



**Note:** Any work not explicitly included in the Project Scope document is implicitly excluded from the project product.

<b>Program &amp; Project Name:</b>	<b>MCESA REIL: Decision Support and Reporting System (DSRS)</b>
<b>Project Manager(s):</b>	<b>Niranjan Dravid (ADE), Al Dullum (MCESA)</b>

<b>Version History</b>		
<b>Version</b>	<b>Date (MM/DD/YYYY)</b>	<b>Comments</b>
.1	12/11/2012	Initial Scope Document Draft
.2	12/14/2012	Draft review revisions from Christa Thompson
.3	12/17/2012	Accepted revisions. Created section called Success Criteria.
.4	01/2/2013	Added user volume to constraint section and Appendix A number of expected users. Updated Project Milestones.
.5	01/18/2013	Revisions incorporated from Christa Thompson, Jolene Newton, and Linda Jewell
.6	01/18/2013	Added revisions incorporated from Christa Thompson
.7	01/22/2013	Incorporated the feedback from Christa Thompson
.8	01/18/2013	Revisions incorporated from Christa Thompson, Jolene Newton, and Linda Jewell
.9	01/18/2013	Updates from Christa and Niranjan.
1.0 Baseline	01/23/2013	Finalized and baselined. Added Venn diagram to Appendix.
1.1 Baseline	01/25/2013	Updated comments from Kristine
1.1 Baseline	01/25/2013	Updated 3.3.9 to "3.3.9 Observation data for Leaders, Teachers, Coaches and Special Education Teachers will be available as and when the TNL solutions are implemented or through existing TODCT, or through other electronic file formats as mutually agreed upon"

## 1. Executive Summary



## 1. Executive Summary

The Maricopa County Education Service Agency (MCESA) has undertaken a five-year initiative aimed at improving student learning and achievement by increasing the effectiveness of teachers and principals. Five local school districts are engaged in the Rewarding Excellence in Instruction and Leadership (REIL) initiative, which is funded by a Teacher Incentive Fund grant from the U.S. Department of Education. Additionally, some local school districts are engaged in the REIL Extend and Next Generation initiatives and are incorporated into this project's scope.

The purpose of the DSRS project is to provide integration and visibility of data from multiple sources, both within the ADE family of applications and hosted vendor solutions, to meet the needs of the REIL initiative. The DSRS must meet 2012-2013 end of school year teacher data and student roster validation requirements and 2013-2014 beginning of school year payout requirements in order to provide educators visibility into certain components of their overall evaluation process..

**Note:** In any instance where there is a discrepancy between the *Project Charter* and the *Project Scope Statement*, the latter is considered authoritative.

## 2. Business Objectives

**2.1 Project Description** (Note- for clarity, the term "product" describes the solution or tool for this particular scope statement):

*By working in collaboration, ADE and MCESA will design, develop and deploy an application which will display evaluation/observation performance related data on Educators and Administrators, Value Added Student Growth data, student-teacher connection , roster verification, Teacher, Leader, Superintendent and HR access to view REIL Score personnel classifications and component scores, including audit/management of workflow completion.*

**2.2 Business Objectives:**

*Goal 1: Provide education professionals the visibility to view observation & assessment data*

*Goal 2: Collect and consolidate data within the ADE Infrastructure and environments*

*Goal 3 Increase visibility to data to ensure proper data inclusion in summative score processes*

*Goal 4: Collection and passing of the award payment authorization data to the HR/Payroll department*



### 3. Project Description

*The Project Product Scope below defines and clarifies the following scope of work for DSRS.*

#### 3.1 Project Product Scope

*This project will include the following:*

- The deliverables produced by this project are expected to satisfy a portion of the REIL grant requirements that are due covering the 2012-14 school years.
- Implementation for 14 REIL Alliance school districts in Maricopa County. (List districts or attach list as appendix A)
- The capabilities delivered by this project will be made available to teachers, coaches, SPED teachers, building administrators, LEA Administrators, and Agency Administrators.
- A method built to automatically collect and display data from different sources for each system that has been identified as a data source for DSRS into a centralized state-hosted repository. The known systems are:
  - HQT, (and other ADE systems for educator demographic/identity information)
  - Teacher-Data Verification system (not currently available) - SRM (S/T/C data for roster verification)
  - Observation Data Capture Tool and True North Logic (3rd Party Vendor Product),
  - Assessment ODS (AIMS, AZELLA, Galileo, MCESA Group B) BASIS Research (3rd Party Vendor Service Provider).
  - SLDS/ODS data warehouse for Assessment data and reports
  - HR/Payroll systems for HR related demographic data
- Features and capabilities supported generally includes:
  - Single sign-on/interoperability and role management (IMS)
  - System configuration and administration
  - Integration with systems and/or databases for data collection and dissemination
  - Business process workflows
  - Usage and performance analytics for DSRS system
- A method built to automatically collect data from different sources for each system which includes (Please refer to external dependencies) :
  - Professional Development including Educator Goal Plan
  - Content Management
  - Learning Management System



### 3. Project Description

- Reporting/Visibility on individual, school, district and program participants for:
  - Observation/performance data
  - Student growth information
  - Student-Teacher-Course connection and resulting Roster data
  - Calculated REIL Score (Value-added and observation score summative findings)
  - Human Resources information about financial incentive payment to districts and educators
  - Data Analytics, Leadership and Audit Reports
  
- A solution architecture that involves consuming all requirements and providing work-in-progress artifacts (e.g., implementation document) to direct product evolution using a phased approach. Compliance with Data Governance and CEDS/Ed-Fi data standards that have been adopted by the ADE.
  
- A solution to collect and pass payment authorization data for teacher awards from DSRS to LEA HR/Payroll department
  
  
- Calculation of REIL score which will be performed by BASIS Research.
  - By SY 2014-15 REIL score calculations need to be performed within the system
  
- REIL grant requirements due outside of the 2012-14 school years
  
- No other REIL Alliance school districts in the state of Arizona other than those identified in the "in scope" sub-section for SY 2013. A Change request will be done for new districts for SY 2013-2014
  
- A method to automatically collect and provide raw data to BASIS Research. Instead, data is to be provided manually in the form of spreadsheets or other mutually-agreeable file format.
  
- In the future, non-REIL Districts may pay for access to DSRS. Paying for access is out of scope for this release
  
- Observation inter-rater and intra-rater and intra-rater reliability data statistics
  
- Capability for DVT (Data Verification Tool) (Please refer to the DVT Scope statement for further details)

**3.2 Does Not  
Include:**



### 3. Project Description

#### **3.3 External Dependencies:**

3.3.1 An Identity Management System with user validation for DSRS to support the management of User accounts, roles, and permissions and support single sign-on interoperability.

3.3.2 DSRS will rely on a periodic collection and load/refresh of the most current educator demographics data that must be provided by HQT or other systems that are identified as its "single source of truth."

3.3.3 DSRS will rely on a periodic collection and load/refresh of the most current teacher student roster data that must be provided by the Student-Teacher-Course Connection, a Teacher-Data Verification solution or other systems that are identified as its "single source of truth."

3.3.4 DSRS will rely on a periodic collection and load/refresh of the most current observation and evaluation data that must be provided by the Teacher Observation Data Capture Tool and/or True North Logic system that is identified as the source.

3.3.6 DSRS will rely on a periodic collection and load/refresh of the most current student assessment test data that must be provided by Pearson and AIMS-A as well as from outside vendors such as Galileo that is identified as its "single source of truth. Note: AIMS historical data is collected in the ODS. MCEA's Group B Assessment and Formative Assessments captured in Galileo systems is expected to be incorporated into the SLDS/ODS AS database for use in this system's reporting capability.

3.3.7 DSRS may rely on a periodic collection and load/refresh of the most current HR and personnel data if it is determined that such information is required or not collected from another source. It may be provided by each LEA HR system or AED<sup>3</sup>S that is identified as its "single source of truth."

3.3.8 The vendor selection & product availability needs to be in place before for the data can be collected for the Professional Development including Educator Goal Plan and Content Management capabilities

3.3.9 Observation data for Leaders, Special Ed Teachers will be available as and when the TNL solutions are implemented, through TODCT, or through other electronic file formats as mutually agreed upon.



### 3. Project Description

#### **3.4 Assumptions / Constraints:**

**3.4.1.** Any reports from DSRS required by end of May 2013 will need to have data made available by Mid April 2013 from the source systems.

**3.4.2.** The maintenance of the accuracy and currency of data is managed by the system (e.g., TDV, ODCT/TNL, AIMS, etc.) that masters the data as its "single source of truth" rather than by DSRS. If the accuracy of data is not managed within the originating system, then any data issues identified in DSRS will require correction in the originating system anyway and then feeding the corrected data to DSRS thus delaying the approval process. Additionally, without accurate and current data, any analysis and calculations using this data will likely lead to incorrect conclusions. Incorrect data may also impact the REIL Score and REIL Payment calculations.

**3.4.3.** An accurate and reliable link between each Student, Teacher, Course combination and its associated amount of instructional time will be established and managed by another system. If the student-teacher-course link is not created the percentage of instructional time, team/group assignments and value-added data cannot be reported at an individual evaluatee level.

**3.4.4.** Usage tracking of login/logout will be enabled for DSRS. Without usage tracking it will not be possible to monitor user access and use of the system.

**3.4.5.** Initial phase 1 development will utilize the existing MCESA infrastructure. If the solution design recommends capacity uplift, then additional infrastructure will need to be made available for the rest of the phases.

**3.4.6.** Demographic, Roster and REIL Score verification will be performed using an external utility (Data Verification) that is being worked as a separate project. Access to this utility will be provided via a link through the relative report/visibility of data in DSRS.

**3.4.7.** The product solution should support the estimated User volumes as shown in Appendix A yet be built for scalability.



### 3. Project Description

#### **3.5 Critical Success Factors**

*Success is determined by the delivery of business requirements identified and agreed upon. Below are the success factors :*

*Evaluatees are able to view the REIL scores.*

*Evaluatees are able to view data used to calculate their performance.*

*Leaders are able to view data for the personnel they manage.*

*Data is collected and consolidated within the ADE infrastructure.*

*Workflow completion is monitored for payment authorization by LEA's.*



## 4. Project Milestones

### 4.1 Estimated Schedule Phase 1

Task / Activity	Target Due Date
<b>DISCOVER</b>	
• POC Project Start	10/08/2012
• Product BRD drafted	12/07/2012
• Project Scope Statement Approved	01/18/2013
• Product BRD Finalized / Approval / Sign-off	01/18/2013
• Project Schedule drafted	02/2/2013
• Project Schedule Finalized / Approval / Sign-off	01/18/2013
• Product BRD Release to Development	01/21/2013
<b>DESIGN</b>	
• Product Design	02/04/2013
• Product SRS/DFD/Design Documents drafted	02/25/2013
• Product Design Review Gate with Customer	03/05/2013
<b>DEVELOP</b>	
• Product Build	03/04/2013
• Product Build Review Gate with Customer	04/19/2013
• Product QA	04/22/2013
• Product QA Review Gate with Customer	05/10/2013
• Product UAT	05/23/2013
<b>DEPLOY</b>	
• Project Deploy- Go / No Go	05/30/2013
<b>DEBRIEF</b>	
• Phase 2 Discovery Complete	06/07/2013
<b>Phase 2 , 3 &amp; 4 delivery dates (Based on requirement priorities and assumptions )</b>	
Phase 2	Aug 2013
Phase 3	Oct 2013
Phase 4	April 2014



**Notes:**

1. The preliminary estimate is  $\pm 40\%$  due to the fact that the project is very early in the discovery phase.
2. If it is determined that the product solution will be:
  - a. Purchased, then the estimated schedule will need to be reviewed and revised
  - b. Custom built, then it may be necessary to iterate through multiple design-build-test cycles.



## 5. Project Approach (overall project approach)

*Describe Primary Plans briefly in the space below.*

The project artifacts will be documented by the ADE PM and BA respectively and archived on the project site(s) noted below. Remote team members who do not have access to the ADE SharePoint site will receive extracts of this data twice a week.

**ADE SharePoint Site:** [MCESA REIL SharePoint Link](#)

**PM Site:** [www.projectmanager.com](http://www.projectmanager.com)

**How will project issues be dealt with?** Issues will be tracked using the logs on the project site(s) noted below. Escalations will be managed through the ADE Program Manager and any actions will be coordinated with ADE PM and MCESA PM on viable solutions of the root cause of the issue. Remote team members who do not have access to the ADE SharePoint site will receive extracts of this data twice a week.

**ADE SharePoint Site:** [SharePoint Log for MCESA Actions, Issues & Risks](#)

**TFS Site:**

<http://tfs.intranet.azed.gov/ADE-Projects/MCESA-AnalyticsIntegration/Dashboards/Progress.aspx>

**How will Change Requests be dealt with?** Change requests to the product scope or enhancements will be submitted to the ADE Program Manager and reviewed with ADE Development Director and MCESA Project Sponsor for development impact as it pertains to cost, time and scope. If the change request can be reviewed and approved for incorporation before the freeze point / close-out of development process for design and build of the product, a BRD update approved by ADE and MCESA will record the change to scope. Changes to cost and time will be tracked in the Project Plan and Weekly Status Reports including the Budget worksheet.

**List any scheduled project team meetings, planned status reports:** Weekly Product Status reports will be generated and delivered to ADE IT directors, CIO and ADE program manager. Project team meetings are scheduled daily for progress updates and impediment identification. Monthly Progress reports (compiled jointly by ADE and MCESA Project Managers) will be generated for the REIL program overall and delivered to ADE IT Program Managers, Directors, and CIO and MCESA directors and executives. MCESA and ADE weekly 1:1 meetings will be used to share progress from both teams, review and approve artifacts and collaborate on various topics. A Steering Committee consisting of members from both MCESA and ADE executive leadership will be used to obtain sponsor approval of phase gate completion, product deliverables, budgetary items and partnership decisions.



## 6. Authorizations

**The Project Scope Statement, Project Schedule, Resource Plan and Project Budget are approved by the:**

- **Program Sponsor(s)** Kristine Morris (MCESA), Jolene Newton (ADE), Linda Jewell(ADE)
- **Program Manager** Christa Thompson
- **Executive Director** Pamela Smith (ADE Budget only)
- **ADE Project Manager** Niranjana Dravid

**Project performance baseline changes will be approved by the:**

- **Program Sponsor(s)** Kristine Morris (MCESA), Mark Masterson (ADE)
- **Program Manager** Christa Thompson
- **ADE Project Manager** Niranjana Dravid

**Project deliverables will be approved/accepted by the:**

- **Program Sponsor(s)** Kristine Morris (MCESA), Jolene Newton (ADE), Linda Jewell(ADE)
- **Program Manager** Laurie King (MCESA), Christa Thompson (ADE), Linda Jewell (ADE)
- **REIL Program Director** Lori Renfro (MCESA)
- **REIL SME** Laurie King (MCESA)
- **MCESA Program Manager** Al Dullum
- **ADE Project Manager** Niranjana Dravid
- **Key Stakeholders** REIL Districts, MCESA, BASIS Research, ADE



## 7. Project Scope Statement Approval / Signatures

<b>Program: Project Name:</b>	MCESA REIL: Decision Support and Reporting System		
<b>Project Manage(s):</b>	Niranjan Dravid (ADE), Al Dullum (MCESA)		
<p><i>The purpose of this document is to provide a vehicle for documenting the initial planning efforts for the project. It is used to reach a satisfactory level of mutual agreement between the Project Manager(s) and the Project Sponsor(s) and Owner(s) with respect to the objectives and scope of the project before significant resources are committed and expenses incurred.</i></p> <p><b>I have reviewed the information contained in this Project Scope Statement and agree:</b></p>			
Name	Role	Signature	Date (MM/DD/YYYY)
Kristine Morris	MCESA Chief Deputy Superintendent		01/25/2013
Al Dullum	MCESA Program Manager		
Christa Thompson	ADE Program Manager		
Jolene Newton	ADE Program Director		
Linda Jewell	ADE IT Director of Development		
Niranjan Dravid	ADE Project Manager		

*The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Scope Statement document.*



Appendix A

**1. APPENDIX A – Estimated User Volumes**

District Name	Type	# of Schools	# of School Leaders	# of Teachers	# of Coaches
Alhambra	REIL	15	30	794	Unknown
Gila Bend	REIL	2	5	27	3
Isaac	REIL	12	31	494	14
Nadaburg	REIL	2	4	52	4
Tolleson	REIL	4	12	154	10
Arizona Department Of Juvenile Corrections	REIL TNG	2	2	36	5
Balz Elementary School District	REIL TNG	5	5	167	10
Maricopa County Regional School District	REIL TNG	4	6	33	5
Mobile Elementary School District	REIL TNG	1	1	5	1
Phoenix Elementary School District	REIL TNG	14	14	450	30
Roosevelt Elementary School District	REIL TNG	19	30	530	50
Wilson Elementary School District	REIL TNG	2	4	76	5
Learning Matters	REIL Extend	21	34	606	Unknown
Laveen	REIL Extend	6	6	218	Unknown
<b>Totals</b>	<b>14 Districts</b>	<b>109</b>	<b>186</b>	<b>3642</b>	<b>137 (est.)</b>



## 2. APPENDIX B – DSRS/DVT VENN DIAGRAM

