



USIMS
Program Management Review
(PMR)
October 2019

STAKEHOLDER ACTIVITY

- Held first USIMS Functional Advisory Board (FAB) meeting - 19 September
 - 32 in attendance
 - 24 In-person – 8 On-line
 - Meeting Discussion
 - USIMS status and accomplishments
 - USIMS Program Vision along with USBE Vision/Mission - giving it more thought and getting additional feedback
 - The updated Draft Program Roadmap (Attachment A)
 - Board agreed **Educator Licensing** to be First Priority Functional Area, or USIMS Capability, to be addressed
- Conducted post-meeting survey and received positive feedback
 - Likes: hearing the status, roadmap, what’s ahead, being involved
- Created a tentative list for Educational Licensing Focus Working Group (FWG) members selected from FAB membership and volunteers.

**see Attachment B for complete list of stakeholders*

Tentative FWG Member List – Educator Licensing

Name	Type	Role / Area	Affiliation
Mr. Jason Strate	IT	Rural - Director	Regional Service Center CUES
Mr. Lynn Raymond	IT	Urban LEA	Weber SD
Ms. Gina Ortega	IT	Charter - PM	American Preparatory Schools
Mr. Paul Lewis	Data Analyst	Urban LEA	Alpine SD
Mr. Matt Ward	Data Analyst	Rural LEA	Logan SD
Mr. Rob Smith	BA	Urban LEA	Asst Super-Bus Services, Alpine SD
Ms. Jo Jolley	HR	Urban LEA	Canyons SD/Granite
Mr. Russell Graham	HR / IT	Rural LEA	Spanish Fork SD
Ms. Holly Allen	Data Analytics	Urban LEA	Jordon SD
Ms. Maegan Heiner	HR	Rural LEA	Box Elder SD
Ms. Priscilla Wadman	HR	Charter	Academia West
Teacher	TBD		
Mr. Travis Rawlings	Functional SME	T&L	USBE
Mr. Brett Baltazar	Finance	School Finance	USBE
Mr. Aaron Brough	Data & Statistics	Data & Statistics	USBE
Ms. Kristin Campbell	Functional SME	T&L	USBE
Mr. Tim Davis	Functional SME	IT	USBE

Important to note: the roadmap is based on information we have to-date and is a living document that will change as we get more detail and as priorities are adjusted

USIMS ARCHITECTURE

- Defined overall architecture strategy (to evolve over time)
 - Adopt ed-fi and Common Education Data Standards (CEDS) data standards to support our efforts to establish:
 - Common vocabulary and descriptors that will be used between SEA and LEAs
 - Consistent ways to interact with USIMS via *Application Program Interfaces (APIs)*
 - Required federal reporting through use of CEDS capabilities
 - Basic system architecture
 - Include all systems based at the LEAs that interact with USIMS
 - Role-based security for user interfaces
 - Common processes used to accomplish business requirements
 - All data intake methods to use same business rules for validation
 - Transactional repositories used for real-time operations through *Operation Data Stores (ODSs)*
 - Reporting repositories kept up to date in real-time with events
 - Reporting and analytics separated from transactional operations through data warehouse/data lakes
 - Development strategy
 - System composed of independent domains, or modules, each providing isolated feature capabilities
 - Micro-services
 - Composite User Interfaces
 - Continuous Integration, *Continuous Delivery and Continuous Deployment (CI/CD)*
- Commenced work on Educator Licensing capability
 - Documenting business processes
 - Creating data models to support captured requirements
 - Working and refining product backlog with information captured from:
 - Visioneering/Roadmap Meeting
 - The Utah Administrative Code
 - Legacy system Educator Licensing SMEs
 - Writing several sprint-ready *user stories*
 - Preparing a draft “project poster” to capture Educational Licensing business case

- Preparing for development team
 - Defining database application and coding standards
 - Developing code templates
 - Working common code libraries for the API service development template
 - CI/CD prep work including:
 - Implementing processes for builds and release pipelines
 - Defining source code branching strategies
 - Researching infrastructure configuration and automation tools
 - Working with the Operations Team
 - Establishing the development environment
 - Researching and defining infrastructure requirements including applicability of cloud-based infrastructure
 - Install and configure an on-premise version of Azure DevOps
 - Researching application security best practices and working with USBE Chief Security Officer (CSO) on involvement
 - Discussions with USBE data privacy team regarding involvement
- Other
 - Attended the KnowledgeWorks and USBE Personalized Learning Training
 - Discussed high level concepts on how personalized learning may impact USIMS
 - Met personnel from LEAs, one charter school, and additional staff members from USBE

PERSONNEL

- 13 Contractor Positions
 - Received ~10 responses per posted position
 - Held evaluation kick-off meeting 2 Oct
 - Received resumes to review
- Transitioned one existing IT professional to the USIMS Program part-time to support early requirements, testing infrastructure, and early development

USIMS Website

- Initial USIMS website landing page was completed
- Initial content in process of being populated

PROGRAM RISK ASSESSMENT

#	Risk Description	Mitigation
1	Currently not all Utah Administrative Rules R277-3XX are written. We cannot accurately estimate the product roadmap timeline without evaluating the completed rules, and ultimately completion of the Educator Licensing capability may be negatively impacted if rules are not completed in short order.	Involve management to ensure priority is given to the writing of the rules and urgency is maintained until completion.
2	Should stakeholders not understanding that the current USIMS roadmap is based on information we have to-date, that it is a <i>living document</i> , and if detail fact-finding or priorities cause completion dates to move to the right, stakeholders may be disappointed and lose confidence in program outcomes.	Demonstrate early win with Educator Licensing capability, demonstrate capability as soon as available, communicate status often including potential impacts with associated rationale early. Also, shift priority to something other than Educator Licensing should Risk 1 above become an issue.
3	As we complete USIMS capabilities, they will migrate into sustainment mode. If we do not plan now for sustainment funding, completed capabilities will not have the resources needed for maintenance.	Estimate sustainment needs immediately for inclusion in IT funding requirements.

UPCOMING EVENTS

Planned Date	Event / Meeting	Purpose
Oct 10 (Tentative)	Monthly FAB Meeting	Provide status, discuss priorities and provide short training sessions
Oct 8	First Educator Licensing Focused Working Group (FWG) Meeting	<i>Event Storming</i> to model the Educator Licensing business domain and associated processes
Oct – Dec	FAB Educator Licensing Focused Working Group Meetings To occur weekly for ~3 mos. (estimated to be 60-90 min ea.)	Define <i>Minimum Viable Product</i> (MVP), obtain additional detail to requirements, verify information gathered to date, prioritize
Nov 14 (Tentative)	Monthly FAB Meeting	Provide status, discuss priorities and provide short training sessions
Dec 12 (Tentative)	Monthly FAB Meeting	Provide status, discuss priorities and provide short training sessions
Jan 9 (Tentative)	Monthly FAB Meeting	Provide status, discuss priorities and provide short training sessions

FINANCIALS

The following table provides a view of the USIMS Budget by Fiscal Year with YTD (30 Sep) Expenses/Encumbrances and Balance Remaining

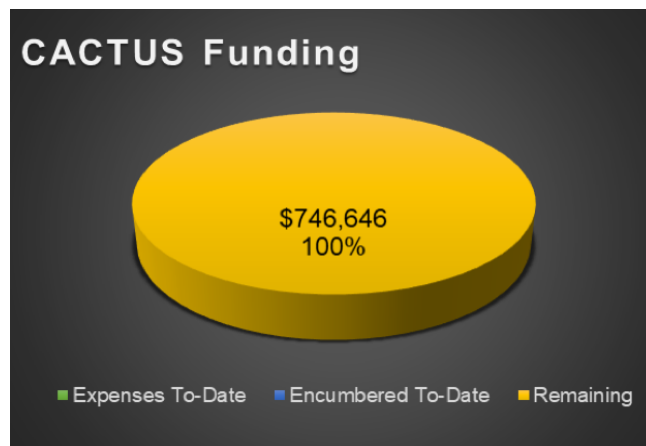
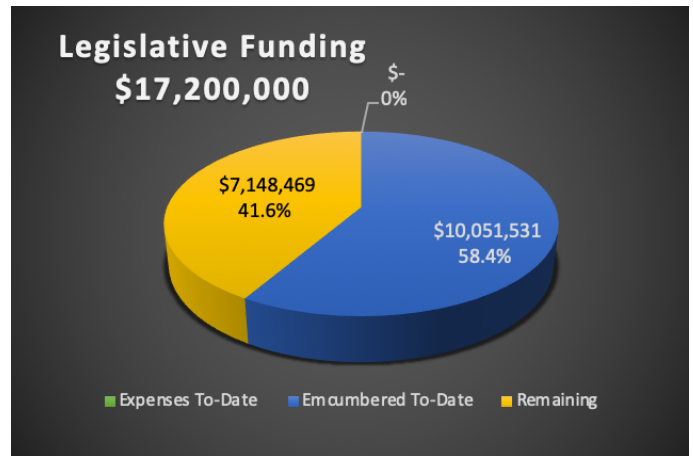
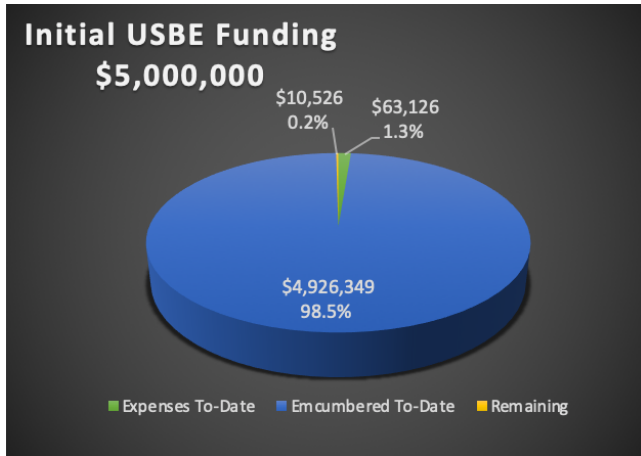
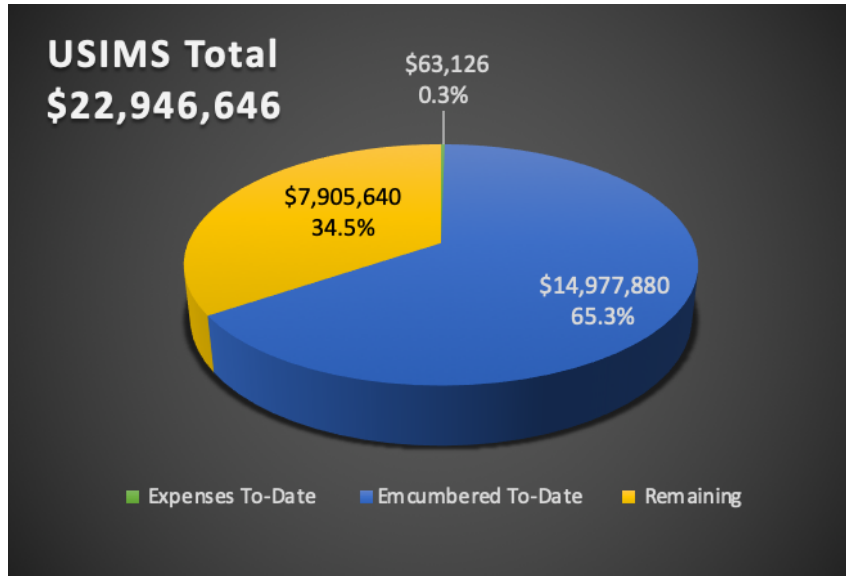
USIMS Project			
Program	Budget	Expenses/Encumbrances YTD	Balance Remaining
16USMS	\$493,389.00	\$486,655.96	\$6,733.04
17USMS	\$3,467,472.92	\$3,467,472.92	\$0.00
18USMS	\$1,039,138.08	\$1,039,138.00	\$0.08
20USMS	\$17,200,000.00	\$10,047,738.25	\$7,152,261.75
18CAC	\$746,645.60	\$ -	\$746,645.60
Total	\$22,946,646	\$15,041,005	\$7,905,640

The following table provides a detailed view of Expenses To-Date (30 Sep) by what has been Encumbered/Expended in comparison to the Actual Expended/Invoiced to Date

Expenses/Encumbrances by Category	Encumbered/ Expended	Actual Expended/ invoiced to Date
Salary/Indirect Cost	\$ 638,234	\$ 71,407
Professional Development	\$ 1,694	\$ 1,694
Misc. (Travel, Computer, Meetings, etc)	\$ 8,521	\$ 4,788
Consultant Braintrust - contract #USBE190126MA	\$ 98,450	\$ 9,488
Contractors - USIMS Architects contract DO 20*14	\$ 2,350,400	\$ 49,838
Contractors - USIMS various positions - in procurrment	\$ 11,943,707	
Total	\$ 15,041,005	\$ 137,214

The following charts provide a graphical representation of budget: to-date expenses, to-date encumbrances and amount remaining by:

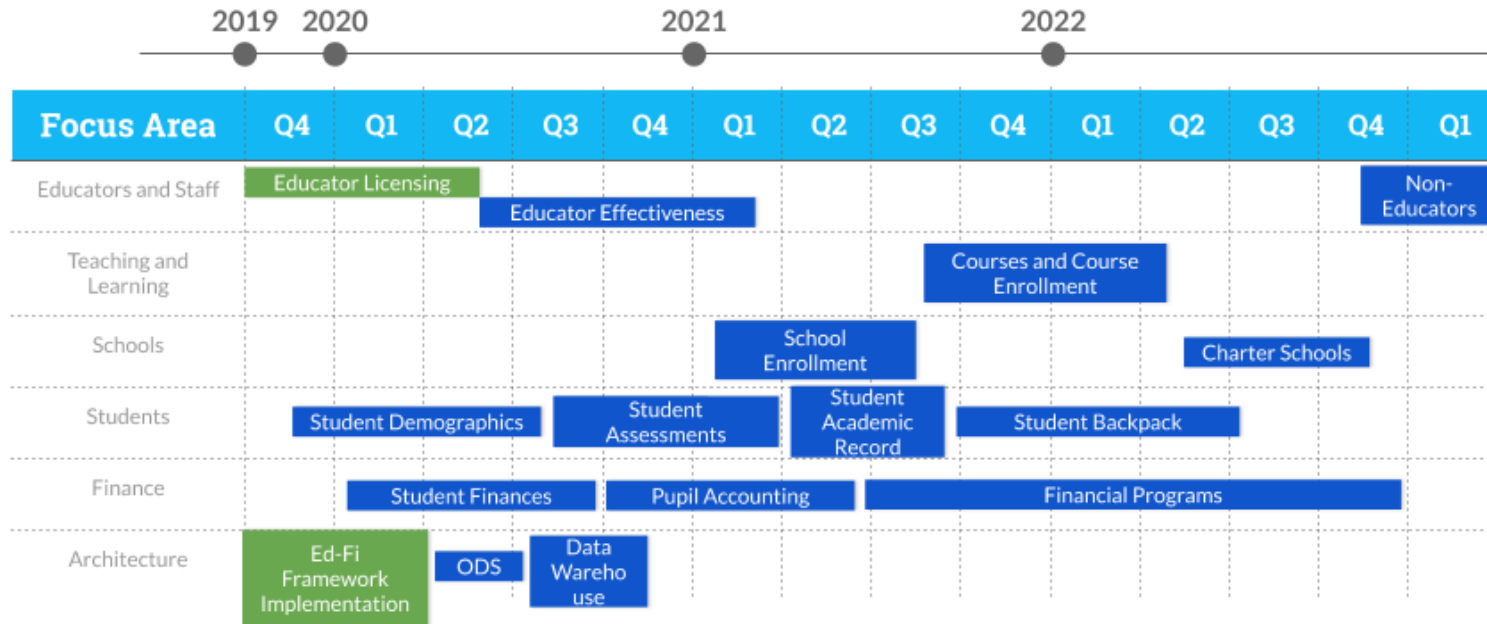
- 1) Total Program
- 2) Each funding stream (Legislative, CACTUS and initial USBE)



ATTACHMENT A

USIMS Roadmap (DRAFT)

NOTE: The roadmap is based on information we have to-date and is a living document that will change as we get more detail and as priorities are adjusted



Complete



In Progress



Planned

ATTACHMENT B

USIMS Functional Advisory Board		
Name	Role	Affiliation
Mr. Duke Mossman	IT Rural - Exec Director	Northeastern UT Ed Services (NUES)
Mr. Jason Strate	IT Rural - Director	Regional Service Center CUES
Mr. Troy Lunt	IT Rural - Technology Dir	Iron School District
Mr. Lynn Raymond/Blayne Christensen	IT Urban	Weber School District
Mr. Scot McCombs /Eric Taylor	IT Urban med	Canyons School District
Ms. Gina Ortega	IT Charter - Program Manager	American Preparatory Schools
Mr. Dale Roberts	Dir of Information Systems, Urban	Granite School District
Mr. Russell Graham	Programmer/Analyst	Nebo School District
Mr. Paul Lewis	Data Analyst Urban, Urban	Alpine School District
Mr. Sam Quantz	Data Analyst/ CIO Urban	Salt Lake City School District
Ms. Sharon Ryle	Data Analyst Rural	Uintah School District
Ms. Joanne Muir	Data Analyst Rural	Wasatch School District
Mr. Matt Ward	Data Analyst Charter	Logan School District
Ms. Emily Bejarano	Data Analyst, Charter	Academica West (AW)
Mr. Jim Black	Data, Software Coordinator	Washington School District
Ms. Holly Allen	Eval, Research, Accountability	Jordan School District
Mr. Chad Lloyd	Business Administration (BA) Rural	Sevier School District
Mr. Robert Smith	BA Urban, Asst Superintendent	Alpine School District
Mr. Craig Carter	BA, Urban	Davis School District
Mr. Josh Spilker	BA, Financial, Charter	Academica West (AW)
Mr. Chris Lewis	Accounting, Urban	Granite School District
Ms. Jo Jolley	HR Urban	Canyons School District/Granite
Mr. Keith Mecham/Ms. Maegan Heiner	HR Rural	Box Elder School District
Mr. Royce Van Tassell	President	Charter Association
Mr. Shad Sorenson	Superintendent, Rural	Kamas School District
Mr. Lance Hatch	Chair, SE Education Service Center	Carbon School District
Mr. Travis Rawlings	Teaching and Learning	USBE
Ms. Tami Walker	CNP	USBE
Mr. Adam Little	SAS	USBE
Mr. Jared Wright	Assessment	USBE
Ms. Tami Gear	SPED	USBE
Mr. Jonathan Frey	CTE	USBE
Ms. Jill Curry	Policy	USBE
Mr. Benjamin Rasmussen	UPPAC	USBE
Mr. David Sallay	Student Data Privacy	USBE
Mr. Brett Baltazar	School Finance	USBE
Ms. Amber Hellstrom	SCSB (Charter)	USBE
Mr. Aaron Brough	Data & Statistics	USBE
Mr. Kevin John	Internal Audit	USBE
Ms. Paula Plant	Schools Children Trust	USBE

ATTACHMENT C

DEFINITIONS OF TERMS

API (Application Programming Interface): Software that allows two applications to talk to each other. Each time you use an app like Facebook or check the weather on your phone, you are using an API. For USIMS, we will use APIs to collect data from LEA systems to transfer data into the USIMS database.

Composite User Interface: A user interface that is created by combining multiple components together during runtime rather than being developed as a monolithic (single) user interface. This technique provides increased change isolation for CI/CD processes as an entire application does not need to redeploy if only a single component has been modified.

Continuous Integration and Continuous Delivery/Deployment (CI/CD): The automation of processes along with continuous monitoring that minimizes the effort for testing and releasing new code.

Event Storming: A rapid group modeling approach to domain-driven design accomplished using a workshop-style technique that brings project stakeholders together (both developers and non-technical users) to quickly model the broader business domain and its processes.

Microservice: An approach in which a large application is built using small functional building block services, making it easier to troubleshoot, test and update.

Minimum Viable Product (MVP): The version of a new product feature which allows a team to collect the maximum amount of validated learning about stakeholders with the least effort. The presented feature may be no more than a landing page, or a service with appearance of automation, but is fully manual behind the scenes. This allows the development team to observe stakeholders' actual behavior with the product or service rather than asking what they would do, which is a much more effective way for getting feedback.

Operation Data Store (ODS): A central database that provides a snapshot of the latest data from multiple transactional systems for operational reporting. It enables organizations to combine data in its original format from various sources into a single destination to make it available for business reporting.

User Story: A very high-level definition of a requirement, containing just enough information so that the developers can produce a reasonable estimate of the effort to implement it.

Use Case: Describes how a user uses a system to accomplish a particular goal focused on behavior. A use case is used to describe a complete interaction between the software and users (and possibly other systems).