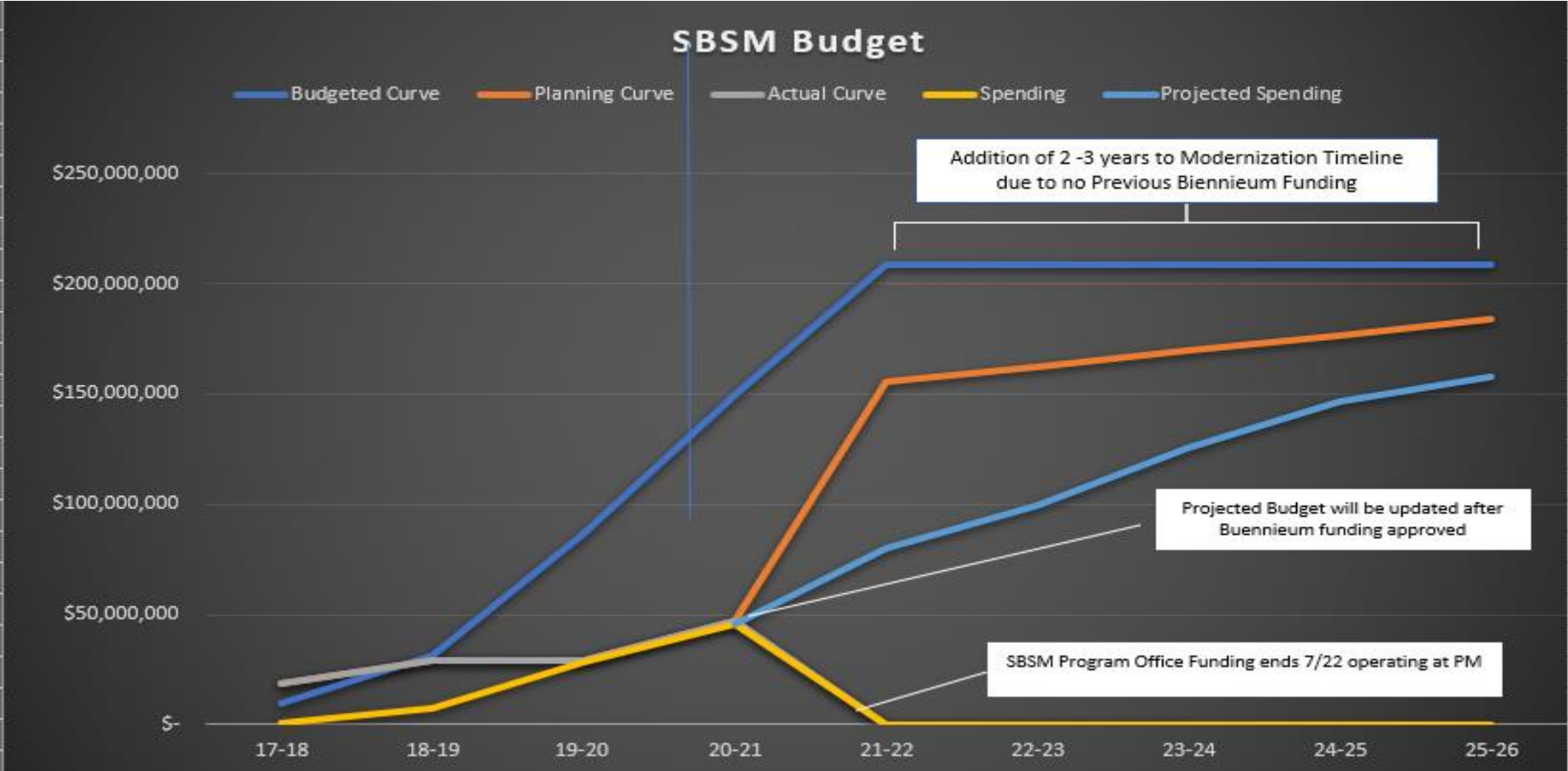
\$101,255,000
Non-Recurring



\$7,055,000
Recurring

Lack of funds have delayed SBSM ERP Projects

The delay in Program funding has caused a delay in modernizing outdated, unsecure systems that have seen skyrocketing maintenance costs.

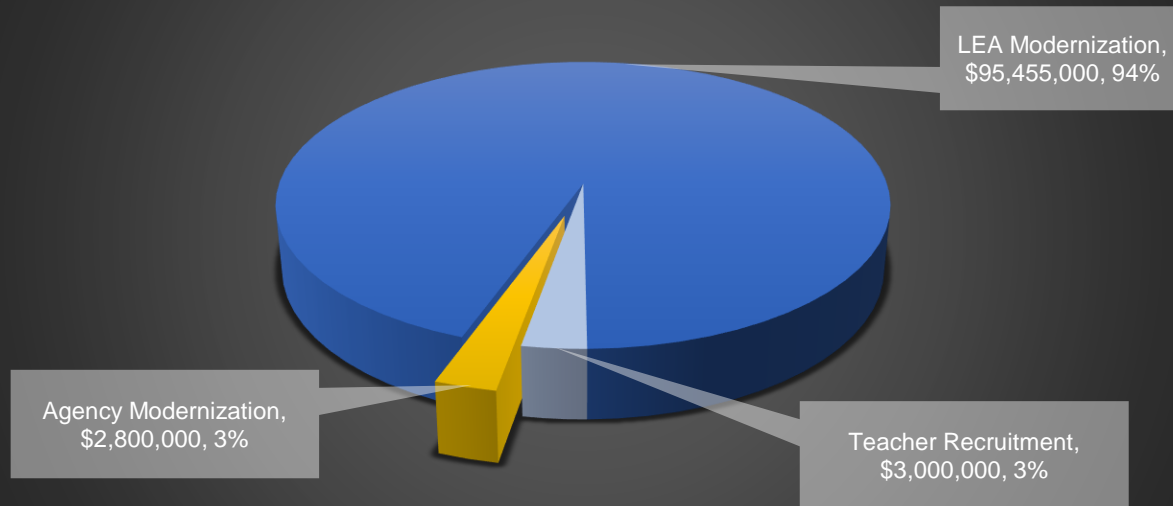


PSUs are the Target of SBSM Investments

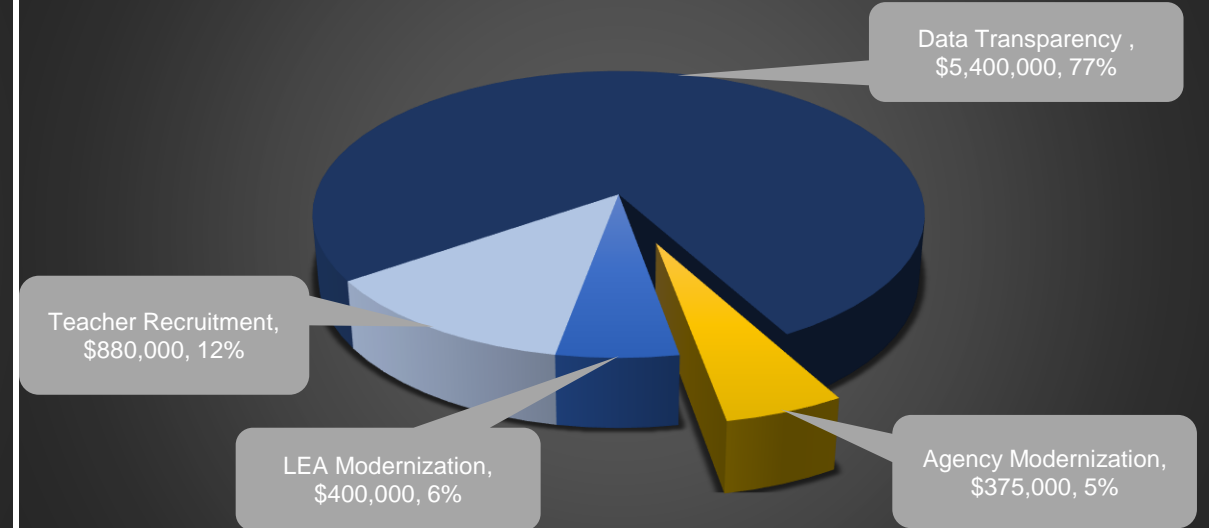
The Majority of the ERP funding is directed to, or spent on behalf of the PSU

- 97 % Nonrecurring
- 95 % Recurring.

\$101,255,000 Non-Recurring Funding Request FY22/23



\$7,055,000 Recurring Funding Request FY22/23



Budget – Additional Related Agency Modernization Requests

- **SBSM: \$101,255,000 (NR) \$7,055,000 (R)** - for funding to continue transitioning LEA and state systems to modern, more stable and secure Cloud-based platforms as directed in S.L. 2017-57

IT Program, Project, or Initiative	Budget Requirement Non-Recurring (\$)	Budget Requirement Recurring (\$)
School Business Systems Modernization Program		
LEA Modernization		
LEA Modernization the LEA financial and HR (ERP) systems to SaaS	\$95,455,000	
Agency Modernization		
NCDPI Financial Systems Modernization	\$2,800,000	
Licensure Systems Modernization	\$3,000,000	
Teacher Recruitment Project		\$880,000
Data Transparency Dashboards		\$1,400,000
Common Education Data Analysis and Reporting System (CEDARS) Expansion		\$1,000,000
Statewide Uniform Education Reporting System (UERS) Expansion		\$3,000,000
NCDIT Consolidation		
Data Center Consolidation		\$75,000
Application and Services Transition		\$100,000
Support Services		
Tier 1 Level IT Support to Vendors		\$200,000
Charter School Data Management System		\$300,000
School Bus Routing System		\$100,000
FY2021-FY2023 Expansion Request Totals --->	\$101,255,000	\$7,055,000

- **PSU Technology Fund:** **\$15,000,000 (NR)**
- **School Connectivity Initiative:** **\$6,900,000 (R)**
- **Cybersecurity: \$14,340,000 (NR)** **\$25,660,000 (R)**

* Note – there are several positions being requested that will leverage the Centralized Data Work Stream:

- Data Visualization Specialist for Education Recruitment and Support
- Data Visualization Expert for Education Human Capital Pipeline

School Business Systems Modernization

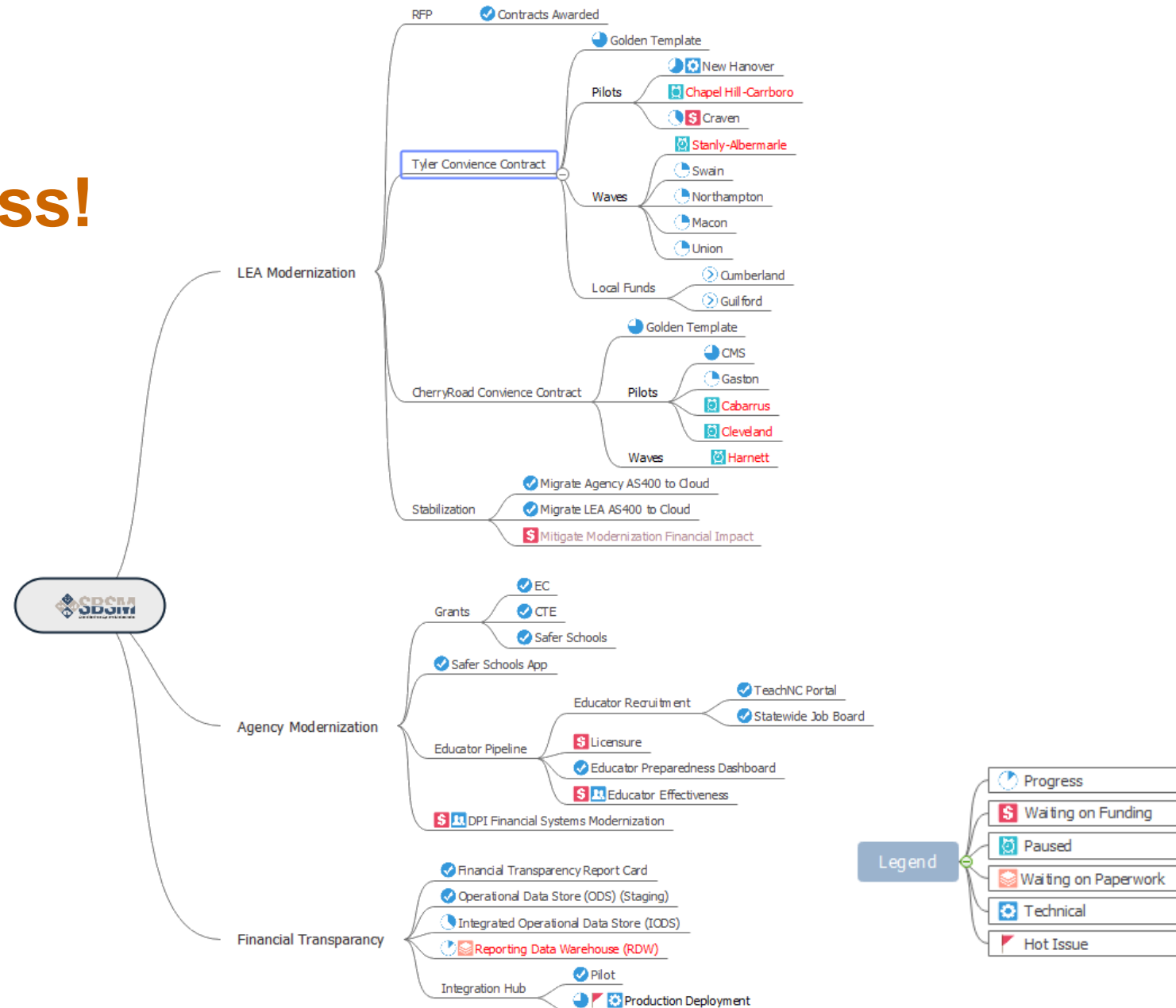
Closing Summary



Summary

We have made progress!

Budget challenges have slowed progress and for now we are just waiting on the next influx of funding to continue on our initial mission.





<http://www.ncpublicschools.org/bsm/>

PUBLIC SCHOOLS OF NORTH CAROLINA | State Board of Education | Department of Public Instruction

SCHOOL BUSINESS SYSTEM MODERNIZATION (SBSM)

GET UPDATES QUICK LINKS

SCHOOL BUSINESS SYSTEMS MODERNIZATION (SBSM)

What is SBSM?
School Business Systems Modernization (SBSM) is specified in Session Law 2016-94 SECTION 8.15 as follows:
SCHOOL BUSINESS SYSTEMS MODERNIZATION SECTION 8.15 (a) The State Board of Education shall collaborate with the Friday Institute for Educational Innovation at North Carolina State University (Friday Institute) to develop a plan to modernize the systems used by the Department of Public Instruction, Financial and Business Services Division, to manage and deliver funds and technical support services to local school administrative units and charter schools. This process shall include modernization of the Division's systems for student information management, financial and payroll information, human resources information, and capital and repairs and renovations planning information.

SBSM Components

- LEA and charter school enterprise resource planning (ERP) platforms
- State-level reporting (financial, HR, student information, etc.)
- State-level licensure

Thank you!



PUBLIC SCHOOLS OF NORTH CAROLINA
State Board of Education | Department of Public Instruction

Jargon

- **SBSM** – School Business Systems Modernization
- **GDAC** – Government Data Analytics Center – DIT reporting partner
- **ERP** – Enterprise Resource Planning – Finance, HR, payroll application
- **PMO** – Program management office
- **ODS** – Operational Data Store – collection point for data that feeds reporting and other consuming applications
- **HRMS** – Human Resources Management System – legacy software system provided to LEAs by DPI
- **AS/400** – IBM system that hosts finance and HR systems at most LEAs and at DPI
- **UERS** – Uniform Education Reporting System – Statutory requirements and specifications for LEAs and charter schools to report certain data to DPI