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Office of the Superintendent of Schools
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

May 14, 2019

MEMORANDUM

To: Members of the Board of Education

From: Jack R. Smith, Superintendent of Schools

Subject: Award of Contract—Student Information System

APPROVED BY BOARD

Background

Montgomery County Public Schools (MCPS) leverages a number of crucial technology systems to operationalize teaching, learning, and business functions within the district. A Student Information System (SIS) acts as the keystone to support these systems and provides the infrastructure necessary to actualize the work. SIS is considered the central hub for transactions related to all student data in MCPS, including student enrollment, demographic data capture, emergency contacts, grades, attendance, special services, transportation needs, discipline, program enrollments, courses, and other relevant information. The Online Administrative Student Information System (OASIS) has served as the SIS in MCPS beginning in 2002.

In the past 17 years, we have made enhancements to this system in order to meet our needs. However, enhancements have been restricted in scope due to limitations in allocated funding. In 2013, we were able to migrate from an outdated scheduling platform and modernize those efforts; however, due to continued funding constraints in order to maintain a same-service budget, a broader upgrade of our core student systems was delayed. For Fiscal Year 2020, funds have been allocated to update our core student systems, which will set the course to bring our platforms into alignment with the innovations occurring across schools and departments. Specifically, the operations of the school district, as well as the ways in which student data need to be accessed have changed. Distinctive trends including innovative school calendars and students who attend multiple schools have tested the limits of our current platform. To that end, MCPS released a Request for Proposals (RFP) on November 19, 2018, RFP 4181.1, *Student Information System*, to solicit high-quality, proven technology solutions for managing student information, scheduling, grading and reporting, and other student information modules from SIS service providers. The RFP outlines each of these specific areas in great detail with respect to the features and functionality required in a SIS in order to thoroughly address the needs of MCPS.

Currently, MCPS utilizes several disparate systems that feed information back to OASIS. For example, the *myMCPS* portal permits access to the student center. This center provides views of student data and also is the main access point to the communication log, office referral, and other student system modules. In the last year, PowerSchool has been used as part of the parent portal and has served as the home for secondary master scheduling, incident management, and Section 504 Plan documentation. Teachers access the Pinnacle gradebook for assignment grades and attendance.

The combination and integration of these various systems has created inefficiencies for conducting transactions related to students and also for ensuring these systems are syncing data updates to OASIS. By engaging in this RFP process, the district's interest is to leverage the power of one integrated system and eliminate or consolidate legacy and other third party systems where possible.

Evaluation and Selection Process

RFP 4181.1, *Student Information System*, was released on November 19, 2018. Prospective service providers were invited to attend a pre-bid conference on December 4, 2018. Vendor submissions were due by December 19, 2018. After the submission window closed, the evaluation and selection process began and occurred in three major phases. An overview of each of the phases detailing the efforts and due diligence to select a viable SIS solution follows.

Phase I: Proposal Evaluation

A core team of 32 central services staff representing multiple offices and perspectives was established and tasked with reviewing the RFP submissions. Members of the core team assessed sections of the RFP and provided feedback on the various modules and components of the response as outlined in the RFP. Areas assessed included Company Background; Description of SIS Application; Hardware and Technical Overview; System Performance; Implementation Plan; Security Plan; Data Conversion Plan; System Interface Integrations; Training/Professional Development Plan; Quality Assurance and Testing; Disaster Recovery Planning; Ongoing Maintenance and Support; Customization Proposal; and References. Feedback from the core team was compiled and the core team debriefed to reach consensus on which vendors were recommended to move forward to the next phase of the RFP process. Three vendors were selected to advance to Phase II: Vendor Presentations.

Phase II: Vendor Presentations

Three vendors were invited to provide a 90-minute demonstration of their product to a broad stakeholder audience. Presentations were held during a two-day period. The first day featured a focus on secondary functionality and the second day focused on elementary functionality. All three vendors presented on both days. More than 200 stakeholders were invited to attend each day. Stakeholder invitations included one Montgomery County Education Association (MCEA) representative from each secondary school, MCEA representatives from 70 elementary schools,

school leaders, registrars, school administrative secretaries, paraeducators, information technology support specialists, master schedulers, counselors, parents/guardians, students, and central services staff.

Participants were asked to rate and provide feedback on each product. The criteria were framed from the outline provided in the RFP and in detailed instructions related to Phase II that were provided to each of the three vendors.

At the conclusion of the vendor presentations, feedback was analyzed and used to recommend candidates to move to Phase III. As a result, two vendors were identified to move to Phase III: Technical Interviews.

Phase III: Technical Interviews

Two vendors were invited to participate in technical interviews. The purpose of the interviews was to better understand, experience, and ask questions about various key areas of the platform. Nine distinct interviews with each vendor were held during a two-day period. Areas of focus included scheduling; gradebook; data privacy and legal issues; data conversion; implementation; parent, teacher, and student portal; application configuration; customization and integrations; student system modules; and infrastructure. Interviews were conducted using one of the following formats: discussion; demonstration/simulation with discussion; or hands-on interactive session with discussion. Selected vendors were provided details about each interview session and the format in which it would be conducted.

Technical interview participants consisted of central services and school-based staff with deep content expertise and knowledge of the configurations and applications being examined for each particular interview focus. Feedback was collected from the participants in each session and was used to further evaluate the products and provide a recommendation for use in MCPS. As a result of Phase III, one product surfaced as a clear front-runner for selection.

Final Product Selection

Before selecting the final product, a team of central services staff contacted at least two references for each vendor. This strategy served to gather additional recommendations and understand other districts' experience migrating their student systems, data conversion, system configurations, training, customer service, and lessons learned. Upon analyzing the data from each of the three phases of the evaluation, along with data gathered from reference calls and discussions with senior leadership and key stakeholders, we are presenting a recommended product.

Implementation Plan

Through collaboration with employee association leaders, school-based leaders, teachers, supporting services staff, parent representatives, central services staff, and senior leadership, the new platform will be implemented during the course of the next school year. By summer 2020,

most, if not all, of the student system functionality will be housed and operationalized in our new platform.

In the next 14 months, major work is planned in order to meet this goal. Essential components include process improvements, planning, gap analysis, data migration, and configuring the new platform. Establishing the environment, configuring and testing security, creating roles, conducting load testing, and iterating through data conversions are key activities that will begin this summer and will continue through the next year. Critical to success will be continued clear and frequent communication with all stakeholders, collaboration with end users to ensure successful change management, and ongoing professional development and training for all users so that they can efficiently and effectively conduct their work while capitalizing on the full power and benefits that this new platform affords.

While the implementation process is under way, MCPS will be required to maintain functionality for certain key systems with existing vendors until the transition is complete and the new modules are fully functional. During the transition period, MCPS expects to continue to utilize PowerSchool for certain modules through at least June 30, 2020, and accordingly, a contract extension has been negotiated to ensure that there are no gaps in services of student system functionality.

Conclusion

In partnership with key stakeholder groups, staff in the Office of the Chief Technology Officer developed RFP 4181.1, *Student Information System,* to solicit high-quality, proven technology solutions for managing student information, scheduling, grading and reporting, and other student information modules from SIS service providers. Through a multi-phase evaluation cycle, this process resulted in the recommendation of one high-quality, integrated platform that will serve as our new SIS, thereby eliminating the need for several disparate systems. This platform will create efficiencies in work processes and in data transfers and storage, as well as ultimately generate budgetary reductions as we consolidate and decommission legacy systems.

Following approval, staff will begin work with the selected vendor to commence the initial phases of configuration and implementation. Time lines, training information, and professional development plans will be communicated before the end of the 2019 school year. We are confident this new platform will be instrumental in helping us move forward with innovative school solutions, and we are excited to begin this new implementation.

Recommended Resolution

WHEREAS, Montgomery County Public Schools issued Request for Proposal No. 4181.1, *Student Information System*, to purchase a student information system; and

WHEREAS, A selection process was developed that included extensive input and feedback from Montgomery County Public Schools stakeholders, including school-based staff

and administrators, central services staff, parents/guardians, students, and employee associations in evaluating the responses to Request for Proposal No. 4181.1, *Student Information System,* attending vendor presentations, and participating in technical interviews; and

WHEREAS, The selection process identified a vendor product that would best meet the needs of Montgomery County Public Schools; and

WHEREAS, Based on the outcome of the selection process, the superintendent of schools recommends the purchase of Edupoint's Synergy Student Information System Platform; now therefore be it

Resolved, That the Board of Education approve the purchase of the following student information system modules, based on a fixed student count for an initial term of five years with an opportunity for three two-year extensions, not to exceed the amounts set forth below:

Year	Subscription, Hosting, and Professional Services Costs
Year 1: Fiscal Year 2020	$1,650,000
Year 2: Fiscal Year 2021	$2,053,811
Year 3: Fiscal Year 2022	$1,765,638
Year 4: Fiscal Year 2023	$1,853,947
Year 5: Fiscal Year 2024	$1,876,604
Total	$9,200,000

and be it further

Resolved, That the president of the Board of Education and the superintendent of schools be authorized to negotiate and execute agreements with Edupoint for the purchase of student system modules; and be it further

Resolved, That the president of the Board of Education and the superintendent of schools be authorized to negotiate and execute an extension of the existing contract with PowerSchool to ensure services continuity of the student information systems during the transition period necessary to implement the Edupoint student system modules in an amount not to exceed $1,400,000 for the period from July 1, 2019, through June 30, 2020; and be it further

Resolved, That the superintendent of schools be authorized to execute all other documents and grant any approvals necessary for these transactions.

JRS:AMZ:pc