REPORT TO

CORPORATE SERVICES, STRATEGIC PLANNING AND PROPERTY COMMITTEE

STUDENT INFORMATION SYSTEM RECOMMENDATION REPORT

"For surely I know the plans I have for you, says the Lord, plans for your welfare and not for harm, to give you a future with hope." Jeremiah 29:1

Created, Draft	First Tabling	Review
January 1, 2020	January 16, 2020	Click here to enter a date.

Steve Camacho, Chief Information Officer

RECOMMENDATION REPORT

Vision:
At Toronto Catholic we transform the world through witness, faith, innovation and action.

Mission:
The Toronto Catholic District School Board is an inclusive learning community uniting home, parish and school and rooted in the love of Christ.
We educate students to grow in grace and knowledge to lead lives of faith, hope and charity.

Rory McGuckin
Director of Education

D. Koenig
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Associate Director of Facilities,
Business and Community
Development, and
Chief Financial Officer

A.   EXECUTIVE SUMMARY

A Student Information System (SIS) is a mission-critical organization-wide system that stores and manages all student records for current and past students. Beyond managing student records, the SIS is critical for the TCDSB as a data source for funding and for staffing. The TCDSB currently uses an older (legacy) Student Information System called Trillium, which it has operated since 2001.

In 2016, PowerSchool, a large SIS vendor, purchased the Trillium SIS business in Ontario and subsequently announced that it would no longer add new functionality to Trillium; PowerSchool indicated that they would like to see school boards "upgrade" to the PowerSchool SIS, their core SIS product. In response to Trillium's future, several school boards participated in an RFP issued by Ontario Education Collaborative Marketplace (OECM) on behalf of all school boards in Ontario for a new SIS.   In January 2019, OECM announced the winning Bidder as the joint bid from Fujitsu and Follett using the Aspen SIS software. Four bidders responded to the RFP, including PowerSchool.

Following the OECM RFP, staff have been engaged in second stage review with both Fujitsu (Aspen SIS) and PowerSchool to determine which system and provider are best suited for the TCDSB. Following the review, staff have identified Fujitsu (Aspen SIS) as the leading proposal.   Therefore, this report recommends signing a long-term contract with Fujitsu to implement and operate the new Aspen SIS. In addition, this report recommends the allocation of the project budget to implement this complex system over the next three years.

The overall cost of implementation is estimated to be $14.1M over a 3-year period. The estimate includes vendor implementation fees as well as costs associated with project staffing, training, and contingency.

The cumulative staff time required to prepare this report was 15 hours

B.   PURPOSE

1. The purpose of this report is to recommend the signing of a long-term contract with Fujitsu to implement and operate the new Aspen SIS. In addition, this report recommends the allocation of a project budget to implement this complex system over the next three years.

C.   BACKGROUND

1. A Student Information System (SIS) is a mission-critical organization-wide system that stores and manages all student records for current and past students. The SIS is often the "source of truth" for student information and holds a significant amount of key information such as student demographic data, grades, transcripts, parent information, attendance, and medical information just to name a few.

2. The SIS is critical to the TCDSB for funding because the information within it is used to gather enrolment totals, class sizes, and other information. This information is also sent regularly to the Ministry of Education to calculate the total amount of Grants for Student Needs (GSNs) that the TCDSB will receive in any given year. Because the SIS holds classroom data, it is also used as a key data source to calculate staffing allocations. The data from the SIS is used to calculate staffing levels for student-facing positions such as teachers, early childhood educators, educational assistants, and other similar groups, which in turn account for most of the TCDSB's daily operating costs.

3. The TCDSB currently uses an older (legacy) Student Information System called Trillium. The Trillium SIS is also used by approximately 44 schools boards across the province of Ontario including the Toronto (public), Dufferin-Peel Catholic, and York Region District School Boards. The software is not used in any other province or state.

4. Starting in 2018, the TCDSB developed a strategic IT systems reserve as part of an overall reserve strategy that was approved by the Board. The intention of this reserve is to support major systems modernization projects such as a new SIS. The current strategic IT system reserve balance is $20.1M.

5. In April 2018, the Ontario Education Collaborative Marketplace (OECM) issued an RFP for new SIS on behalf of all 72 school board in Ontario. The TCDSB was heavily involved in the RFP process from the beginning and contributed to the RFP criteria, bid response scoring, and master contract negotiations with the top bidder.

6. In January 2019, OECM announced the winning Bidder as the joint bid from Fujitsu and Follett using the Aspen SIS software. Follett will provide the Aspen SIS software while Fujitsu will be the prime contract holder and provide implementation and on-going support services. There were four bidders who

responded to the RFP, including the TCDSB incumbent vendor, PowerSchool. The bid from Aspen/Fujitsu was the highest-scoring bidder.

7. At the October 10, 2019 Corporate Service Committee meeting, staff provided Trustees with a detailed history of the Trillium SIS and information as to why it needs to be replaced. A link to the public report can be found here. In addition, staff provided Trustees with a private report in December 2019 with commercial details associated with two SIS providers that the TCDSB were considering.

D. EVIDENCE/RESEARCH/ANALYSIS

1. Throughout 2019, staff have been engaged with the top two SIS vendors in the Ontario Market to determine which is best suited for the TCDSB. Staff have identified Fujitsu (Aspen SIS) as the leading proposal. The advantages of the Fujitsu contract include:

   a. Strong future guarantees on unit pricing
   b. Guaranteed compliance with Ministry requirements
   c. Better contractual protections for data and privacy
   d. Strong performance measures and contract terms
   e. The migration of 20-years worth of data
   f. Additional work and supports during implementation

2. Beyond, the noted contractual benefits above, there are also a number of additional intangible benefits with the Fujitsu proposal that staff consider important to TCDSB. These benefits include:
   a. Alignment with Auditor General recommendations for School Boards
   b. Vendor size and scope (Fujitsu is the world's fourth-largest IT services provider).
   c. Recent Canadian RFP Awards (Fujitsu, using the Aspen SIS, is the preferred SIS vendor in the province of BC and Saskatchewan).
   d. Potential for future Joint Deals pricing model with other Boards
   e. Increasing Ontario Customer Case – (Fujitsu has signed contracts with 30 Ontario school boards, representing approximately 550,000 students).

3. The Fujitsu contract has gone through extensive reviews. These reviews include reviews by OECM staff, OECM legal counsel, TCDSB staff, and

TCDSB in-house legal counsel. Additionally, and most recently, staff hired external legal counsel from BLG to review the Fujitsu contract one last time. After reviewing the Fujitsu contract in December, BLG produced a discussion note that highlighted a few minor issues in the contract that TCDSB needed to consider further. Staff reviewed these with Fujitsu and were able to modify some of the contract terms to reduce the overall risks to the TCDSB. Staff believe the contract with Fujitsu is the best overall value and lowest risk proposal available to the TCDSB.

4. The Fujitsu (Aspen) SIS will include a number of functions and modules included in most SIS. While the exact implementation and configuration of the software of each is not yet determined, the following is a list of functionality that is anticipated in the new SIS
   - Ontario Baseline Configuration
   - Ministry Reporting
   - Parent Portal
   - Case Management and Individual Educations Plans
   - Reporting and Analytics
   - Transcripts and Report Cards
   - Gradebook
   - Electronic Attendance
   - Program/Course Management
   - Scheduling
   - Hosting (Software-as-a-Service)
   - Disaster Recovery Services
   - Training and Change Management
   - Implementation Support

In addition, implementation of new modern SIS brings with it a number of other benefits including but not limited to
   - Improved access for teachers and principals on any device
   - simplified and streamlined Ministry compliance report
   - Increased data security and privacy controls
   - the reduction of TCDSB data centre hardware
   - Improved data integration with future software products
   - Enhanced reporting tool for teachers, principals, and central staff

5. As mentioned in the executive summary, staff are estimating the implementation to cost $14.1M inclusive of 10% contingency. Of this total

amount, $2.5M is estimated to be associated with implementation services from various vendors, most of which will be directed to Fujitsu for Aspen SIS implementation services. The remaining and bulk of the budget are for internal project staffing, training, and contingency.

6. Fujitsu will operate the software on behalf of the TCDSB as Software-as-Service model out of a Microsoft Data Centre in Canada. The contract is based on a 10-year term. Although highly unlikely to be used, to protect the TCDSB, there are several provisions in the contract that allows the TCDSB to terminate the contract based on select scenarios such as poor performance, privacy breaches, or material change in implementation costs.

7. The operating cost for the new SIS software is tied to the overall Average Daily Enrolment (ADE) of the TCDSB and will grow and shrink with enrolment. The discounted unit rate was negotiated by staff with Fujitsu over and above the rate provided in the RFP response. Based on current enrolment trends, the yearly cost for the software is estimated to be $0.88M for the first 4 years of the contract and $1.08M for the following 6 years. These funds are already available and approved in the yearly operating budget.

E.   ACTION PLAN

1. Once the project budget is approved, staff will proceed to create a dedicated project team to implement the SIS. The exact make-up of the project team has not been finalized, but estimates currently include the use of experienced personnel including several ICT Services staff, principals, vice-principals, and teachers. The project staff would be seconded from their current positions for the duration of portions of the implementation project.

2. With any system change, there are impacts on individual working habits that can cause frustration if not managed properly. Throughout the implementation project, staff will be engaging with affected employee groups and their unions about the impact of these changes

3. Staff are currently estimating that SIS, case management system, and parent portal will take approximately 3 years to implement. Implementation will be followed by a period of intensive support shown by the transparent coloured bars below. This high-level project schedule is an estimate. A detailed project schedule will not be determined until detailed planning is completed in the fall of 2020.
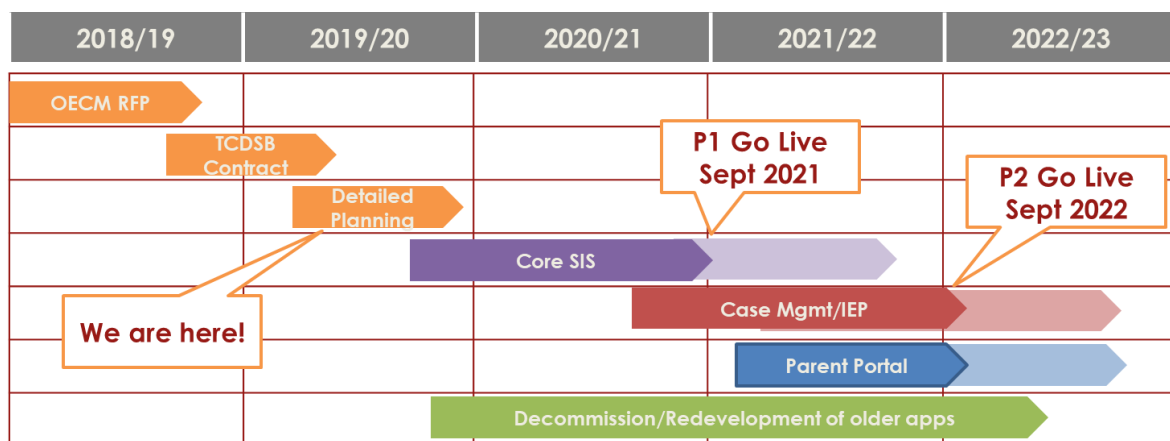
F.   STAFF RECOMMENDATION

1. That the Board of Trustees approve the project budget of $14.1M for the implementation of a new Student Information System from the IT Strategic Systems Reserve.
2. That a contract be awarded to Fujitsu Canada for implementation of the Aspen SIS in line with the overall project budget.
3. That the contract above also include the operation of a new Student Information System for a 10-year term based on actual average daily enrolment in the estimated amount $0.88M for the first 4 years of the contract and $1.08M for the last year 6 years.