

**Joint Committee on
Ways and Means**

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**Subcommittee on
Education**

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TO: Education Subcommittee Members
FROM: Doug Wilson and Bob Cummings, LFO
DATE: April 17, 2013
RE: Education Longitudinal Data System

The Oregon Education Investment Board (OEIB) is requesting a \$200,000 General Fund appropriation for the preparation of a business case for the development of a statewide longitudinal data system to be used by educators, students, parents and others to guide decisions. The system is planned to cover the education system from early learning programs to post-secondary education. The Governor has also proposed to allocate up to \$10 million in bonding authority for the project to be available when the business case is completed and accepted.

As with any project anticipated to be this large, LFO has generally recommended that industry-standard project management steps be completed to best insure that the project is a success. This project is in the early stages of planning so taking the time now to make sure the proper steps are taken is crucial. LFO will likely recommend that the budget report include language or a budget note which captures the following:

1. The OEIB should work closely with the Department of Administrative Services' (DAS) Chief Information Office in all activities related to the development of their needs analysis, business case/option analysis, and related materials.
2. In order to provide a clearer framework for defining the "problem" that OEIB is trying to address by the development of this proposed data system, a clear description of the problem, how it relates to statewide OEIB and other education strategic direction, and how it relates to the wider education stakeholder groups should be developed.
3. As part of better defining the "problem" and data needs of OEIB and its stakeholder agencies/entities, a detailed needs analysis should be developed prior to beginning the actual business case/options analysis.

4. The more robust “problem definition” and “needs assessment” identified in #2 and #3 needs to be reviewed and approved by OEIB stakeholders prior to beginning the actual business case/options analysis.
5. OEIB (or its vendors) should follow DAS standards in the development of their business case/options analysis and related materials.
6. OEIB should report back during the Legislature on project status (including providing the following materials):
 - a. Request for Proposal (RFP) or Request for Information (RFI) for a detailed needs assessment (if done by a vendor);
 - b. RFP/RFI for the business case/options analysis (if done by a vendor);
 - c. A DAS/DOJ approved contract(s) and Statement of Work for “a” and “b” (if work for either is done by a vendor);
 - d. The completed Detailed Problem Statement and Strategic Alignment Documentation (including stakeholder signoff);
 - e. The completed Detailed Needs Assessment (including stakeholder signoff);
 - f. The completed business case/options analysis which includes at a high level the following: project schedule, resource plan, financial plan, information on the anticipated return on investment, and risk management plan;
 - g. DAS’s and LFO’s review and approval of all documents in “f”; and
 - h. A clear plan for the proposed next steps (including products and milestones) during 2014-15.
7. OEIB should provide periodic status reports on progress to both DAS and the LFO between now and the time when the business case and other materials are completed.

LFO is also concerned that the timeframe included in the OEIB presentation is too aggressive at this point. Without the information captured in the business case and related material outlined above, it is likely premature to lay out such a timeframe. Based on the experience of other significant information system projects , it also does not appear to include sufficient time to prepare and complete the necessary RFPs if this is to be contracted out to complete the work. The timeframe also does not seem to take into account the timing issues around the issuance of bonds to pay for the project.