SLDS FY23 Grant
Utah Annual Performance Report
2024-2025

Project Narrative

Current Status & Funding Uncertainty:

Our project faces a significant challenge due to **a lack of communication from the Department of Education regarding the future of 23SLDS Grant funding**. It is currently unknown whether this funding will continue beyond September, which presents a major concern for our project's sustainability.

Strategic Approach for Project Continuity:

To mitigate this uncertainty, we are developing a two-pronged strategic approach:

1. **Contingency Planning (Exit Strategy):** We will plan for an exit strategy, assuming the cessation of federal funding. This includes identifying critical deliverables that must be completed and outlining a responsible winding-down process for project activities and resources.
2. **Local Sustainability & Continued Operations:** Simultaneously, we will explore and pursue avenues for securing local sustainability funding. This strategy aims to determine what, if any, local resources can be secured to ensure the continued fulfillment of project obligations and objectives, even in the absence of federal support.

Addressing the Communication Gap:

Our preference is to receive timely and definitive communication from the Department of Education regarding the continuation or discontinuation of the 23SLDS Grant. Such clarity would allow us to proceed with confidence, either by continuing planned work or by initiating a well-managed transition. The current absence of this information necessitates our proactive planning for both eventualities.

Outcome 1.0: Implementation of the transactional data request UDRC system (BRIDGE)

    a. <u>Outcome Summary and Major Accomplishments:</u>

This year, significant strides have been made in laying the foundational groundwork for the BRIDGE project's technical development. Key accomplishments include the successful development of a comprehensive stakeholder engagement plan (1.1.1), crucial for gathering functional requirements and priorities. We identified existing MOUs and are working to update the legal framework (1.1.2) to support BRIDGE's ongoing implementation and ensure continued legal compliance. Furthermore, our efforts have ascertained BRIDGE's potential (1.1.4) as a vital

resource for both current and future transactional data needs, confirming its strategic value. On the resource front, a third-party technical services provider has been vetted and retained (1.1.5), and our internal UDRC personnel capacity has been expanded to manage new administrative and system-specific tasks (1.1.7). Finally, strong and accurate requirements have been designed and created (1.1.6), outlining the features and capabilities of the upcoming BRIDGE system.

       b.   <u>Challenges and Plans for Remaining Tasks:</u>

The remaining three main phases outline the remaining work required in the development and integration of BRIDGE. First, complete work on the essential pre-development administrative and design work (1.1). This includes creating new or updating current policies, procedures, and documentation (1.1.3) to formally implement BRIDGE within the current UDRC's governance structure. Next is the technical development of BRIDGE's infrastructure (1.2), broken into four sequential phases:
- initial architecture (1.2.1),
- back-end and services development (1.2.2),
- integrated back end and front-end development (1.2.3), and,
- front-end completion (1.2.4).

The last task involves the creation and adoption of policies and procedures for the general administration and management of BRIDGE among partner agencies (1.3.1), ensuring smooth launch and ongoing operation.

Outcome 2.0: Further develop USBE's school finance data infrastructure to support agency efforts to modernize and improve school finance information and user access to school finance information.

       a.   <u>Outcome Summary and Major Accomplishments:</u>

Instead of working with a contractor, the state leveraged funding to hire a full-time programmer (2.1.1), significantly enhancing our in-house development capacity. Concurrently, substantial progress has been made in the planning and design of school finance visualizations (2.2): Models have been planned, and development has commenced for internal and external dashboards. SQL scripting is complete within the revenue finance domain. Student membership information (ADM) is being incorporated into the models as a key metric for cross-LEA and cross-State system comparisons. This will enable the calculation of per student finance data.

       b.   <u>Challenges and Plans for Remaining Tasks:</u>

Looking ahead, our focus will shift to critical next steps in developing the school finance visualizations. This includes identifying and effectively engaging stakeholders (2.2.1), a crucial phase for gathering input. Subsequently, requirements and business rules must be meticulously designed and documented (2.2.2) to guide development. Upon successful incorporation of models into the school finance data infrastructure, ongoing documentation and potential future improvements will also be critical. Concurrently, we will continue to solicit feedback from end-users and key stakeholders (2.2.3), ensuring the visualizations meet their needs. These efforts will culminate in user acceptance testing (UAT) to validate functionality before deployment.

Outcome 3.0: Further develop USBE's data and statistics infrastructure to support agency efforts to increase the availability and visibility of Utah's education data.

        a.   <u>Outcome Summary and Major Accomplishments:</u>

A key component of our strategic expansion involves maintaining and enhancing our data visualization capabilities. To this end, we have secured a new five-year Tableau contract (3.1.1) for agency-wide licensing. This contract is strategically aimed at leveraging updated staff expertise, gained through training new features, such as AI integration and broader industry trends, to maximize the value derived from our data.

        b.   <u>Challenges and Plans for Remaining Tasks:</u>

Addressing future needs, we anticipate partnering with an external contractor to facilitate the re-envisioning of our agency's data systems. Furthermore, a core element of our ongoing development plan is to provide annual training for USBE staff members (3.3). This initiative will involve the systematic development and delivery of comprehensive training resources (3.3.1), ensuring sustained capability enhancement.

Outcome 4.0: Sustainability Plan- Subtasks will start at a future date.

Outcome 5.0: Update and implement plans to ensure the confidentiality of data- UDRC-
        a.   <u>Outcome Summary and Major Accomplishments:</u>
        b.   <u>Challenges and Plans for Remaining Tasks:</u>

In the coming period, a significant focus will be placed on enhancing our data governance and security posture. This includes a critical initiative to update and implement a robust cybersecurity plan (5.1), ensuring it aligns with current industry best practices such as the NIST Cybersecurity Framework or ISO/IEC 27001 and 27002. We will work to update and implement a comprehensive privacy plan (5.2), ensuring all data remains protected according to state and federal law. A key component of this effort will also be to update and implement clear policies

(5.3), including publicly posting them, detailing what data are accessible, to which users, and for what purposes, thereby ensuring transparency and accountability in our data practices.

Outcome 6.0: Scalable Data Use (ScDU) Project Work

a. <u>Outcome Summary and Major Accomplishments:</u>

Throughout the year, the team demonstrated active contribution to broader initiatives, notably through participation in the supplemental project planning process (6.1) and various supplemental work groups (6.2). This engagement included attendance at the CEDS/Generate ScDU workshop in Atlanta, the Engagement Best Practices training in New Orleans, and the CEDS and SLDS Best Practice Workshop in Washington, D.C.

b. <u>Challenges and Plans for Remaining Tasks:</u>

Moving forward, we will maintain our active participation in standardization efforts by engaging with the CEDS OSC and piloting EDPASS files FS22 and FS226 (6.3). Following these key engagements, our next critical step will be to document and disseminate all outcomes and lessons learned (6.4), ensuring these insights from collaborative efforts inform future improvements.