Idaho’s Instructional Management System (Schoolnet) Offers Lessons for Future IT Projects

Office of Performance Evaluations
Idaho Legislature
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Joint Legislative Oversight Committee 2015–2016

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From the director

March 20, 2015

Members
Joint Legislative Oversight Committee
Idaho Legislature

This evaluation report concludes that poor management, poor decisions, and poor system functionality compounded themselves and prevented the goals for a statewide instructional management system from being realized. The net result is that the project has sunk costs of about $61 million, and the Department of Education and the Legislature are left with few options to consider when deciding the future of the program.

One of the lessons offered by this report is that we should learn from our past mistakes. Project planners and implementers should heed additional lessons from this project:

Careful contract risk management can prevent performance problems such as the inability of a vendor to deliver the expected product.

For any large project involving IT systems, close attention needs to be given to the advice and concerns of relevant or qualified parties, such as the Albertson Foundation’s concerns to the department in its three rejection letters for funding.

Sincerely,

Rakesh Mohan, Director
Office of Performance Evaluations
Acknowledgements

We appreciate the cooperation and assistance we received from the Department of Education.

Lance McCleve, Hannah Crumrine, and Jennifer Tomlinson of the Office of Performance Evaluations conducted this study. Margaret Campbell copy edited and desktop published the report.

Bob Thomas of Robert C. Thomas and Associates conducted a quality control review, and Matthew Von Hendy of Green Heron Information Services conducted a literature review.
Executive summary

Idaho’s Instructional Management System (Schoolnet) Offers Lessons for Future IT Projects

Legislative interest

In 2011 the Department of Education began rolling out a pilot project for a statewide instructional management system (IMS) software program known as Schoolnet. The J. A. and Kathryn Albertson Foundation provided $21 million for the project with the intent that the instructional management system would interface with the state’s K–12 longitudinal data system (the Idaho System for Educational Excellence—ISEE). The department hoped to use the instructional management system to provide teachers, principals, and administrators with accurate, up-to-date data on student performance as well as access to curriculum, professional development, and student assessment resources.

Poor project management decisions and persistent software issues affected system functionality, hampering the first two years of the pilot project. Use of Schoolnet is voluntary and as districts became increasingly frustrated with the system, many districts stopped using it believing Schoolnet was more trouble than it was worth. After the foundation became aware of districts’ attitude toward the system, in spring 2013 it commissioned an independent assessment of the rollout, implementation, and use of Schoolnet from the Institute for Evidence-Based Change.
The institute found substantial problems with project management and functionality issues. The institute also found that the 2005 failure of the department’s student management system (ISIMS) project affected districts’ willingness to accept Schoolnet. The ISIMS project and the Schoolnet project were department efforts to implement a statewide version of IT software traditionally implemented by districts.

Given the frustration expressed by districts and action taken by the foundation, during the 2014 legislative session, the Joint Legislative Oversight Committee directed us to evaluate Schoolnet. Problems with system functionality and the department’s management of the project have been well documented by the institute. Therefore, we do not intend to duplicate its work. Instead, this report is intended to show that the problems with the project began long before a system vendor was selected, were rooted in decisions made by the department, and importantly, were for the most part avoidable. This report also summarizes the current state of the project and offers recommendations for avoiding similar mistakes in the future.

Report message

Throughout the planning and implementation of Schoolnet, poor management, poor decisions, and poor system functionality compounded themselves and prevented the goals for a statewide instructional management system from being realized.

The department continued to pursue funding for the instructional management system despite outside concerns about the project proposal

Insufficiencies in the department’s plan to implement a statewide instructional management system led the federal government and the J. A. and Kathryn Albertson Foundation to reject requests for funding on three separate occasions. Undaunted, the department pushed forward without making serious efforts to reconsider its plan in light of the issues raised in the three rejected funding proposals.

Based on a third proposal to the foundation and policymakers’ support demonstrated by Students Come First, the foundation awarded the department a $21 million grant in May 2011.
The department’s vision for a statewide instructional management system was overly ambitious given the capabilities of the product it selected

The former superintendent’s vision and design for a centralized statewide instructional management system overreached the capabilities of existing software. The vendor agreed to redesign its existing product to function as a statewide system, but the product it delivered did not function as the department expected. The department noted that functionality issues, such as data quality, timely access to data, inaccurately displayed data in the modules, and delayed implementation of some features continued to be challenges. The vendor should share responsibility for the functionality challenges experienced by districts. However, it was the department’s responsibility to verify the potential vendor’s capabilities before signing a contract and to hold the vendor responsible for contract performance.

Additionally, the department had entered into a limited scope contract in 2010, which should have been an excellent opportunity to further evaluate vendor capabilities, assess project risk, and identify any problems Pearson might have in meeting contract deliverables. Instead, in 2011 the department proceeded to expand the contract from $900,000 to $10 million.

Rather than limit the number of districts with access to Schoolnet during the pilot phase, the department gave all districts access to Schoolnet while only providing financial and technical support to pilot districts

The department originally planned to implement full Schoolnet functionality among districts in pilot phases starting in the 2012-2013 school year. However, in 2012 the department chose to give all districts access to Schoolnet but only provide funding, training, professional development, and technical support to a limited number of pilot districts.
The purpose of any pilot project is to identify and solve issues, and then make a decision about the potential success of the product before implementing it on a larger scale. Providing all districts access to Schoolnet without support and before the department had the opportunity to learn from the pilot districts essentially defeated the purpose of implementing a pilot project.

In hindsight, the department acknowledged that providing Schoolnet to all districts without also providing support contributed to challenges with the pilot project. Likewise, the vendor said the absence of an appropriate pilot phase hindered the implementation of Schoolnet.

The department and the J. A. and Kathryn Albertson Foundation both found that the Schoolnet project was not meeting expectations

In December 2012 the department notified Pearson that poor system functionality was affecting district use and requested that the vendor develop an action plan to address documented issues previously submitted to the vendor. The department met with Pearson in January 2013 and continued correspondence about the noncompliance issues through the spring.

The department identified 7 high priority issues and 20 essential issues it wanted resolved by June 30, 2013. In April 2013 Pearson provided documentation showing 17 issues completed, 7 issues open, and 4 issues not included in the original contract. However, according to the department, several software deficiencies continued after the June 2013 deadline.

Within two years after the department began implementing the pilot project, the foundation was sufficiently concerned about the progress of the project that it hired the Institute for Evidence-Based Change to conduct an independent assessment of Schoolnet. The institute found significant problems with the functionality of Schoolnet and the department’s management of the project.

Although the department made efforts to improve data quality and data access issues in response to the institute’s assessment, the foundation found the department’s progress to be unsatisfactory and ultimately terminated the grant agreement, withholding approximately $1.1 million of the remaining funds.
The department minimized the significance of implementation problems, which left policymakers and the foundation with reassurances that Schoolnet was useful to districts

In presentations to the Senate and House Education committees, the department did not acknowledge challenges with Schoolnet until the 2014 session when legislators began questioning the success of the project. The department reported that it and Pearson developed a work plan in response to feedback from pilot districts. In actuality, the work plan was a result of the institute’s review, which was commissioned by the foundation. Additionally, in our interviews, the foundation expressed that the department’s portrayal of the project as it progressed appeared to be misleading.

Past decisions have limited future options for Idaho’s statewide instructional management system

The pilot project has ended without having established a statewide instructional management system as an integral part of Idaho education. Stakeholders remain uncertain about the value of a centralized statewide instructional management system. The department continues to host Schoolnet, but so far, it has been unable to demonstrate that a statewide instructional management system offers any unique value to districts.

Each of the poor decisions made by the department further limited future options, leaving the state with few options for moving forward. Given the inability of the department’s former administration to demonstrate the value of a statewide instructional management system, districts’ disinterest or uncertainty about the long-term sustainability of the system, and the completion of the pilot project phase, the department and the Legislature are left with few options to consider when deciding the future of the program.

In the conclusion of the report, we discuss considerations for maintaining and for discontinuing state funding for the system. We found no clear answer for what should be done about the problem the state and the districts have been left with. However, the lessons are clear. For any large project involving IT systems in the future, project planners and implementers should pay close attention to the advice offered in the rejection letters the department received in response to its first three requests for funding. Those rejection letters shared common themes that any funding proposal should address:
Clear, complete, and comprehensive descriptions of all project plans

Measurable goals and metrics with realistic outcomes

State and local policies in support of the project

Evidence of project or system sustainability

Evidence of stakeholder engagement in developing the project and support for implementation or participation
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Introduction

In 2011 the Department of Education began rolling out a large education technology project including a statewide instructional management system (IMS) software program known as Schoolnet. The J. A. and Kathryn Albertson Foundation committed $21 million for the project and the state committed $57 million, $21 million to match the foundation’s contribution plus an additional $36 million. Of the total $77.7 million commitment for the project, about $10 million was for Schoolnet software and maintenance. The department hoped to use the instructional management system to provide teachers, principals, and administrators with accurate, up-to-date data on student performance as well as access to curriculum, professional development, and student assessment resources.

Poor project management decisions and persistent software issues affected system functionality, hampering the first two years of the pilot project. Use of Schoolnet is voluntary and as districts became increasingly frustrated with the system, many districts stopped using it believing Schoolnet was more trouble than it was worth. As the foundation became aware of districts’ attitude toward the system, in spring 2013 it commissioned an independent assessment of the implementation and use of Schoolnet from the Institute for Evidence-Based Change.

The assessment found substantial problems with the following:

- Clarity about project tasks, deliverables, goals, and success
- Data quality
- Data timeliness
- Department expertise
- Department leadership of the project
- Project communication by the department
- Relationship between the department and Pearson
- Support for system users
- System functionality

In addition, the institute found that the 2005 failure of the department’s student management system (ISIMS) project affected districts willingness to accept Schoolnet. The ISIMS project and the Schoolnet project were department efforts to implement a statewide version of IT software traditionally implemented by districts.
The Institute for Evidence-Based Change found that the failure of the department’s student management system (ISIMS) affected districts willingness to accept Schoolnet.

Given the frustration expressed by districts and the foundation, during the 2014 legislative session, the Joint Legislative Oversight Committee (JLOC) directed us to evaluate Schoolnet (appendix A—study request). Problems with system functionality and the department’s management of the project have been well documented by the institute. Therefore, we do not intend to duplicate their work. Further, this report is not an evaluation of the Schoolnet product.

Instead, it is an evaluation of Idaho’s implementation and use of a statewide instructional management system. This report is intended to show that the problems with the project began long before a system vendor was selected, were rooted in decisions made by the department, and importantly, were for the most part avoidable. This report also summarizes the current state of the project and offers recommendations for avoiding similar mistakes in the future (appendix B—study scope).

**Instructional Management System**

A single platform to bring together resources and data for multiple district goals, such as curriculum development, standards, and assessments.
The department’s vision for a centralized statewide instructional management system linked to the statewide longitudinal data system exceeded capabilities of existing software.

Nationwide, it is common for districts to use an instructional management system but much less common for states to operate a statewide system. In states that do not have a statewide system, districts that want an instructional management system contract with a vendor of their choice and usually connect their already existing student information system directly to their instructional management system. The few states that use a statewide instructional management system also use a statewide student information system that directly connects with and uploads data to the instructional management system.

The former superintendent of Idaho envisioned a system that would make student data readily available to districts through a centralized statewide instructional management system. This vision required the proposed instructional management system to have the capability to be populated by Idaho’s statewide longitudinal data system (ISEE) as opposed to a district or statewide student information systems, which are the more common practices. However, the two systems were not easily interrelated and ultimately, the inability to seamlessly interface Schoolnet and ISEE complicated the system design and was a contributing factor in problems with system functionality, data quality, data timeliness, and data accessibility.

In July 2009 the department hosted a vendor fair for a statewide instructional management system and in January 2010 released a Request for Information for an instructional management system vendor. Three finalists were selected for consideration based on their responses to the Request for Information.
An advisory group of 16 education stakeholders representing superintendents, principals, teachers, parents, district IT staff, and the business community reviewed the nontechnical capabilities of the potential vendors using a scoring rubric. The combined group scores preferred Schoolnet, giving it 816 points out of 960. The department evaluated the technical capabilities of the three potential vendors and used feedback from the advisory group as part of its decision-making process.

In July 2010 the department entered into the first of two contracts with Schoolnet Incorporated for a statewide instructional management system. The first contract price was $900,000 and included four Schoolnet modules. Because the department’s plan depended on an instructional management system being able to receive data from ISEE, as part of the contract, Schoolnet Incorporated agreed to redesign Schoolnet to make it function as a statewide instructional management system.
The department was denied funding for an instructional management system three times before receiving funding in May 2011.

The department began seeking funding for a broad array of education reforms including an instructional management system in January 2010. After failing to secure federal grant funding through the Race to the Top grant program, the department turned to the J. A. and Kathryn Albertson Foundation. Although the foundation denied two separate grant proposals from the department, it awarded the department a $21 million grant in May 2011 based on a third proposal and policymakers’ support demonstrated by passing the Students Come First legislation.

Race to the Top grant application (rejected)

In January 2010 the department submitted a grant application for Race to the Top funding through the US Department of Education. Race to the Top was a competitive grant program funded by the American Reinvestment and Recovery Act and asked states to advance four specific education reforms. Idaho requested $120 million to implement its proposal that addressed six categories required by the grant program. Of that total, the department requested approximately $17 million for data systems to support instruction, the third category, including a statewide instructional management system.

Idaho was not approved for funding through the grant program. The reviewers ranked Idaho’s application 28 out of 40 states and District of Columbia with an overall average score of 66 percent. Within the six required categories, Idaho’s proposal to implement data systems to support instruction received an average score of 53 percent—the second lowest score Idaho received within the six categories. In general, the grant reviewers found many insufficiencies with the proposals in Idaho’s application, such as:

- Unrealistic or overly ambitious goals given the timeframe of the grant
- A lack of detail, evidence, discussion, or comprehensive information about implementation of its proposals
- No plan to link student achievement and growth to teachers
Lack of a fully functional K–12 statewide longitudinal data system

Inadequately addressed grant requirements

Idaho’s Race to the Top application outlined sweeping education reforms, of which the instructional management system was only one component. In addition to concerns about Idaho’s data systems and overly ambitious goals, the department’s application lost points for reasons unrelated to data systems.

First proposal to the foundation (rejected)

Despite the reservations expressed by reviewers of Idaho’s Race to the Top application, the department pushed forward to secure alternative funding sources for an instructional management system. In June 2010 the department presented a funding request for an instructional management system to the J. A. and Kathryn Albertson Foundation. In August 2010 foundation staff sent a letter to the department outlining items that needed to be addressed before the foundation would reconsider the department’s request. The items identified by the foundation included the following:

- Develop benchmarking tests used to frequently gauge student achievement and develop short-cycle assessments used in instructional planning
- Develop incentives for use by educators and administrators
- Provide professional development suggestions for educators directly aligned to student outcomes
- Develop policies that support data use to improve instruction and achievement
- Identify education stakeholders and produce a formal agreement from them that indicates what data should be collected, how the data should be defined, and how often the data should be collected and analyzed
- Demonstrate how the data system has the ability to inform policy and ensure alignment and continuous improvement
- Demonstrate the state’s ability to sustain the system
- Develop data elements to inform efforts to improve college and career readiness
- Develop a matrix of best practices for using ISEE data and Schoolnet at every level suitable for evaluations
Second proposal to the foundation (rejected)

In October 2010 the department submitted a second proposal for funding requesting $20 million from the foundation. In November 2010 the foundation responded to the request by again declining to fund the grant proposal based on the department’s inability to ensure long-term success. In a letter to the department, the foundation reiterated the concerns expressed in its first rejection letter:

- The development and adoption of frequent benchmark assessments that are critical to providing real time assessment of student achievement
- Teacher incentive programs
- Ongoing professional development for educators on how to collect and analyze data and improve curriculum
- State and local policy that supports the use of teacher-level data for student achievement accountability
- Key education stakeholder engagement in implementation and in formalized agreements for use
- Formalized relationships with educators and administrators to be part of the design and implementation of a system that measures and adjusts based on the needs of the student
- A sustainability plan from state leaders to ensure ongoing funding
- Data driven instruction practices integrated into teacher preparation programs, as well as teacher and principal evaluations

The foundation’s letter to the department stated, “There must be a demonstrated shift in Idaho from mere compliance in the area of data driven educational practices to strategic implementation and adoption before the Foundation will consider program funding.”
Third proposal to the foundation (accepted)

During the 2011 legislative session, three bills were introduced in the Senate Education Committee—Senate bills 1108, 1110, and 1184. The bills were known as Students Come First and were, in part, intended to bring technology to every classroom, teacher, and student. The Legislature approved the Students Come First legislation and with it, an investment of $130 million over six years to modernize the state’s education system. The Legislature directed the superintendent to create and chair a task force to study and develop plans for the successful implementation of the technology components of Students Come First.

In April 2011, shortly after the Students Come First legislation was signed by the Governor, the department submitted its third proposal to the foundation for $21 million. The department pledged $57 million of the $130 million Students Come First investment to demonstrate to the foundation the state’s commitment.

Although the department had not addressed many of the foundation’s concerns found in the first and second grant proposals, the foundation said it believed the matching funds showed a strong commitment from legislators, the Governor, and the department in their efforts to modernize the education system. In May 2011 the foundation announced that it would fund the $21 million grant.

The grant period was scheduled to end after three years. The grant covered the cost of hardware, software, department staff, professional development for teachers, digital content, classroom technology, and grants for districts to pilot Schoolnet software in their districts. Of the $21 million, about $10 million was budgeted for Schoolnet software and maintenance. See exhibit 1 for the budget proposal submitted by the department to the foundation.

After securing the $21 million grant from the foundation, in July 2011 the department signed the second contract with Schoolnet Incorporated. The contract extended three years and totaled approximately $10 million for completion of specific milestones, maintenance, and the perpetual licenses for seven Schoolnet modules, as shown in exhibit 2.

Digital content
Computer-based curriculum materials, such as videos, interactive activities, and electronic textbooks
Exhibit 1

**Funding for Schoolnet software was just one of seven budget items included in the initial $77.7 million project total.**

<table>
<thead>
<tr>
<th>Budget item</th>
<th>Foundation grant ($)</th>
<th>State funds ($)</th>
<th>Total budgeted ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schoolnet software and maintenance</td>
<td>8,770,000</td>
<td>1,065,900</td>
<td>9,835,900</td>
</tr>
<tr>
<td>Support for district adoption of Schoolnet</td>
<td>4,000,000</td>
<td>0</td>
<td>4,000,000</td>
</tr>
<tr>
<td>Professional development and training</td>
<td>2,034,400</td>
<td>9,985,726</td>
<td>12,020,126</td>
</tr>
<tr>
<td>Digital content</td>
<td>2,100,000</td>
<td>3,560,000</td>
<td>5,660,000</td>
</tr>
<tr>
<td>Classroom technology and infrastructure</td>
<td>2,222,600</td>
<td>39,820,500</td>
<td>42,043,100</td>
</tr>
<tr>
<td>Personnel</td>
<td>1,513,008</td>
<td>2,123,772</td>
<td>3,636,780</td>
</tr>
<tr>
<td>Travel and supplies</td>
<td>368,677</td>
<td>150,000</td>
<td>518,677</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>21,008,685</strong></td>
<td><strong>56,705,898</strong></td>
<td><strong>77,714,583</strong></td>
</tr>
</tbody>
</table>


Exhibit 2

**The department contracted for seven Schoolnet modules.**

<table>
<thead>
<tr>
<th>Schoolnet module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment Admin</td>
<td>Provides districts with a standard platform to build, administer, and track assessments. Provides teachers with class rosters, instruction plans, and student performance and mastery reports for curriculum management and instructional planning.</td>
</tr>
<tr>
<td>Classroom</td>
<td></td>
</tr>
<tr>
<td>My Account</td>
<td>Portal used by all Idaho Schoolnet users to manage their accounts.</td>
</tr>
<tr>
<td>My Schoolnet</td>
<td>Allows department staff with system operator access to configure the landing page for all Idaho Schoolnet users.</td>
</tr>
<tr>
<td>Outreach</td>
<td>Allows district and school staff to perform management tasks. The department is not aware of any districts that use this module.</td>
</tr>
<tr>
<td>Parent Portal</td>
<td>Gives parents access to student grades, assignments, attendance records, and discipline incidents. This module was never implemented because the vendor was unable to meet the department’s needs.</td>
</tr>
<tr>
<td>Student Access</td>
<td>Portal used by students to access assessments and other applications or resources.</td>
</tr>
</tbody>
</table>

Source: Department of Education and NCS Pearson Incorporated publications.
The department made Schoolnet available to all districts but provided funding and training only to pilot districts.

The Students Come First Task Force established a subcommittee to address the implementation of Schoolnet among districts. The subcommittee agreed with the department’s plan to give all Idaho educators access to longitudinal student data and Common Core Standards through Schoolnet in the 2011-2012 school year. In addition, the subcommittee agreed with the department’s plan to award a limited number of pilot districts full access to all the Schoolnet modules along with funding, training, and professional development through a grant selection process.

District grants were awarded in two phases: phase A and phase B. Districts applying for a grant were asked to develop specific goals, objectives, and a plan for implementation to ensure the adoption and sustainability of Schoolnet. According to the department, it selected pilot districts using the following criteria:

- Geographic distribution
- Average daily attendance variances, both large and small
- Demonstrated commitment to adopting Schoolnet as shown through the number of user logins from each district, staff trained on Schoolnet, and the number of local assessments loaded into Schoolnet

Fifteen districts received phase A grants for the 2012-2013 school year and 42 districts received phase B grants for the 2013-2014 school year. Phase B grants totaled $1.85 million. The amount of grant funds received by pilot districts ranged from $12,000 to $250,000. On average, pilot districts received about $58,346. Pilot districts worked with department grant coordinators and data coaches to implement or revise data processes and attain project goals and objectives.

In 2012, at the same time the pilot was rolled out, the department decided to give all districts access to the Schoolnet modules. However, nonpilot districts did not receive the same dedicated training, professional development, and technical support as pilot districts. Without dedicated support from the department, nonpilot districts did not know how to use or leverage Schoolnet tools available to them. Additionally, they did not know how to troubleshoot problems. However, according to the department, some nonpilot districts were able to successfully use Schoolnet.
The department reported that making Schoolnet available to all districts fulfilled one of fifteen 2009 federal Statewide Longitudinal Data Systems Grant Program requirements to provide the transfer of electronic student records. However, the idea of an instructional management system was not included in the original grant proposal and the department was not obligated to use Schoolnet to fulfill the requirement.

In hindsight, the department acknowledged that providing Schoolnet to all districts without also providing support contributed to challenges with the pilot project. Likewise, Pearson said the absence of an appropriate pilot phase hindered the implementation of Schoolnet.

Providing all districts access to Schoolnet without support and before the department had the opportunity to learn from the pilot districts essentially defeated the purpose of implementing a pilot project. A pilot project should be used to identify and solve issues, and then make a decision about the potential success of the product before implementing it on a larger scale. Because of the department’s decision, nonpilot districts did not have the same initial introduction to and experience using Schoolnet.

**In response to district frustrations, the department increased its outreach efforts**

The department reported that during the summer and fall of 2012 approximately 77 percent of all districts received technical training on Schoolnet as part of the department’s outreach efforts beyond the pilot districts. The department created an *ISEE Kick Starter Kit* as a Schoolnet resource for districts, and in May 2013 the department hosted its first annual ISEE boot camp. Although the boot camp was focused on ISEE, Schoolnet was included as a training topic. In spring 2014 the department updated its website with process and training documents for Schoolnet.

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1. In 2009 Idaho received $5.9 million from the federal Statewide Longitudinal Data Systems Grant Program to design and implement the K–12 SLDS known as ISEE.
The repeal of Students Come First jeopardized grant funds and led the department to reassess Schoolnet.

In November 2012 voters repealed the Students Come First legislation. The grant agreement between the foundation and the department depended on matching funds for professional development, which had been allocated through the legislation. With the education reforms outlined in the legislation no longer valid, the matching funds were in jeopardy. In December 2012 the foundation notified the cochairs of the Joint Finance-Appropriations Committee that the grant agreement would be terminated unless the state secured $6.8 million for professional development. Exhibit 3 shows how the department revised the project budget from $77.7 million to about $43 million after the repeal of Students Come First. Although the department projected a $35 million reduction to the project, the state was able to provide more funding for professional development and classroom technology and infrastructure than the department anticipated, bringing the total project cost to about $61 million.

The repeal of Students Come First also meant the department had to reassess Schoolnet to determine whether the project was still meeting the intent of the grant and the needs of districts. According to the department, it placed a higher priority on contract and vendor management, and developed new efforts to support instructional practices with data and technology.

Exhibit 3
The department expected the Schoolnet budget to decrease by approximately $35 million following the repeal of Students Come First.

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Foundation grant ($)</th>
<th>State planned ($)</th>
<th>State revised ($)</th>
<th>Total planned ($)</th>
<th>Total revised ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schoolnet software and maintenance</td>
<td>8,770,000</td>
<td>1,065,900</td>
<td>1,065,900</td>
<td>9,835,900</td>
<td>9,835,900</td>
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<tr>
<td>Support for district adoption of Schoolnet</td>
<td>4,000,000</td>
<td>0</td>
<td>0</td>
<td>4,000,000</td>
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<tr>
<td>Professional development and training</td>
<td>2,034,400</td>
<td>9,985,726</td>
<td>3,925,738</td>
<td>12,020,126</td>
<td>5,960,138</td>
</tr>
<tr>
<td>Digital content</td>
<td>2,100,000</td>
<td>3,560,000</td>
<td>0</td>
<td>5,660,000</td>
<td>2,100,000</td>
</tr>
<tr>
<td>Classroom technology and infrastructure</td>
<td>2,222,600</td>
<td>39,820,500</td>
<td>14,409,750</td>
<td>42,043,100</td>
<td>16,632,350</td>
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<td>Personnel</td>
<td>1,513,008</td>
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</tr>
<tr>
<td>Total</td>
<td>21,008,685</td>
<td>56,705,898</td>
<td>21,675,160</td>
<td>77,714,583</td>
<td>42,683,845</td>
</tr>
</tbody>
</table>

Source: Department of Education.
The department discovered noncompliance issues with the vendor contract.

Schoolnet Incorporated designed and marketed its product as a district tool, not a statewide tool. The vendor agreed to redesign its existing product to function as a statewide system, but the product it delivered did not function as the department expected.

The department noted that functionality problems, such as data quality, timely access to data, inaccurately displayed data in the modules, and delayed implementation of some features continued to create challenges for the districts. The majority of functionality problems were the result of a combination of ISEE and Schoolnet’s technology creating interface problems.

The vendor should share responsibility for the functionality challenges experienced by districts. However, it was the department’s responsibility to verify potential vendors’ capabilities before signing a contract and to hold the vendor responsible for contract performance.

In assessing project risk, the department should have questioned potential vendors’ ability to produce the product the department expected for at least three reasons:

1. The Schoolnet software was designed for use at the district level.
2. Schoolnet Incorporated had never supported a statewide system.
3. Schoolnet Incorporated had never attempted to link its software with a statewide longitudinal data system like ISEE.

The department had entered into a limited scope contract, which should have been an excellent opportunity to further evaluate vendor capabilities, assess project risk, and identify any problems the vendor might have in meeting contract deliverables. Instead, in 2011 the department proceeded to expand the contract from $900,000 to $10 million.

In 2011 Schoolnet was purchased by NCS Pearson Incorporated, and Pearson became contractually obligated to fulfill the department’s contract with Schoolnet.
In December 2012 the department notified Pearson that poor system functionality was affecting district use and requested that it develop an action plan to address documented issues previously submitted to the vendor. The department met with Pearson in January 2013 and continued to correspond about the noncompliance issues through the spring.

The department identified 7 high priority issues and 20 essential issues it wanted resolved by June 30, 2013. In April 2013 Pearson provided documentation showing 17 issues completed, 7 issues open, and 4 issues not included in the original contract (see exhibit 4). However, according to the department, several software deficiencies continued after the June 2013 deadline.

Although the department did not begin remediation efforts until December 2012, the department and Pearson had struggled to communicate since ownership of the company had changed. Pearson was a much larger company than Schoolnet, and the department said that the new company did not prioritize the department’s project or needs.

**The department created the five file format as a workaround for uploading district data into Schoolnet**

Two problems prevented districts from having access to current data in Schoolnet. The first problem was that districts only update data in ISEE once a month. By the time districts are ready to upload data into ISEE in a given month, the data available in Schoolnet was a month old. The second problem was that Pearson was unable to provide districts with access to timely information during the summer months. To address data timeliness problems, in fall 2013 the department created a workaround for data uploads called the five file format to help districts upload data into Schoolnet outside of ISEE.

Using the format, districts upload data from 5 of the 14 required ISEE data files as frequently as they choose. Unlike data uploaded through ISEE that are validated and certified, the five file format data does not use validated and certified data. About 32 districts use the five file format for weekly or daily Schoolnet uploads; the remaining districts either use the five file format infrequently or do not use it at all.
### Exhibit 4

**In April 2013 Pearson reported that seven noncompliance issues remained open.**

<table>
<thead>
<tr>
<th>Department noncompliance issue, March 2013</th>
<th>Pearson response, April 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functionality among multiple districts was deficient</td>
<td>●</td>
</tr>
<tr>
<td>District access to multiple calendars was not implemented</td>
<td>●</td>
</tr>
<tr>
<td>Support to ensure accurate data in Schoolnet had not been provided</td>
<td>●</td>
</tr>
<tr>
<td>Data uploads had not been supported</td>
<td>●</td>
</tr>
<tr>
<td>Option to streamline uploads was not available</td>
<td>●</td>
</tr>
<tr>
<td>2.5 Pearson resources were not dedicated onsite</td>
<td>●</td>
</tr>
<tr>
<td>Hosting transition plan had not been completed</td>
<td>●</td>
</tr>
<tr>
<td>Specific configurations were not available to districts</td>
<td>●</td>
</tr>
<tr>
<td>Districts were unable to share materials</td>
<td>●</td>
</tr>
<tr>
<td>The product was not ADFS compliant</td>
<td>●</td>
</tr>
<tr>
<td>Monthly usage statistics by role for each district and campus were not accessible on demand</td>
<td>●</td>
</tr>
<tr>
<td>Idaho had not transitioned to self-hosting</td>
<td>●</td>
</tr>
<tr>
<td>Outreach module was not available</td>
<td>●</td>
</tr>
<tr>
<td>Pilot districts not able to administer at least one online assessment to 80% of students</td>
<td>●</td>
</tr>
<tr>
<td>First cohorts not configured and trained</td>
<td>●</td>
</tr>
<tr>
<td>Remainder of first cohort not configured and trained</td>
<td>●</td>
</tr>
<tr>
<td>40% of districts statewide had not been enabled with Schoolnet and data coaches</td>
<td>●</td>
</tr>
<tr>
<td>Second cohort had not been configured and trained</td>
<td>●</td>
</tr>
<tr>
<td>Retraining on statewide package not completed</td>
<td>●</td>
</tr>
<tr>
<td>Parent portal was not implemented</td>
<td>●</td>
</tr>
<tr>
<td>Districts were unable to have community engagement</td>
<td>●</td>
</tr>
<tr>
<td>Professional Learning Communities not supported</td>
<td>●</td>
</tr>
<tr>
<td>10 Idaho-specific eLearning videos had not been completed</td>
<td>●</td>
</tr>
<tr>
<td>5 additional Idaho specific eLearning videos had not been completed</td>
<td>●</td>
</tr>
<tr>
<td>Communication plan had not been created</td>
<td>●</td>
</tr>
<tr>
<td>Marketing plan had not been created</td>
<td>●</td>
</tr>
<tr>
<td>Training plan had not been created</td>
<td>●</td>
</tr>
</tbody>
</table>

**Source:** Email correspondence between the Department of Education and NCS Pearson Inc., provided by the Department of Education.
Oversight of Schoolnet has changed hands four times since 2011.

After the repeal of the Students Come First, the department transferred oversight of the project to the director of instructional technology in November 2012. In August 2013, at the same time the department had hired a new deputy superintendent, the department was also working with Pearson to develop a work plan in response to an independent review of the project commissioned by the foundation. Although the new deputy superintendent was not hired to oversee Schoolnet, project management was again reorganized giving oversight to the deputy.

However, shortly after the former superintendent of public instruction announced he would not be seeking reelection, the deputy submitted his resignation in January 2013. After the deputy’s departure, oversight was reverted to the director of instructional technology. In January 2015 a new superintendent of public instruction took office and again reorganized management of Schoolnet. The instructional technology division was moved from the IT division to the content division and oversight was transferred to a new project manager.
Concerned whether the department was meeting grant expectations, the foundation hired an independent review of the project.

In March 2013 the department provided the foundation with the fourth of six formal progress updates required by the grant agreement. The update detailed both challenges and successes but overall indicated positive results and renewed plans for moving the project forward. However, the foundation found that districts were increasingly expressing challenges with Schoolnet, such as limited support from the department and limited time and resources to use the system. According to the foundation, the department was not taking the necessary steps to acknowledge or address these concerns.

In April 2013 the foundation hired the Institute for Evidence-Based Change to conduct an assessment of the implementation and use of Schoolnet. The institute found problems with ineffective department communication, a lack of data quality and access, low levels of district participation, and a lack of value for Schoolnet among districts. In its final report, published in May 2013, the institute offered action steps to help remedy these and other issues it identified in the review.
The department and Pearson entered into remediation efforts to improve the delivery of Schoolnet among districts.

In August 2013 the department and Pearson collaborated to develop a work plan with agreed upon deliverables and services that were each associated with specific timeframes for completion. The following month, the department provided the foundation with a work plan to address specific challenges in the final year of the Schoolnet pilot. The plan detailed objectives as well as revised the grant budget.

In a November 2013 presentation, the Schoolnet project manager stated that the original three-year pilot had been completely revised and work was being done to reevaluate all aspects of the project. Additionally, the department began working with Pearson to pilot a direct data connection between Schoolnet and PowerSchool, a separate Pearson Education Incorporated product used by districts to track student information. Three districts participated in the pilot, which was funded by Pearson.
The foundation tied the release of remaining grant funds to the department’s ability to meet specific benchmarks.

Although the department immediately began working to address the findings in the institute’s review, the foundation informed the department in November 2013 that it would withhold the remaining $4.5 million in grant funds until measurable benchmarks were achieved. The foundation also expressed its concern that Schoolnet, as well as ISEE, lacked key elements needed to ensure long-term success. The foundation encouraged the department to complete the following tasks, which were also identified as lacking in the first two grant proposals:

- Develop state and local policies supporting the use of teacher-level data for accountability of student achievement
- Formalize relationships with educators and administrators to design and implement a system that measures and adjusts to student needs
- Develop data-driven instruction practices integrated with teacher preparation programs and evaluations
- Create ongoing professional development that teaches educators how to collect and analyze data to improve curriculum
- Develop and adopt benchmark assessments that are critical to providing real-time assessment of student achievement

The foundation also stated that education stakeholders and policymakers must demonstrate a shift from a focus on compliance to strategic implementation and adoption.
The department collaborated with Pearson and the institute to develop a plan to address specific challenges during the final year of the Schoolnet pilot

In January 2014 the department, Pearson, and the institute developed a Schoolnet leadership implementation plan that identified four major areas of focus during the remaining months of the foundation’s support of the pilot under the grant:

1. Increase accurate data with a focus on direct connect, five file format, and programming changes
2. Improve professional development
3. Increase effective communication
4. Strengthen project management

The focus areas were in addition to the steps agreed upon in the new work plan and were intended to expand the department’s role in implementation of the project. Data sources and desired outcomes were identified and were to be reported to the foundation. As written in the leadership implementation plan, the primary objective was “to increase the number of teachers who are using Schoolnet in a meaningful way to improve classroom instruction.”

However, the department has never had access to meaningful metrics for the use of Schoolnet among districts. The department relies on login data as its primary metric for use, but login data has many limitations and does not give a complete picture of how districts use the many modules and tools within the Schoolnet platform. Likewise, the department has no way to measure how students are using the modules and tools within Schoolnet because the platform was not designed as an accountability tool for instruction.

The department also counts the number of assessments created in each districts. Again, a simple count does not demonstrate use or value. Additionally, the department has no ability to determine the quality of the assessments created, although it encourages districts to share assessments.
The foundation found the department to be noncompliant with the grant agreement and announced its decision to limit financial support of the project.

In May 2014 the institute issued a second report, *Lessons Learned from Idaho’s Instructional Improvement System*. This follow-up review found that the department and Pearson had “struggled to meet the expectations and needs of Idaho educators.” However, the review also found that the department and Pearson had successfully worked to address some of the issues identified in the initial review. In conclusion, the review found that the foundation was frustrated with the outcome and future plans for Schoolnet to serve as a resource for districts.

Ultimately, the foundation found that the department was not meeting the grant requirements and developed a strategy to dissolve the grant agreement. The goal of the Schoolnet pilot was to provide timely and relevant instructional data to teachers, but the challenges districts faced when using the system prevented that goal from being realized. The foundation withheld $1.1 million of the initial $21 million.
In spring 2014 the department transitioned to hosting Schoolnet in-house. Self-hosting had been an option for the department upon completion of the pilot. The department purchased a perpetual license for Schoolnet in October 2012 and received a $4.5 million state appropriation in fiscal year 2014 to purchase additional hardware and software to make the transition. The department completed the self-hosting transition in June 2014 and reported a noticeable improvement in upload speed and server response time among teachers.

According to the department, self-hosting would give its IT staff better access to the Schoolnet platform, which will allow the department to improve assistance to districts that had questions. On the other hand, the institute raised concerns that self-hosting Schoolnet would limit the department’s access to support for Schoolnet and that the department may not have had the training and expertise to maintain the system and implement future versions.
The department minimized the significance of implementation problems, which left policymakers and the foundation with reassurances that Schoolnet was useful to districts.

In its January 2013 legislative report, the department informed legislators of Schoolnet accomplishments and of its plans for the continued implementation of Schoolnet among districts. The department’s report did not mention, however, that the department had recently requested for Pearson to submit a critical action plan addressing product deficiencies that affected system functionality. Similarly, the legislative report for the following year, January 2014, highlighted the success of the five file format and use of the process by both pilot and nonpilot districts. The report did not mention, however, that the five file format was developed as a work-around to address system limitations for the Schoolnet platform, the findings of the institute’s review, or the foundation’s decision to withhold grant funds unless specific benchmarks were achieved.

In fall 2013 the department acknowledged that Schoolnet was not working well for some districts, but only after a K-12 Educational System Interim Committee heard testimony from districts about some of their challenges. When legislators began questioning the success of the project during the 2014 session, the department reported that it and Pearson developed the work plan after feedback from pilot districts. In actuality, the work plan was a result of the institute’s review, which was commissioned by the foundation.

Additionally, in our interviews, the foundation expressed that the department’s portrayal of the project as it progressed appeared to be misleading.
The Legislature provided districts with funding for other instructional management systems.

For fiscal year 2015, the Legislature appropriated $4.5 million to the former superintendent for the maintenance, operation, and licensing of the statewide instructional management system. Of that total, the former superintendent was allowed to distribute no more than $2 million to districts to implement and operate local instructional management systems, other than Schoolnet, that interface with ISEE, technology staffing costs, or classroom technology.

By appropriating up to $2 million specifically for district use, the Legislature recognized both its support for an instructional management system and districts’ frustration with Schoolnet. However, the decision deviated from the department’s efforts to provide a single statewide platform to all districts. This decision did not change the cost of maintaining and hosting Schoolnet in-house, but it potentially influenced the number of districts willing to continue using Schoolnet when state funds were made available for an alternative system—thereby decreasing the value of a single statewide system.
Conclusion

The research for this evaluation was conducted before the newly elected superintendent of public instruction took office in January 2015. Therefore, the information included in this report is reflective of the efforts of the former administration and does not consider the opinions or actions of the current administration. However, a change in administration is often an appropriate time to reevaluate an agency’s mission and goals. The new administration is well situated to work with districts and the Legislature to determine the future of Schoolnet.

For any large project involving IT systems in the future, project planners and implementers should pay close attention to the advice offered in the rejection letters the department received in response to its first three requests for funding. Those rejection letters shared common themes that any funding proposal should address:

- Clear, complete, and comprehensive descriptions of all project plans
- Measureable goals and metrics with realistic outcomes
- State and local policies in support of the project
- Evidence of project or system sustainability
- Proof of stakeholder engagement in developing the project and support for implementation or participation

Insufficiencies in the department’s plan to implement a statewide instructional management system led the federal government and the J. A. and Kathryn Albertson Foundation to reject requests for funding on three separate occasions. Undaunted, the department pushed forward without making serious efforts to reconsider its plan in light of the issues raised in three rejected funding proposals.

Although the foundation denied two separate grant proposals from the department, it awarded the department a $21 million grant in May 2011 based on a third proposal and policymakers’ support demonstrated by passing of the Students Come First legislation.
Within two years after the department began implementing the pilot project, the foundation was sufficiently concerned about the progress of the project that it hired the Institute for Evidence-Based Change to conduct an independent assessment of Schoolnet. The institute found significant problems with the functionality of Schoolnet and the department’s management of the project. We believe some of those problems could have been prevented had the department addressed the issues presented in the previous rejection letters.

Although the department made efforts to improve data quality and access issues in response to the institute’s assessment, the foundation found the department’s progress to be unsatisfactory and ultimately terminated the grant agreement withholding approximately $1.1 million of the remaining funds.

The pilot project has ended without having established a statewide instructional management system as an integral part of Idaho education. The department continues to host Schoolnet, but so far, it has been unable to demonstrate to many districts that a statewide instructional management system offers any unique value. Some districts remain uncertain about the value of a centralized statewide instructional management system, whereas, some districts are using Schoolnet and are satisfied.
Options for the future

Given the inability of the department’s former administration to demonstrate the value of a statewide instructional management system, districts’ disinterest or uncertainty about the long-term sustainability of the system, and the completion of the pilot project phase, the department and the Legislature are left with few options to consider when deciding the future of the program. Each option has advantages and disadvantages but the way forward is unclear.

Although the project has cost the state and the foundation about $61 million, these are sunk costs and cannot be recovered regardless of future decisions. Therefore, the $61 million should not be a consideration in future decisions regarding Schoolnet.
Option 1: Continue financial support for the statewide instructional management system (Schoolnet).

Given the problematic pilot and system functionality problems, even the few districts that have been committed to Schoolnet are only recently starting to see educators and administrators make consistent use of it.

Because some districts have started to see educators and administrators make consistent use of Schoolnet, the department and policymakers might consider continuing to fund the project. But if the department intends to continue to support a statewide instructional management system and ensure the cost of maintaining the system is worthwhile, the department will need to reassess its strategy to increase use among districts and educators.

The ongoing annual cost to maintain Schoolnet (including the associated digital content) is about $2.5 million. However, successful efforts to increase use among districts would likely add to the ongoing $2.5 million maintenance costs. The department spent on average $58,346 per pilot district to support implementation of Schoolnet.

To determine the value of continuing to support a statewide instructional management system, the department should develop realistic and meaningful goals and metrics that define successful outcomes for districts using the system. One of the primary benefits to districts of the statewide system is that districts can use it with no direct cost for software and support.

The Legislature should also consider that providing districts with state funding for alternative instructional management systems affects the value of the statewide system. Any future goals and metrics would need to reflect the possibility that districts might choose a different system regardless of whether the department offers Schoolnet statewide.
Option 2: Discontinue financial support for the statewide instructional management system (Schoolnet).

The Legislature and the department may determine that the inability of the department’s former administration to demonstrate value to a widespread user base for a statewide instructional management system is cause enough to terminate state funding for the project without first developing new goals and metrics.

Some districts are using the state-hosted system and are satisfied. If the Legislature or department choose to discontinue funding for the statewide system, consideration should be given to whether state funding should be provided to districts so they can independently contract for a system of their choice and continue to realize the benefits they have found in an instructional management system. During the 2014 legislative session, the Legislature already took a step in this direction by appropriating state funding for districts to purchase their own local systems rather than continue to use Schoolnet.

An additional factor that must be considered before discontinuing Schoolnet at the state level is the department’s Elementary and Secondary Education Act (ESEA) flexibility waiver. The department identified its use of Schoolnet as a key aspect of its current waiver. Before discontinuing support for Schoolnet, the department would need to identify and prepare alternatives that would satisfy ESEA requirements.
Appendix A

Study request

The ISEE portion of the request is discussed in the February 2015 evaluation report. The K-12 Longitudinal Data System (ISEE).
February 26, 2014

Mr. Rakesh Mohan, Director
Office of Performance Evaluations
State of Idaho
STATEHOUSE MAIL

Dear Mr. Mohan:

Idaho was the last state in the country to develop their longitudinal data system for public education. The Idaho System for Educational Excellence (ISEE) is that system. ISEE is coupled with an instructional improvement system, currently Schoolnet, to form a statewide platform. Both systems have had implementation issues with local school districts concerns about the additional cost of gathering and submitting data into ISEE as well as accuracy. There are many examples of data systems available for comparison where service oriented architecture enables the free flow of data from a local level to a state level and back.

We, the Senate Education Committee, request an Office of Performance Evaluations study of both the ISEE system and the instructional improvement system with the focus directed on how both systems can be made to work effectively without additional pressure on local school district staff.

Respectfully,

John W. Goedde
Chairman
Senate Education Committee

JWG/esl
February 4, 2014

Senator Dean Mortimer
Representative Shirley Ringo
Co-Chairs, JLOC

Dear Senator Mortimer and Representative Ringo,

For many years the State of Idaho has been funding a program called “Schoolnet” in conjunction with donations from the J.A. and Kathryn Albertson Foundation.

I request a study from the Office of Performance Evaluation to determine the rationale of continuing to fund a program that has not provided results.

To this end, I request the following information:

1. A study from the Office of Performance Evaluation to determine the rationale of continuing to fund a program that has not provided results as evidenced in the Institute for Evidence-Based Change’s external study commissioned by JKAIF.
2. How much money has been expended on Schoolnet to date?
3. Why is this program still being called a “pilot” project after so many years with all schools being required to participate?
4. An analysis of acceptance from the school districts regarding the validity of this program, including accuracy and ease of use.
5. What other systems are the local school districts using to track students in longitudinal studies to ensure accuracy?

I would like to have this completed by December 31, 2014.

Thank you for your consideration.

Respectfully,

Senator Roy Lacey
The Department of Education envisioned linking the K–12 longitudinal data system (ISEE) with an instructional management system that would bring student data to the classroom. In 2010 the department selected Schoolnet as the statewide instructional management system and in 2011 received $21 million from the J. A. and Kathryn Albertson Foundation to implement a pilot project.

The implementation and usefulness of Schoolnet drew criticism from local stakeholders, and in 2013 the foundation commissioned an independent review conducted by the Institute for Evidence-Based Change. The institute confirmed a sense of frustration among local stakeholders but also a sense of hope about the future. Similar to the previous surveys, the institute found that data quality, communication, and an understanding of the value of the systems continued to be key concerns at the local level.

Despite the work done to improve Schoolnet, some local stakeholders continued to express frustration. During the 2014 legislative session, the Joint Legislative Oversight Committee approved the evaluation at its March meeting.

**Evaluation objective**

The evaluation will identify sustainable approaches to the challenges that affect districts’ and the department’s ability to effectively and efficiently use ISEE and a statewide management improvement system.
Appendix C

Methodology

We developed the scope of this report based on the study requests from legislators and preliminary interviews with stakeholders. Legislative questions about Idaho’s K–12 statewide longitudinal data system (ISEE) are not addressed in this report but are answered in a separate report *The K–12 Longitudinal Data System (ISEE)*, published February 2015.

Problems with system functionality and the department’s management of the project have been well documented by the Institute for Evidence-Based Change. Therefore, we did not intend to duplicate its work. Instead, this report is intended to show that the problems with the project began long before a system vendor was selected, were rooted in decisions made by the department, and importantly, were for the most part avoidable.

We determined that the methods most suitable for the goals of this project were interviews with key stakeholders and a comprehensive document review. By conducting multiple interviews within each stakeholder group, we were able to identify themes common among stakeholders. The comprehensive document review allowed us to develop a clear recounting of the events and decisions underlying the themes identified through stakeholder interviews. Taken together, stakeholder interviews and extensive documentation showed a clear link between decisions, events, and outcomes.

**Interviews**

We interviewed Department of Education officials as well as IT and Schoolnet staff. The former director of instructional technology gave us a three-hour live demonstration of the Schoolnet modules owned by the department.

We interviewed the executive director and the program officer with the J. A. and Kathryn Albertson Foundation.
We interviewed 16 districts about their experiences using Schoolnet. Responses ranged from little or no involvement to direct oversight of the instructional management system. Their responses supported comments we heard or read from other sources.

We met with the legislative budget and policy analyst for public school education to collect funding information and historical context surrounding legislative support of the instructional management system. We also worked with the department’s chief financial officer to collect itemized funding data for the Schoolnet project.

**Comprehensive document review**

We reviewed the complete assessment of Schoolnet *A Review of Idaho’s Instructional Improvement Systems* conducted by the Institute for Evidence-Based Change in spring 2013. The institute conducted its own document review, visited 11 districts, surveyed 18 districts, and interviewed key stakeholders. We also reviewed the institute’s May 2014 follow-up assessment, *Lessons Learned from Idaho’s Instructional Improvement System: Executive Summary*.

We reviewed Idaho’s 2009 Race to the Top grant application. In its proposal, Idaho sought funding for many education reforms, among them a statewide instructional management system. In addition, we reviewed the technical review form Idaho received from the five grant application reviewers who provided comments and total points scored on the proposal.

We reviewed documents provided by the Department of Education and the J. A. and Kathryn Albertson Foundation relevant to Schoolnet, such as grant proposals, internal correspondence, progress reports, work plans, and vendor contracts.

We reviewed and analyzed funding documentation and data including the initial $77.7 million project budget for the larger education technology reform, of which Schoolnet was one component; the revised project budget after the Students Come First legislation was repealed; data for the 57 districts that received grants from the Department of Education to implement and use Schoolnet.

We reviewed meeting minutes from legislative germane committees, legislative task forces, and the Students Come First Task Force. We reviewed press releases and other media publications. We reviewed information provided by NCS Pearson.
Incorporated on its website about the services and systems it sells.

We reviewed other federal grant applications submitted by Idaho, regardless of whether those proposals were funded, to learn about related technology or longitudinal data projects.

We worked with a consultant specializing in library sciences and gray literature reviews to complete a literature review about instructional management systems. We researched the use of instructional management systems in other states.
Responses to the evaluation

“The [report’s] summary of milestones in the development of the system and the challenges of implementation will be very helpful in determining a path forward.”
—Butch Otter
Governor

“It was not only said internally, but became part of the discussion amongst districts and the department alike that we are unfortunately ‘trying to build a plane while flying it.’”
—Sherri Ybarra
Superintendent of Public Instruction
Rakesh Mohan, Director  
Office of Performance Evaluations  
954 W. Jefferson St.  
Boise, ID 83720

Dear Rakesh,

Thank you for the opportunity to comment on the report on Idaho’s Instructional Management System (Schoolnet). The summary of milestones in the development of the system and the challenges of implementation will be very helpful in determining a path forward to ensure teachers have effective tools and resources to improve instruction.

The Task Force for Improving Education included research on the importance of educator collaboration including the use of data to set goals and measure student progress. Its work highlighted the need for school access to accurate and timely data along with training on how to use data for school-based decisions. Schoolnet was discussed and feedback was solicited from school districts on their use of the statewide instructional management system or of alternate systems.

While the Task Force committee was aware of your office’s pending report, it preliminarily concluded that a single system such as Schoolnet may not be in districts’ best interests. It recommended that districts have the flexibility to choose instructional management systems that best meet their needs, provided such systems can fulfill state reporting requirements. It further found that individual vendors, such as Milepost and Skyward, may have more technical resources and incentives available than Schoolnet can bring to bear in working with districts in a timely manner.

Your report and the research of the Task Force will be valuable as the state considers how best to support teacher collaboration and use of data for decision making. Once again, thank you for your work on this issue and for the opportunity to review your report.

As Always – Idaho, “Esto Perpetua”

C.L. “Butch” Otter  
Governor of Idaho

CLO/mlw
Office of Performance Evaluation  
954 W. Jefferson St. 
Boise, ID 83720

Formal Agency Response: Idaho’s Instructional Management System (Schoolnet) Offers Lessons for Future IT Systems

The State Department of Education is responding to the Schoolnet report as written by the Office of Performance Evaluation. The department is also referencing the Idaho State Department of Education Reporting and Analysis System Vendor Selection process. This document discussed the vendor selection process, who was involved and why Schoolnet was selected. It is important to note that within this document that the advisory group selected Schoolnet as the statewide solution; this was two years prior to the hiring of those individuals who would ultimately be responsible for the management and implementation of the platform. It should also be noted that the selection committee did not include employees of the State Department of Education; the committee was constructed of the following:

- Trustees (3)
- Superintendents (1), two planned - one late cancellation
- Principals (2) three planned - one did not show
- Parents (PTA) (3) two planned – one late addition
- Teachers (3)
- Charter school (1)
- IT directors/technical (2)
- BSU Center for School Improvement (1)
- Idaho Industry (2) (Idaho Innovation Council, one at large)
- National Center For Educational Statistics Forum member (1)

It is also important to note that although Schoolnet was selected as the statewide solution, there were individuals on selection committee that recognized the shortcomings of Schoolnet as stated below:

- “One concern might be their relative lack of experience with state initiatives”
- “Never done a statewide install – risk factor”

While there are many truths within the OPE report, the bottom line is the implementation of Schoolnet was bound to be unsuccessful from day 1; you cannot implement a software platform that does not function properly and that was not developed, nor intended for statewide implementation. No matter the amount of communication or professional development, if the software provided to the local district does not function, it will not be adopted. It was a mistake to sign a contract with a vendor providing a software platform that, (a) did not provide a statewide solution, and (b) did not interface with ISEE. Signing a contract with these shortfalls, and looking for these promises to be delivered later was an initial step in the wrong direction.
Within the leadership implementation plan it was stated that the primary objective was “to increase the number of teachers who are using Schoolnet in a meaningful way to improve classroom instruction.” This goal was established while the functionality of the Schoolnet platform was still lacking, making this goal unachievable.

While platform functionality was, and continues to be a concern, other issues were roadblocks in the implementation of Schoolnet. Within the original contract, Pearson/Schoolnet was obligated to provide the department with a marketing and communications plan. After several months of review and feedback from one of the department’s grant coordinators stating that the provided draft marketing and communications plan was severely lacking in development, content, knowledge and strategy, the obligation of providing this plan was never delivered upon. Without this plan, the department had no formal direction structured around marketing and communicating Schoolnet to districts.

Additionally, it was a contractual obligation of Schoolnet (Pearson) to provide login and usage statistics to the department. Over the course of the ISEE Phase II B grant, this information wasn’t provided until 2014 and once provided was laced with inaccuracies. A grant coordinator, following the end of the grant in a different personnel role, wrote a letter regarding the inaccuracies of the login and usage scripts written by Pearson/Schoolnet. This letter was provided to the prior administration; however the distribution of this letter may not have occurred at that time. If we are to expect teachers to utilize viable and accurate data to support decision making in the classroom, we should also expect that we as a department would utilize accurate login and usage statistics to lead decision making in the implementation of Schoolnet. Unfortunately, accurate and dependable login and usage statistics were never obtained as reported by department personnel.

Ultimately, the department cannot expect success when signing a contract for a statewide solution that doesn’t satisfy the goals and objectives from day one. It was not only said internally, but became part of the discussion amongst districts and the department alike that we are unfortunately “trying to build a plane while flying it.” This was reactionary on the part of the grant coordinators in an effort to be honest with districts, and display the actual situation when standing in front of dozens of teachers attempting to provide training and support.

The grant coordinators were, due to the lack of functionality of the platform, forced to train on areas of Schoolnet which were performing slightly better than others. The reason for this was, if they were to have a chance at adoption and to show effective use to teachers, they were unwilling to risk system failure while training dozens of teachers at a time. This was an unfortunate reality of the implementation of Schoolnet. Towards the end of the project, it was extremely difficult to bring teachers and school administrators back to the table to try Schoolnet just one more time when the platform was functioning fairly well; the overwhelming response from districts was, “I tried it and it didn’t work, it isn’t worth my time.” While this response was based on their user experience in the past, it proved difficult to bring teachers and school administrators back to try Schoolnet again. This was due to the premature launch of the platform, releasing it statewide rather than focusing on a small subset of school
districts with their understanding that it was a true pilot program.

Those in charge of managing the School implementation from January 2013 until the end of the project were placed in a precarious position. These individuals were not a part of the original adoption of the Schoolnet platform, and were not in a direct leadership role at the signing of the contract. These individuals were in a similar position as the grant coordinators; taking over a program that was struggling from the very beginning. These individuals spent the vast majority of their time dealing with an unsuccessful vendor, personnel and product, and were largely unable to focus much of their time on implementation of the software.

In conclusion, there is not and will never be a software solution that will be adopted by all districts and all teachers in the great state of Idaho. The idea of a statewide instructional improvement system does have its merits; however it is at best naïve and lacks the understanding of how educators work. Great teachers utilize a significant amount of resources at their fingertips, and for the most part are not tied to one software solution. They, like their students, frequently try new things in an effort to expand the horizons of learning. Schoolnet or any other IMS, ties them to one resource thus creating a void in their technical imagination, and as noted, places all of their fruit in one basket. What is needed is a consistent, secure display of accurate and timely student level data that can be accessed by any educator to be used by whatever instructional improvement system they deem valuable.

Sincerely,

Pete Koehler
Idaho State Department of Education
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