

## Durham Public Schools Board Work Session PRECIS

### Agenda Item: District Dashboard

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### Main Points:

District Administration will provide information to the Board for approval to implement a districtwide Data Dashboard Platform designed by Panorama Education. The presentation will focus on the Strategic Plan Alignment and coherence with findings from district stakeholders' needs assessments. The information will be presented by Academic Services, Student Support Services, and Research & Accountability administrators.

### Fiscal Implications:

There are fiscal implications for purchasing the platform and developing professional development over a three-year implementation period.

### Purpose

**Information/Discussion** ☐ **Action** ☐ **Consent** ☒

**Reviewed by:** ☒ **Finance** Paul Lesieur ☒ **Attorney**  
M.M.



**IGNITING LIMITLESS POTENTIAL**



# **Panorama Data Dashboard**

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**Dr. Julie D. Spencer**  
**Assistant Superintendent for Research and  
Accountability**

**Dr. LaVerne Mattocks-Perry**  
**Senior Director of Student Support Services**



# BACKGROUND





# THE STRATEGIC PLAN



# Strategic Plan Alignment

- **Goal 1B**
  - > Establish and monitor individual student achievement goals using a centralized data dashboard and design instruction to accelerate growth for every student
- **Goal 1B**
  - > Create and implement a tiered plan of support that provides standardized intervention strategies that are designed to supplement or enhance core instruction
- **Goal 1C**
  - > Develop a centralized Early Warning Tracking System, beginning at elementary school, that identifies students who are at risk of disconnecting from school
- **Goal 2B**
  - > Monitor and report disaggregated suspension rates on a school-by-school basis



# Why DATA DASHBOARDS?

Data dashboards can:

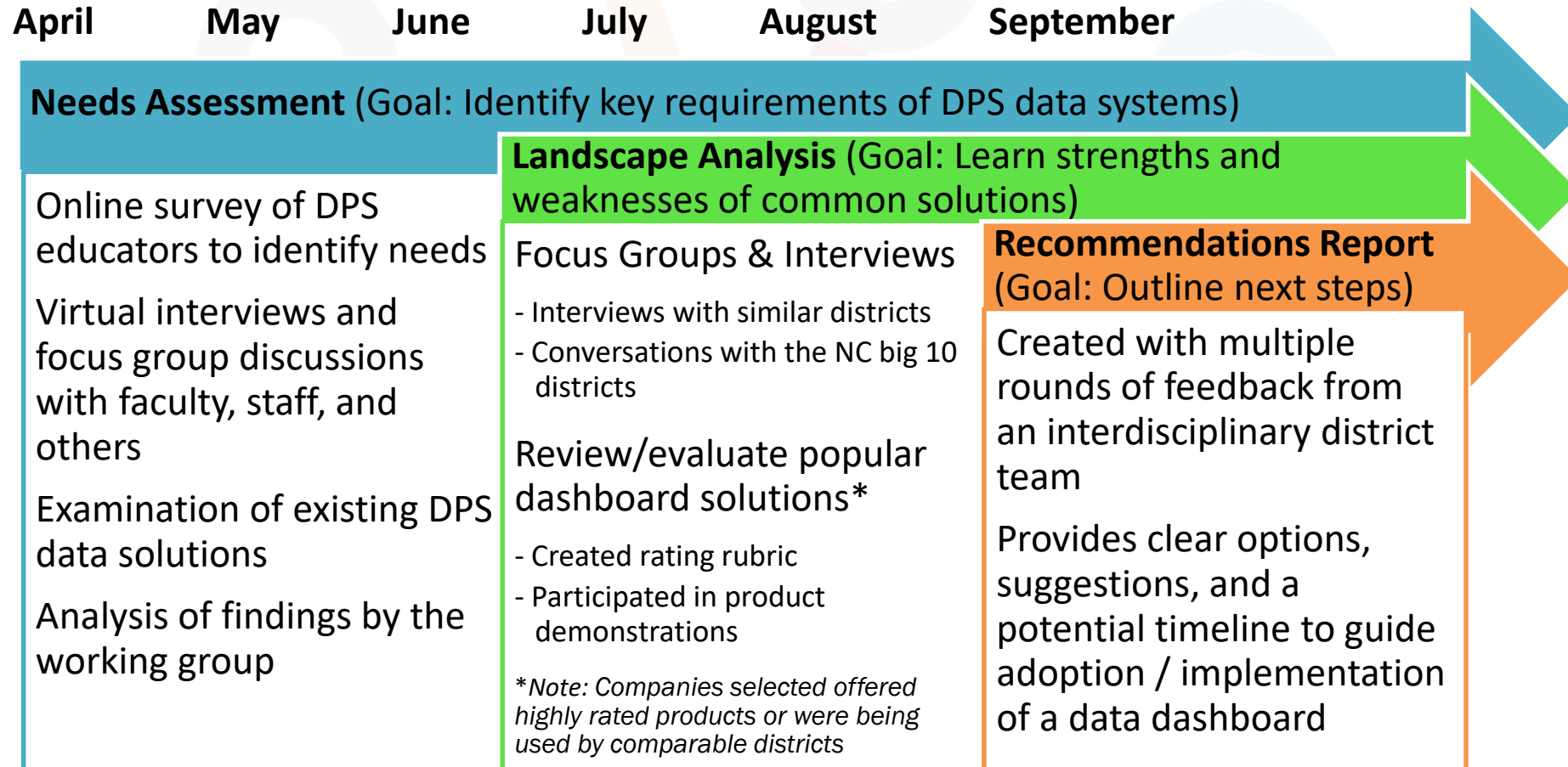
- Help schools and districts organize and present raw data into actionable insights.
- Highlight relationships across different data sets (e.g., attendance, course grades, SEL, behavior, test scores) so administrators, teachers, and families better understand the holistic student experience.
- Give educators the information they need to intervene at the right time and place and provide students the supports they need.
- Provide educators analytics to help nurture and guide students toward greater success.



# THE PROCESS

# Timeline of 2021 DPS Data Dashboard Planning Work

All planning work was completed through a collaborative partnership between an inter-departmental DPS Data Dashboard Working Group and FHI 360



# RECOMMENDATIONS FOR NEW CENTRALIZED DASHBOARD

### Recommended Features

- Pull indicators from various databases into a one-stop shop dashboard updated in real-time
- Show trends of historical data and correlations across indicators
- Show student-level and aggregated data
- Include pre-loaded and customizable reports
- Track students and monitor progress (e.g., search for students and groups of students)
- Provide users with access to all relevant student data
- Be able to export data as raw Excel files and printer-friendly PDFs of visuals
- Be user-friendly, including widgets, charts, and consistent color schemes
- Be able to adapt to changes in the education system (e.g., new assessments)

### Recommended Indicators

- Most important: student demographics, contact information, performance (grades/assessments), and attendance as well as data for targeting students
- Secondary indicators to include are student discipline, SEL, and school climate

## Focus Group and Interview Results

### CENTRALIZED DASHBOARD ACCESS RECOMMENDATIONS

#### District Staff



Access to all attendance data

Access to all grades' data to assess students on the cusp and problem solve

#### School

#### Administrators



School-level access

Specialist (e.g., EC, ESL, AIG) access to full caseloads

Principal access to data from other similar schools to know what other schools are doing to help student improvement

#### Teachers



Access to students' current and historical data to see trends and manipulate data

Access to classroom-level data vs. access to all subjects students have been enrolled in, including across the district

Access to strategies and interventions; full access for IAs

#### Parents and

#### Students (later phase)



Access to child's current and historical data

Comparison of child's data in relation to meeting standards

Comparison of child's data in relation to class, school, district

Includes credit recovery, standards master, attendance, test scores, progress, achievement, etc.

## DPS DISTRICT DASHBOARD RECOMMENDATIONS

Recommendation 1:	<b>SELECT A PRODUCT THAT SUPPORTS DURHAM'S STRATEGIC GOALS</b> DPS should use its strategic goal as a lodestar: Which product will help DPS “establish and monitor individual student achievement goals using a centralized data dashboard and design instruction to accelerate growth for every student”?
Recommendation 2:	<b>USE AN OFF-THE-SHELF PRODUCT</b> Off-the-shelf products provide strong usability with a lower investment in internal expertise.
Recommendation 3:	<b>SELECT A PRODUCT THAT CAN GROW AND EXPAND WITH DPS'S NEEDS</b> While DPS initially has basic requirements for a data dashboard, it may want to expand its capabilities over time.
Recommendation 4:	<b>USE A PHASED-IN APPROACH TO IMPLEMENTATION</b> Consider starting with district leadership, then adding school-based educators, followed by families and community.
Recommendation 5:	<b>CONSIDER PRIOR SUPPORT EXPERIENCE</b> Attentive, responsive, and professional customer service supports the successful launch and maintenance of a new data dashboard.



## DPS DISTRICT DASHBOARD RECOMMENDATIONS

Recommendation 6:	<b>CREATE A COMMUNICATIONS PLAN FOR ALL STAKEHOLDERS</b> Strong communication will ensure that everyone understands how the new dashboard works and how it will help DPS meet its strategic goals.
Recommendation 7:	<b>CREATE AN ONGOING, HANDS-ON PROFESSIONAL DEVELOPMENT PLAN</b> Professional development should go beyond basic dashboard functionality, teaching educators to inform instruction and increase equity across classrooms. The professional development plan should also allow users to practice and learn together to build their data analysis skills.
Recommendation 8:	<b>ESTABLISH CLEAR ROLES, RESPONSIBILITIES, AND RULES</b> DPS should clearly define roles and responsibilities for leading the data dashboard's launch and ongoing use.
Recommendation 9:	<b>STAFF FOR SUCCESS</b> To successfully shift to a new dashboard, DPS will need to establish dedicated staff to support the work.
Recommendation 10:	<b>INVEST IN PANORAMA</b> The Dashboard Working Group unanimously recommends Panorama.



# PANORAMA STUDENT SUCCESS PLATFORM

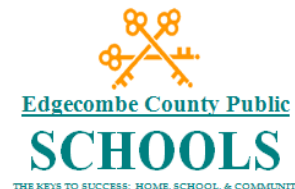
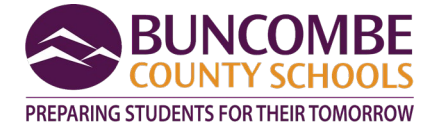
# PANORAMA EDUCATION

## Overview of Supports



## About Panorama

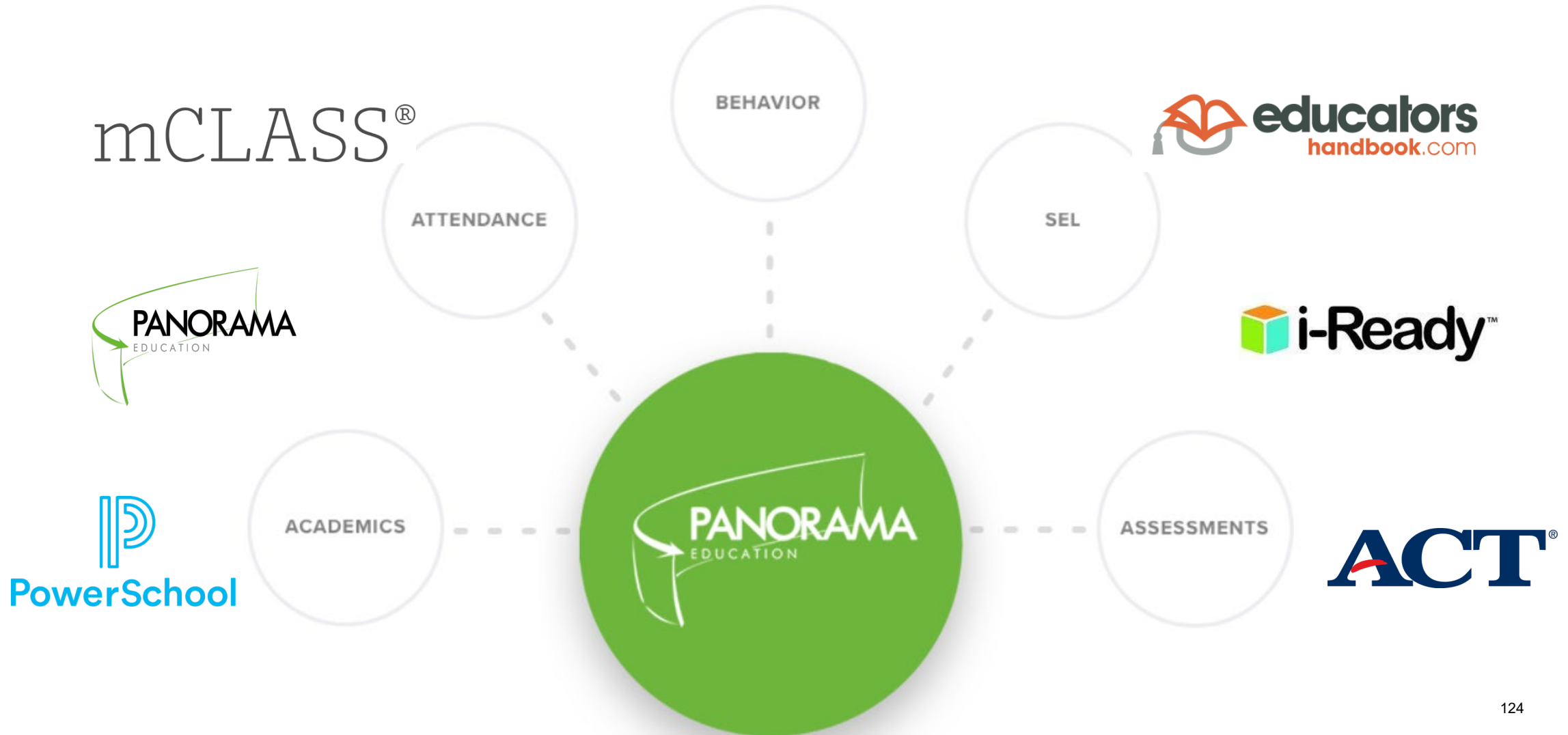
- **A team of 350+** educators, software developers, designers, and researchers working across the continental US
- **Our focus:** Help every student succeed across academics, SEL, behavior, attendance, and school climate
- **Supporting more than 1 million NC students K-12** through SEL, school climate, and MTSS



# DPS Data in One Space

End-of-Course (EOC)

End-of-Grade (EOG)



# School Dashboard Overview

## School-Wide Indicators

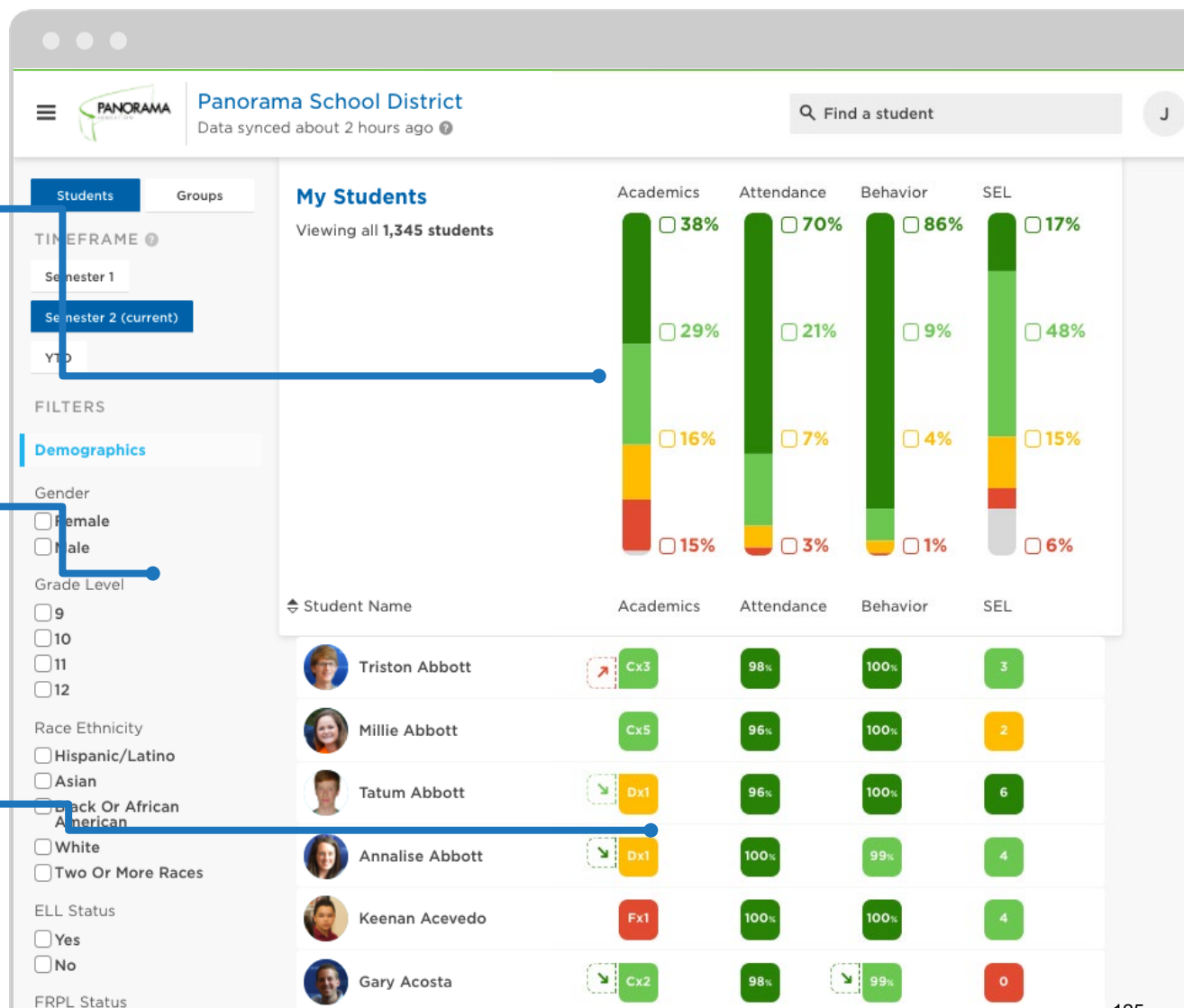
Monitor school-wide trends in academics, attendance, behavior, and SEL. Sort by students who are at risk or those on track in each area.

## Custom Filters

Filter roster by students' demographic information, or upload custom filters such as mobility, program participation, counselor assignment, and more.

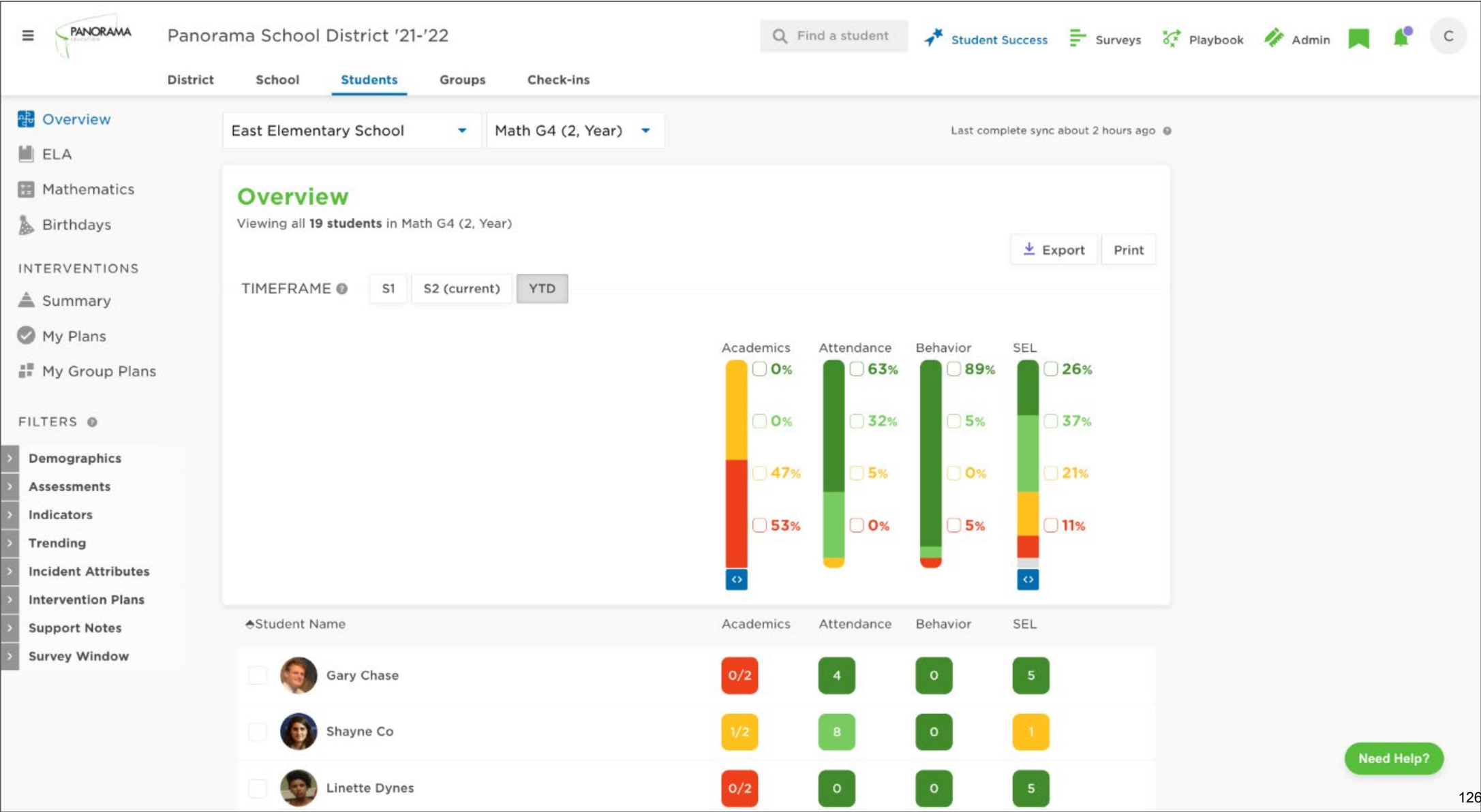
## Student Trends

See a list of students' recent changes for each indicator and click in to view their full Student Profile to identify what's causing certain patterns.

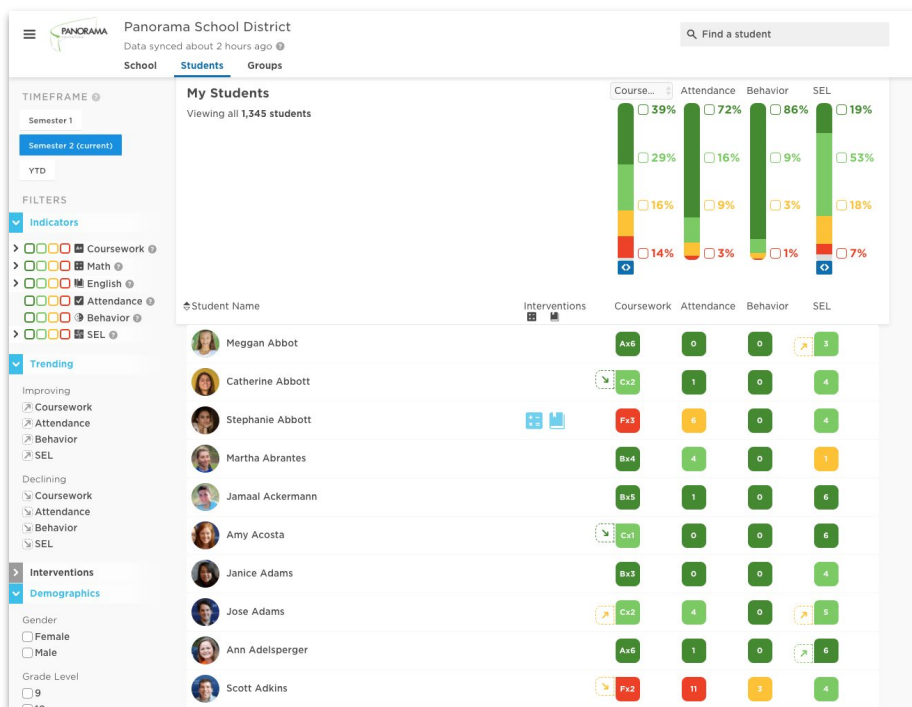




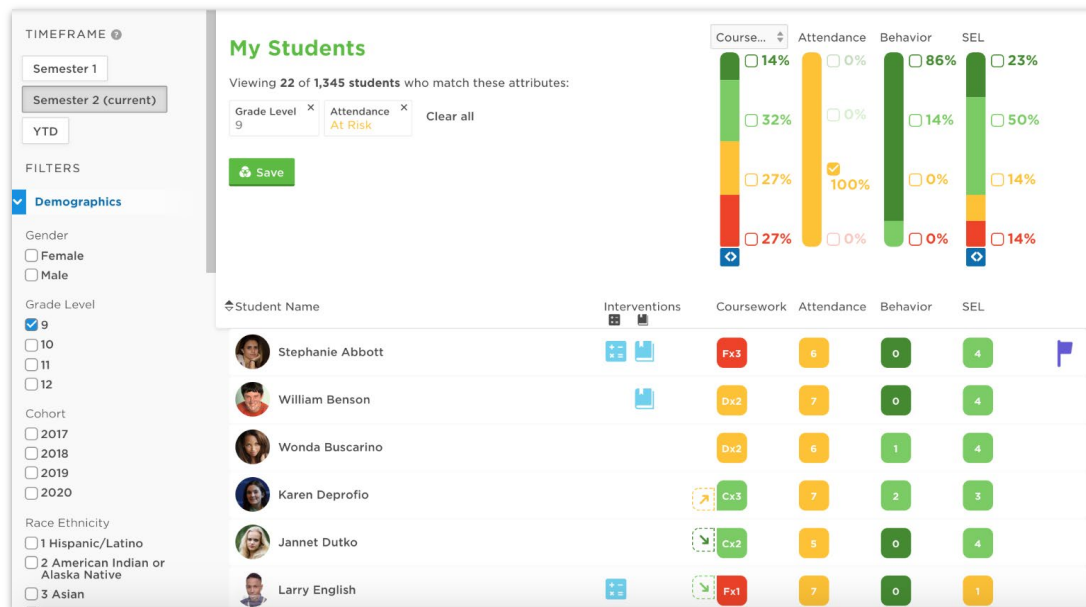
# School Dashboard: Classroom View



# School Dashboard: Monitor Groups of Students



Visualize student progress across a variety of indicators, to quickly highlight tier 1 needs.



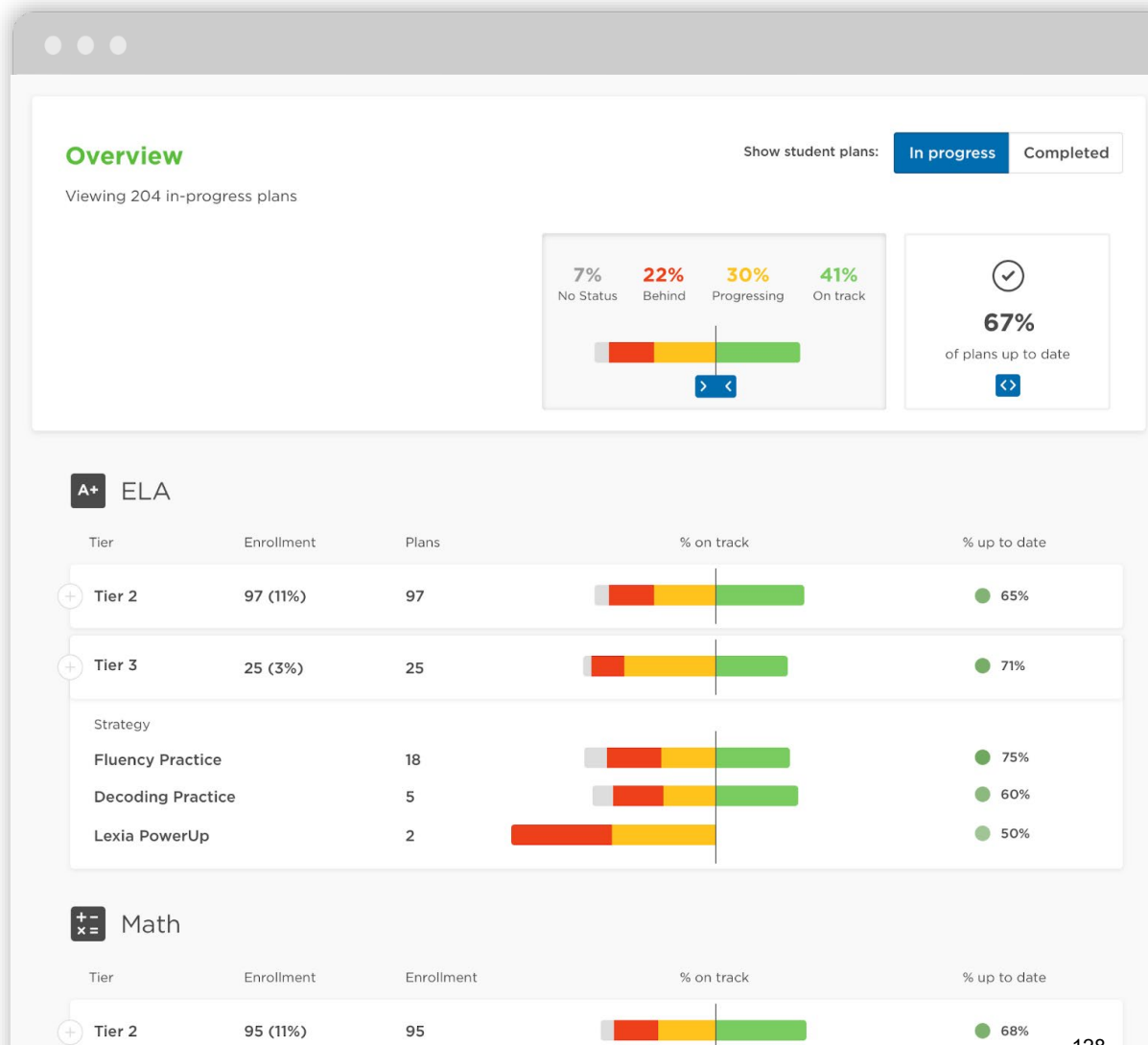
Monitor and intervene during key transition years (i.e. 9th grade) to focus on critical factors like attendance and academics



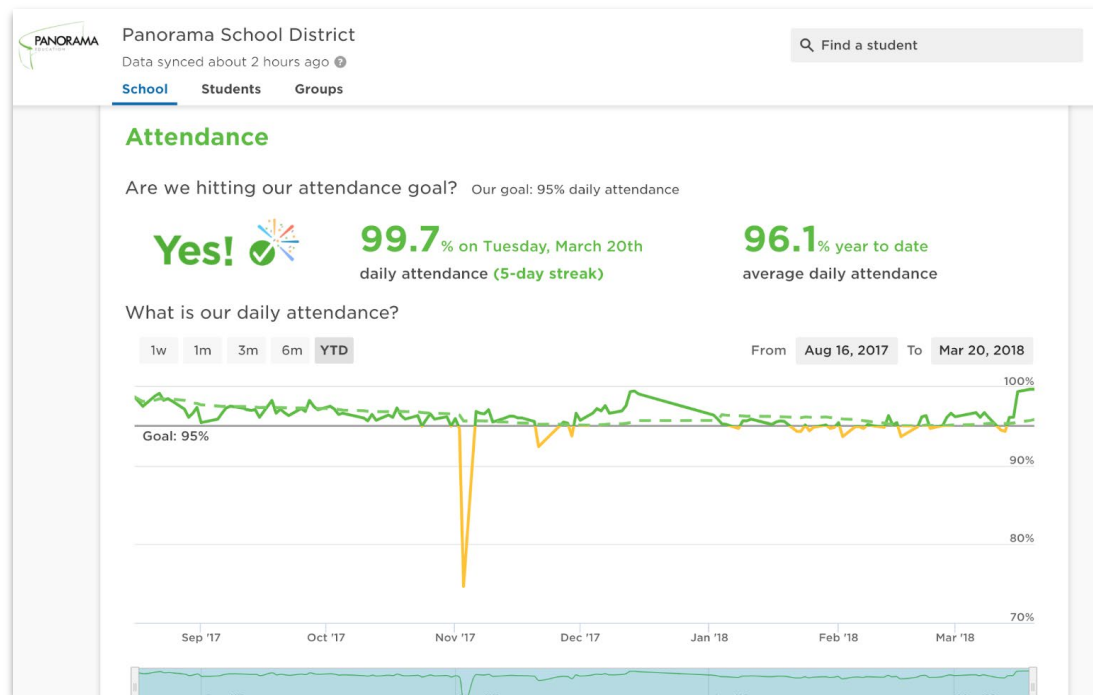
# School Dashboard: Interventions Overview

Assess the overall performance of interventions across your school.

- *What percent of students are receiving Tier 2 or 3 interventions?*
- *What percent of intervention plans are "on track" in each domain?*
- *What percent of students met their goals?*
- *What percent of intervention plans are up to date?*







# Understand Attendance Trends



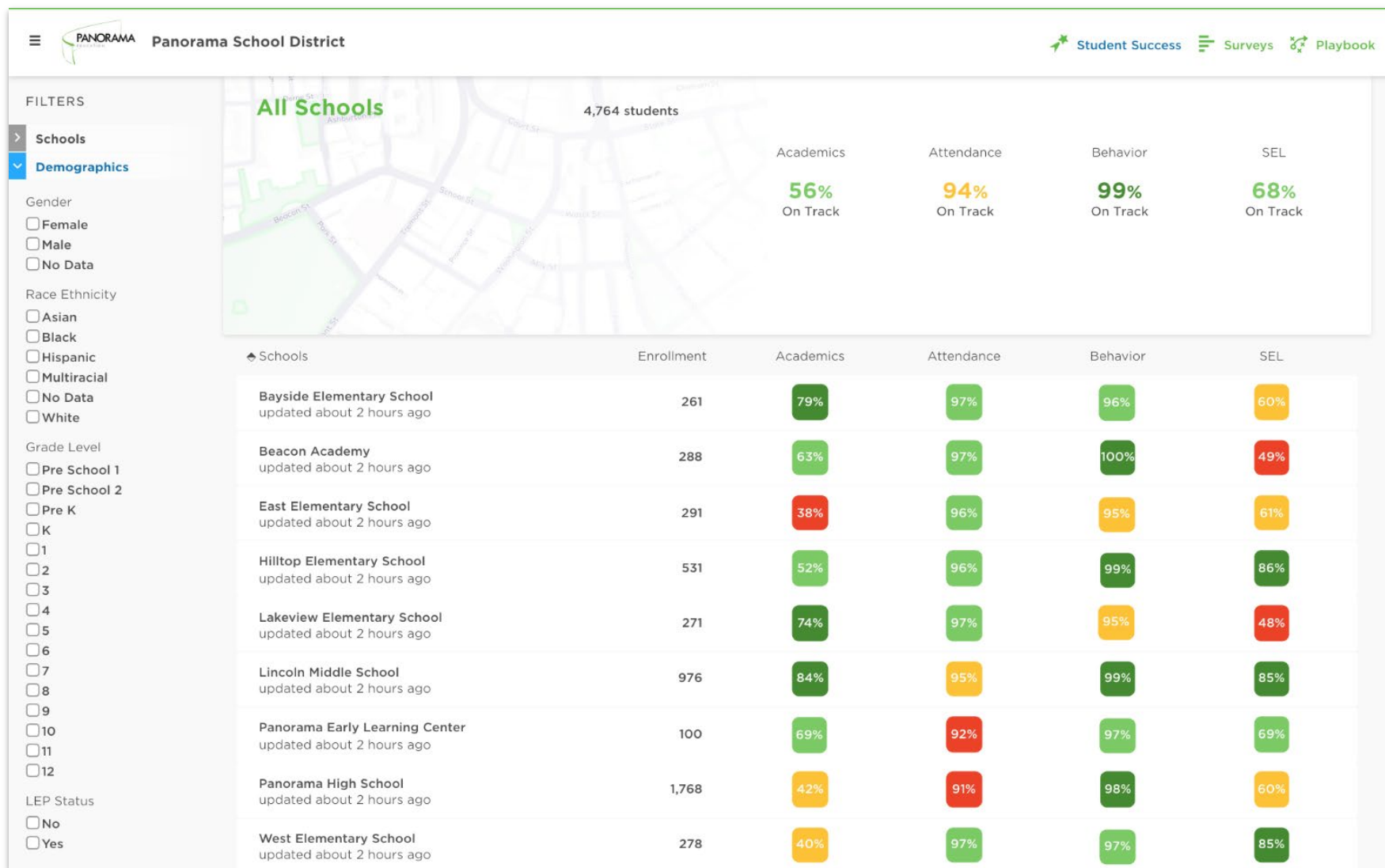
Quickly access school-level attendance progress and easily filter through specific time segments.

Who missed school on Tuesday, March 20th?

Student Name	Grade Level	Streak	YTD Attendance	Summary
 Mitchel Belue	10th	41 days	87	<b>4 students absent</b>  Grade Level 2 9th 1 10th 1 12th
 Irene Morse	9th	28 days	39	
 Charles Sweeney	12th	9 days	13	
 Evelyn Wilcox	9th	7 days	17	

Identify students who are out of school on any given day and visualize their recent attendance patterns. Use "summary" to see attendance patterns by grade.

# District Dashboard





# Student Profile

## Intervention Tracking

See the status of each intervention that a student is receiving

## Academics Overview

Click in to see course grades, credits, and state/district assessment results

## Social-Emotional Learning

View students' strengths and growth areas on Panorama's SEL assessments

## On Track Indicators

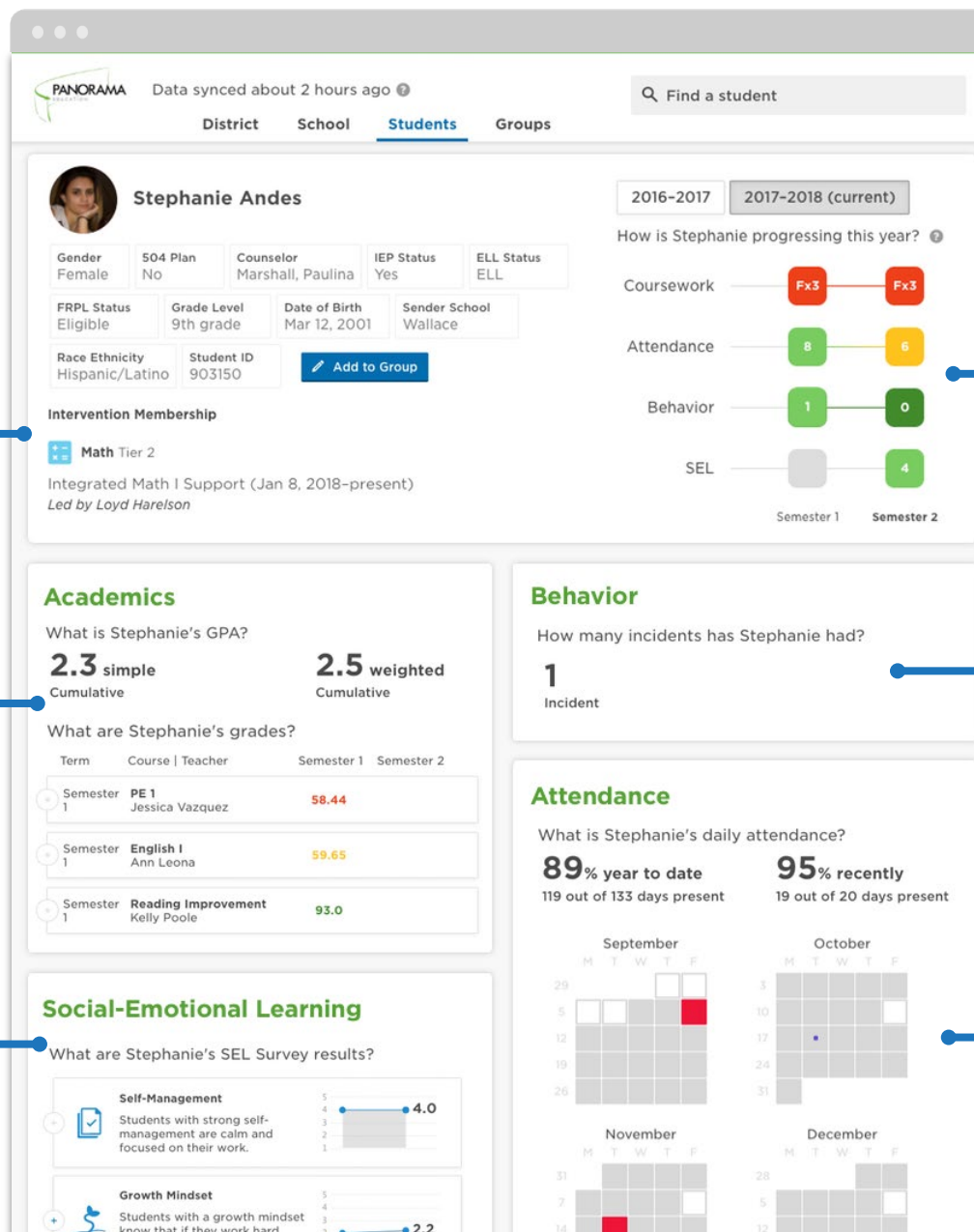
Monitor each student's overall trends in academics, attendance, behavior, & SEL

## Behavior Reporting

Click in to see details of each student's recent and historical behavior incidents

## Attendance Reporting

Monitor students' daily absences and tardies and reduce chronic absenteeism





# NEXT STEPS



## Next Steps

### The purchase of Panorama Student Success Platform License

- > Technical Support
- > Professional Development
- > Dashboards and reporting
- > Integration of various data sets
- > MTSS Intervention Tracking System
- > Panorama Social Emotional Learning Student Surveys



# Funding Source (3-year plan)

Year 1 2022-23	Year 2 2023-24	Year 3 2024-25 and subsequent years
ESSER/PRC 181	ESSER/PRC 181	To Be Determined
\$311,995	\$311,995	\$311,995

\*\*The funding plan for this product is aligned to DPS ESSER approved plan.



# IMPLEMENTATION TIMELINE

**May**

## PROJECT KICKOFF

- Led by a multi-departmental team (Curriculum and Instruction, Student Services/MTSS, Research and Accountability, Informational Technology, Professional Learning, Federal Programs, Equity Affairs, and others as needed)

**Mid-May-Early July**

## DATA INTEGRATION

**July-Early Aug**

## TESTING, PREVIEW, AND FEEDBACK SESSIONS

**August-October**

## LAUNCH AND TRAINING (Phased in training)

- District Staff
- School Administrators
- School-Based Leaders - MTSS Coordinators, School-Based Student Support Services, Teaching and Learning Coaches

**October-November**

## TRAINING

- All School Staff

## CONTINUOUS IMPROVEMENT

- Feedback
- Data Collection
- Program Evaluation
- Process for suggestions, concerns, and questions



# QUESTIONS

# Durham Public Schools District Dashboard Recommendations Report



September 30, 2021

The Durham Public School (DPS) District Dashboard Recommendations Report shares clear options, suggestions, and a potential timeline to guide the adoption and implementation of a centralized education data dashboard that will allow the Durham Public Schools District Dashboard Leadership Team to monitor student achievement goals and ultimately, increase education equity for all DPS students.

This report is the collaborative work of the DPS District Dashboard Leadership Team, DPS's District Dashboard Working Group, and FHI 360, a nonprofit organization dedicated to improving education opportunities for youth through services that include program design, project management, professional development, school-based coaching, creation of local and national networks, collective impact, and program evaluation.

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- Dr. Julius Monk, Deputy Superintendent of Operational Services
- Tanya Giovanni, Esq., Chief of Staff
- Dr. Julie Spencer, Assistant Superintendent – Research and Accountability

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# Introduction

FHI 360 and Durham Public Schools (DPS) came together around a shared commitment to build more equitable outcomes for young people.

Equity is one of the core beliefs held by DPS: “Our students and schools deserve equitable access to the resources and opportunities they need to succeed. Durham Public Schools and the community must distribute those resources in a manner that eliminates inequities.” In Spring 2021, FHI 360 partnered with DPS to create a Dashboard Working Group focused around one of DPS’s Strategic Plan Priorities: to establish and monitor individual student achievements using a centralized data dashboard and design instruction to accelerate growth for every student. The Dashboard Working Group collaborated to map the DPS data system’s strengths and challenges, conduct a needs assessment, and analyze the landscape of solutions, knowing that access to key data is critical to making decisions that further equity across DPS.

## Problem Statement

DPS centers its work around data-driven practices that enable students to get what they need to thrive in school and ensure the system is driven by student outcomes. To that end, DPS uses data about students’ demographics, academic history, state test scores, class grades, interim assessment scores, behavior, and attendance to guide decisions about individual student instruction and the structure and operations of the DPS system. The challenge is that the current data system is insufficient to meet DPS’s needs:

- Many data streams, including PowerSchool, iReady, EVAAS, and Educators’ Handbook, do not connect to each other.
- While some data is widely accessible at any time, other data is available only upon request.
- Access and permissions are idiosyncratic rather than systematized.
- Some sites are difficult to use, and so data-savvy educators often download information and create their own spreadsheets that they share with colleagues. However, these spreadsheets are not distributed widely, and many educators don’t know how to create these spreadsheets.
- Some sites are not synchronized regularly or quickly and therefore do not show the most recent data.

All of this means that DPS lacks a coherent and easy-to-access dashboard for educators at every level.

## Primary Goal

To help DPS create a centralized data dashboard that establishes and monitors individual student achievement, the Dashboard Working Group has researched the pros and cons of moving to a market dashboard product, including proposed implementation timelines and professional development considerations. Strengthening DPS educators’ ability to access data will enable them to make informed and effective equity-driven decisions at the student-, classroom-, school-, and district-level.

## Purpose of this document

There's no such thing as a one-size-fits-all data dashboard. So, in this report we shine a light on the options that will best fit the needs of DPS constituents, now and into the future, including how they fare in terms of financial costs, investments of time, usability, and scalability. The Dashboard Working Group's learnings are documented here, including the voiced needs of a variety of stakeholders in DPS and the pros and cons of the various products we explored. In addition, this report highlights clear research around the importance of data dashboards and how they can be a foundational tool for building equitable education across a district.

Our recommendations focus on key attributes determined through the landscape analysis and needs assessment. They include best-practice key systems, structures, and implementation steps for DPS leaders to consider, along with proposed timelines and implementation factors.

While our research reflects the needs of a wide audience, including students, parents, teachers, student support services, and district leadership, this report is specifically for DPS decision makers — that is, district and board leaders — to use our findings to make informed decisions that further their strategic goals and educators' ability to support and monitor students' academic growth.





# A Focus on Equity





# A Focus on Equity

Data dashboards play a key role in establishing a more equitable system.

A centralized data dashboard is critical to achieving the first goal of the DPS strategic plan: to increase academic achievement by 2023. In addition to serving as a practical tool for educators, a centralized data dashboard helps establish a more equitable system by shining a light on data across students, classrooms, and schools. A data dashboard will provide key mechanisms for DPS, including transparency, accountability, and real-time information for meaningful decision making.

## TRANSPARENCY


In the days of paper gradebooks and report cards, it was difficult to get a clear view of patterns and trends across a school or a district. Data dashboards provide education leaders with a clear window into student achievement across a grade, school, or district, and the ability to analyze that data. With the right dashboard, a school-based administrator can understand patterns across their middle school, and a district administrator can view trends across all middle schools in the district. This transparency reveals any uneven outcomes, so that education leaders can understand their root causes and devise effective solutions to resolve them. They also clarify misconceptions: For example, in a middle school with a reputation for struggling, a dashboard might actually show strong growth patterns, with students coming in significantly below grade level but leaving at or above grade level.

## ACCOUNTABILITY

While education leaders have been working within a landscape of high-stakes accountability for some time, data dashboards give them the tools to set clear goals around student outcomes and then quickly see whether those goals are being met.

## DATA-DRIVEN DECISIONS

Dashboards provide education leaders at all levels access to real-time data, not just past data from last semester or last year. Dashboards can make it easy to parse data to make decisions or to track students affected by a particular decision or policy. This allows principals and district leaders to make ongoing adjustments in policy, pedagogy, or curriculum. For example, if a principal notes uneven reading outcomes across a given grade, especially among English language learners, the principal can enact an intervention or change a policy — for example, integrating those at-risk students into additional Tier 1 instruction. Then the principal can easily track the outcomes of that decision as they unfold, rather than waiting for next year's state test results.



**A data dashboard is critical in the work toward equity. Without the transparency, accountability, and data-driven decision-making abilities that a dashboard provides, education leaders will struggle to identify inequities and determine whether interventions are successful.**

# Recommendations



# Recommendations

We began our research into DPS student-level dashboard options by learning about DPS stakeholders' specific needs. We identified essential criteria through a needs assessment process that included surveys and focus groups, then correlated the articulated needs with the strengths and features of a variety of products researched through a landscape analysis. We considered both universal data visualization and off-the-shelf solutions. While Tableau and Power BI, two leading examples of universal data visualization solutions, have real strengths, there was consensus across the Dashboard Working Group that both tools required a level of staffing and expertise beyond DPS's current capabilities. A few DPS stakeholders proposed a universal data warehouse as a solution, noting that a warehouse would consolidate numerous education-related data sources in order to simplify data requests (e.g., accountability, attendance, discipline, grades, state assessments, student demographics, social emotional learning, teacher performance, and transportation). While a universal data warehouse may eventually make sense, it does not offer the most effective strategy to meet DPS's strategic goals. Such a project would extend well beyond student-level data and require a much larger effort, more resources, and more time than currently allotted.

Ultimately, off-the-shelf products meet DPS's immediate strategic goals, with a heavy emphasis on end users and minimal strain on budget and staffing, and they can be adapted to meet DPS's needs as they change over time. Two off-the-shelf products rose to the top: Panorama and Hoonuit. As indicated below, both meet the identified essential criteria and features fully or with only minor concerns (see Table 1).

**Table 1. Top Two Data Dashboard Platforms**


	Criteria	Hoonuit	Panorama
<b>CUSTOMIZATION</b>	Are definitions (goals, objectives, calculations) customizable?	✓	✓
	Can different users access different, specific metrics?	✓	✓
	Can user groups be assigned specific metrics or dashboards?	✓	✓
	Can comments be attached to metrics?	✓	✓
	Can views be limited to specific groups?	✓	✓
	Can subgroups be created?	✓	✓
<b>SYSTEM CONNECTIVITY &amp; INTEGRATION</b>	Can it connect to a variety of data sources?	✓	✓
	Can it support different operating systems?	✓	✓
	Can it be integrated with portals?	✓	✓
	Can it be integrated with other applications?	✓	✓
	How much manual work is involved?	Minimal	Minimal
	How easy it is to automate?	Minimal	Minimal
	Is the data live?	Updates as needed	Updates as needed

	Criteria	Hoonuit	Panorama
	Is it mobile friendly?	✓	✓
ANALYSIS CRITERIA	Does it have drill-down features?	✓	✓
	Does it have aggregation features?	✓	✓
	Can it move from monitoring layer to analysis layer?	✓	✓
INFORMATION DELIVERY	Customized layout of metrics for print	Minor concern	✓
	Exporting information to spreadsheets, presentation slides, Word, PDF, Excel, etc.	✓	✓
	Data filtering for selected reports	✓	✓
	Sorting the report	✓	✓
	Scheduling automatic reports	✓	✓
	Information delivery to different audiences	✓	✓
VISUAL DESIGN	Visual intelligence to highlight areas and values	✓	Minor concern
	Table and chart on the same screen	✓	✓
	Allowing different layouts (graphs versus numbers)	✓	Minor concern
	Inclusion of metric definition and calculation	✓	✓
	Having descriptions/help bubbles	✓	Minor concern
	Efficient/user-friendly layout	✓	✓
	Languages, ADA compliant	✓	✓
SECURITY	Appropriate authentication and authorization methods	✓	✓
	Backup and restore procedures	✓	✓
	Version control dashboards	✓	✓
	Audit trails	✓	✓
	Data protection from change	✓	✓
	Defining role-based security	✓	✓
	Automatic accessibility change by change in user roles or groups	✓	✓

While the products are similar in their ability to meet the basic requirements articulated by stakeholders, the Dashboard Working Group found distinct differences in their look, usability, scalability, and price (see Table 2).

Table 2. Hoonuit versus Panorama

	Hoonuit	Panorama
<b>COST</b>	<b>\$195,575</b>	<b>\$268,500</b>
<b>POSITIVES</b>	<p><b>Connection to PowerSchool:</b> Since Hoonuit is a part of the PowerSchool family of tools and connects with many other vendors, it has a proven ability to integrate an array of vendors' data.</p>	<p><b>Connection to Social Emotional Learning Data:</b> Since Panorama runs the social emotional learning surveys, it has a proven ability to create systems for DPS data. Panorama has partnerships with most of DPS's key vendors and will be able to synch easily with those data streams.</p>
	<p><b>Breadth of Data:</b> Hoonuit offers impressive functionality that may seem overwhelming but may serve the district well as they get to know the product. Hoonuit has an extensive range of data visualization options; its dashboards allow users to cut through data in many different ways, aiding data analysis.</p>	<p><b>Usability:</b> The Dashboard Working Group universally agreed that Panorama's tool was significantly more user-friendly and intuitive, especially for users who are not data savvy. It got strong marks for aesthetics, with a professional and appealing look and feel. These differences provide an excellent user experience and are a significant strength in that DPS's strategic goal relies on heavy uptake from across stakeholders. In addition, users can easily create and print individual reports for IEP meetings and family conferences.</p>
	<p><b>Public-Facing Option:</b> Hoonuit provides public-facing data dashboards for customers that regularly pull real-time data. Following are some examples:</p> <ul style="list-style-type: none"> <li>• <a href="#">The NNM Public Education Dept (State)</a></li> <li>• <a href="#">The San Antonio School Finder (City)</a></li> <li>• <a href="#">TXschools.gov (State)</a></li> <li>• <a href="#">ZoomWV (State)</a></li> <li>• <a href="#">WISEdash WI K-12 Dashboard (State)</a></li> </ul> <p><b>Price:</b> Hoonuit costs \$72,925 less than Panorama.</p>	<p><b>Vendor Responsiveness:</b> Panorama's responsiveness in other contracted work has been excellent. In addition, the team's ability to answer technical questions and to provide clear solutions to technical problems lent the working group confidence in considering a collaboration.</p>
<b>NEGATIVES</b>	<p><b>Vendor Responsiveness:</b> PowerSchool's previous weak and unreliable support causes concern, since Hoonuit is in the same family.</p>	<p><b>Price:</b> Panorama costs \$72,925 more than Hoonuit.</p>
	<p><b>Usability:</b> The Hoonuit platform is layered, intricate, and overwhelming in ways that would likely dissuade educators from using the dashboard.</p>	<p><b>Public Facing Option:</b> Panorama does not offer a public-facing option and has no plan to do so in the near future.</p>
	<p><b>Lacks Technical Clarity:</b> The Hoonuit presentation lacked technical clarity, and when faced with questions, the team had vague or incomplete answers.</p>	



The following recommendations are a framework to guide decision points and next steps. Recommendations grew out of our collective research about the critical planning steps, implementation processes, and evaluation criteria that are most in line with DPS's current make-up and goals.

### **RECOMMENDATION 1: SELECT A PRODUCT THAT SUPPORTS DURHAM'S STRATEGIC GOALS**

The needs assessment collected input from a range of stakeholders with different interests, and the landscape analysis highlighted product “bells and whistles” that might be appealing. DPS should use its strategic goal as a lodestar: Which product will help DPS “*establish and monitor individual student achievement goals using a centralized data dashboard and design instruction to accelerate growth for every student*”? Some critical questions to consider:

- Which product will provide a comprehensive approach to data integration?
- Which product will easily connect to current vendors, including iReady, Educators' Handbook, PowerSchool, and Panorama?
- Which product will offer ongoing support to promptly resolve any issues that arise?

### **RECOMMENDATION 2: USE AN OFF-THE-SHELF PRODUCT**

Flexible data visualization tools like Tableau and Power BI require deep skills and experience that would stretch DPS's capacity. In addition, they would leave DPS vulnerable with even minor turnover within a department. Off-the-shelf products provide strong usability with a lower investment in internal expertise. Hoonuit and Panorama would provide a strong experience for the end user, which is critical in helping DPS achieve its strategic goal (See Appendix D).

### **RECOMMENDATION 3: SELECT A PRODUCT THAT CAN GROW AND EXPAND WITH DPS'S NEEDS**

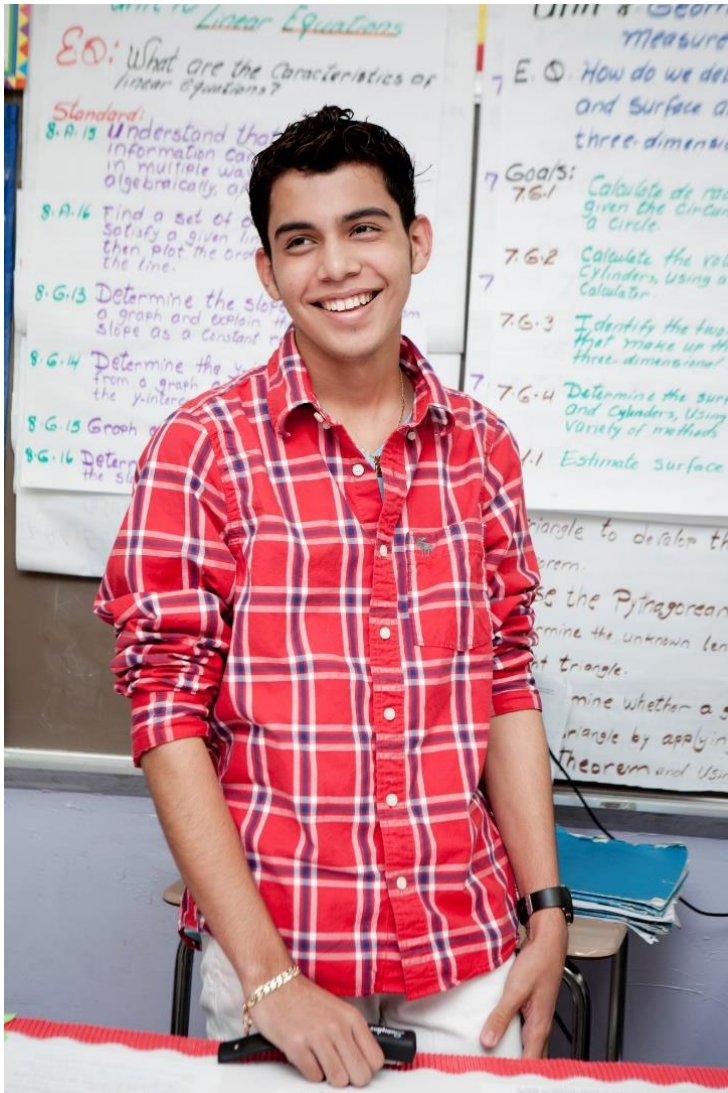
While DPS initially has basic requirements for a data dashboard, it may want to expand its capabilities over time. Hoonuit is part of the PowerSchool family, so it may offer expansion opportunities for DPS down the line. Because Panorama is a relatively new product, as they grow and expand, there are opportunities for DPS to expand their approach and audience.

### **RECOMMENDATION 4: USE A PHASED-IN APPROACH TO IMPLEMENTATION**

A phased-in implementation will enable DPS to steadily work toward meeting its critical goals. Consider starting with district leadership, then adding school-based educators, followed by families and community:

- **Phase 1a:** DPS and the vendor collaborate to plan, design, and launch data mapping and integration solutions between core data systems and the dashboard solution.
- **Phase 1b:** Vendor trains district staff to use the dashboard.
- **Phase 1c:** DPS staff turnkey the training with school-based leaders (principals, assistant principals, learning coaches, and Multi-Tiered System of Supports (MTSS) coordinators).
- **Phase 1d:** School-based leaders train teachers.
- **Phase 2:** Introduce a community-facing dashboard.





## RECOMMENDATION 5: CONSIDER PRIOR SUPPORT EXPERIENCE

Attentive, responsive, and professional customer service supports the successful launch and maintenance of a new data dashboard. Building initial data synchs, maintaining connections, adding new data streams, and working out glitches all require quick, solutions-oriented customer support. DPS has significant experience with both Panorama and Hoonuit and should factor in the customer service performance of each vendor when considering where to invest.

## RECOMMENDATION 6: CREATE A COMMUNICATIONS PLAN FOR ALL STAKEHOLDERS

Strong communication will ensure that everyone understands how the new dashboard works and how it will help DPS meet its strategic goals. See a sample communication plan in the Appendix B.

## RECOMMENDATION 7: CREATE AN ONGOING, HANDS-ON PROFESSIONAL DEVELOPMENT PLAN

To maximize utilization and ensure strong

outcomes, DPS will need a professional development program that is tailored to its users and goals. Professional development should go beyond basic dashboard functionality, teaching educators to inform instruction and increase equity across classrooms. The professional development plan should also allow users to practice and learn together to build their data analysis skills. See Appendix A for an Implementation Cycles sample plan that illustrates shared practice.

## RECOMMENDATION 8: ESTABLISH CLEAR ROLES, RESPONSIBILITIES, AND RULES

DPS should clearly define roles and responsibilities for leading the data dashboard's launch and ongoing use. In addition, there should be a clear process for determining and automatically assigning data access, instead of assigning it on a case-by-case basis.

## RECOMMENDATION 9: STAFF FOR SUCCESS

Launching a new data dashboard is a significant lift, especially given that DPS staff have been working beyond full capacity through a pandemic. To successfully shift to a new dashboard, DPS will need to establish dedicated staff to support the work — for example, by:



- Freeing up current staff by sunseting initiatives that are complete or less critical, or by changing roles and responsibilities
- Hiring new staff
- Contracting with an external agency to provide support around project management, data consultation, and professional development, or to liaise with the vendor

## RECOMMENDATION 10: INVEST IN PANORAMA

The Dashboard Working Group unanimously recommends Panorama for the following key reasons:

- The Panorama dashboard is very easy to understand and use, with an attractive and engaging look and feel, making data informative and actionable for all levels of district staff.
- Panorama has demonstrated a proven commitment to promoting students' social-emotional learning skills, putting social emotional development at the center of its solutions. Panorama's dashboard solutions use critical factors such as growth mindset, social awareness, and self-management as levers to improve academic performance, behavior, and attendance — the key indicators to keeping students on track to success. This holistic approach to educating and supporting the whole child is a core part of the theory of action behind the DPS 2018-2023 strategic plan.
- Panorama's dashboards provide actionable ways to achieve DPS's core beliefs — promoting equity, shared responsibility, high expectations, and a child-centered approach.
- The Panorama team has demonstrated responsiveness in other contracted work, reflecting its commitment to ensuring satisfaction at every level of use, and this ultimately was the biggest differentiator between Panorama and the PowerSchool family of tools.
- DPS's strategic priority related to academic achievement requires that stakeholders across the system embrace a data dashboard and use it regularly, an outcome most likely to happen with Panorama.

# Background



## Background

DPS is committed to promoting equity, shared responsibility, high expectations, and a child-centered approach in response to the challenges of a global pandemic and the pressing need for social justice and equity in American education.

With the renewal of the Every Student Succeeds Act (ESSA) and the development of its state plans, DPS has committed to accountability and support systems that strive toward equal opportunity for all students.

Specifically, ESSA provides greater flexibility for states to design accountability systems that reflect ambitious academic standards, use a variety of indicators to measure college- and career-ready or social emotional outcomes for all students, and direct resources and tiered supports and interventions to struggling students and schools. Next-phase accountability and support systems should be committed to continuous improvement, experimentation, ongoing evaluation, and self-reflection.<sup>1</sup> Such accountability systems that employ multiple measures to track and monitor student progress necessitate the use of data dashboards.<sup>2</sup>

### WHY DATA DASHBOARDS?

Data dashboards are critical in:

- ✓ Helping schools and districts organize and present raw data into actionable insights
- ✓ Highlighting relationships across different data sets (e.g., attendance, course grades, SEL, behavior, test scores), so that administrators, teachers, and families better understand the holistic student experience
- ✓ Providing educators with the information they need to intervene at the right time and place and to provide students with the supports they need

Research reveals that data dashboards, multiple indicators, and other data-informed tools and practices can serve as an impetus<sup>3</sup> to enact social justice leadership, anchor professional learning, and develop<sup>4</sup> the collective consciousness of teachers, thereby influencing their actions in the classroom. However, while more and more student-level data become available, educators and educational leaders often lack the knowledge or strategies to transform the data into actionable plans to improve instruction and increase student learning and success.<sup>5</sup> For example, the Data Quality Campaign's 2019 poll of teachers<sup>6</sup> found that only 17 percent had learned to use data during preservice training, and 45 percent said they taught themselves about data on the job.

**17%**

of Data Quality Campaign-surveyed teachers learned to use data during preservice training.

Research on developing learning dashboards at scale suggests that low-cost deployments of self-service dashboards are useful in building meaningful data experiences and paving the way for future data-informed educational practices.<sup>7</sup> Additionally, four enabling conditions should be considered: 1) developing a tiered system to support growing the capacity of staff; 2) engaging stakeholders as valued thought partners to build consensus around educational goals and priorities; 3) creating structures that fast-track support to schools; and 4) supporting flexibility, customization, and innovation at the local level.<sup>8</sup>

## TYPES OF DATA DASHBOARDS

Districts of all size are improving students' growth, achievements, and healthy development through the sustained and strategic use of five types of dashboards:

1. District-level dashboards that highlight resource and budget allocation
2. School-level student performance dashboards (which can also compare schools across a district)
3. Teacher-level dashboards that highlight class trends and inform instruction and student supports
4. Parent-level dashboards that help identify children's specific strengths and areas for growth
5. Dashboards that help inform infrastructure and facilities decisions

To achieve DPS's equity goal, we are primarily focused on the district-, school-, and teacher-level performance dashboards. When integrated, these data dashboards allow districts to compare their schools' performance with others across the district and to rank their schools on such criteria as student academic performance, attendance, and drop-out statistics. Principals and administrators can track students' attendance, grades, behavior, social emotional learning competencies, and performance on periodic and state level assessments from year to year. Being able to easily aggregate and disaggregate data helps educators identify academic trends and drill down to ask questions at the district, school, class, and individual student level. It can also help educators quickly and easily identify students who show signs of being at risk. Educators can use early indicator dashboards to conduct predictive analysis, aggregating different data types and assigning a value to reveal whether students have met indicators. Student status results can be color-coded to make it easy to identify, at a glance, which students are at risk, so that educators can proactively plan supports and interventions for them. Data can be disaggregated for subgroups, and data findings can be used to match at-risk students with interventions and supports.

Principals can track the progress of their students' performance and identify key topic areas for teacher professional development. Principals and school-based leaders can work with teachers to pinpoint struggling students and take action for improvement. Teachers can pull up holistic dashboard views during meetings with students, parents, and other team members.

## ATTRIBUTES AND QUESTIONS TO CONSIDER

**Universal visualization solutions:** Data visualization is the “practice of translating information into a visual context, such as a map or graph.”<sup>9</sup> It makes large amounts of data easy to understand, and it highlights trends and patterns. For this report, universal data-visualization tools include business intelligence (BI) tools that can generate updatable dashboards that track performance visually. BI tools are highly customizable, with infinite amounts of display features; however, they require in-house staff to build and maintain dashboards. Popular data visualization tools include Tableau and Microsoft Power BI.

**Off-the-shelf solutions:** Off-the-shelf solutions are comprehensive Student Information Systems (SIS) that come with pre-built dashboards that integrate with existing data systems for seamless displays of automated data. Most come with baseline features, and additional modules can be purchased. The vendor is responsible for updating data and maintaining the system. Popular tools in this category include PowerSchool and Unified Insights Hoonuit, Panorama Student Success, and Illuminate Education.

Table 3 highlights attributes that the Dashboard Working Group reflected on, as well as key questions.

**Table 3. Decision Attributes and Key Questions**

	Key Questions About the Dashboard
<b>ABILITY TO MEET DISTRICT NEEDS</b>	<ul style="list-style-type: none"> <li>• Will it help us meet the specific strategic goal to establish and monitor student achievement?</li> </ul>
<b>AESTHETICS</b>	<ul style="list-style-type: none"> <li>• Is it visually pleasing? Do the aesthetics build broader usability?</li> </ul>
<b>COST</b>	<ul style="list-style-type: none"> <li>• What are the initial and ongoing costs?</li> <li>• What do the costs include in terms of customization, number of vendor connections or syncs, quality, and technical assistance?</li> <li>• How much training is included in basic costs? Is it live or asynchronous?</li> </ul>
<b>CUSTOMIZABILITY</b>	<ul style="list-style-type: none"> <li>• Can it be tailored to DPS's unique needs?</li> </ul>
<b>DATA INTEGRATION</b>	<ul style="list-style-type: none"> <li>• How labor intensive is data integration?</li> <li>• What does it require on the part of DPS?</li> <li>• How frequently will data be integrated?</li> </ul>
<b>FLEXIBILITY</b>	<ul style="list-style-type: none"> <li>• Can it be used in a wide range of ways?</li> </ul>
<b>PROFESSIONAL DEVELOPMENT</b>	<ul style="list-style-type: none"> <li>• What does the professional development entail?</li> <li>• Is there a one-time session or ongoing professional development?</li> <li>• Is professional development tailored to each set of stakeholders?</li> </ul>
<b>RESPONSIVENESS</b>	<ul style="list-style-type: none"> <li>• Will the vendor respond and resolve issues quickly?</li> </ul>
<b>STAFFING</b>	<ul style="list-style-type: none"> <li>• What are the staffing requirements, and can they be sustained?</li> </ul>
<b>TECHNICAL SUPPORT</b>	<ul style="list-style-type: none"> <li>• Does the vendor provide strong technical support that will support DPS during implementation and beyond?</li> <li>• Is technical support readily available and ongoing?</li> </ul>
<b>USABILITY</b>	<ul style="list-style-type: none"> <li>• Is the platform user friendly?</li> <li>• Does it have tools to support different stakeholders, including district staff, coaches, principals, teachers, families, and the community?</li> </ul>



# Methodology



## Methodology

Our study employed both a needs assessment and a landscape analysis to better understand how DPS can establish and monitor individual student achievement goals using a centralized data dashboard. We obtained multiple sources of input from stakeholders across DPS to ensure that the selection and development of a DPS data dashboard was grounded in the experiences and needs of staff. We gathered both quantitative and qualitative data to get a holistic view of the district's needs. Additionally, we spoke to key leaders in districts similar to DPS to learn about their experiences with data collection and dashboards, which informed our research. Using these methods, we were able to understand the role the dashboard will play for a variety of stakeholders within the district as well as inform how we looked at various providers and made recommendations.

Throughout the study, the FHI 360 team met weekly with the DPS Dashboard Working Group to develop a clear understanding of the strengths and gaps within DPS's data systems; learn the data realities and needs of various stakeholders within DPS; and review and revise study materials and protocols. For example, during the needs assessment, the Dashboard Working Group identified key players for focus groups, interviews, and surveys to understand how different users access and use data to improve student outcomes.

### Needs Assessment

The needs assessment assessed the strengths and weaknesses of DPS's current data systems/data collections and uncovered the most important needs and solutions in a centralized data dashboard. The needs assessment consisted of 1) an online survey of DPS educators; and, 2) virtual focus groups and interviews with key DPS leaders and users.

#### ONLINE SURVEY OF DPS EDUCATORS

We administered a 12-question online survey between June 9 and 21, 2021, to a targeted audience of 70 people selected by the Dashboard Working Group. Participants were asked what they typically use data dashboards for, how helpful their current data platforms are, and the most important features to include in a district data dashboard (see Table 4).



**Table 4. Survey Participants by Role and School Type**

	Number	Percentage		Number	Percentage
ADMINISTRATORS	31	42%	ELEMENTARY <sup>1</sup>	42	60%
TEACHERS	21	29%	MIDDLE <sup>1</sup>	15	21%
DISTRICT STAFF	5	7%	HIGH SCHOOL	8	11%
COACHES	5	7%	ALL SCHOOLS	6	9%
OTHER	8	11%			
TOTAL	70	100%	TOTAL	70	100%

<sup>1</sup>One participant responded as working in both elementary and middle school grade levels.

## VIRTUAL FOCUS GROUP DISCUSSIONS/INTERVIEWS

We conducted seven virtual focus groups and two interviews (all were an hour in duration) between June 9 and July 8, 2021 (see Table 5). Protocols asked the 51 participants, who identified themselves as intermediate or advanced data users, to reflect on their experiences with education data systems and dashboards and to share their preferences for new data dashboard features.

**Table 5. Focus Group/Interview Participation by DPS Staff Group**

	Number	Percentage
RESEARCH & ACCOUNTABILITY	8	16%
ADMINISTRATORS	8	16%
STUDENT & SPECIALIZED SERVICES	8	16%
TEACHERS	8	16%
CURRICULUM & INSTRUCTION	7	14%
COACHES	7	14%
PRINCIPAL SUPERVISORS	3	6%
DEPUTY SUPERINTENDENTS	1	2%
INFORMATION TECHNOLOGY	1	2%
TOTAL	51	100%



## Landscape Analysis

To supplement the needs assessment, the FHI 360 team conducted a landscape analysis of data dashboards used by other districts to learn their strengths and weaknesses and reviewed existing tools and platforms, including both universal visualization solutions and off-the-shelf solutions. We held focus groups and interviews with teachers, principals, and district level data analysts in comparable districts to gain a range of perspectives on how they are using data dashboards and tools, which systems and processes support the improvement of student outcomes, and what does and does not work.

### ENGAGE COMPARATIVE DISTRICTS

In June 2021, FHI 360 conducted two focus groups with districts comparable in size and demographic makeup to DPS, gathering insights on their use of data analysis tools, data systems, and processes. Focus group protocols asked participants to describe their data dashboards, including strengths and limitations, and to provide recommendations for DPS as they develop their own dashboard.

The first focus group was with five representatives of North Carolina Big 10 Districts: Cumberland County (1), Guilford County (2), Johnston County (1), and Wake County (1). The second group was with four representatives from Baltimore City Public Schools familiar with their knowledge management systems.

### REVIEW EXISTING TOOLS

In collaboration with the Dashboard Working Group, FHI 360 created a rubric to provide standard scoring guidelines, thus establishing a constant way to evaluate commercial data platforms. Rubric criteria were based on needs identified and agreed upon by the working group.

The FHI 360 team then participated in demonstration meetings with data dashboard company representatives. Companies that were selected by the working group were known as effective tools in the industry and/or were being used by comparable districts.

We organized our rubric's evaluation criteria into six categories (see Figure 1). Each category had a specific set of criteria against which data tools were evaluated, and each criterion was assessed against three standards: works well, minor concerns, or serious concerns.

- **Customization.** How much control will DPS have of the tool at various levels (for example, will a data analyst be able to define “chronic absenteeism” so that it aligns with the district’s definition)? Can a teacher attach comments to metrics for others to view? Can a guidance counselor have a different view of data than a teacher?
- **System connectivity and integration.** Will the tool be able to integrate DPS’s wide array of data sources and maintain accessibility for all users? What level of manual work will it require of the IT staff?
- **Analysis criteria.** How does the tool enable users to analyze data? Can users drill down to a more granular view of a data set? Can they easily move from a monitoring layer to an analysis layer?
- **Information delivery.** What can we do with the data we’ve collected? Is it possible to build processes and protocols around analysis, discussion, and operations of the data? How can data be shared? What can be exported and in what format? Can users create their own reports?

- **Visual design.** Can users view data in a way that is useful and meaningful to them? Are there different layout options — for example, can one user choose to see data in a graph, while another user views it in a table? Are there descriptions or help bubbles for users who need them?
- **Security.** How does the tool ensure that data is accurate and visible only to those in the DPS system with the appropriate permissions?

Although our rubric incorporates a range of functional and technical criteria, it is not intended to be rigid or prescriptive. We used the rubric to collect easily comparable information about each tool to aid DPS in making an informed decision, not to rule options out.

Figure 1. Landscape Analysis Rubric

Category	Criteria	Works Well	Minor Concerns	Serious Concerns	Not Applicable
<b>Customization</b>	Are definitions customizable? (goals, objectives, calculations)				
	Can different users have access to specific metrics?				
	Can a group of users be signed to a group of metrics or dashboards?				
	Can comments be attached to metrics?				
	Can you limit views to different groups?				
<b>System connectivity &amp; integration</b>	Can you create subgroups				
	Can it connect to a variety of data sources?				
	Can it support different operating systems?				
	Integration with portals				
	Integrating with other applications				
<b>Analysis criteria</b>	How much manual work is involved?				
	How easy it is to automate?				
	Is it real-time data?				
	Mobile friendly?				
	Drill-down features				
<b>Information delivery</b>	Aggregation features				
	Move from monitoring layer to analysis layer				
	Customized layout of metrics for print				
	Exporting information to spreadsheets, presentation slides, word, PDF, etc.				
	Data filtering for selected reports				
<b>Visual design</b>	Sorting the report				
	Scheduling automatic reports				
	Updating the reports				
	Notification when new data is available				
	Info delivery to different audiences				
<b>Security</b>	Visual intelligence to highlight areas and values				
	Table and chart on same screen				
	Allowing different layouts (graphs vs numbers)				
	Inclusion of metric definition and calculation				
	Having descriptions/help bubbles				
	Single screen with no scrolling				
	Languages, ADA compliant				
	Appropriate authentication and authorization methods				
	Backup and restore procedures				
	version control dashboards				
	Audit trails				
	Protecting data from change				
	Defining role-based security				
	Automatic accessibility change by change in user roles or groups				

# Discussion of Findings



# Discussion of Findings

Dashboard Working Group findings summarize DPS's needs as identified through the survey and focus groups/interviews, document experiences of similar districts, and reviews a broad array of potential data tools/platforms.

## Summarizing DPS Needs

Over the course of the needs assessment, we identified DPS's current use of data, which aspects of a data dashboard are most important, and the attributes participants most want in a data dashboard.

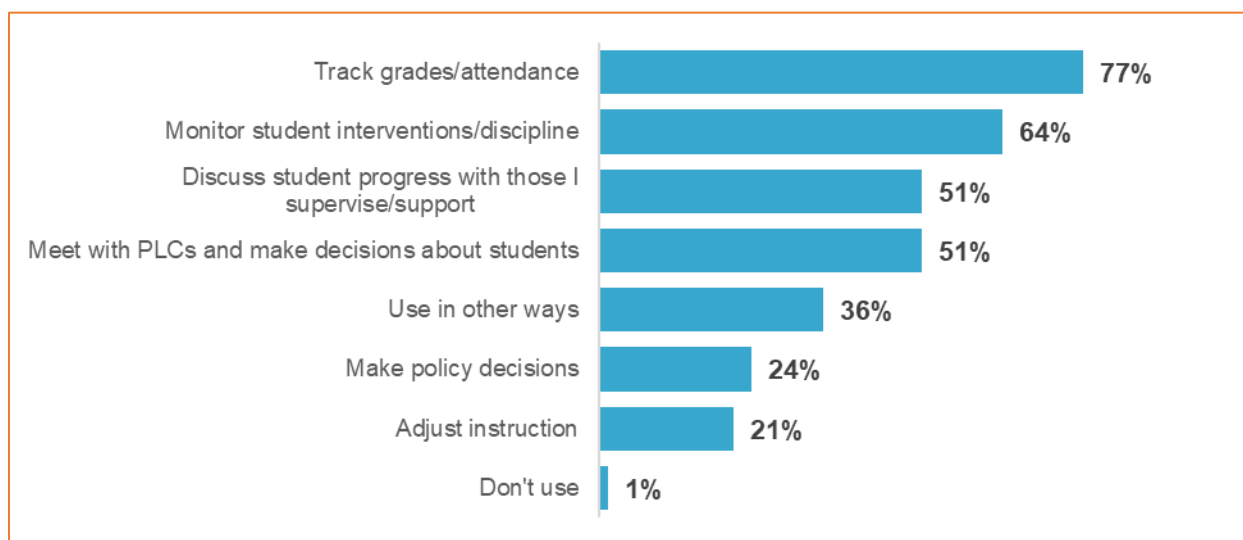
### CURRENT USE OF DATA

Most survey participants said they use DPS's current data systems to track student grades/attendance, monitor student interventions/discipline, discuss student progress, and set student goals (see Figure 2). Teachers are most likely (100%) to use data dashboards to track student grades and attendance, whereas school administrators (principals and assistant principals) are most likely (84%) to use data dashboards to monitor student interventions and discipline. Learning coaches are most likely (100%) to use dashboards when they meet with their performance learning communities (PLCs) and as they make decisions about students.

**100%**

of surveyed teachers reported using data dashboards to track student grades and attendance.

Figure 2. What do survey participants typically use a data dashboard for?



Teachers use data systems and/or dashboards most frequently, with 86% reporting using data systems or data dashboards at least weekly, and they tend to use them independently. Principals are also frequent users (with 84% using them weekly), mostly using data platforms on their own to understand progress across classrooms and schools. AIG specialists and testing coordinators indicated the next most frequent usage (75%), using it equally on their own and with teachers they supervise or coach. Equal percentages of learning coaches and district staff (60%) use data systems or dashboards weekly. Learning coaches use data platforms alone and with teachers in a team or with teachers they supervise or coach to understand progress across classrooms or schools. District staff use current data systems and dashboards to understand progress across classrooms and schools.

**86%**

of surveyed teachers used data systems or data dashboards at least weekly.

Data systems used by DPS staff included RADD, PowerSchool, iReady, Mastery Connect, Reading Plus, and EVAAS. Table 6 presents survey and focus groups findings by DPS data systems.

**Table 6. Respondent Impression on Current DPS Data Systems**

	Survey Data (n=70)		Focus Group Data (n=51)	
	Usage	Rating	Advantages	Disadvantages
<b>POWERSCHOOL</b> Grades, attendance, demographics, and course enrollments	97%	5.3	<ul style="list-style-type: none"> <li>• Good source of student-level data (e.g., demographics)</li> <li>• Easy-to-query data</li> <li>• Includes smart phone app</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of visuals</li> <li>• Lack of projections data</li> <li>• Reports not user friendly</li> <li>• Difficult to see big-picture data</li> <li>• Can't compare subgroups</li> <li>• May not have capacity to pull all student data</li> </ul>
<b>EVAAS</b> Growth data for students and schools, and projections of student success	90%	4.7	<ul style="list-style-type: none"> <li>• User-friendly way to interact with data</li> <li>• Includes projected percentiles and ability to see trends</li> <li>• Color-coded tables with detailed school and student data</li> </ul>	<ul style="list-style-type: none"> <li>• Mostly based on EOG/C scores and not a holistic approach</li> </ul>
<b>iREADY</b> Assessment data for select grades in reading and math	83%	5.1	<ul style="list-style-type: none"> <li>• Good source of performance data: grades and testing</li> <li>• Good reports for teachers</li> <li>• Ability to view standards, sort data, group students by needs</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of historical data</li> <li>• Difficult to export data</li> <li>• Data not directly linked (e.g., medical condition and IEP)</li> </ul>
<b>MASTERY CONNECT</b> Teacher-made and benchmark assessment data in reading, math, and science	80%	5.0	<ul style="list-style-type: none"> <li>• Breaks down standards</li> </ul>	<ul style="list-style-type: none"> <li>• Difficult to navigate</li> <li>• Resources are generic, not thoroughly vetted, or useless</li> </ul>

	Survey Data (n=70)		Focus Group Data (n=51)	
	Usage	Rating	Advantages	Disadvantages
<b>EDUCATOR'S HANDBOOK</b> Discipline	74%	5.2	<ul style="list-style-type: none"> <li>• Educator's Handbook is very simple and effective</li> <li>• Great for Behavior Improvement Plan meetings and data collection</li> </ul>	<ul style="list-style-type: none"> <li>• None Noted</li> </ul>
<b>RADD</b> Reports and datasets related to testing, accountability, surveys, and the student information system	69%	5.8	<ul style="list-style-type: none"> <li>• Lots of data and reports</li> </ul>	<ul style="list-style-type: none"> <li>• Data not aggregated</li> <li>• Long reports, not printer friendly</li> <li>• Folders not well organized</li> </ul>
<b>RADD DATA MINING</b> Reports and datasets related to testing, accountability, surveys, and the student information system	61%	5.7	<ul style="list-style-type: none"> <li>• Lots of data and reports</li> </ul>	<ul style="list-style-type: none"> <li>• Difficult to query data and retrieve custom reports</li> </ul>
<b>READING PLUS</b> Assessment data for select grades in reading	27%	4.9	<ul style="list-style-type: none"> <li>• Attractive visuals</li> </ul>	<ul style="list-style-type: none"> <li>• Can't export data</li> </ul>

Note: Ratings were calculated as the average of a 7-point scale, ranging from 1 (least helpful) to 7 (most helpful). Average ratings greater than 5 can be considered helpful in supporting student achievement and well-being.

## WHAT IS MOST IMPORTANT TO USERS

Survey and focus group participants articulated the following similar dashboard priorities.

**Data integration.** The most frequently stated need was a single data warehouse or one-stop site that would consolidate DPS's many data systems and platforms.

### Appropriate and multiple levels of access.

Participants value the ability to protect student information and provide appropriate levels of access. For example, district staff should have access to all attendance and grades data, school administrators should have access to aggregated and student-level data within their school, and teachers and parents should have access to students' current and historical data in all subjects. With so many individuals using data to tailor their support and services, it is critical to find a dashboard provider that can support the needs of them all.

**“What we're typically doing is creating parallel databases in Google spreadsheets. That information ... would be much more effective if it was in a centralized location and everyone could pull from it what they needed. That's what a database is supposed to do.”**

*Student and Specialized Services Staff Member*

#### **Ability to track and monitor student**

**progress.** Participants want to aggregate and disaggregate data at multiple points (such as the district, school, class, and student levels) and by subject to track and monitor student progress. This should include early warning indicators or similar metrics and the ability to track strategies and interventions.

#### **Alignment to student standards.**

Participants revealed the need for stronger alignment between data systems/platforms and existing standards. Many noted that existing DPS data systems and platforms did not align well to existing standards (e.g., instructional or grading), and when they do, they are often difficult to navigate.

**Training and communication.** Participants reiterated the need for ongoing training and communication plans, including a detailed timeline for implementation, a clear plan for communicating with target audiences (including parents), formal and self-paced training opportunities, and support from a dedicated school or grade-level point of contact.

**Student indicators.** According to our survey results, the top-ranking data types to include in an education data dashboard were student contact information and data for targeting students (e.g., an early warning indicator). Other highly ranked indicators were local/interim assessments, student demographics, student grades, and state test scores (see Figure 3).

**“Data has to be transparent if we expect people to work with it. Everyone who is dealing with that child needs to have access to all the information that defines the student services in Durham Public Schools.”**

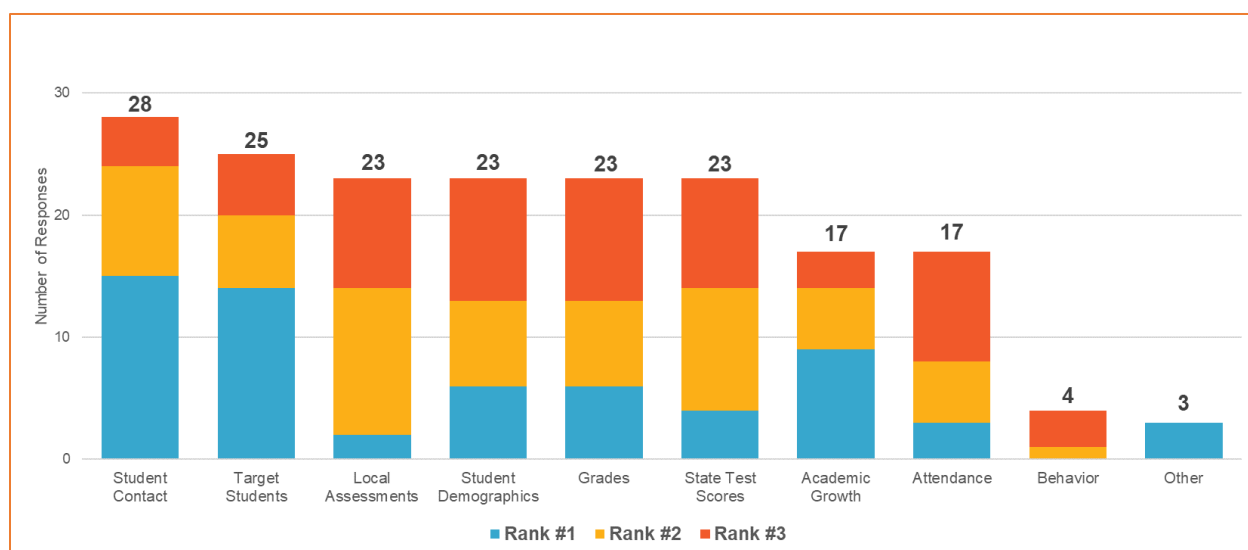
*Curriculum & Instruction Staff Member*

**“Updated, accurate student information that can give a whole picture of a student rather than just a snapshot.”**

*Principal/Assistant Principal*

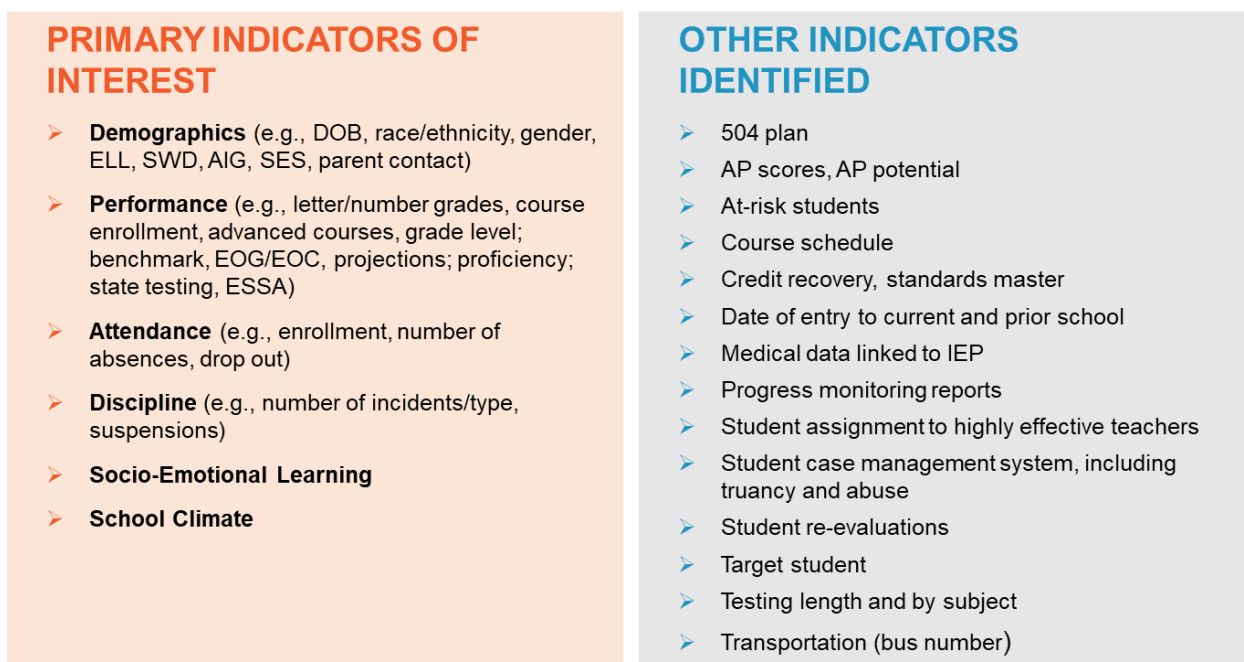


**Figure 3. Data Types Ranked in Order of Importance**



Focus group participants reinforced survey findings identifying both primary and secondary indicators of interest (see Figure 4).

**Figure 4. Focus Group Recommended Student Indicators**

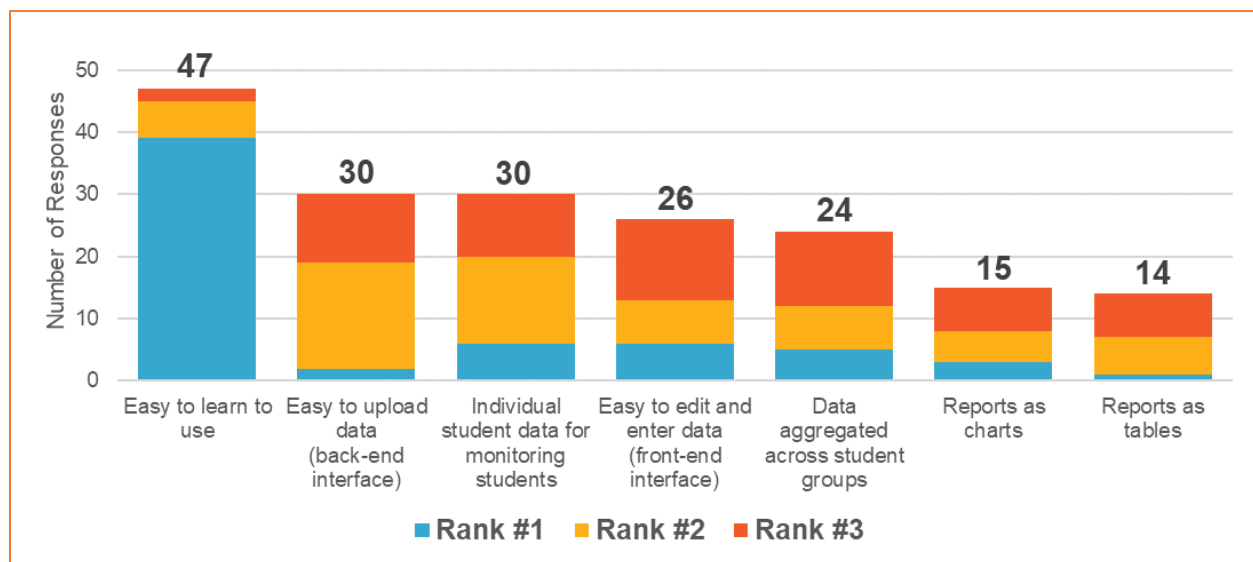


## FAVORED ATTRIBUTES

In addition to discussing the content of the dashboards, we discussed district staff needs in terms of appearance and functionality. Survey participants mostly want an education data dashboard that is easy to learn and use (see Figure 5). Additional top-ranked features included providing individual student data for monitoring students and ensuring an easy-to-upload data process (that is, a simple back-end interface to upload batches of student records).



Figure 5. Data Dashboard Features Ranked in Order of Importance



Focus group and survey participants wanted an education data dashboard that is:

- **User-friendly** — easy to navigate, including comparability with DPS single access sign-on and identity authentication processes
- **Visually appealing** — with intuitive dashboard design and layouts with appealing data visualization and color-coded graphs/figures
- **Customizable and adaptable** — flexible enough to grow and adapt with DPS as priorities and guidelines change, including the ability to customize dashboards and reports to fit various audience needs; for example, to:
  - Sort students by subgroup (e.g., demographics, lowest 5%)
  - View students across district, schools, and classes
  - Triangulate data across multiple indicators and shows trends and correlations
  - Export printer-friendly reports (e.g., as CSV or PDF) that show only relevant indicators

**“We must have an education dashboard that houses all the data from all sources ... so that the examination of all data points is easy. We desperately need a ‘one stop shop.’ People will not utilize this if it is not easy and makes all of the data readily available.”**

*Principal/Assistant Principal*

**“Whatever we have has to be able to grow and change with us. If the state changes a rule, changes reading assessment, it has to have a flexible system.”**

*Research & Accountability Staff Member*

- **Consistency and accuracy** — aligning color schemes, fonts, and naming conventions to DPS branding and standards; establishing a common set of queries and reports; and continually updating data as it becomes available.

**“There should be a common set of queries/reports – and the district should have a wide array of queries that everyone has access to.”**

*District Staff Member*

## Summarizing what is out there

The landscape analysis revealed 1) what other district are doing and which data platforms they are using, and 2) the broad array of data tools/platforms, including their features and how they align with DPS’s needs.

### DISTRICT CONVERSATIONS

With guidance from the Dashboard Working Group, FHI 360 compiled a list of districts that are comparable in size and/or demographics with DPS or that were believed to have an effective data solution (see Table 7).

**Table 7. Districts Reviewed and the Data Platforms they are Using**

	PowerSchool Family		Off-the-Shelf Education		Universal Data Visualization	
	Hoonuit	Performance Matters	Illuminate	Panorama	Power BI	Tableau
CABARRUS, NC	✓					
CHARLOTTE-MECKLENBURG, NC		✓		✓	✓	
CUMBERLAND, NC		✓				
GUILFORD, NC		✓				✓
JOHNSTON, NC				✓	✓	
UNION COUNTY, NC	✓					
WAKE COUNTY, NC			✓			✓
WINSTON-SALEM, NC		✓		✓		✓
BALTIMORE CITY, MD					✓	✓

To understanding what works in other North Carolina districts, the FHI 360 team conducted virtual focus groups in Cumberland, Guilford, Johnston, and Wake Counties. The focus groups answered a series of

questions and discussed their district's data use and aspirations. We also interviewed a principal, teacher, and two data leadership team members from Baltimore City Public Schools.

Participants shared the following similar priorities:

- **Invest in training and phase it in.** One of the strongest themes to come from district conversations was to invest in training for all stakeholders and to phase in the implementation.
- **Understanding your data strengths and needs.** All participants excel in tracking attendance, discipline, state assessments, social emotional, climate, and historical data. They noted that a good indicator of success with data is when there is consistent collaboration with other departments using data.

The group reported challenges such as too many sources, siloed sources of data, lack of training for stakeholders, and too much user management by IT.

- **Build to a specific audience and purpose.** The district participants said it was important to identify specific audiences, understand what measures they will need, and what purposes data serves them. The group uses a range of data tools/platforms for dashboards, such as Tableau, Performance Matters, Panorama, Power BI, and Microsoft Office products.

The group also recommended portholes like secure drives and SharePoint. To track student performance, use factors such as attendance, discipline, social emotional learning, and grade level performance for reading, math and writing.

**“[One of our] main issues is multiple data sources and [not] having one place where all of it is housed.”**

*District Staff Member*

**“Most people are indeed interested in a lot of the similar indicators. Sometimes the way in which they want it or the depth to which they want to see it will differ ... a lot of the indicators will be useful, whether you're a school board member or a school principal.”**

*District Staff Member*

**“What does work well is when the administrative data sets ... integrate and [we] look at it alongside of our achievement data.”**

*District Staff Member*








































#### WHAT ADVICE WOULD YOU GIVE TO A DISTRICT WITH A NEW DATA SYSTEM?


- Have a dedicated development team to work through all the technical aspect of the dashboard build
- Invest resources and time in learning about new and key data visualizations
- Offer plenty of professional development opportunities
- Keep it as simple as possible (to start)
- Find a tool that uses historical data (important for identifying trends, correlations, and the whole picture)
- Invest in ongoing training
- Have security agreements in place when investing in Power Tools (e.g., Power BI, Tableau)
- Minimize the need for user management
- Do not overlook the importance of customer support
- Clearly define users upfront
- Make sure the infrastructure is an appropriate match for the tool

#### REVIEW OF TOOLS

We created a list of data tool companies based on what we learned in focus groups and interviews, as well as guidance and approval from the Dashboard Working Group. FHI 360, with the use of the rubric, participated in multiple demonstration and discussion sessions with representatives from these data companies (see Table 8).

Table 8. Tools Reviewed and Rubric Ratings Articulated for DPS Needs

	Key:  Works Well  Minor Concerns  Does Not Meet DPS Needs					
	Customization	System Connectivity & Integration	Analysis Criteria	Information Delivery	Visual Design	Security
HOONUIT						
PERFORMANCE MATTERS						
ILLUMINATE EDUCATION						
PANORAMA STUDENT SUCCESS						
POWER BI						
TABLEAU						



**Hoonuit** is PowerSchool product that provides school, district, and state-wide insights. Hoonuit features accountability tracking, early warning and intervention, social and emotional learning reporting, and college and career readiness, as well as K-12 finance and operations, talent management, enrollment analytics, and location analytics. **Notable features include** longitudinal data, SEL surveys, intervention management, and digital learning analytics.

**Performance Matters** is a PowerSchool product offered as an optional module of Hoonuit. It features an integrated portfolio of assessment data analytics that link student and educator growth. The platform offers solutions that encourage professional growth, inform instruction, and increase accountability across districts. **Notable features include** a shareable report that populates the users levels of data, a professional learning community for users, and evidence-based assessments.

**Illuminate Achievement** helps districts measure progress and achieve goals. Users can move from a single data point and a holistic view of the whole child, combining assessment, academic, social-emotional behavior, intervention, and qualitative data (e.g., observations, notes, and comments) for each student — including current and past years. **Notable features include** the ability to set strategic plans, action items, and goals; link to Google Sheets; and create multiple dashboards with customizable data points/charts.

**Panorama Student Success** partners with K-12 schools and districts nationally to collect and analyze data on social-emotional learning, school climate, and family engagement. It includes research-backed surveys and a technology platform. **Notable features include** ongoing integration of NC PowerSchool and standard filters into its Student Success platform, which includes behavior, attendance, coursework, rosters, and demographics, as well as ongoing integration of iReady, mClass, End-of-Course, End-of-Grade, Educators Handbook, and SEL surveys.

**Power BI** is a Microsoft desktop tool that enables users to connect to data, analyze and model data to uncover insights, then track data as it changes over time to guide informed and strategic decisions. Power BI can enrich that data through added calculations and by building visualizations and reports. From there, data can be published to the Power BI server and the user can build dashboards that can aggregate data from many sources — online or in-house data sources within the district. **Notable features include** a range of attractive visualizations, live data updates, datasets filtration to customize reports, customizable dashboards, and an Office 365 App launcher, that lets it easily share reports and data.

**Tableau** is a powerful data visualization platform that offers unlimited data exploration through an intuitive interface. The system can connect to virtually any data source, integrate authentication tools, and has detailed security and access settings. It has three levels of licensing for tailored access: 1) Creators can design, clean, and curate data sources and visualization; 2) Explorers can access, analyze, and create their own dashboards; and 3) Viewers can interact with published dashboards (read only). **Notable features include** drag-and-drop visualization, the ability to add comments and tag peers, data source verification, and the ability to drill down from aggregated data to the student level.

# Implementation Timeline



# Implementation Timeline

A new data dashboard must be introduced in a careful, thoughtful way that includes clear communication to stakeholders and allows users at every level ample time to learn and practice.

1. **Phased in approach:** This will allow one group to become proficient at a time, equipping those users to provide support to the next group.
2. **Hands on, practical training:** DPS, in partnership with the vendor, will teach educators how data analysis can improve their work. Users will learn how the dashboard works — how to input data, run reports, look at trends, etc. — and practice those skills in specific, critical scenarios that link instruction and student outcomes. This practice will elevate and socialize best practices.
3. **Small, specific required protocols:** Protocols in each phase ensure that everyone practices in ways that drive the monitoring of student outcomes (see Appendix A).

Table 9. Sample Implementation Timeline

	Group Responsible	Action
<b>OCTOBER 2021</b>	District Leadership	<ul style="list-style-type: none"> <li>Gain a final decision on product; get contract signed.</li> </ul>
<b>NOVEMBER 2021</b> <b>PHASE 1A</b>	IT/Operations	<ul style="list-style-type: none"> <li>Identify data sources to include in the dashboard (e.g., SIS, periodic assessment, SEL, discipline).</li> <li>Plan for data handshakes and data synchronization processes and schedules.</li> <li>Clean the data.</li> <li>Agree on the key dashboards that must be available upon launch and what may be rolled out over time, including the filters and infographics that will provide the report view and data triangulation.</li> <li>Create a timeline and calendar for technology and operational decision points and preparation activities.</li> <li>Identify roles and responsibilities for ongoing data management.</li> </ul>
	District Leadership	<ul style="list-style-type: none"> <li>Create a communication plan (see Appendix B).</li> <li>Design a Professional Development Plan (see Appendix A)</li> </ul> <p><i>Note: DPS will create a small interdisciplinary Data Dashboard Leadership Team (with representatives from IT, operations, leadership, curriculum and instruction, assessment, and SEL) to make decisions about the dashboard.</i></p>
<b>DECEMBER 2021</b>	IT/Operations	<ul style="list-style-type: none"> <li>Test the dashboard.</li> <li>Test the data synchronization solutions.</li> </ul>
<b>PHASE 1A CONTINUED</b>	District Leadership	<ul style="list-style-type: none"> <li>Launch the communication plan across internal stakeholders.</li> <li>Work closely with the vendor to plan and finalize the district training plan and workshops (as defined in Phase 1b).</li> <li>Review and provide ongoing feedback on the dashboard designs to ensure that they are easy to use and answer the most critical questions about student progress and performance.</li> </ul>
<b>JANUARY 2022</b> <b>PHASE 1B</b>	IT/Operations	<ul style="list-style-type: none"> <li>Work with vendors to update/refine dashboards as necessary.</li> <li>Continue to update the dashboards with new data sets and recent data.</li> </ul>
	District Leadership	<ul style="list-style-type: none"> <li>Receive professional development from the vendor.</li> <li>Practice dashboard use through three Data Dashboard Implementation Cycles.</li> </ul>



	Group Responsible	Action
MARCH 2022 PHASE 1C		<ul style="list-style-type: none"> <li>Plan Phase 1c rollout, turnkeying Data Dashboard Implementation Cycles across all schools.</li> </ul>
	IT/Operations	<ul style="list-style-type: none"> <li>Work with vendors to update/refine dashboards as necessary.</li> <li>Continue to update the dashboards with new data sets and recent data.</li> </ul>
	District Leadership	<ul style="list-style-type: none"> <li>Lead professional development for all school-based administrators and coaches, with practice using three Data Dashboard Implementation Cycles.</li> </ul>
MAY 2022 PHASE 1D	School Administrators	<ul style="list-style-type: none"> <li>Work with coaches to plan Phase 1d rollout, turnkeying Data Dashboard Implementation Cycles within each school.</li> </ul>
	School Administrators	<ul style="list-style-type: none"> <li>Lead professional development, with practice using three Data Dashboard Implementation Cycles to create regular data routines across educators and schools.</li> </ul>
JULY 2022 PHASE 1D CONTINUED	District Leadership	<ul style="list-style-type: none"> <li>Establish ongoing professional development for new employees, new roles, and new analyses across the system.</li> </ul>
JANUARY 2023 PHASE 2	District Leadership	<ul style="list-style-type: none"> <li>Provide external access (parents and community).</li> </ul>



## END NOTES

<sup>1</sup> Darling-Hammond, L., & Plank, D. N. (2015). Supporting Continuous Improvement in California's Education System. Stanford, CA: Policy Analysis for California Education and Stanford Center for Opportunity Policy in Education.

<sup>2</sup> Bae, S. (2018). Redesigning Systems of School Accountability: A Multiple Measures Approach to Accountability and Support. Education Policy Analysis Archives. 26. 8. 10.14507/epaa.26.2920.

<sup>3</sup> Ezzani, M. (2021). A Principal's Approach to Leadership for Social Justice: Advancing Reflective and Anti-Oppressive Practices. Journal of School Leadership, 31(3): 227-247.

<sup>4</sup> Molenar, I, & Campen, C.K. (2021). How Teachers Make Dashboard Information Actionable. IEEE Transactions on Learning Technologies PP(99):1-1.

<sup>5</sup> Boudett, K.P., City, E.A., & Murnane, R.J. (2007). The "Data Wise" Improvement Process. Principal Leadership, 7(2): 53-56.

<sup>6</sup> <http://dataqualitycampaign.org/wp-content/uploads/2019/11/DQC-Personalized-Learning-11132019.pdf>

<sup>7</sup> Tom Broos, Maarten Pinxten, Margaux Delporte, Katrien Verbert & Tinne De Laet (2020). Learning Dashboards at Scale: Early Warning and Overall First Year Experience, Assessment & Evaluation in Higher Education, 45:6, 855-874, DOI: [10.1080/02602938.2019.1689546](https://doi.org/10.1080/02602938.2019.1689546).

<sup>8</sup> Ibid 2.

<sup>9</sup> <https://searchbusinessanalytics.techtarget.com/definition/data-visualization>



## Appendix A: Implementation Cycles

Implementation Cycles build strong habits by creating multiple opportunities to practice together in a collaborative and public way. The cycles provide rounds of practice that allow a team to socialize norms and protocols, to identify challenges, and to learn from each other. Implementation Cycles are especially helpful when learning a new tool or system, like a new data dashboard, and they offer a time for guided practice after a team receives professional development.

### STEP 1: PROVIDE DATA DASHBOARD PROFESSIONAL DEVELOPMENT.

The team should learn how to use the data dashboards in a whole group, via webinar, through asynchronous videos, or in whatever way is most convenient.

### STEP 2: CREATE A CYCLICAL PRACTICE ACTIVITY.

A cyclical practice activity simply means an activity that has several rounds, each round allowing for learners to get more practice in a particular skill. This activity should be a relevant and meaningful way to try out the dashboard, requiring a deliverable that can be shared and discussed across a team. For example, if DPS district leaders receive professional development in January, that may provide them with a technical understanding of how to operate the dashboard. However, we know a complex tool like a dashboard requires practice. In order to build user confidence, after each group of learners (district leadership, building administration, and teachers) could be assigned a specific assignment that requires that they apply their technical learning to specific, relevant data analysis tasks so that they have three opportunities for guided practice before they need to use the dashboards independently.

Table A-1 presents a detailed implementation cycle timeline for DPS commencing January, 2022 through May, 2022.

Table A-1. DPS Implementation Cycles Timeline

	Activity
<b>JANUARY 10</b>	<b>District leadership</b> receives professional development
<b>JANUARY 17</b>	<b>District leadership</b> receives Cycle 1 assignment
<b>JANUARY 31</b>	<b>District leadership</b> shares and debriefs
<b>FEBRUARY 7</b>	<b>District leadership</b> receives Cycle 2 assignment
<b>FEBRUARY 21</b>	<b>District leadership</b> shares and debriefs
<b>FEBRUARY 28</b>	<b>District leadership</b> receives Cycle 3 assignment
<b>MARCH 7</b>	<b>District leadership</b> shares and debriefs, plans professional development
<b>MARCH 14</b>	<b>District leadership</b> turnkeys professional development for building administrators
<b>MARCH 14</b>	<b>Building administrators</b> receive Cycle 1 assignment
<b>MARCH 28</b>	<b>Building administrators</b> share and debrief
<b>APRIL 4</b>	<b>Building administrators</b> receive Cycle 2 assignment
<b>APRIL 18</b>	<b>Building administrators</b> share and debrief
<b>APRIL 25</b>	<b>Building administrators</b> receive Cycle 3 assignment

	Activity
<b>APRIL 25</b>	<b>Building administrators</b> share and debrief, plan professional development for teachers
<b>MAY 2</b>	<b>Building administrators</b> turnkey professional development for teachers
<b>MAY 16</b>	<b>Teachers</b> receive Cycle 1 assignment
<b>MAY 16</b>	<b>Teachers</b> share and debrief
<b>MAY 23</b>	<b>Teachers</b> receive Cycle 2 assignment
<b>MAY 23</b>	<b>Teachers</b> share and debrief
<b>MAY 30</b>	<b>Teachers</b> receive Cycle 3 assignment

### STEP 3: DISCUSS THE DELIVERABLE FROM EACH CYCLE.

In each round, practitioners should have an opportunity to share and discuss their results and the process. What worked well and what was difficult? Did everyone get similar results? How will this inform the way DPS uses the dashboards moving forward?

## Examples of Cycle Assignments

This is an opportunity to simultaneously practice the mechanics of the data dashboard and build shared data protocols across a team. To that end, the more relevant and urgent the assignments are, the more powerful the resulting learning can be. Ultimately, the assignments should align to current data questions across the classrooms, the schools, or the districts. For that reason, the following examples should be tailored as DPS priorities and urgencies shift.

### District Example

1. Our district has invested heavily in professional development in literacy, given that literacy is an equity issue. Looking across grade ABC, are students still struggling in literacy? Are trends evident by school or by subgroup? Where are the bright spots? Use the data dashboard to look at class grades, test grades, and other leading indicators to understand our progress. How should that inform our next steps in literacy, especially in light of our equity work?
2. We know that the 2020-2021 school year was difficult for students and for families, and we have dedicated significant time to SEL. Use the data dashboard to look at our fall data. Are there any indicators about whether our SEL work has been more successful in some schools than in others? Is there any correlation between strong SEL implementation and student academic success? How should that inform our work in SEL?

### School Administrator Examples

1. We know that the pandemic has had a severe impact on attendance this year and last, and that attendance is closely linked to equity issues and to academic success. Use your data dashboard to identify your attendance patterns in your school this year. How do your subgroups compare to each other and to schoolwide averages in attendance? How can this data inform your work with teachers? With other staff?

2. Across your school, you have been building systems of intervention that are targeted and intended to accelerate or recoup learning for struggling students. Use your data dashboard to analyze interventions you've used across the school. Which interventions have shown promising outcomes? Which interventions have not shown clear progress? How will this data inform your practice moving forward?

### Teacher Examples

1. Our school created a compelling and relevant curriculum for students. Use your data dashboard to analyze student progress, comparing end-of-unit assignments. How do results differ from assignment to assignment? Are there some units with higher completion rates? Do students perform better on some units than others? How will this data inform your practice?
2. Our school has used iReady for the third year in a row. Use your data dashboard to understand the effects of iReady in your classroom. Is there a correlation between time on iReady and student outcomes? Does iReady accurately reflect progress that translates into class performance? Does iReady work better for some subgroups than for others? How does this data make you think about your practice for next year?

# Appendix B: Communication Plan

## District Wide Data Dashboards for Equity

This sample communications plan is designed to support the Office of Public Affairs in informing and engaging key stakeholders about the adoption of a district wide data dashboards tool selected by DPS as part of their strategic plan to increase student achievements and support educational equity.

This cross-cutting communications strategy will help: 1) articulate communications goals; 2) clarify key messages and target audiences; 3) provide an outline, suggested action steps, and a timeline; and 4) provide a list of resources and sample materials.

### THE CHALLENGE

- Inequities in access to resources and opportunities for some students across DPS schools have a significant impact on student success and learning.
- While DPS has access to a lot of data, and many educators across the system use data regularly, the current data systems are not compatible, connected, or regularly updated, and there is not a coherent and easy-to-access dashboard available for educators at every level.

### THE CHARGE:

- To rise to the challenge of truly closing the opportunity and achievement gaps, especially those exacerbated by COVID-19, our district needs to facilitate deeper and more effective data usage across the system, a stronger data culture, and streamlined access across the system.

Durham Public Schools believes:  
**“Our students and schools deserve equitable access to the resources and opportunities they need to succeed.”**

### THE SOLUTION:

- Identify a data tool to be used district wide to help educators build equitable education outcomes across the district.
- Adopt that data tool (dashboards) district wide to establish and monitor disaggregated individual student achievement and other indicators at the classroom, school, and district level.
- Continuously use the data collected in the dashboard, in real time, to assess progress, identify challenges and allocate resources or improve opportunities at the classroom, school, and district level.

## Communications Plan Goals for District Wide Data Dashboards for Equity

The district wide data dashboards will:

1. Help DPS achieve a critical piece of the first goal of the DPS strategic plan: increasing student achievement by 2023.
2. Create a systemic approach to addressing the achievement and opportunity gap.
3. Create a shared commitment to building more equitable outcomes and opportunities for DPS students.
4. Create a data culture and a shared language across the district around equitable student achievement.
5. Provide district-wide uniformity about what data is collected and tracked, and how that data is used to measure outcomes, assess progress, and make adjustments.
6. Strengthen DPS educators' ability to access and use real time, disaggregated data to support equity-driven decisions at the classroom, school, and district level.
7. Engage students and their families in understanding individual student strengths and challenges, using data as a tool for improvement and advancement.

**“When students, parents, educators, and administrators have the right information to make decisions, students excel.”**

<https://dataqualitycampaign.org/why-education-data>

## Intended Audiences and Phased Communications Timeline

Intended audiences are the people or groups of people you want to inform, engage and impact. Having clear, specific, and timely messages for each group is essential in creating the foundation on which the acceptance and use of the data dashboards are built. In a school district, crucial to this is transparency about how decisions have been made; how they will impact each group; and how each group will be expected to change, adapt, or learn moving forward. Along with clear communication, space for conversations, feedback, and readjustment will be helpful to keep the initiative moving smoothly.

### CREATE A TIMELINE TO ALIGN WITH IMPLEMENTATION

In the following sample communications timeline (see Table B-1), we recommend a phased rollout aligned with the implementation timeline for the data dashboard tool.



Table B-1. Sample Communication Timeline

	Group Responsible	Action
<b>NOVEMBER 2021</b> <b>PHASE 1A</b>	Office of Public Affairs/Lead	<ul style="list-style-type: none"> <li>• Develop communications plan.</li> <li>• Develop timeline for communications plan.</li> </ul>
<b>DECEMBER 2021</b> <b>PHASE 1A CONTINUED</b>	Office of Public Affairs/Lead (Internal)	<ul style="list-style-type: none"> <li>• Launch communications plan across various internal stakeholders.</li> <li>• Sends out emails to District staff and school leaders.</li> <li>• Schedule in-person or virtual meetings with district staff and school leaders to walk through data dashboards using PowerPoint</li> <li>• Assistant supervisors follow up meeting with details in internal newsletter and links to FAQ's and relevant documents on the intranet.</li> </ul>
<b>JANUARY 2022</b> <b>PHASE 1B</b>	Office of Public Affairs/Lead (Internal)	<ul style="list-style-type: none"> <li>• District sends out emails to teachers and support staff at schools announcing the data dashboards district wide.</li> <li>• A week later, principals send out email to school staff.</li> <li>• Principals schedule in-person or virtual meetings with teachers and walk-through data dashboards using PowerPoint.</li> <li>• Principals or district follow up meeting with takeaway on school internal newsletter and links to FAQ's and relevant documents on the intranet.</li> </ul>
	Office of Public Affairs/Lead (External)	<ul style="list-style-type: none"> <li>• Team begins planning website content to add to district website.</li> <li>• Team creates press release.</li> <li>• District drafts email to send to all parents and key stakeholders.</li> </ul>
<b>FEBRUARY 2022</b> <b>PHASE 1B CONTINUED</b>	Office of Public Affairs/Lead (Internal)	<ul style="list-style-type: none"> <li>• Principals or district follow up meeting to teachers with email or internal newsletter and share key lessons from the meeting and answers to FAQs.</li> <li>• Relevant documents are added to the intranet and links shared.</li> <li>• District can share snap shots of trainings/ workshops in internal newsletters.</li> </ul>
	Office of Public Affairs/Lead (External)	<ul style="list-style-type: none"> <li>• District updates website with info on data dashboards.</li> <li>• District posts weekly on social media informing larger community.</li> <li>• District can also share snapshots of trainings/ workshops on social media.</li> </ul>
<b>MARCH 2022</b> <b>PHASE 1C</b>	Office of Public Affairs/Lead (Internal)	<ul style="list-style-type: none"> <li>• District sends out second email to teachers with info about rollout and professional development and link the survey (below)</li> <li>• Office of Public Affairs to send survey to teachers with questions about data dashboards.</li> <li>• Office of Public Affairs/District to schedule webinar or Zoom call with teachers to show them dashboards and answer questions solicited before the meeting.</li> <li>• District to sends out email to everyone in district about how training went for the principals, sharing pics, personal stories, and visuals.</li> </ul>
	Office of Public Affairs/Lead (External)	<ul style="list-style-type: none"> <li>• Schools send email to parents about data dashboards and link to website pages.</li> <li>• District continues social media posts about learning about dashboards and how to use them.</li> </ul>
<b>April 2022</b> <b>PHASE 1C CONTINUED</b>	Office of Public Affairs/Lead (Internal)	<ul style="list-style-type: none"> <li>• Follow up webinar or Zoom call by answering the questions in writing and spelling out next steps.</li> <li>• Principals share their experience in learning to use the new data dashboard tool with teachers in email or internal newsletter.</li> </ul>

	Group Responsible	Action
	Office of Public Affairs/Lead (External)	<ul style="list-style-type: none"> <li>Teachers to talk with students about data and how to use it.</li> <li>Principal sends newsletter or email to parents with more details about data dashboards and dates for a community meeting or Zoom call to discuss.</li> <li>District continues to share on social media and through email.</li> </ul>
<b>MAY 2022</b> <b>PHASE 1D</b>	Office of Public Affairs/Lead (Internal)	<ul style="list-style-type: none"> <li>District collects stories from different schools about training and use of data and shares internally and externally.</li> <li>District sends staff email to assess how learning and implementation are going.</li> <li>District shares survey findings via email, along with next steps for implementation, based on survey.</li> </ul>
	Office of Public Affairs/Lead (External)	<ul style="list-style-type: none"> <li>Principals host parent or community meetings.</li> <li>District continues to share social media stories about community meetings.</li> <li>District shares FAQs on social media and through emails to answer community questions.</li> </ul>
<b>JULY 2022</b> <b>PHASE 1D</b> <b>CONTINUED</b>	Office of Public Affairs/Lead (Internal)	<ul style="list-style-type: none"> <li>Begin preparing communications plan for external access.</li> <li>Assess progress of current communications plan and adjust as need.</li> <li>Provides ongoing support to school administrators by sharing info with teacher and school community.</li> <li>Continue social media stories about how data is being used in real time.</li> <li>Highlight stories to share with local press.</li> </ul>
	Office of Public Affairs/Lead (External)	<ul style="list-style-type: none"> <li>Share access rollout info with parents and students via email.</li> <li>Share video via email and school newsletter on how to access dashboard.</li> <li>Have teachers walk students through access and use.</li> <li>Share access info on social media.</li> </ul>
<b>JANUARY 2023</b> <b>PHASE 2</b>	Office of Public Affairs/Lead (Internal)	<ul style="list-style-type: none"> <li>Provide email to schools to send to parents. Include detailed instruction on access.</li> <li>Follow up with email about how to use the dashboards.</li> <li>Continue posting social media stories about how data is being used in real time.</li> <li>Share stories with local press.</li> <li>Develop long-term plan to continue sharing info and telling stories.</li> </ul>
	Office of Public Affairs/Lead (External)	<ul style="list-style-type: none"> <li>Send email to parents with clear access instructions and link to video and school website.</li> <li>Discuss with students and create incentives for them to use it with their parents.</li> <li>Post stories of parents accessing the dashboards on social media.</li> </ul>



## BEGIN WITH SHORT, CLEAR EMAILS AND ANTICIPATE QUESTIONS

Initial contact with each stakeholder group should be done via a short, clear email (see sample email in Figure B-1), which should include a link to FAQs (see next section). FAQ'S are helpful when rolling out a new initiative or program. They anticipate questions each group might have and, if shared up front, can help reduce the number of follow-up inquiries, quell uncertainty, focus the work, and reinforce key messages.



Figure B-1. Sample Email

## FREQUENTLY ASKED QUESTIONS

Frequently asked questions (FAQ'S) are helpful when rolling out a new initiative or program. They anticipate questions key stakeholders will ask and, if shared up front, can help reduce the number of follow-up inquiries, quell uncertainty, and help refine messaging. Figure B-2 provides a list of questions to start the process. As the initiative rolls out, additional questions will come up. Be sure to update the list with new questions and answers as they arise and share a link to the FAQs on all initial correspondence with stakeholders. Make the list easily accessible on the website and as part of outreach and general communications efforts such as posting key questions to social media, embedding a link to the FAQ list in the text or heading, or including a link with all correspondence.

**To:** DPS DISTRICT STAFF AND SCHOOL ADMINISTRATORS:

**Subject:** District-Wide Investment in Data Dashboards to Increase Student Achievement and Support Educational Equity

**Email Body:**

***"Our students and schools deserve equitable access to the resources and opportunities they need to succeed." DPS Strategic Plan 2021***

After a year-long process to assess how best to improve equitable student outcomes across DPS, the DPS Leadership has voted to adopt the **[Insert Name]** data (dashboard) tool district-wide to help increase student achievement and educational equity. The **[Insert Name]** dashboard is a customizable electronic dashboard with easy-to-use interfaces and access points which will allow educators, administrators, and the district to establish and monitor disaggregated individual student outcomes and other indicators at the classroom, school, and district levels.

Implementation is scheduled to begin in January 2022 and will be phased in over the course of **xxx** years. Hands-on training, support, and practical protocols will be provided for all staff.

Starting in January, IT/Operations will work with the vendor to update and refine dashboards and synchronize with existing district data. At the same time the district leadership teams will receive professional development from the vendor.

Beginning in March 2022, the district leadership team will begin professional development for all school-based administrators and coaches. Teacher implementation begins May 2022 and will be led by school-based administrators and coaches.

[Click here to learn more or to see a list of FAQs](#) **[insert link]**

We will provide weekly updates on the status and rollout of this initiative. If you cannot find the answer to your question in the FAQs, please email **[Insert Contact Name and Email]**.

Figure B-2. Sample FAQ List

FOR ALL STAKEHOLDERS	FOR INTERNAL STAKEHOLDERS	FOR TEACHERS
<ul style="list-style-type: none"> <li>➤ What is student data?</li> <li>➤ What is data for equity?</li> <li>➤ What is the data dashboard tool?</li> <li>➤ Why did DPS choose this tool?</li> <li>➤ Why are we implementing this?</li> <li>➤ What are the benefits?</li> <li>➤ How will it impact our district?</li> <li>➤ How will it impact teaching and learning?</li> <li>➤ What is the implementation process?</li> <li>➤ Who will be involved?</li> <li>➤ How will parents and students use it?</li> <li>➤ Where do I go to learn more?</li> </ul>	<ul style="list-style-type: none"> <li>➤ Who is overseeing this initiative?</li> <li>➤ Who is responsible for implementation?</li> <li>➤ What is the timeline for implementation?</li> <li>➤ How will success be measured?</li> <li>➤ What training will be provided and by whom?</li> <li>➤ How will this be used to make decisions at the district level?</li> <li>➤ What are our goals for our students?</li> <li>➤ What are our goals for our teachers?</li> <li>➤ What are our goals for our administrators?</li> <li>➤ What are our goals for our District staff?</li> <li>➤ How can I provide feedback? Get involved?</li> </ul>	<ul style="list-style-type: none"> <li>➤ How will educators use it? How will it impact how they teach?</li> <li>➤ When will teachers have to start using the tool?</li> <li>➤ What about the tools educators are already using?</li> <li>➤ What will it look like in the classroom on a day-to-day basis?</li> <li>➤ What training and support will educators receive?</li> <li>➤ Will students and their families have to use it? If so, how?</li> <li>➤ How will the district use it? Principals?</li> <li>➤ How do I learn more?</li> <li>➤ How can I provide feedback? Get involved</li> </ul>

The [Data Quality Campaign](#) provides a [list of answers](#) you can reference to populate your own FAQs or you can use some of the ones suggested above.

## FOLLOW UP REGULARLY

Once initial contact is made via email, follow up with either virtual or in-person meetings to share more details. The Office of Public Affairs can support the meeting facilitator by sharing templates and talking points or with instructional videos from the vendor.

## CREATE SPACE FOR QUESTIONS AND FEEDBACK

After each point of contact, allow space for questions and feedback, creating clear lines of communication and response. Follow up and update FAQs as need.

## IDENTIFY TARGET AUDIENCES

- **District Staff and School Administrators:** These are the drivers of the data dashboards, the first line of staff to receive training as facilitators and coaches, tasked with implementation at the school sites. Equipping them with a set of tools—including key messages, talking points, sample emails, and a [slide deck](#)—will help ensure a uniform message and support implementation.
- **Teachers and support staff:** Teachers are the end users of data dashboards and the group most impacted by it on a day-to-day level. Ensuring they are engaged and have a clear understanding of what is expected of them is critical to the success of the initiative.
- **Students:** Students are the clients. They will need to learn how to use data as a learning tool. For the data to be useful, it must be incorporated into their school routines.
- **Community/Parents:** In younger grades, parents will be the clients before the students. But a dashboard helps parents become active participants in learning. This is an opportunity to engage parents and the community in a new way. The Office of Public Affairs can help schools share a uniform message and support by providing key messages, talking points, sample emails, and slides.
- **Media:** Local media can be key to creating understanding and support of the data tool districtwide. Placing positive stories or examples of how the tool is used can help initiate community support and buy-in.

## Key Messages

As the data dashboards are phased in, there will be multiple opportunities for communicating with a range of stakeholders. Below are some key messages and talking points.

### PRIMARY (BIG PICTURE)

- The district wide data dashboards are a tool to help increase student achievement and educational equity by 2023.
- The dashboards will create a systemic approach to addressing the achievement and opportunity gap.
- The dashboards are a way of organizing data so it is uniformly accessible across the district, disaggregated, and easy to use.
- The dashboards will strengthen DPS educators' ability to access and use real time, disaggregated data to further equity-driven decisions at the classroom, school, and district levels.
- The dashboards will provide key mechanisms for DPS, including transparency, accountability, and real-time information for decision-making.

### SECONDARY (FOR STAKEHOLDER GROUPS)

- The new district wide data dashboards will make it easy to use data to support student success and educational equity.
- The dashboards will give educators access to real-time disaggregated data to make decisions about how best to support student learning.
- The dashboards will be integrated into the work educators are already doing and will provide additional data to inform their instructional decisions.
- The dashboards will be a tool for teachers, parents, and students to assess student progress and challenges and make appropriate adjustments.

### TALKING POINTS

- **Good dashboards make data readily available and transparent.** They are easy to understand and allow the viewer to draw quick, informed conclusions about a program or service. Dashboards advance equity by increasing transparency.
- **Continuously updated dashboards allow educators to use leading and lagging indicators for intervention, support, and adjustment** at critical points that will positively impact student learning and engagement.
- **Dashboards move data from local perspectives to aggregated, cross-functional views of collective impact.** For example, rather than simply disaggregating the attendance of 100 high school students from a single class by semester, dashboards allow an institutional student engagement perspective—tracking and visualizing attendance across classes, school years, and even afterschool activities and clubs. This advances equity by increasing awareness about how many students attended and enables visual comparison across a variety of demographic indicators, including race, ethnicity, gender, nationality, and socioeconomic status.

## Communications and Action Step Outline

As you roll out strategies in the communication plan, ask yourself the following:

- What is my goal?
- Who is my audience?
- What is my message/talking point for this audience? Is there a story?
- Who is my messenger for this audience?
- How do I reach my audience?
- How do I deliver my message and engage in dialogue?
- How do I know I succeeded?

Figure B-3 provides a quick-start checklist of suggested activities and strategies aligned with the phased rollout of the tool.

**Figure B-3. Quick Start Communication Checklist**

INTERNAL DISTRICT COMMUNICATIONS	
<input type="checkbox"/>	Emails to district staff and school administrators, emails to teachers
<input type="checkbox"/>	Develop FAQs
<input type="checkbox"/>	PowerPoint presentation for in-person or virtual meetings
<input type="checkbox"/>	Newsletter blurbs or stories (for monthly newsletter and weekly newsletters to superintendents, administrators, and teachers)
<input type="checkbox"/>	Website update: Language to reflect commitment to educational equity and use of data
<input type="checkbox"/>	Intranet: All relevant documents added and updated regularly to a clearly marked and accessible section (Google drive)
<input type="checkbox"/>	Webinar or video to share in newsletter and to put on intranet (Ask vendor or make one internally with dashboard coaches.)
SCHOOL-LEVEL COMMUNICATIONS	
<input type="checkbox"/>	Emails to teachers
<input type="checkbox"/>	FAQs for teachers
<input type="checkbox"/>	PowerPoint presentation for in-person or virtual meetings
<input type="checkbox"/>	Video for teachers on how to use the tool
<input type="checkbox"/>	Follow-up email or electronic newsletter to teachers with videos embedded in newsletter
<input type="checkbox"/>	Portal on website or intranet where all videos and resources are categorized
PARENTS/COMMUNITY	
<input type="checkbox"/>	Initial emails using sample from templates
<input type="checkbox"/>	Newsletters from district and school with embedded video that walks through the tool
<input type="checkbox"/>	Follow-up emails with video embedded in email
<input type="checkbox"/>	Community meetings at the schools
<input type="checkbox"/>	Follow-up emails with access to tool and request to check grades or progress
<input type="checkbox"/>	Access through parent groups- offer of trainings
<input type="checkbox"/>	Website page with all resources
<input type="checkbox"/>	Targeted social media posts of how the tool is being used by parents
<input type="checkbox"/>	All videos on YouTube channel and easily accessible through website
MEDIA AND OTHER STAKEHOLDERS	
<input type="checkbox"/>	Press release
<input type="checkbox"/>	Targeted social media post

## Resources

There are many resources and organizations to help as you create a final communications plan. Below are links to several that provide key messages, talking points, graphics, and strategies for a variety of key stakeholders.

**The Data Quality Campaign (DQC)** is the nation's leading voice on [education data](#) policy and use. Every student's education journey is unique. DQC believes that all students deserve the benefit of data that supports them along their way. [Their] advocacy relies on the different experiences, backgrounds, and opinions of our team members to inform our efforts and explore avenues that expand our thinking.

**DQC mission: We advocate to change the role of data in education so that every student is not only counted but counts.**

DQC's website provides a range of talking points for different audiences and free infographics with detailed explanations on how data works in various settings. It also includes success stories of how data has been used successfully to improve outcomes.

- Data literacy 101: [Data Literacy 101 - Data Quality Campaign](#)
- Infographics: [DQC Infographics - Data Quality Campaign](#)
- Success stories: [How Effective Data Use Fuels District Turnarounds - Data Quality Campaign](#)
- Success story: [Chicago Makes Data the Centerpiece of a District-Wide Improvement Strategy - Data Quality Campaign](#)
- Case Study: [Empowering Families with Data: How Washington, DC, Engaged Stakeholders to Build Its School Report Card - Data Quality Campaign](#)

**The Harvard Family Research Project:** This set of [tip sheets](#) helps administrators, teachers, and families determine the best ways to share student data in meaningful ways on a regular basis to strengthen family-school partnerships and promote student learning. The tip sheets include examples of data-sharing practices that illustrate how administrators, teachers, and families can adopt a data-driven approach to supporting student learning. Designed to be used either individually or as a set, the tip sheets allow educators and families to approach conversations about student data with shared expectations. This understanding helps increase their ability to work together to improve children's educational outcomes.

**Data Equity Walk Toolkit:** A [Data Equity Walk](#) is a 45–90 minute activity for any size audience—high school and college students, teachers, district leaders, community members, or others—to engage with education data and discuss equity issues. Participants dive into data that shows education outcomes and exposes gaps between groups of students. The data usually show district or school performance across different measures like student achievement and school climate.

This toolkit offers a range of strategies and activities for talking about data with key stakeholders in the school district.

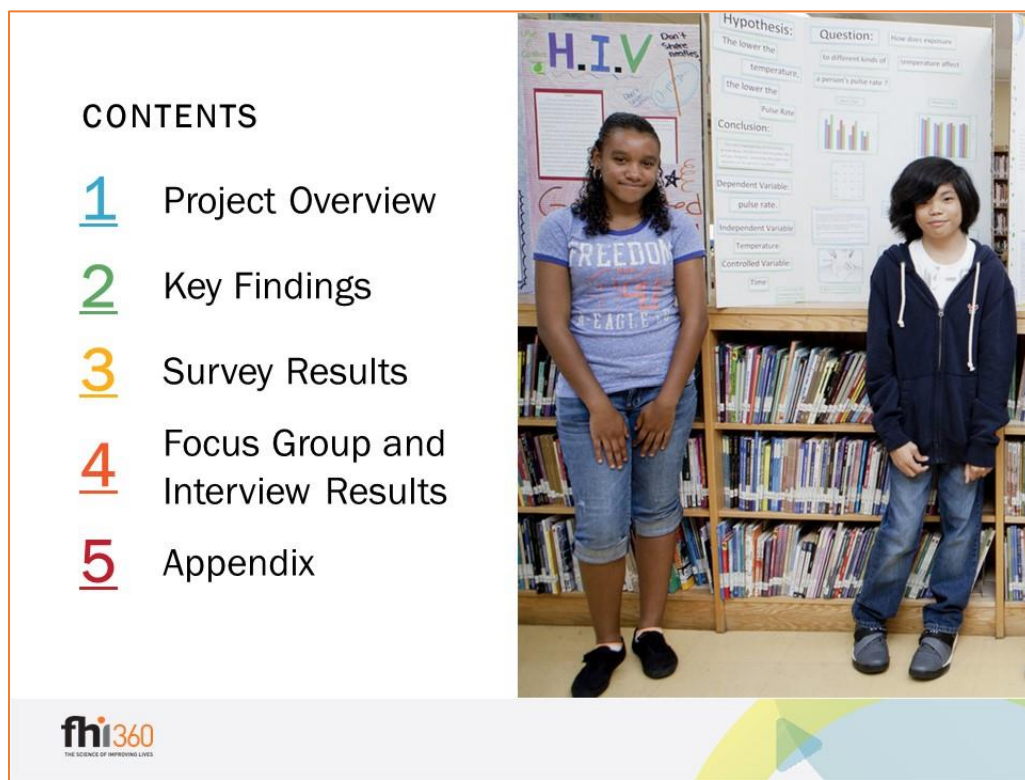
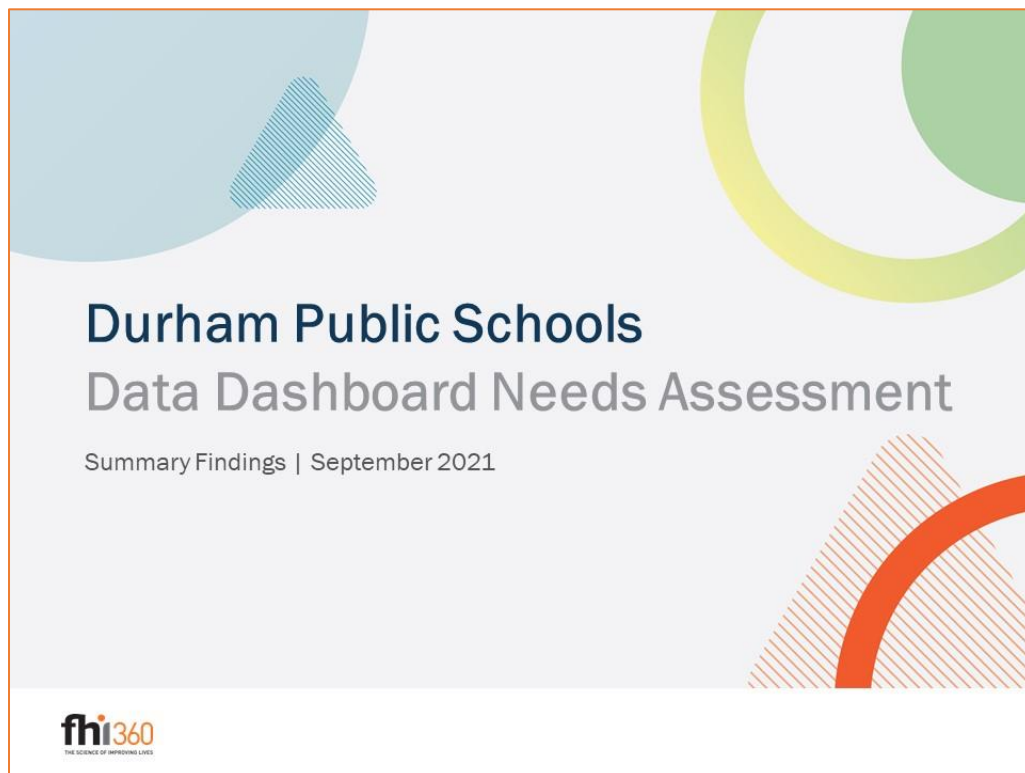
- [Template](#) for creating slides to include in a school-level conversation about data equity.

- Examples of how various districts are sharing their data: [District Data Sharing Examples](#)

**San Francisco Unified School District Telling the Story Behind the Numbers:** The district's Local Control and Accountability Plan (LCAP) Task Force hosted this [event](#) in January 2016 to review district-level data and the progress SFUSD has made toward its LCAP goals. This [link](#) includes a downloadable agenda and data presentation, with the first five slides presented by the district and the remaining slides posted around the room for use as a data walk.



## Appendix C: Needs Assessment PowerPoint





## Project Overview

- [Project Goal and Benchmarks](#)
- [Needs Assessment](#)



### Project Overview

#### PROJECT GOAL AND BENCHMARKS

##### Project Goal

By September 30, 2021, FHI 360 and Durham Public Schools (DPS) will have created a map of options, recommendations, a potential timeline, and an implementation guidebook to guide the adoption of a centralized data dashboard that will enable DPS to monitor student achievement goals.

##### Benchmark 1 Landscape Analysis

###### Intended outcome

Learn strengths and weaknesses of existing solutions in districts around the country.

##### Benchmark 2 Needs Assessment

###### Intended outcome

Learn the strengths and areas of growth of existing data systems and uncover the most important needs and solutions in DPS.

##### Benchmark 3 Recommendations & Implementation Plan

###### Intended outcome

Create a clear plan of action for implementing a centralized data dashboard that supports analysis of student outcomes that represents the collective vision of key constituents across the district.



## PROJECT OVERVIEW

### Benchmark 2: Needs Assessment

#### Intended outcome



To learn the strengths and areas of growth of existing data systems and uncover the most important needs and solutions in DPS.

#### Description

FHI 360 will work in partnership with DPS to develop a clear understanding of the current strengths and gaps of DPS's current data systems.

With careful planning in partnership, FHI 360 and DPS will identify key players for focus groups, interviews, and surveys to understand how different users currently access data and how they use that data to move student outcomes.

#### Methods

Online survey 	Virtual focus groups 
June 9-21, 2021	June 9-July 8, 2021
70 DPS educators	51 DPS leaders and users



## Key Findings

- [General Observations and Comments](#)
- [Recommendations for New Centralized Dashboard](#)



## Key Findings

### GENERAL OBSERVATIONS

#### Participants

- Most survey responses were teachers and principals
- Most FGD and interview participants were district staff; considered intermediate and advanced data users

#### Most useful current data systems cited

- RADD, PowerSchool, and iReady

#### Primary Uses of Current Data Systems

- Track attendance and grades
- Track and monitor students
- Set goals
- Compare interventions across schools

#### New Centralized Dashboard Rollout Recommendations

- Phased approach, starting with critical features and indicators
- Consider student privacy concerns, user permissions, and quality control
- Include clear communication plan with training materials



## Key Findings

### RECOMMENDATIONS FOR NEW CENTRALIZED DASHBOARD

#### Recommended Features

- Pull indicators from various databases into a one-stop shop dashboard updated in real-time
- Show trends of historical data and correlations across indicators
- Show student-level and aggregated data
- Include pre-loaded and customizable reports
- Track students and monitor progress (e.g., search for students and groups of students)
- Provide users with access to all relevant student data
- Be able to export data as raw Excel files and printer-friendly PDFs of visuals
- Be user-friendly, including widgets, charts, and consistent color schemes
- Be able to adapt to changes in the education system (e.g., new assessments)

#### Recommended Indicators

- Most important: student demographics, contact information, performance (grades/assessments), and attendance as well as data for targeting students
- Secondary indicators to include are student discipline, SEL, and school climate



## Survey Results

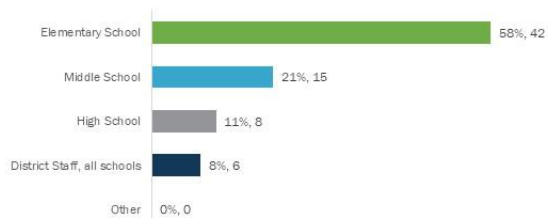
- [Survey Data Responses](#)
- [Working Group Questions](#)



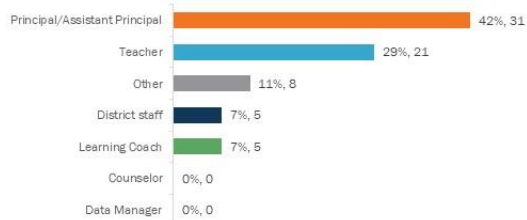
### Survey Results

#### SURVEY DATA RESPONSES

##### Q1. School Grade



##### Q2. Role



**70**  
survey respondents

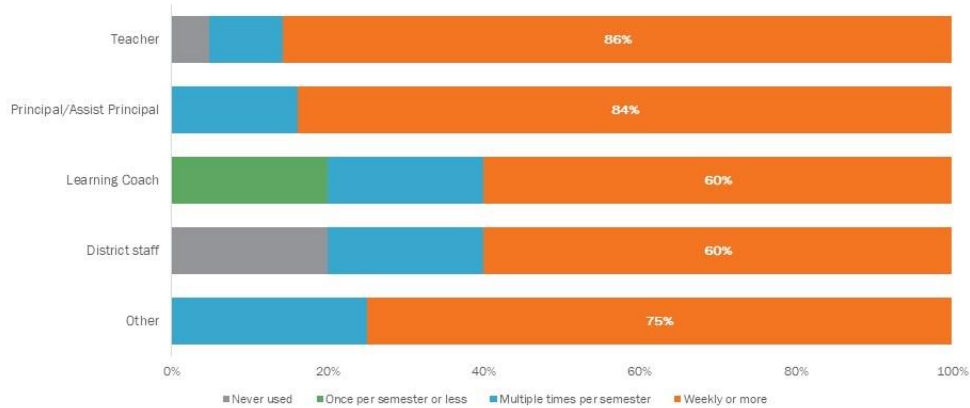


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## Survey Results

### SURVEY DATA RESPONSES

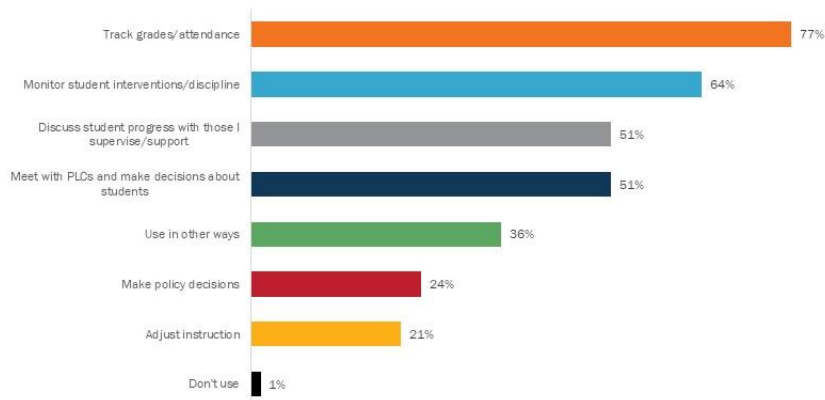
Q3. How often do you use data systems or data dashboards?



## Survey Results

### SURVEY DATA RESPONSES

Q4. What do you typically use a data dashboard for?

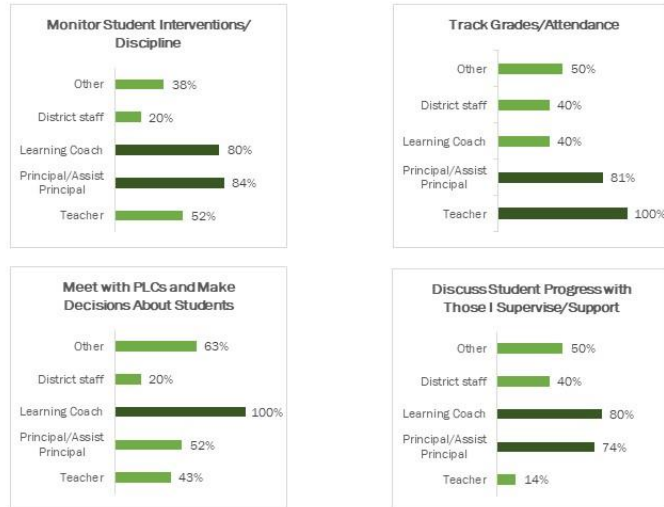




## Survey Results

### SURVEY DATA RESPONSES

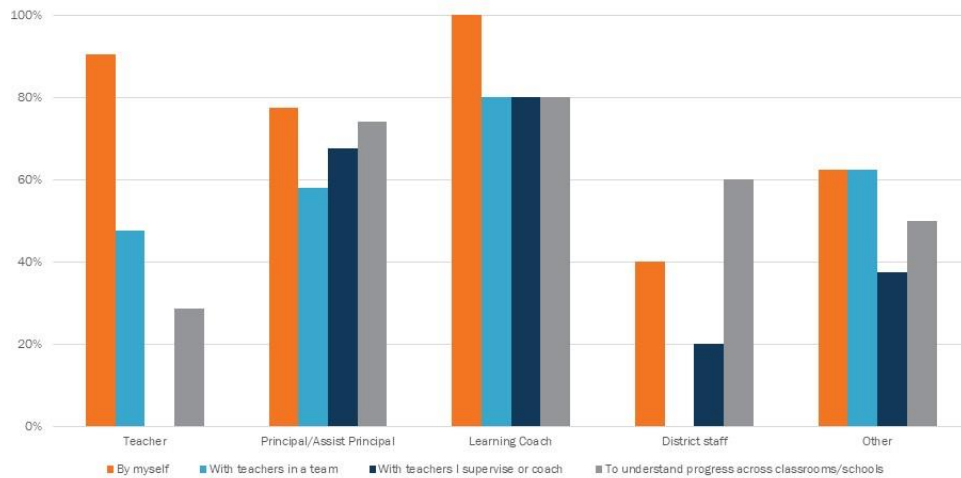
#### Q4. What do you typically use a data dashboard for?



## Survey Results

### SURVEY DATA RESPONSES

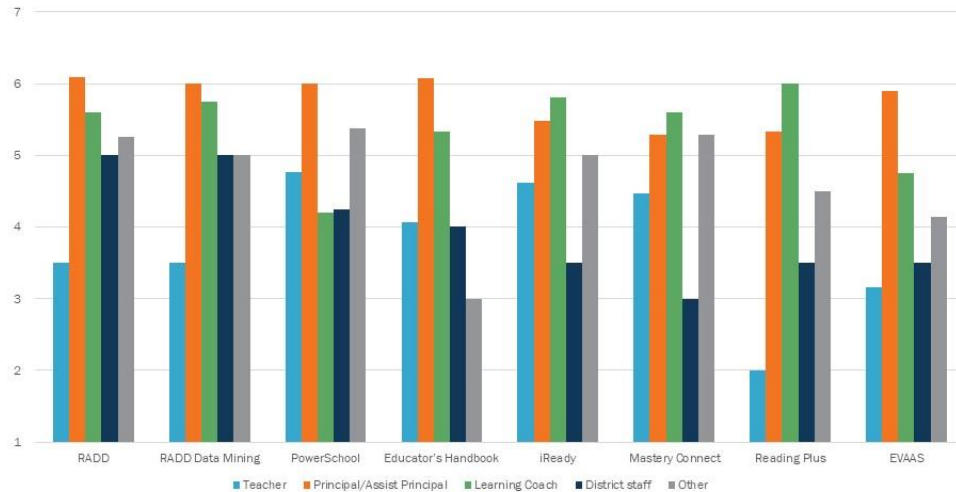
#### Q5. How would you describe your use of data platforms?



## Survey Results

### SURVEY DATA RESPONSES

Q6. How helpful are the following systems in your support of students?



## Survey Results

### SURVEY DATA RESPONSES

Q7. Enter any comment related to your experience in using these data systems.

- Limited access to student data and to stakeholders
- Data systems are different to learn and hard to use
- Data needs to be in a central warehouse
- Data systems do not align with standards
- Lack of training, cheat sheets, and support materials on using data systems

It becomes tedious when **you have to be a proficient user in multiple platforms** to obtain the data you need.

*District Staff Member*

The information/data in RADD and PowerSchool are great, but **an intuitive interface that can pull their contents together for analysis is needed.**

*District Staff Member*

**I have received little to no training** in how to use EVAAS and RADD or PowerSchool to support student achievement.

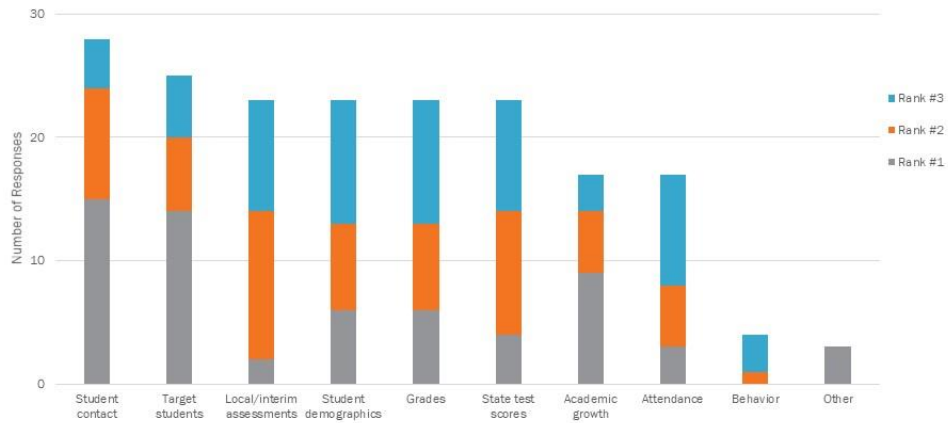
*Learning Coach*



## Survey Results

### SURVEY DATA RESPONSES

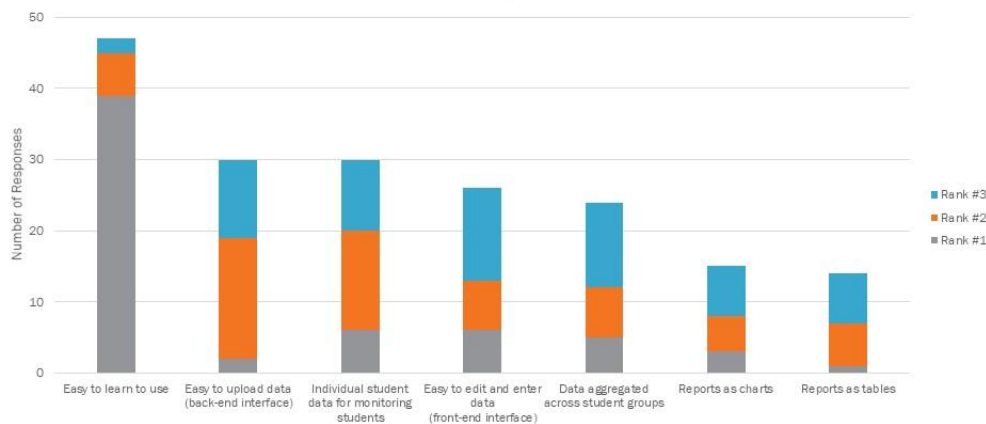
Q8. Rank the following types of data in order of importance for including in an education data dashboard.



## Survey Results

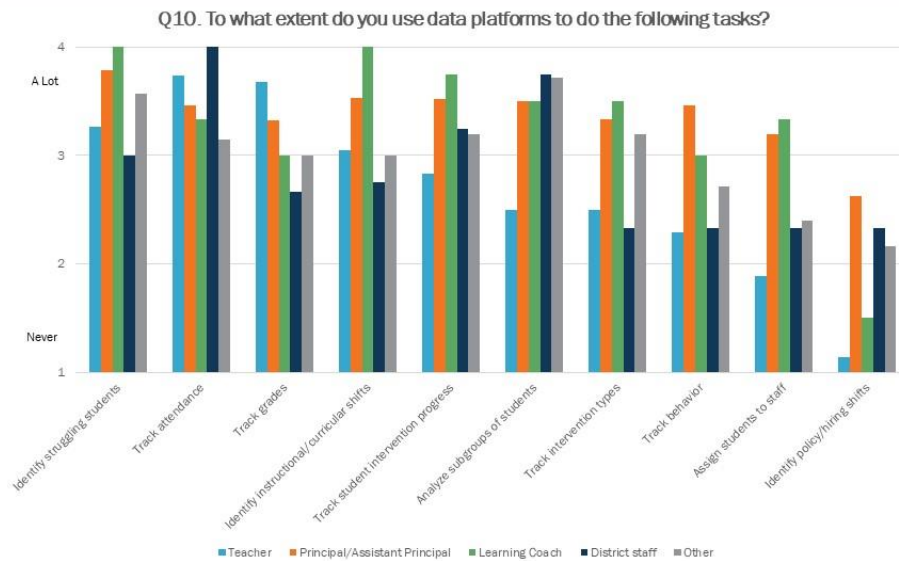
### SURVEY DATA RESPONSES

Q9. Rank the following features in order of importance for including in a district data dashboard.



## Survey Results

### SURVEY DATA RESPONSES



## Survey Results

### SURVEY DATA RESPONSES

#### Q11. What is the main thing you would need from an education dashboard?

- Access to more student data and for multiple stakeholders
- Easy to use and intuitive
- Data integrated across all sources
- Visuals, graphs, charts, colors
- Real-time data
- Student-level data and aggregated data
- Ability to track students and monitor progress
- Training and communication of dashboard's benefits

**We desperately need a "one stop shop."**

People will not utilize this if it is not easy and makes all of the data readily available.

Principal/Assistant Principal

Updated, accurate student information that can give a **whole picture of a student rather than just a snapshot.**

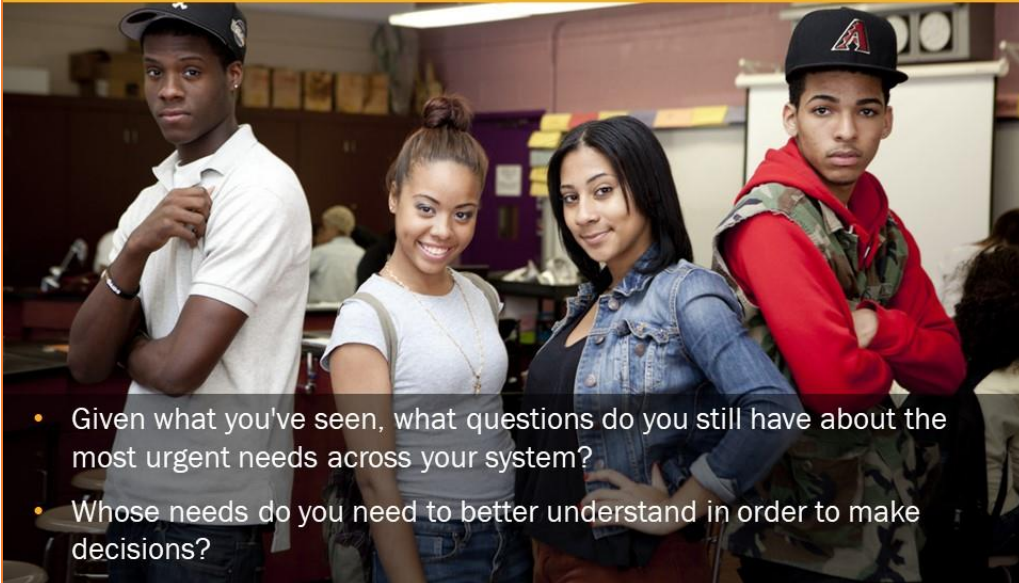
Principal/Assistant Principal

I need information presented in a **simple, easy to follow format.** The addition of visuals will aid in using the dashboard.

Principal/Assistant Principal

## Survey Results

### WORKING GROUP QUESTIONS



- Given what you've seen, what questions do you still have about the most urgent needs across your system?
- Whose needs do you need to better understand in order to make decisions?









## Focus Group & Interview Results

- Perceptions of Existing DPS Data Systems
- Feedback for Centralized Dashboard
- Recommended Features
- Recommendations for Training and Implementation
- Guiding Questions



## Focus Group and Interview Results




### PERCEPTIONS OF EXISTING DPS DATA SYSTEMS

Data System	Advantages	Disadvantages
<b>RADD</b>	Lots of data and reports	Data not aggregated Long reports Not printer friendly Difficult to query data and retrieve custom reports Folders not well-organized
 PowerSchool	Good source of student-level data (e.g., demographics) Easy to query data Includes app for smart phones	Lack of visuals and projections data Reports not user-friendly Difficult to see big picture data Can't compare subgroups May not have capacity to pull all student data
 i-Ready	Good source of performance data Grades and testing (e.g., length of time, results by subject) Good reports for teachers Ability to view standards, sort data, group students by needs	Lack of historical data Difficult to export data Data not directly linked (e.g., medical condition and IEP)
 SAS EVAAS	User-friendly data interaction (e.g., can view underlying data) Includes projected percentiles Ability to see trends Color-coded tables with detailed school and student data	Mostly based on EOG/C scores and not a holistic approach
 reading plus	Nice visuals	Can't export data
 MASTERY CONNECT	Breaks down standards	Difficult to navigate Resources are generic, not thoroughly vetted, or useless
<b>Case21</b>	Ability to compare a school to the district and student performance	Does not compare student to projections Difficult for progress monitoring
 Microsoft SQL Server	Functional and helpful Only system that pulls together all DPS data	Only one developer managing system (not sustainable)



## Focus Group and Interview Results

### PERCEPTIONS OF OTHER DPS DATA SYSTEMS

Data System	Advantages	Disadvantages
 Power BI	Highly customizable Allows for different role-level security access and views (e.g., read-only, edit) Easy to export data as spreadsheets or visuals Easy to integrate multiple systems	Requires high skills to customize and maintain High cost Need high back-end tech servers DPS does not have staff in-house to build and maintain dashboard (would need to hire staff or outsource) Challenges with external users accessing dashboard
 + a b   e a u	User-friendly	High cost
 Performance Matters	Ability for users to create their own reports	Can't drill down to see more tables and charts

"PowerSchool should be the database for using those kind of things....It seems logical that all that information would go there. And then, once it's in your database, then you can pull it out into a dashboard and do the different queries and such. But **what we're typically doing is creating parallel databases in like Google spreadsheets.** But then that information, even though it's effective, I think would be much more effective if it was in a centralized location and everyone could pull from it, what they needed, that's what the database is supposed to do."

-Student and Specialized Services Staff Member





## Focus Group and Interview Results

### PERCEPTIONS OF EXISTING DPS DATA SYSTEMS

#### Current Uses

- **Coaches and District Staff** use data to compare different interventions across schools to see what's working; set goals by schools, students, and other groups prior school starting
- **Principals** use data with School improvement team, MTSS team, School leadership team; for goal setting (e.g., proficiency goals) and putting programs and interventions in place
- **Teachers** use data individually and as part of PLCs (e.g., track subjects, enrichment groups, standards to be retaught, identify Tier 2 and 3 students)

#### Example Uses

- Generating a list of all teachers who teach AP courses
- Creating spreadsheets and seeing trends for every student enrolled in a course and comparing it to their EOC performance
- Identifying Black and brown students who take advance courses or whether they are primarily in classes with fully licensed teachers
- Identifying whether students are retaking classes they had already taken and passed
- Correlating student rank/GPA with another indicator (e.g., course selections and grades of top 50 students)



## Focus Group and Interview Results

### PERCEPTIONS OF EXISTING DPS DATA SYSTEMS

**The data really empowered us to make a concrete change for students, but it literally took a week** to pull all of that data, and to contact this person, request this piece from here, and then put it all in a spreadsheet it.

**It was really cumbersome.**

*Curriculum & Instruction Staff Member*



## Focus Group and Interview Results

### CENTRALIZED DASHBOARD ACCESS RECOMMENDATIONS

#### District Staff



Access to all attendance data

Access to all grades' data to assess students on the cusp and problem solve

#### School Administrators



School-level access

Specialist (e.g., EC, ESL, AIG) access to full caseloads

Principal access to data from other similar schools to know what other schools are doing to help student improvement

#### Teachers



Access to students' current and historical data to see trends and manipulate data

Access to classroom-level data vs. access to all subjects students have been enrolled in, including across the district

Access to strategies and interventions; full access for IAs

#### Parents and Students



Access to child's current and historical data

Comparison of child's data in relation to meeting standards

Comparison of child's data in relation to class, school, district

Includes credit recovery, standards master, attendance, test scores, progress, achievement, etc.



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## Focus Group and Interview Results

### CENTRALIZED DASHBOARD PERCEIVED ISSUES

We need to **keep FERPA policy in mind.**

Not everyone needs access to student-level data.

It should be reserved for teachers/pertinent staff within the school ... and everything else is at the aggregate level.

Research & Accountability Staff Member

**Data has to be transparent if we expect people to work with it.**

Everyone who is dealing with that child needs to have access to all the information that defines the student services in Durham Public Schools.

Curriculum & Instruction Staff Member



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## Focus Group and Interview Results

### CENTRALIZED DASHBOARD PERCEIVED ISSUES



#### Student Privacy

Strong privacy and protection of confidential student data



#### User Types

Internal (DPS staff) vs. external users (parents, community)



#### Access

Limited vs. wide access to student data (beyond own classroom or school)



#### Indicators

All indicators vs. prioritizing main indicators

Ability to click aggregate data and drill down to specifics

All data in one place with ability to filter out indicators of interest

Button to indicate favorite reports



#### Quality Control

Clear roles, responsibilities, and accountability system

Read-only vs. editing rights

Ticket system for data requests

## Focus Group and Interview Results

### RECOMMENDED FEATURES

- Update in real-time
- Triangulate data across multiple indicators
- Show trends and correlations
- Sort students by subgroup (e.g., demographics, lowest 5%)
- View students across schools (e.g., ability for district staff to view all Math 1 students within the district)
- Search for a specific student
- Export reports (e.g., as CSV or PDF) showing only relevant indicators, printer-friendly
- Alert user when data are updated
- Compare individual student's data (benchmarks/actuals to projections, diagnostics to end of year, EOC planning reporting report with end goal)



## Focus Group and Interview Results

### RECOMMENDED FEATURES

- Raw data
- Historical data
- Both pre-loaded and customized reports (i.e., ability to run queries)
- A combination of student-level and aggregated data

There should be a common set of queries/reports, and the district should have a wide array of queries that everyone has access to.

District Staff Member

Some dashboards are more aesthetically pleasing, but I'm going to always prefer from an export from PowerSchool so I can manipulate the raw data in a spreadsheet.

Research & Accountability Staff Member



## Focus Group and Interview Results

### RECOMMENDED FEATURES

- **Data entry for users**  
Sharing notes, comments, communication logs; entering data in real time; assigning students to instructional groups
- **Survey/evaluation data collection and results**  
Progress monitoring reports)
- **Student data**  
Tracking students across schools; allowing students to see four-year and academic trajectory
- **Teacher data**  
Tracking teachers; comparing outcomes across teachers
- **User alerts**  
Trends and correlations in data
- **Parent portal**  
Communicating about attendance and behavior, viewing all siblings in one log-in, completing school surveys, validating surveys and student data, simplifying text, offering Spanish option



## Focus Group and Interview Results

### RECOMMENDED FEATURES

Whatever we have **has to be able to grow and change with us.**

If the state changes a rule, changes reading assessment, it has to have a flexible system.

Research & Accountability Staff Member

## Focus Group and Interview Results

### RECOMMENDED APPEARANCE



#### User-Friendly

Simple, interactive, few clicks to get to data



#### Widgets

Buttons, tabs, widgets



#### Visuals

Color-coded graphics and visuals



#### Consistency

Consistent color-scheme, fonts, and naming conventions; aligned with DPS branding

## Focus Group and Interview Results

### RECOMMENDED STUDENT INDICATORS

#### Primary Indicators

- Demographics (e.g., DOB, race/ethnicity, gender, ELL, SWD, AIG, SES, parent contact)
- Performance (e.g., letter/number grades, course enrollment, advanced courses, grade level; benchmark, EOG/EOC, projections; proficiency; state testing, ESSA)
- Attendance (e.g., enrollment, number of absences, drop out)
- Discipline (e.g., number of incidents/type, suspensions)
- Socio-emotional learning
- School climate

#### Indicators from Specific Data Systems

EVAAS, iReady, ReadingPlus, mClass, Case21, Panorama, CogAT, IOWA, Woodcock Johnson, OLSAT (Otis Lennon), ELP Assessments, ECAT

#### Other Indicators

- 504 plan
- AP scores, AP potential
- At-risk students
- Course schedule
- Credit recovery, standards master
- Date of entry to current and prior school
- Medical data linked to IEP
- Progress monitoring reports
- Student assignment to highly effective teachers
- Student case management system, including truancy and abuse
- Student re-evaluations
- Target student
- Testing length and by subject
- Transportation (bus number)



## Focus Group and Interview Results

### RECOMMENDED NON-STUDENT INDICATORS

#### School Staff Data

- Demographics, HR, equity
- Licensures, certifications (CPR, education)
- Teacher working conditions
- Staff hirings, school turnover rates

#### Other Data

- Survey data (parent annual Title I surveys, principal feedback on PD and school level support)
- Process measures, program uses



## Focus Group and Interview Results

### RECOMMENDED OFF-THE-SHELF DATA DASHBOARDS

School staff preferred building off a current DPS education data system; district staff preferred a new customizable dashboard



Nice reports

[curriculumassociates.com/products/i-ready](https://curriculumassociates.com/products/i-ready)



Nice charts, dashboard layout, easy to maneuver and see growth

[lexialearning.com/](https://lexialearning.com/)



Nice reports and dashboard layout

[amplify.com/programs/mclass/](https://amplify.com/programs/mclass/)



Performance Matters Useful spreadsheets

[powerschool.com/solutions/performance-matters/](https://powerschool.com/solutions/performance-matters/)



PowerSchool Familiar to school staff

[powerschool.com](https://powerschool.com)



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## Focus Group and Interview Results

### RECOMMENDED DATA DASHBOARDS

#### Preferred Universal Data Visualization Systems



Power BI

Highly customizable

[powerbi.microsoft.com](https://powerbi.microsoft.com)



User-friendly visuals

[tableau.com](https://tableau.com)

#### Other Model Dashboard Cited



Interactive dashboard

Clear categories and explanations

[northcarolina.edu/impact/stats-data-reports/](https://northcarolina.edu/impact/stats-data-reports/)



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## Focus Group and Interview Results RECOMMENDED IMPLEMENTATION



### Timing

Timeline for rollout and training, including phased roll out of dashboard features and user access



### Communication Plan

Clear plan for communicating to stakeholders



### Training

Formal and self-paced training opportunities



### Point Person

School or grade-level point-person to provide dashboard support



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## Focus Group and Interview Results RECOMMENDED IMPLEMENTATION



### Video Tutorials

Tutorials embedded in dashboard



### Access

Priority access for district and school leaders vs. teachers



### Lunch and Learns

Events for parents



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## Focus Group and Interview Results

### GUIDING QUESTIONS

1. What findings from the needs assessment surprised you or changed your thoughts about this work?
2. What findings do you have questions about? Are there areas you want to understand better or dig deeper?
3. What are the big takeaways from the needs assessment as we move toward the recommendations and implementation report?

"It'd be great to have some **clear expectations on how we're supposed to utilize all the different data pieces and sets that we have.**

Sometimes there's an expectation that we do or don't meet, and we didn't know.

If this dataset is available, here's how you can use it and here's what the expectation is to use it."

Principal/Assistant Principal



## Appendix

- [Survey Questions](#)
- [Focus Group and Interview Questions](#)



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## Appendix SURVEY QUESTIONS

\* 9. Rank the following features in order of importance for including in a district data dashboard (select a number or drag the item to rank from 1=most important to 7=least important).

☐ Easy to learn to use

☐ Easy to upload data (back-end interface, for example, uploading whole school attendance data)

☐ Easy to edit and enter data (front-end interface, for example, assigning specific students to learning coaches)

☐ Data aggregated across student groups (across schools, grades, subgroups)

☐ Individual student data for monitoring individual students

☐ Reports of student data shown as tables

☐ Reports of student data shown as charts (visuals)

\* 10. To what extent do you use data platforms to do the following tasks?

	Never	Rarely	Sometimes	A Lot	NA
Track attendance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Track grades	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Track behavior	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identify struggling students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analyze subgroups of students (e.g., by demographics)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identify a need for instructional or curricular shifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identify policy or hiring shifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assign students to staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Track student intervention progress	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Track intervention types	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify):

11. What is the main thing you would need from an education dashboard?

12. Please enter your email address if you would like to be considered for the \$15 Amazon gift card. Your email address will only be used to contact you should you be selected. It will not be used for any other purposes.

Email Address



## Appendix FOCUS GROUP AND INTERVIEW QUESTIONS

### Needs Assessment for Developing a District-Wide Data Dashboard Durham Public Schools

#### Interview/Focus Group Questions

##### Overview

Thank you again for taking the time to speak with us today. My name is [NAME], and I'm a [TITLE] at FHI 360, a human development organization headquartered in Durham. I am joined by my colleague [NAME], who is a [TITLE] at FHI 360 and my colleague [NAME], who is a [TITLE].

##### Project Goal:

FHI 360 and DPS are collaborating to build a plan so that Durham Public Schools is prepared to fulfill part of their strategic plan: "Establish and monitor individual student achievement goals using a centralized data dashboard." To achieve this work, we will conduct a landscape analysis, examining what tools exist, and we will conduct a needs assessment, which you all are a part of in this focus group. Then, by September 30th, FHI 360 and DPS will create a clear map of options, along with recommendations, potential timeline, and an implementation guidebook to guide the adoption of a centralized data dashboard that will allow DPS to monitor individual student achievement goals.

Your feedback will help us with the needs assessment, which we will use to develop a recommendations and implementation guidebook for DPS to build a district-wide data dashboard. Your name and identifiable information will not be used in the needs assessment report. Your participation is voluntary, and you may choose to not answer a question or leave at any time.

[Focus Group Discussion]: To make sure we don't talk over one another, we'd like to ask you to use the "raise hand" feature located at the bottom of your screen. Can everyone raise their hand now so we know everyone knows how? Also please don't hesitate to use the chat box if you want to add on or clarify. Can everyone just say hello in the chat? Please don't hesitate to mute and unmute when you would like to speak.

[All]: If you experience connectivity issues during the call, you may also try to call-in using the number listed on the meeting invite. As a thank you, you will receive a gift card for your participation.

We would also like to record this session to help with note taking, but rest assured, the recording will never be shared outside of the FHI 360 team. Are you willing to have this interview/focus group discussion recorded?

Before we get started, do you have any questions?

Note to Interviewer: The following are examples of questions we would ask during the interview.

#### Interview/Focus Group Questions

##### Introduction

1. Please introduce yourself (name, position, school grade).
2. [Focus Group Discussion]: How would you rate your experience level with using education data systems and dashboards (beginner, intermediate, advanced)?
3. [Interview]: Describe your past experience with using education data systems and dashboards.



## Appendix

### FOCUS GROUP AND INTERVIEW QUESTIONS

#### Prior Experience with Data Systems

The first set of questions asks you to reflect on your experience related to using education data systems and dashboards.

4. Think about the data systems you have used to collect and report on education data, what features of this data system do you like? What features of this data system do you not like or would like changed? (PowerSchool Student Information System; RADD (Research and Accountability Data Drive); RADD Data Mining; EVAAS (Education Value-Added Assessment System); Mastery Connect (local assessment); Educator's Handbook (discipline); iReady; Reading Plus (middle school reading))
5. Can you give an example of something specific you were able to accomplish around moving student outcomes with your CURRENT systems OR a specific way you wanted to move student outcomes but could not because of the limitations of your current systems?

#### Other Data Systems

The next set of questions asks you to reflect on your knowledge of other data systems and dashboards.

6. Think about other education data systems you have heard about but have not used, what features of that system do you like that you think could be adapted for DPS?

#### Data Collection and Reporting

The final set of questions asks about your preferences for features to include in a new data dashboard.

7. Who do you think would be the main users (i.e., levels of access) of a new data dashboard?
  - a. What would these groups use the dashboard for? What types of data would these users like included in the new data dashboard?
    - i. Probe on specific data types. Examples:
      1. Grades: GPA, percent passing, all subjects or core/required ones
      2. Attendance: average daily attendance, number absences, percent chronically absent
      3. Behavior: suspensions, reported incidents
      4. Demographics: ELL, FRL, Title I, homelessness
    - b. What level of data security (i.e., access to data) should be given to various user groups (district staff principals, teachers, learning coaches, counselors, parents, etc.)?
      - i. Should parents have a separate portal?
  8. Do you primarily use data platforms on your own or with a team (if so, who)?
  9. What features would help ensure all users (regardless of tech-level or school position) regularly access the dashboard?
  10. How do you currently use data platforms to support students (e.g., track EW, analyze subgroups, analyze instructional shifts, identify policy or hiring shifts)?
  11. What types of reports would you like to see included in a new data dashboard (tables, visuals)?
  12. What other features would you like to see in a new data dashboard?

## Appendix

### FOCUS GROUP AND INTERVIEW QUESTIONS

#### Power BI

The following questions are specific to Power BI to understand its limitations and capabilities to serve as a centralized dashboard.

13. What is your experience with using Power BI?
14. What advantages or features of Power BI would be useful for the DPS dashboard?
  - a. What features of Power BI make it better than other dashboards (e.g., Tableau, PowerSchool)?
  - b. Does Power BI allow users to input data or build their own report templates (versus users only viewing data)?
15. What disadvantages of Power BI would create limitations for the DPS dashboard?
16. How accessible would Power BI be for various users (e.g., role-level access, Mac users)?
  - a. What are the security features of Power BI?
  - b. How easy would it be for users to login?
17. How easy would it be to link multiple data systems into Power BI?
  - a. Which, if any, of the current DPS data systems would not be able to integrate with Power BI?
18. What staffing, technological, or other capacities will DPS need to ensure Power BI is developed and maintained?

#### End

19. Is there anything else you would like to share about your ideas for building a new district-wide data dashboard?

## Appendix D: Landscape Analysis PowerPoint



Project Overview	
PROJECT GOAL AND BENCHMARKS	
Project Goal	By September 30, 2021, FHI 360 and Durham Public Schools (DPS) will have created a map of options, recommendations, a potential timeline, and an implementation guidebook to guide the adoption of a centralized data dashboard that will enable DPS to monitor student achievement goals.
Benchmark 1 Landscape Analysis	<b>Intended outcome</b> Learn strengths and weaknesses of existing solutions in districts around the country.
Benchmark 2 Needs Assessment	<b>Intended outcome</b> Learn the strengths and areas of growth of existing data systems and uncover the most important needs and solutions in DPS.
Benchmark 3 Recommendations & Implementation Plan	<b>Intended outcome</b> Create a clear plan of action for implementing a centralized data dashboard that supports analysis of student outcomes that represents the collective vision of key constituents across the district.

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## Project Overview

### LANDSCAPE ANALYSIS

#### Description

FHI 360 is collaborating with Durham Public Schools to examine the array of commercial data platforms to identify strengths and weaknesses of each.

In addition, we are looking at customized, non-commercial options to understand the investments, strengths, and weaknesses provided by data platforms built from the ground up.

We are also learning what districts (particularly comparable districts) have chosen, using interviews and focus groups to understand what works and what doesn't work from the perspective of teacher, principal, and district level data analysts.

#### Purpose

To ensure DPS is prepared to fulfill part of their strategic plan, to "establish and monitor individual student achievement goals using a centralized data dashboard."

#### Intended outcome

To learn strengths and weaknesses of existing solutions in districts and tools around the country.



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## Project Overview

### WHY DATA DASHBOARDS?

Data dashboards can:

- Help schools and districts organize and present raw data into actionable insights.
- Highlight relationships across different data sets (e.g., attendance, course grades, SEL, behavior, test scores) so administrators, teachers, and families better understand the holistic student experience.
- Give educators the information they need to intervene at the right time and place and provide students the supports they need.
- Provide educators analytics to help nurture and guide students toward greater success.



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## Process TOOLS REVIEWED

Power School Family	Off-the-Shelf Education	Universal Data Visualization
		
		

## Process DISTRICTS REVIEWED

### North Carolina Districts

Cabarrus  
 Charlotte-Mecklenburg  
 Cumberland  
 Guilford  
 Johnston  
 New Hanover  
 Union County  
 Wake County  
 Winston-Salem, NC

### Other Districts

Baltimore City (BCPS)



## North Carolina Districts Overview DISTRICTS AT A GLANCE

District:	# Students	% AI/AN	% Asian	% Black or African American	% Native Hawaiian or Other Pacific Islander	% White	% Hispanic or Latino	Gender: % Male	Gender: % Female	% of students with F&R Lunch
Cabarrus	33,654	0.4	4.9	20.5	0.2	52.7	16.9	52	48	41.8
Charlotte-Mecklenburg	147,638	0.3	6.9	37.5	0.3	27.6	24.9	51	49	59.3
Cumberland	50,879	2	2	45	1	29	14	51	49	76
Durham Public Schools	31,577	.2	2	41	.1	19.3	33.2	49	51	51.7
Guilford	72,950	1	7	41	1	31	31	51	49	65
Johnston	36,685	1	1	16	1	54	25	51	40	43
New Hanover	25,952	1	2	19	1	61	14	52	48	56.4
Union County	41,488	1	5	12	1	61	18	52	48	30
Wake County	161,784	1	9	23	1	46	18	51	49	33
Winston-Salem, NC	52,000	1	2.7	39.4	1	34.5	28.4	51	49	61.8
<b>Non-North Carolina Districts</b>										
Baltimore City (BCPS)	77,856	5	5	75.7	5	7.5	14.2	50.8	49.2	100

## North Carolina Districts Overview DISTRICT PRODUCTS USED

District	PowerSchool Family		Off-the-Shelf Education		Universal Data Visualization	
	Hoonuit	Performance Matters	Illuminate	Panorama	Power BI	Tableau
<b>North Carolina Districts</b>						
Cabarrus	✓					
Charlotte-Mecklenburg		✓		✓	✓	
Cumberland		✓				
Guilford		✓				✓
Johnston				✓	✓	
Union County	✓					
Wake County			✓			✓
Winston-Salem, NC		✓		✓		✓
<b>Other Districts</b>						
Baltimore City (BCPS)					✓	✓

## NC Big 10 Districts Conversation

- Cumberland County
- Guilford County
- Johnston County
- Wake County



### NC Big 10 Districts Conversation TRACKING STUDENT PERFORMANCE

In your district, what measures do you use to track student performance?

- Attendance
- Discipline
- Social emotional learning
- Grade level performance for reading, math, and writing

#### Assessments used:

- MAP
- Case 21
- Panorama Student Success
- i-station
- MClass

Most people are indeed interested in a lot of similar indicators.

Sometimes the way in which they want it or the depth to which they want to see it will differ ... a lot of the indicators will be useful, whether you're a school board member or a school principal.





## NC Big 10 Districts Conversation HOW DATA IS SHARED

How does your district make data available to internal stakeholders such as district staff, principals, teachers, and instructional staff?

### Portals

- Secure drives
- SharePoint

### Dashboards

- Tableau
- Performance Matters
- Panorama Student Success
- Power BI
- Microsoft Office products

We have a hodgepodge [of data], various departments own their own data. [we] worked on the process of getting a dashboard, wanted something easy for teachers to get on and interpret, teachers could see their students, principal their school, and district everything all at one spot.



## NC Big 10 Districts Conversation WHAT WORKS WELL

What does your data dashboard do well?

- Attendance data
- Disciplinary data
- State Assessment data
- SEL climate surveys
- Historical data
- Inspires collaboration between departments

What does work well is when the administrative data sets integrate...alongside of our achievement data.

We have monthly data meetings, but [didn't] typically pull in attendance and disciplinary data, but now with Panorama, they are in one spot.



## NC Big 10 Districts Conversation CHALLENGES

What are your [data dashboard] challenges?

- Too many sources
- Siloed sources
- Lack of training for stakeholders
- Too much user management

[Our] main issue is multiple data sources and [not] having one place where all of it is housed.

"A lot of these assessment vendors have all of their own business intelligence tools built around it, because they realize that people like those kinds of packages, but then you don't really own the thing

If you go to a different assessment vendor, then you lose all the business intelligence function that goes along with it, so it's kind of hard.



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## NC Big 10 Districts Conversation ADVICE

What advice would you give to a district that is getting started with a district-wide data system?

- A tool that uses historical data is important for trends, correlations and whole picture
- Invest in on-going training
- Have security agreements in place when investing in "Power Tools" (e.g., Power BI, Tableau)
- Less user management is important
- Do not over-look the importance of customer support
- Clearly define users upfront
- Make sure the infrastructure is an appropriate match for the tool



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## NC Big 10 Districts Conversation ADVICE

It's really hard to find one thing that does everything for everybody.

Be clear about who the stakeholders and the users of the tool are. Without that, you end up with multiple pieces.

Whatever they do...don't spend all of their money on tools and not spend any money on training and professional learning for the people who are going to use it.



## NC Big 10 Districts Conversation PANORAMA

Panorama is new to us, but our schools who have used it absolutely love it.

It has helped on the school level perspective down to the individual student level, and it also has intervention tracking at the school and district level.

Their customer support is outstanding.

They are very responsive and have made improvement based off feedback.

We are very pleased with SEL as it was lacking in other platforms.



## NC Big 10 Districts Conversation OFF-THE-SHELF ADVANTAGES

### Training and support

- Customer support
- Access to trainings and Professional Learning Communities— topical and regional
- Easy lift for IT staff — integration, authentication and automation

### Flexibility and customization

- Customizable
- All data in one place; allows user to see correlations and trends
- Easily share reports across user levels/permissions
- Users at all levels can create groups and track by groups
- Intervention, assessment, and survey, libraries



## NC Big 10 Districts Conversation OFF-THE-SHELF ADVANTAGES

### Data analytics, user access, and experience

- Secure
- User friendly
- Easy incorporation of historical data for a whole child understanding
- Themed modules to select from (e.g., post-secondary indicators, staff development, school financial, community engagement, enrollment geographical location analysis, SEL)
- EWS tracking is standard
- Sustainable (will survive turnover)
- Can compare staff data with student outcomes (e.g., attendance, PD)



## NC Big 10 Districts Conversation

### OFF-THE-SHELF DISADVANTAGES

- May not consistently communicate with related software, such as Illuminate for Special Education Students.
- Limited variety of data visualizations
- For some, virtual discussions/sharing comments is cumbersome/limited
- Amount of data and analysis possibilities can be overwhelming
- User interfaces are not as intuitive as they could be



## NC Big 10 Districts Conversation

### UNIVERSAL VISUALIZATION DISADVANTAGES

- Additional cost for licenses
- Requires dedicated staff time to create and manage dashboards and authenticate data
- Requires additional platform specific staff training
- Viewers have Read-only access to data
- Users are unable to create a set of user defined subgroups
- Users cannot easily create their own reports
- Additional cost for targeted professional development
- High cost
- Need high back-end tech servers
- Compatibility with other platforms





## NC Big 10 Districts Conversation UNIVERSAL VISUALIZATION ADVANTAGES

- Highly customizable
- Designers have full autonomy over data displays and dashboard design
- Easily handles a large amount of data
- If you have a solid and dedicated team, you can design customized reports to support specific needs



## Case Study: Baltimore City Public Schools



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## Case Study

### BALTIMORE CITY PUBLIC SCHOOLS

#### Current dashboard platform

Tableau, but intends to transition to Power BI due to Tableau licensing cost and difficulty connecting data to additional platforms

#### SIS

Infinite Campus

#### Staffing

Two dedicated staff/analyst help develop and manage data dashboards

#### Dashboards in use

Early warning indicators dashboard, climate dashboard, on track graduation in a college career readiness, and key assessments dashboard

#### Data updates

Refreshed nightly from SIS

#### Audiences

District personnel, school principals, separate parent portal with aggregate data



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## Case Study

### BALTIMORE CITY PUBLIC SCHOOLS ADVICE

- Have a dedicated development team to work through the technical aspects of the dashboard build
- Invest resources and time in learning about new and key data visualization
- Make sure they are plenty of PD opportunities
- Keep it as simple as possible, or at least have the home screen be key questions

[We are] making the pivot to Power BI this summer, for two reasons, one is the Tableau licenses [are] expensive and we've had a hard time getting them [student sensitive data] loaded onto or other platforms.



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## Tools Overview

- PowerSchool Family
- Off-The-Shelf Education
- Universal Data Visualization Tools



## Tools Overview

### TOOLS REVIEWED

PowerSchool Family	Off-the-Shelf Education	Universal Data Visualization
		
		



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## Tools Overview RUBRIC RATINGS

Product	Customization	System Connectivity & Integration	Analysis Criteria	Information Delivery	Visual Design	Security
<b>PowerSchool Family</b>						
Hoonuit	●	●	●	●	●	●
Performance Matters	●	●	●	●	●	●
<b>Off-the-Shelf Education</b>						
Illuminate Education	●	●	●	●	●	●
Panorama Student Success	●	●	●	●	●	●
<b>Universal Data Visualization</b>						
Power BI	●	●	●	●	●	●
Tableau	●	●	●	●	●	●

- Works well for DPS articulated needs
- Minor concerns for DPS articulated needs
- Serious concerns for DPS articulated needs

## Tools Overview OFF-THE-SHELF PRODUCTS



**Hoonuit is a PowerSchool product** that provides insights school, district, and state-wide. Hoonuit features accountability tracking, early warning and intervention, social and emotional learning reporting, and college and career readiness, as well as K-12 finance and operations, talent management, enrollment analytics, and location analytics.



**Performance Matters**

**Performance Matters is a PowerSchool product** offered as an optional module of Hoonuit. It features an integrated portfolio of assessment data analytics that link student and educator growth. The platform offers solutions that encourage professional growth, inform instruction, and increase accountability across districts.



Panorama Education partners with K-12 schools and districts nationally, to collect and analyze data about social-emotional learning, school climate, and family engagement. It includes research-backed surveys and a technology platform.

## Tools Overview

### OFF-THE-SHELF PRODUCTS



Illuminate Achievement Dashboard is built to give districts the visibility they need to measure progress and ensure achievement of district goals.

Users can move from a single data point and a holistic view of the whole child, combining assessment, academic, social-emotional behavior (SEB), intervention, and qualitative data (e.g., observations, notes, comments) for each student – including both current and past years.



Power BI is a tool within the Microsoft platform you can use to make and share reports that you create with your data.

Power BI is an “enterprise grade” software, meaning that it is designed for large businesses with the goal of increased productivity and efficiency.



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## Tools Overview

### UNIVERSAL DATA VISUALIZATION PRODUCT



Tableau offers business intelligence (BI) tools to enhance data visualization and discovery for all types of organizations and business users.

They offer K-12 solutions.

Tableau is known for powerful visualizations.

Tableau offers the option to embed dashboards into existing applications, such as SharePoint.



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# Tools Reviewed

- Hoonuit
- Illuminate Education
- Panorama Student Success
- Performance Matters
- Power BI
- Tableau



## Tools Reviewed

### HOONUIT: A SYSTEMS VIEW OF THE WHOLE CHILD

Hoonuit is a [PowerSchool](#) product that provides insights for schools, districts, and state-wide. Hoonuit provides its users a comprehensive dashboard that is fully customizable. The dashboard features accountability tracking, early warning and intervention, social and emotional learning reporting, and college and career readiness, as well as K-12 finance and operations, talent management, enrollment analytics, and location analytics.



PowerSchool published a [White Paper](#) "Using SEL, CCLR, and At-Risk Data To Support the Whole Child," advocating that a "shift in that perspective requires four types of information: current and past academic behavior outcomes, long-term outcomes, SEL and intervention participation and impacts."

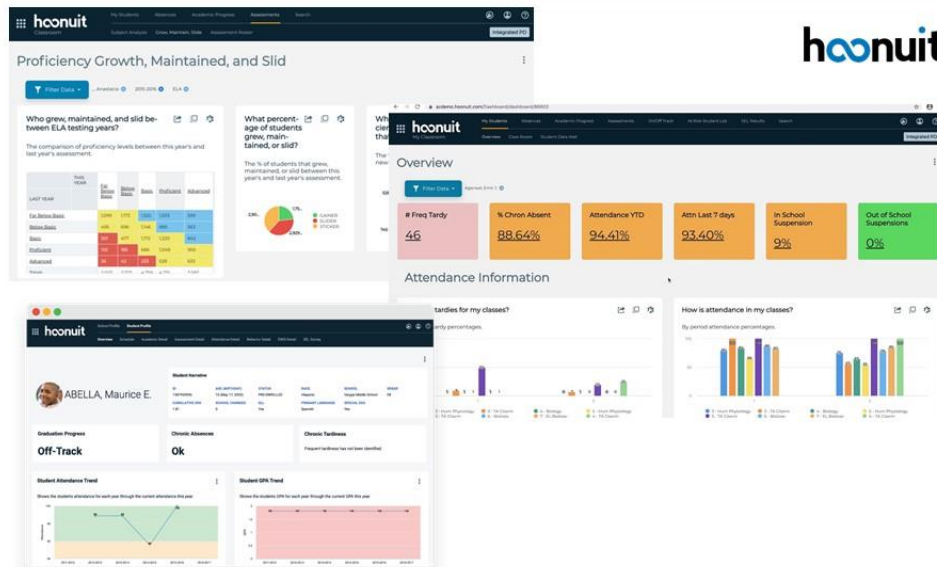


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## Tools Reviewed

### HOONUIT SAMPLE DASHBOARDS



## Tools Reviewed

### HOONUIT DETAILS

#### DPS Rubric rating

Customization	System connectivity & integration	Analysis criteria	Information delivery	Visual design	Security
5/5	9/9	3/3	7/8	5/6	8/8

#### Notable features

- Works seamlessly with PowerSchool
- Professional Learning Community for users
- Data security
- User friendly
- Evidenced based assessments
- Sustainable (will survive turnover)
- Out of the box options
- Customizable
- All data in one place, allows user to see correlations and trends
- EWS module uses historical data for a whole child understanding
- PostsecondaryOutcomes module
- Geographical filter for enrollment data
- Can compare staff data with student outcomes (ie, attendance, PD)

#### Other clients

Union County Public Schools, Iredell-Statesville Schools, Chicago Public Schools, Hawaii DOE

#### Quoted cost

\$195,575 (Option 2 of 2, see quote for details)



## Tools Reviewed

### ILLUMINATE EDUCATION



Illuminate Achievement Dashboard is built to give districts the visibility they need to measure progress and ensure achievement of district goals.

Users can move from a single data point and a holistic view of the whole child, combining assessment, academic, social-emotional behavior (SEB), intervention, and qualitative data (e.g., observations, notes, comments) for each student—including both current and past years.

Illuminate Achievement Dashboard is designed to “bring clarity to data and confidence to decisions and actions, so every educator knows the right next steps to take.”



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## Tools Reviewed

### ILLUMINATE EDUCATION SAMPLE DASHBOARDS



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## Tools Reviewed

### ILLUMINATE EDUCATION DETAILS

#### DPS Rubric rating

Customization	System connectivity & integration	Analysis criteria	Information delivery	Visual design	Security
3/5	9/9	3/3	7/8	5/6	8/8



#### Notable features

- Drag-and-drop/resize modules
- Simple workflow/toggle graph types
- Ability to set strategic plans, action items, and set goals
- Links to Google Sheets
- Ability to create multiple dashboards with customizable data points/charts
- Monitors critical KPIs for summary data to help your team make quick, informed decisions
- By combining data from reports and spreadsheets, into an interactive dashboard, you can create and align your district's strategic plans
- Intuitive, user-friendly design with no coding required

#### Other district clients

Johnston County, Washoe County School District Nevada

#### Quoted cost

\$195,575 (Option 2 of 2, see quote for details)



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## Tools Reviewed

### PANORAMA STUDENT SUCCESS

Panorama Education partners with K-12 schools and districts across the country to collect and analyze data about social-emotional learning, school climate, and family engagement. It has research-backed surveys.



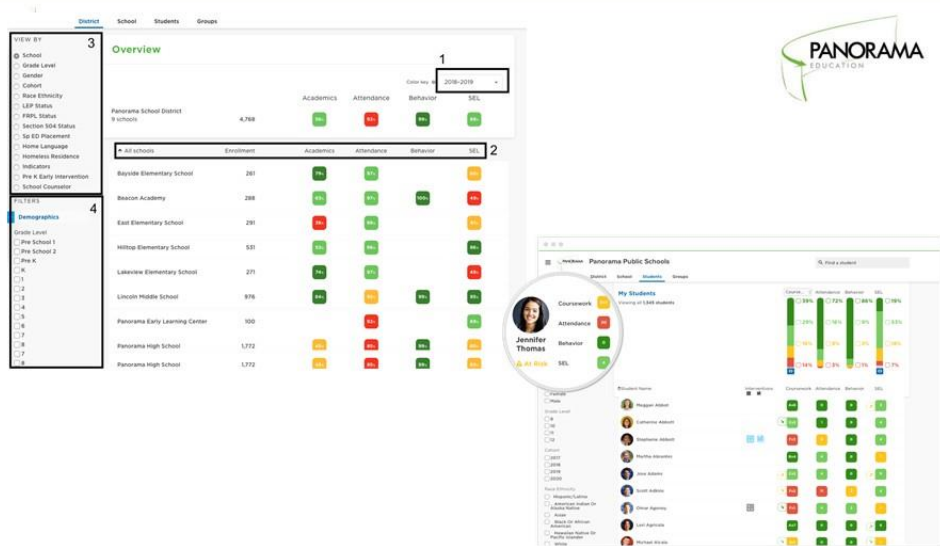
Panorama helps educators act on data and improve student outcomes. Panorama features an "all-in-one solution to scale consistent student supports with MTSS, PBIS, or RTI frameworks." The tool puts the "whole child" at the center with a focus on SEL monitoring and growth.



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## Tools Reviewed

### PANORAMA STUDENT SUCCESS SAMPLE DASHBOARD



## Tools Reviewed

### PANORAMA STUDENT SUCCESS DETAILS

#### DPS Rubric rating

Customization	System connectivity & integration	Analysis criteria	Information delivery	Visual design	Security
5/5	7/9	3/3	8/8	4/6	8/8

#### Notable features

- Intervention Tracking, access to intervention library of approved, evidence-based strategies
- Users can drill down from district level to student level to track each student's progress
- "Check-in" feature to track students SEL needs as often as daily
- Wide range of dashboards including: Student Voice and Surveys, SEL, College and Career Readiness, Attendance, MTSS and RTI reporting
- Access to supports and Interventions and Progress Monitoring Toolkit as well as other PD and resources
- Ability to create custom District Strategic Goals Report
- Early Warning and On Track Indicators
- Can track outreaches to families for a range of supports to provide holistic supports for scholars

#### Other district clients

Johnston County, Winston-Salem/Forsyth, Charlotte Mecklenburg Schools, Washoe County School District Nevada

Quoted cost \$268,500

## Tools Reviewed

### PERFORMANCE MATTERS

Performance Matters is a [PowerSchool](#) product that falls under its Unified Classroom solution category. It is offered as an optional module of Hoonuit. It features an integrated portfolio of assessment data analytics that link student and educator growth together. The platform offers solutions that encourage professional growth, inform instruction, and increase accountability across districts.



Users can combine current data with historical and/or sub-group data to make correlations or identify trends. One of the most notable features is the [Baseball Card feature](#). Users can create custom reports from student performance and demographic data, and school and district initiatives. Users can create reports that provide analytics on the different measures they selected to gauge student progress. These reports can then be shared with other stakeholders using a custom link that requires staff to authenticate and automatically filters based on their role and position.



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## Tools Reviewed

### PERFORMANCE MATTERS SAMPLE DASHBOARDS



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## Tools Reviewed

### PERFORMANCE MATTERS DETAILS

#### DPS Rubric rating



Customization	System connectivity & integration	Analysis criteria	Information delivery	Visual design	Security
3/5	9/9	3/3	7/8	5/6	8/8

#### Notable features

- Out-of-the-box options
- Customizable
- All data in one place, allows user to see correlations and trends
- User can create a shareable report that will populate with recipients' level of data
- Works seamlessly with PowerSchool
- Professional Learning Community for users
- Data security
- User friendly
- Evidenced based assessments
- Sustainable (will survive turnover)

#### Drawbacks

- Ability to customize visuals is limited

#### Other district clients

Charlotte Mecklenburg PS, Cumberland County Schools, Guilford County Schools



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## Tools Reviewed

### POWER BI



Power BI

Power BI is a Microsoft desktop tool that enables a user to connect to data, analyze and model that data to help uncover insights, then track that data as it changes over time to help make informed and strategic decisions.

Via the desktop application, Power BI connects to data and the user can structure it in a way to further use it.

Power BI can then enrich that data by adding things like calculations and build visualizations and reports.

From there, data can be published to the Power BI server, and the user can build dashboards that can aggregate data from many sources — online sources or in-house data sources within the district.



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## Tools Reviewed

### POWER BI SAMPLE DASHBOARDS



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## Tools Reviewed

### POWER BI DETAILS

#### DPS Rubric rating

Customization	System connectivity & integration	Analysis criteria	Information delivery	Visual design	Security
4/5	5/9	3/3	3/8	6/6	7/8

#### Notable features

- Range of attractive visualizations
- Live data updates
- Datasets filtration to customize reports
- Customizable dashboards
- Natural language Q & A question box
- Help and Feedback buttons
- Office 365 App Launcher (can share reports and data across Microsoft)

#### Drawbacks

- Requires in-house staff to build and maintain dashboard
- Requires training and high skills to customize and maintain
- High cost
- Need high back-end tech servers

#### Other clients

Johnston County, Washoe County School District Nevada, [Forsyth County GA](#)

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## Tools Reviewed

### TABLEAU

Tableau is a powerful data visualization platform that offers unlimited data exploration through an intuitive interface.



The system can connect to any data source, has integrated authentication tools, and detailed security and access settings.

Role-based licensing allows clients to tailor access-based needs:

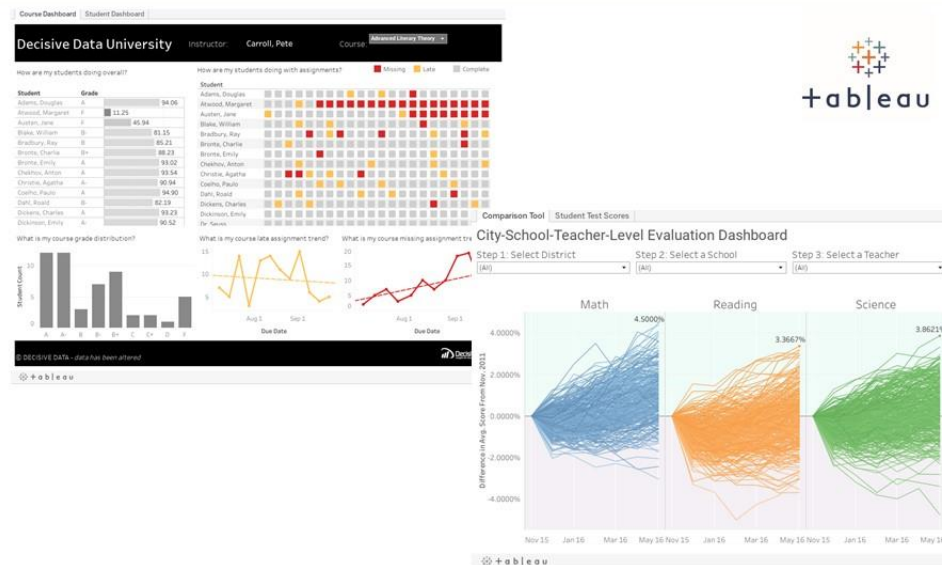
- **Creators** design, clean, and curate data sources and visualization
- **Explorers** can access, analyze and create their own dashboards
- **Viewers** can interact with published dashboards (read only)



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## Tools Reviewed

### TABLEAU SAMPLE DASHBOARDS



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## Tools Reviewed

### TABLEAU DETAILS

#### DPS Rubric rating:

Customization	System connectivity & integration	Analysis criteria	Information delivery	Visual design	Security
3/5	2/9	3/3	4/8	6/6	7/8



#### Notable features

- Tiered licenses
- Automated authentication
- Established Data verification processes
- Detailed account user level security and access
- Easy data visualization tools, filters, and drill downs
- Automated notifications
- Allows for comments to be shared across users
- General PD training and supports

#### Drawbacks

- Additional cost for licenses
- Requires dedicated DPS staff time to create and manage dashboards/authenticate data
- Requires additional platform specific staff training
- Viewers have Read only access to data
- Viewers unable to create a set of user defined subgroups
- Additional cost for targeted/focused PD

#### Other clients

Baltimore City Public Schools, Guilford County Schools, Polk County Schools



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## Tools Reviewed

### TABLEAU COSTS

#### Tableau Creator

Every deployment requires at least one Creator

\$70

user/month | billed annually

Discover insights with a powerful suite of products that support your end-to-end analytics workflow.

Includes: Tableau Desktop, Tableau Prep Builder, and one Creator license of Tableau Server.

#### Tableau Explorer

\$35

user/month | billed annually

Explore trusted data and answer your own questions faster with full self-service analytics.

Includes: one Explorer license of Tableau Server.

#### Tableau Viewer

\$12

user/month | billed annually

View and interact with dashboards and visualizations in a secure, easy-to-use platform.

Includes: one Viewer license of Tableau Server.



See full comparison at [Tableau website.](https://www.tableau.com/compare)



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## Appendix TOOL RUBRIC

Category	Criteria	Works Well	Minor Concerns	Serious Concerns	Not Applicable
<b>Customization</b>	Are definitions customizable? (goals, objectives, calculations)				
	Can different users have access to specific metrics?				
	Can a group of users be signed to a group of metrics or dashboards?				
	Can comments be attached to metrics?				
	Can you limit views to different groups?				
	Can you create subgroups				
<b>System connectivity &amp; integration</b>	Can it connect to a variety of data sources?				
	Can it support different operating systems?				
	Integration with portals				
	Integrating with other applications				
	How much manual work is involved?				
	How easy it is to automate?				
	Is it real-time data?				
	Mobile friendly?				

## Appendix TOOL RUBRIC

<b>Information delivery</b>	Customized layout of metrics for print				
	Exporting information to spreadsheets, presentation slides, word, PDF, etc.				
	Data filtering for selected reports				
	Sorting the report				
	Scheduling automatic reports				
	Updating the reports				
	Notification when new data is available				
	Info delivery to different audiences				
<b>Visual design</b>	Visual intelligence to highlight areas and values				
	Table and chart on same screen				

## Appendix TOOL RUBRIC

<b>Visual design</b>	Visual intelligence to highlight areas and values				
	Table and chart on same screen				
	Allowing different layouts (graphs vs numbers)				
	Inclusion of metric definition and calculation				
	Having descriptions/help bubbles				
	Single screen with no scrolling				
	Languages, ADA compliant				
<b>Security</b>	Appropriate authentication and authorization methods				
	Backup and restore procedures				
	version control dashboards				
	Audit trails				
	Protecting data from change				
	Defining role-based security				
	Automatic accessibility change by change in user roles or groups				



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# PANORAMA EDUCATION – SERVICE ORDER



Primary Contact Information			
Client		Panorama Education, Inc. ("Panorama")	
<i>Client Legal Name ("Client")</i>	Durham Public Schools	<i>Company Name</i>	Panorama Education, Inc.
<i>Primary Contact, Title</i>	Dr. Laverne Mattocks-Perry, Senior Executive Director of Student Support Services	<i>Primary Contact, Title</i>	Maurice Anderson, Account Director
<i>Billing / Payment Address</i>	808 Bacon St.	<i>Billing Address</i>	24 School St. Fourth Floor
<i>City / State / Zip</i>	Durham, NC 27703	<i>City / State / Zip</i>	Boston, MA 02108
<i>Email</i>	laverne_mattocks@dpsnc.net	<i>Email</i>	manderson@panoramaed.com
<i>Phone</i>	(919) 560 - 2000 ext. 21126	<i>Phone</i>	774-243-2851
<i>Billing Contact</i>			
<i>Billing Email Address</i>			
(1) Description of Services and (2) Fees			
Description of Services		Fees	
<b><u>Annual Licenses:</u></b> <b>Districtwide Panorama Student Success: Platform License</b> Access to Panorama Student Success Platform and Support (as defined in the Terms and Conditions): <ul style="list-style-type: none"> <li>• Dashboards and reporting for teachers, student support staff, school administrators, and district administrators</li> <li>• Ongoing integration of Powerschool &amp; standard filters into Student Success platform. Includes behavior, attendance, coursework, rosters, and demographics</li> <li>• Ongoing integration of Educators Handbook, iReady, mClass, EOC, EOG, and ACT into Student Success platform</li> <li>• Intervention tracking</li> </ul> <b>Districtwide Student Climate Surveys &amp; SEL: Platform License</b> <ul style="list-style-type: none"> <li>• Student Surveys</li> </ul>		<b><i>Effective Date:</i></b>	Date agreement is counter-signed by all parties.
		<b><i>Contract Term:</i></b> <i>(From Effective Date)</i>	<u>1</u> Contract Year
		<b><i>Annual License Fee:</i></b>	\$271,495 / year
		<b><i>Subtotal License Fee Over Contract Term:</i></b>	<b>\$271,495</b>



# PANORAMA EDUCATION – SERVICE ORDER



<p><b><u>Services:</u></b></p> <p><b>Technical Support</b> Includes dedicated Client Success Manager who will work with the</p>	<p><i>Technical Support:</i></p> <p><i>Professional Development:</i></p>	<p>\$16,500 / year</p> <p>\$24,000 / year</p>
<p>client's main point of contact to execute a successful implementation.</p> <ul style="list-style-type: none"> <li>• Manage setup and configurations</li> <li>• Platform maintenance</li> <li>• End user email support</li> <li>• Online resources</li> <li>• Data integration</li> </ul> <p><b>8 Virtual Workshops (Core Offering)</b> Includes a consultative planning session with a professional learning specialist and up to 2 hours of virtual facilitation for groups &lt;50 per session (Larger sessions can be supported as interactive webinars, and additional facilitators can be added for breakout rooms or chat moderation at an additional cost).</p> <p><b>Program-Focused Advising</b> Includes monthly or 12x annual advising support with a professional learning advisor</p> <p><b>Executive Briefing (Virtual)</b> Includes curation and virtual presentation of insights from data, including recommended focus areas and action steps aligned to priorities.</p>	<p><b><i>Subtotal Services Fees Over Contract Term:</i></b></p>	<p><b>\$40,500</b></p>
	<p><b><i>Annual Total:</i></b> <i>(Invoiced on Effective Date) Total Over Contract Term:</i></p>	<p>\$311,995 / year</p> <p><b>\$311,995</b></p>
<p><b>(3) Agreement</b></p>		
<p>The entire agreement by and between Client and Panorama ("<u>Agreement</u>") consists of (i) the terms set forth in this Service Order ("<u>SO</u>") and (ii) the terms attached as Exhibit A to, and hereby incorporated by reference into, this SO ("<u>Terms</u>").</p>		
<p><b>(4) Supplemental Terms and Conditions (if any)</b></p>		
<p>For the avoidance of doubt the Security Agreement dated 9/9/2020 is not applicable to this Agreement, as data security and privacy provisions have been included herein.</p>		

# PANORAMA EDUCATION – SERVICE ORDER



Authorization		
By signing below, Client and Panorama ACCEPT AND AGREE TO the Agreement as of the Effective Date.		
Client Signature:	Print Name, Title:	Date:
Panorama Signature:	Print Name, Title:	Date:

This instrument has been pre-audited in the manner required by the School Budget and Fiscal Control Act. G.S. 115C-441(a).

\_\_\_\_\_  
Finance Officer

\_\_\_\_\_  
Date

## Exhibit A

### Terms

#### BACKGROUND

Panorama is an education technology company that provides a cloud-based platform-as-a-service and related support services to enable schools and school districts to analyze student and school data, measure social-emotional learning, and design and implement survey programs for students, staff and parents or authorized guardians (“Platform”). The client named on the Service Order attached hereto (“Client”) and Panorama have entered into an agreement consisting of the attached Service Order, including any exhibits attached thereto, (“SO”), these terms (“Terms” and collectively with the SO, “Agreement”). From time to time hereafter, Client and Panorama may enter into additional service orders pursuant to which Client may purchase additional rights to use the Platform and receive additional services, provided that these Terms will be incorporated by reference into and apply to each such additional service order to create a separate agreement that governs each such additional service order, in each case to the exclusion of any other terms or conditions that either party seeks to impose or incorporate or that are implied by course of dealing.

#### 1 RIGHT TO USE PLATFORM

1.1 Platform. Subject to this Agreement, Panorama hereby grants Client (including Client’s students, employees, and parents and authorized guardians of Client’s students, all as applicable and described in the relevant SO, (“Authorized Users”)), the limited, nonexclusive, nontransferable, non-sublicenseable right to access and use the Platform via the Internet during the Term solely for Client’s use, in accordance with applicable laws and regulations and the Platform’s intended uses as communicated to Client by Panorama.

1.2 Limitations. Except as expressly permitted in the Agreement, Client will not and will not authorize or allow any third party to: (a) provide access to the Platform to any person who is not an Authorized User or (b) reverse engineer, decompile, disassemble or otherwise attempt to discover the source code, object code or underlying structure, ideas or algorithms of the Platform; (c) modify, translate or create derivative works based on the Platform; (d) copy, rent, lease, distribute, pledge, assign or otherwise transfer or allow any lien, security interest or other encumbrance on the Platform; (e) use the Platform for timesharing or service bureau purposes or otherwise for the benefit of a third party; (f) hack, manipulate, interfere with or disrupt the integrity or performance of or otherwise attempt to gain unauthorized access to the Platform or its related systems, hardware or networks or any content or technology incorporated in any of the foregoing; or (g) remove or obscure any proprietary notices or labels of Panorama or its suppliers on the Platform or on any printed or digital materials provided by Panorama.

1.3 Compliance with Laws. Panorama is responsible for compliance with federal, state local laws and regulations to the extent they govern Panorama’s activities, including providing the Platform to Client and specifically agrees to comply with FERPA, PPRA, and

COPPA, as defined below, in all respects to the extent applicable to Panorama and its provision of services under this Agreement. Client is responsible for compliance with federal, state and local laws and regulations to the extent they govern Client’s activities, including but not limited to the use by Client of the Platform to collect, record, retain, use and disclose any individual’s information. Without limiting the foregoing, each party is responsible for determining its own obligations, including but not limited to notice and consent obligations, under the Family Educational Right to Privacy Act and its implementing regulations (“FERPA”) and the Protection of Pupil Rights Act and its implementing regulations (“PPRA”). The parties agree that they intend for the collection and use of personally identifiable information (as defined under FERPA) for only legitimate educational purposes and other purposes allowed under relevant laws, including but not limited to FERPA and PPRA. Client hereby gives its consent to Panorama on behalf of parents (as defined under FERPA, PPRA and the Children’s Online Privacy Protection Act (“COPPA”)) of children from whom any personal information (as defined under COPPA) may be gathered in connection with this Agreement and the Platform.

#### 2 INTELLECTUAL PROPERTY; PRIVACY; SECURITY

2.1 Client Data. As between Client and Panorama, Client owns data input into the Platform, or otherwise provided to Panorama, by Client and Authorized Users, that constitutes personally identifiable information (as defined under FERPA), such as student survey responses reported on an individual level, (“Client PII”) and (b) any other data and content input into the Platform, or otherwise provided to Panorama, by Client and Authorized Users or on their behalf, such as survey questions, (“Non-PII” and together with PII “Client Data”). Client hereby grants Panorama a nonexclusive, worldwide, royalty-free, fully paid up, sublicenseable (through multiple tiers) solely for the following purposes: (i) right and license during the Term to copy, distribute, display, create derivative works of and use Client Data to perform Panorama’s obligations under this Agreement; and (ii) perpetual, irrevocable right and license to copy, modify and use Client PII to create aggregated, non-personally identifiable data sets (“Blind Data”) and copy, distribute, display, create derivative works of and use Blind Data for benchmarking, and internal research or development purposes as specified herein, including published research. Any such Blind Data will have all direct and indirect personal identifiers removed, including, but not limited to, name, ID numbers, date of birth, demographic information, location information, and school ID. Panorama agrees not to attempt to re-identify any de-identified data and will not transfer Blind Data to any other party without Client’s express written consent or as allowed under applicable law. Client reserves any and all right, title and interest in and to Client Data other than the licenses therein expressly granted to Panorama under this Agreement. Panorama may only publish Client’s Non-PII, or Client Data upon receipt of Client’s prior written consent.

## Exhibit A

### Terms

**2.2 Panorama Intellectual Property.** Panorama retains all right, title and interest in and to the Platform, including but not limited to learning content, teaching materials, survey questions, underlying research and methodologies (by whomever produced except to the extent Client produced such material), all copies and parts of any of the foregoing, and all intellectual property rights therein. Panorama grants no, and reserves any and all, rights other than the rights expressly granted to Client under this Agreement with respect to the Platform.

**2.3 Client Feedback.** Client may from time to time provide suggestions, comments for enhancements or functionality or other feedback, excluding Client PII, ("Feedback") to Panorama with respect to the Platform. Panorama has full discretion to determine whether to proceed with development of the requested enhancements, features or functionality. Client hereby grants Panorama a royalty-free, fully paid-up, worldwide, transferable, sublicenseable, irrevocable, perpetual license to: (a) copy, distribute, transmit, display, perform, and create derivative works of the Feedback in whole or in part; and (b) use the Feedback in whole or in part, including without limitation, the right to develop, manufacture, have manufactured, market, promote, sell, have sold, offer for sale, have offered for sale, import, have imported, rent, provide and lease products or services that practice or embody, or are configured for use in practicing, the Feedback in whole or in part.

**2.4 Panorama Privacy Policy.** Panorama's Privacy Statement, as may be amended from time to time, is available at <https://www.panoramaed.com/privacy>. To the extent there is a conflict between Panorama's Privacy Statement, the terms of this Agreement shall control.

#### **2.5 Data Security and Privacy.**

(a) Panorama will implement and maintain an information security program that is consistent with industry recognized practices, which include using commercially reasonable administrative, physical and technical safeguards designed to protect the Platform from unauthorized access that could compromise the security, confidentiality or integrity of Client PII. Panorama shall: (i) use reasonable efforts to secure physical premises where Client PII will be processed and/or stored and (ii) take reasonable precautions with respect to the employment of, access given to, and education and training of personnel engaged by Panorama to perform its obligations under this Agreement. Panorama agrees that it will implement technical, physical and administrative safeguards designed to protect Client PII against loss, destruction, and unauthorized uses or disclosures no less rigorously than those safeguards it has implemented to protect its own confidential information. In the event of any breach of Panorama's information security program that implicates potential unauthorized access to or disclosure of Client's data in Panorama's custody, Panorama shall promptly inform Client of the breach in writing and, in any event, the written notification shall occur no later than one business day after

Panorama's notice of the breach. Within seven (7) days, Panorama shall follow up with a more detailed report which shall identify: the nature of the unauthorized use or disclosure; the data used or disclosed; who made the unauthorized use or received the unauthorized disclosure; what Panorama has done or shall do to mitigate the effects of the unauthorized use or disclosure; and what corrective action Panorama has taken or shall take to prevent future similar unauthorized use or disclosure. Panorama shall also provide such other information related to the unauthorized use or disclosure that may be reasonably requested by Client. In the event of such a data breach, Panorama shall, if required by applicable law, also notify all affected schools and make a reasonable effort to notify all affected users.

(b) Panorama agrees to use the Client Data for no other purpose other than those expressly authorized by Client in this Agreement. Panorama acknowledges that Panorama's marketing and advertising activities, if any, are not an authorized use of Client Data, and Panorama agrees not to use any Client Data for its own or a third party's marketing or advertising purposes.

(c) Panorama agrees not to mine Client Data for any purposes other than those agreed to in advance writing by Client. Data mining or scanning of user content for the purpose of advertising and/or marketing employees is strictly prohibited.

(d) Client will and will instruct its Authorized Users to: (i) use the Platform to collect, record, retain, use and disclose personally identifiable information only to the extent necessary for its legitimate educational purposes; (ii) otherwise provide Panorama with personally identifiable information only to the extent necessary for Panorama to provide the Platform and perform its obligations under the Agreement; (iii) input personally identifiable information into the Platform only as prescribed by Panorama and only in the fields designated by Panorama ("Structured Fields"); (iv) use reasonable efforts to prevent unauthorized access to or use of the Platform; and (v) notify Panorama promptly of any known or suspected unauthorized access or use. Client will assist Panorama in all efforts to investigate and mitigate the effects of any such incident.

(e) Within thirty (30) days following termination of this Agreement or Client's request in writing, Panorama will delete or otherwise render unrecoverable Client PII in Panorama's possession in a manner consistent with media sanitization practices described under industry recognized standards. No other entity, including any subcontractors of Panorama, shall be authorized to continue possessing or using any Client Data. Any Client Data remaining on any computers, servers, or other technological devices of Panorama or its employees, agents, or subcontractors, shall be permanently deleted in accordance with section 4.2(b). Within such thirty (30) period, Panorama shall certify in writing to Client that such purge has been completed. This section shall survive the expiration or earlier termination of this Agreement.

## Exhibit A

### Terms

(f) Subject to reasonable security and confidentiality protocols, Panorama shall cooperate with Client or with any other person or agency as directed by Client, in monitoring, auditing, or investigating activities related to Panorama's use and safeguarding of the Client Data. Client and its auditors will maintain the confidentiality of any trade secrets of Panorama that may be accessed during an audit conducted under this Agreement.

(g) In the event of a material data or security breach, or, if Client determines, in its sole discretion, that Client PII has been mishandled or disclosed in a manner inconsistent with this Agreement, Client may demand the immediate return or deletion of any and all of the Client Data.

(h) Panorama shall not be responsible for any personally identifiable information input into the Platform in a manner not prescribed by Panorama or in a field that is not a Structured Field.

### 3 FEES; PAYMENT TERMS

3.1 Fees; Payment Terms. Unless otherwise indicated on the SO, Client will pay all fees within thirty (30) days of the invoice date. If payment of any fee is not made when due and payable, a late fee will accrue at the rate of the lesser of one and one-half percent (1.5%) per month or the highest legal rate permitted by law and Client will pay all reasonable expenses of collection. In addition, if any past due payment has not been received by Panorama within thirty (30) days from the time such payment is due, Panorama may upon written notice to Client suspend access to the Platform until such payment is made.

3.2 Taxes; Tax Exemption. All amounts payable by Client to Panorama hereunder are exclusive of any sales, use and other taxes or duties, however designated, including without limitation, withholding taxes, royalties, know-how payments, customs, privilege, excise, sales, use, value-added and property taxes (collectively "Taxes"). To the extent applicable, Client will be solely responsible for payment of all Taxes and will not withhold any Taxes from any amounts due Panorama. For the avoidance of doubt, Taxes do not include taxes based on Panorama's income. Client is responsible for determining whether it qualifies for any tax exemption, and if Client claims it is tax-exempt, it will, upon request from Panorama, provide documentation evidencing its tax-exempt status.

### 4 TERM, TERMINATION

4.1 Term. The term of the Agreement will commence on the Effective Date and, unless earlier terminated in accordance with this Section 4, will continue through the date set forth on the SO ("Term").

4.2 Expiration; Termination. In addition to any other remedies it may have, either party may terminate the Agreement prior to expiration if the other party breaches any part of the Agreement and fails to cure such breach within thirty (30) days after receiving notice thereof. Upon expiration or any termination for any reason of the Agreement: (a) Client will pay in full for use of the Platform up to and including the

last day on which the Platform is provided and, other than for Client breach, Panorama will provide to client a pro-rata refund based on the amount of time Client had access to and use of the Platform; (b) Panorama may, with reasonable prior notice to Client, delete or otherwise render unrecoverable Client PII in Panorama's possession in a manner consistent with media sanitization practices described under industry recognized standards; and (c) all rights granted to Client and all obligations of Panorama will immediately terminate and Client will promptly cease use of the Platform. Client also reserves the right to terminate the Agreement for convenience upon sixty (60) days' written notice in its sole discretion that is in the school system's best interest to do so.

4.3 Survival. Upon expiration or termination for any reason of the Agreement, Sections 2 (Intellectual Property; Privacy; Security), 3 (Fees; Payment Terms), 4.2 (Termination; Effect of Termination), 4.3 (Survival), 5 (Confidentiality), 6.2 (Disclaimer), 7 (Limitations of Liability; Indemnification), and 9 (General) will survive.

### 5 CONFIDENTIALITY

5.1 As used herein, "Confidential Information" means, subject to the exceptions set forth in the following sentence, any information or data that is not Client PII, regardless of whether it is in tangible form, disclosed by either party ("Disclosing Party") that Disclosing Party has either marked as confidential or proprietary, or has identified in writing as confidential or proprietary within thirty (30) days of disclosure to the other party ("Receiving Party"). Panorama's Confidential Information includes, without limitation, the Platform, including but not limited to learning content, teaching materials, survey questions, underlying research and methodologies and, subject to any applicable Open Records laws, this Agreement. Information will not be deemed Confidential Information" if such information: (a) is known to the Receiving Party prior to receipt from Disclosing Party directly or indirectly from a source other than one having an obligation of confidentiality to Disclosing Party; (b) becomes known (independently of disclosure by Disclosing Party) to the Receiving Party directly or indirectly from a source other than one having an obligation of confidentiality to Disclosing Party; or (c) becomes publicly known or otherwise ceases to be secret or confidential, except through a breach of this Agreement by the Receiving Party. Each party acknowledges that certain Confidential Information may constitute valuable trade secrets and proprietary information of a party, and each party agrees that it will use the Confidential Information of the other party solely in accordance with the provisions of this Agreement and will not disclose, or permit to be disclosed, the same directly or indirectly, to any third party without the other party's prior written consent, except as otherwise permitted hereunder or in accordance with law. Each party will use reasonable measures to protect the confidentiality and value of the other party's Confidential Information. Notwithstanding any provision of this Agreement, either party may disclose the terms of the Agreement, in whole or in part (i) to its employees, officers, directors, professional advisers (e.g., attorneys, auditors, financial

## Exhibit A

### Terms

advisors, accountants and other professional representatives), existing and prospective investors or acquirers contemplating a potential investment in or acquisition of a party, sources of debt financing, acquirers and/or subcontractors who have a need to know and are legally bound to keep such Confidential Information confidential by confidentiality obligations or, in the case of professional advisors, are bound by ethical duties to keep such Confidential Information confidential consistent with the terms of this Agreement; and (ii) as reasonably deemed by a party to be required by law (in which case each party will endeavor to provide the other with prior written notification thereof, will provide such party with the opportunity to contest such disclosure, and will use its reasonable efforts to minimize such disclosure to the extent permitted by applicable law). Panorama acknowledges that Client has obligations subject to the North Carolina Public Records law (N.C.G.S. 132-1, et seq.) and Open Meetings law (N.C.G.S. 143-318.9, et seq.) ("Open Records laws") and further agrees that nothing herein is intended to prevent Client from complying with such obligations. Each party agrees to exercise due care in protecting the Confidential Information from unauthorized use and disclosure. In the event of actual or threatened breach of the provisions of this Section, the non-breaching party will be entitled to seek immediate injunctive and other equitable relief, without waiving any other rights or remedies available to it. Each party will promptly notify the other in writing if it becomes aware of any violations of the confidentiality obligations set forth in the Agreement. Upon Disclosing Party's written request, Receiving Party will either promptly return to Disclosing Party Disclosing Party's Confidential Information, and all embodiments thereof, that is in Receiving Party's possession and certify such return or use reasonable efforts to delete or otherwise render inaccessible such Confidential Information and certify the same.

#### **6 REPRESENTATIONS, WARRANTIES AND DISCLAIMER**

6.1 Representations and Warranties. Each party represents and warrants to the other party that (a) such party has the required power and authority to enter into this Agreement and to perform its obligations hereunder, (b) the execution of this Agreement and performance of its obligations thereunder do not and will not violate any other agreement to which it is a party or any law or regulation applicable to it, and (c) this Agreement constitutes a legal, valid and binding obligation when signed by both parties. Client further represents and warrants that it has the right to provide Client Data to Panorama as well as the licenses and rights therein and thereto for the purposes contemplated by this Agreement.

6.2 Disclaimer. EXCEPT AS EXPRESSLY SET FORTH HEREIN, THE PLATFORM IS PROVIDED ON AN "AS-IS" BASIS AND PANORAMA DISCLAIMS ANY AND ALL WARRANTIES. EXCEPT AS OTHERWISE EXPRESSLY PROVIDED IN THIS AGREEMENT, NEITHER PARTY MAKES ANY ADDITIONAL REPRESENTATION OR WARRANTY OF ANY KIND, WHETHER EXPRESS, IMPLIED (EITHER IN FACT OR BY OPERATION OF

LAW), OR STATUTORY, AS TO ANY MATTER WHATSOEVER. ALL OTHER EXPRESS OR IMPLIED

CONDITIONS, REPRESENTATIONS AND WARRANTIES ARE HEREBY EXCLUDED TO THE EXTENT ALLOWED BY APPLICABLE LAW. EACH PARTY EXPRESSLY DISCLAIMS ALL IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, QUALITY, ACCURACY, TITLE, AND NON-INFRINGEMENT. NEITHER PARTY WARRANTS AGAINST INTERFERENCE WITH THE ENJOYMENT OF THE PRODUCTS OR SERVICES PROVIDED BY SUCH PARTY OR AGAINST INFRINGEMENT. NEITHER PARTY WARRANTS THAT THE PRODUCTS OR SERVICES PROVIDED BY SUCH PARTY ARE ERROR-FREE OR THAT OPERATION OF SUCH PARTY'S PRODUCTS OR SERVICES WILL BE SECURE OR UNINTERRUPTED. NEITHER PARTY WILL HAVE THE RIGHT TO MAKE OR PASS ON ANY REPRESENTATION OR WARRANTY ON BEHALF OF THE OTHER PARTY TO ANY THIRD PARTY.

#### **7 LIMITATIONS OF LIABILITY; INDEMNIFICATION**

7.1 Disclaimer of Consequential Damages. THE PARTIES HERETO AGREE THAT, NOTWITHSTANDING ANY OTHER PROVISION IN THIS AGREEMENT, EXCEPT FOR LIABILITY ARISING OUT OF (A) CLIENT'S USE OF THE PLATFORM OTHER THAN EXPRESSLY PERMITTED BY SECTION 1 (RIGHT TO USE PLATFORM), (B) EITHER PARTY'S BREACH OF SECTION 5 (CONFIDENTIALITY), AND (C) A PARTY'S INDEMNIFICATION OBLIGATIONS SET FORTH IN SECTION 7.4(a) AND 7.5 BELOW, AS APPLICABLE, IN NO EVENT WILL EITHER PARTY BE LIABLE TO THE OTHER FOR ANY SPECIAL, INDIRECT, RELIANCE, INCIDENTAL OR CONSEQUENTIAL DAMAGES OF ANY KIND, LOST OR DAMAGED DATA, LOST PROFITS OR LOST REVENUE, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), OR OTHERWISE, EVEN IF A PARTY HAS BEEN NOTIFIED OF THE POSSIBILITY THEREOF.

7.2 General Cap on Liability. NOTWITHSTANDING ANY OTHER PROVISION OF THIS AGREEMENT, EXCEPT FOR LIABILITY ARISING OUT OF (A) CLIENT'S USE OF THE PLATFORM OTHER THAN EXPRESSLY PERMITTED BY SECTION 1 (RIGHT TO USE PLATFORM), (B) EITHER PARTY'S BREACH OF SECTION 5 (CONFIDENTIALITY), AND (C) A PARTY'S INDEMNIFICATION OBLIGATIONS SET FORTH IN SECTION 7.4(a) AND 7.5 BELOW, AS APPLICABLE, UNDER NO CIRCUMSTANCES WILL EITHER PARTY'S LIABILITY FOR ALL CLAIMS ARISING UNDER OR RELATING TO THIS AGREEMENT (INCLUDING BUT NOT LIMITED TO WARRANTY CLAIMS), REGARDLESS OF THE FORUM AND REGARDLESS OF WHETHER ANY ACTION OR CLAIM IS BASED ON CONTRACT, TORT, OR OTHERWISE, EXCEED THE AGGREGATE OF THREE TIMES (3X) FEES PAID BY CLIENT TO PANORAMA UNDER THIS AGREEMENT DURING THE TWELVE (12) MONTH PERIOD PRECEDING THE EVENT OR CIRCUMSTANCES GIVING RISE TO SUCH LIABILITY. THIS LIMITATION OF LIABILITY IS CUMULATIVE AND NOT PER INCIDENT.

7.3 Independent Allocations of Risk. EACH PROVISION OF THIS AGREEMENT THAT PROVIDES FOR A LIMITATION OF LIABILITY,



## Exhibit A

### Terms

DISCLAIMER OF WARRANTIES, OR EXCLUSION OF DAMAGES IS TO ALLOCATE THE RISKS OF THIS AGREEMENT BETWEEN THE PARTIES. EACH OF THESE PROVISIONS IS SEVERABLE AND INDEPENDENT OF ALL OTHER PROVISIONS OF THIS AGREEMENT, AND EACH OF THESE PROVISIONS WILL APPLY EVEN IF THEY HAVE FAILED OF THEIR ESSENTIAL PURPOSE.

**7.4 Indemnification by Panorama.** Except for liability for which Client is responsible under Section 7.5, Panorama will indemnify, defend and hold Client and the officers, directors, agents, and employees of Client ("Client Indemnified Parties") harmless from settlement amounts and damages, liabilities, penalties, costs and expenses ("Liabilities") that are payable to any third party or incurred by the Client Indemnified Parties (including reasonable attorneys' fees) arising from (a) any third party claim, demand or allegation that the use of the Platform in accordance with the terms and conditions of this Agreement infringes such third party's copyright or results in a misappropriation of such third party's trade secrets; and (b) third party claims of any unauthorized use of disclosure of Client Data by Panorama or its subcontractor(s) to the extent resulting solely from Panorama's failure to use reasonable safeguards in preventing unauthorized access that compromises the integrity, confidentiality or security of Client Data; and (c) a third party claim to the extent proximately caused by the omission or but not limited to court costs and reasonable attorney's fees, incurred in connection with the defense of said matters.. Panorama will have no liability or obligation under this Section 7.4 if such Liability is caused in whole or in part by (a) modification of the Platform by any party other than Panorama without Panorama's express consent; (b) the combination, operation, or use of the Panorama with other product(s), data or services not provided by Panorama where the Platform would not by itself be infringing; or (c) unauthorized or improper use of the Platform. If the use of the Platform by Client has become, or in Panorama's opinion is likely to become, the subject of any claim of infringement, Panorama may at its option and expense (i) procure for Client the right to continue using the Platform as set forth hereunder; (ii) replace or modify the Platform to make it non-infringing so long as the Platform has at least equivalent functionality; (iii) substitute an equivalent for the Platform or (iv) if options (i)-(iii) are not available on commercially reasonable terms, terminate the Agreement. This Section 7.4 states Panorama's entire obligation and Client's sole remedies in connection with any claim regarding the intellectual property rights of any third party.

**7.5 Indemnification by Client.** Client will indemnify, defend and hold Panorama and the officers, directors, agents, and employees of Panorama ("Panorama Indemnified Parties") harmless from Liabilities that are payable to any third party or incurred by the Panorama Indemnified Parties (including reasonable attorneys' fees) arising from any third party claim, demand or allegation arising from or related to any use by Client or Authorized Users of the Platform or Client Data in violation of the Agreement or any applicable federal, state or local law or regulation. The indemnification provided for

herein shall not be construed as a waiver of any applicable defense of governmental, statutory, or common law immunity, and shall not prevent Client from asserting any defense of such immunity; provided that if a court of competent and final jurisdiction determines that no such immunity applies, then the indemnity provided for herein shall apply.

**7.6 Indemnification Procedure.** If a Client Indemnified Party or a Panorama Indemnified Party (each, an "Indemnified Party") becomes aware of any matter it believes it should be indemnified under Section 7.4 or Section 7.5, as applicable, involving any claim, action, suit, investigation, arbitration or other proceeding against the Indemnified Party by any third party (each an "Action"), the Indemnified Party will give the other party ("Indemnifying Party") prompt written notice of such Action. Indemnified Party will cooperate, at the expense of Indemnifying Party, with Indemnifying Party and its counsel in the defense and Indemnified Party will have the right to participate fully, at its own expense, in the defense of such Action with counsel of its own choosing. Any compromise or settlement of an Action will require the prior written consent of both parties hereunder, such consent not to be unreasonably withheld or delayed.

**7.7 Insurance by Panorama.** During the term of this Agreement, Panorama agrees to maintain Commercial General Liability in AN amount not less than \$1,000,000 for each occurrence with \$2,000,000 General Aggregate, and Cyber Security Liability insurance coverage in an amount not less than \$5,000,000 for each occurrence. Such coverage must include, but not be limited to, the following: claims resulting from breach or failure to protect confidential information; information theft, damage, or destruction of electronic information; and intentional or unintentional release of private information. Client is to be named as an additional insured on a primary, non-contributory basis, and Panorama shall furnish such Certificates of Insurance to Client.

## 8 COMPLIANCE WITH UNIFORM GUIDANCE

Panorama acknowledges that Client will finance the project with federal funds, and the parties incorporate by reference the applicable provisions of the Uniform Guidance found in 2 C.F.R. Part 200, Appendix II—Contract Provisions for non-Federal Entity Contracts Under Federal Awards. These obligations may include but are not limited to the following provisions: Equal Employment Opportunity (41 C.F.R. Part 60); Davis-Bacon Act (40 U.S.C. 3141-3148); Copeland "Anti-Kickback" Act (40 U.S.C. 3145); Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708); Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387); Debarment and Suspension (Executive Orders 12549 and 12689); Byrd Anti-Lobbying Amendment (31 U.S.C. 1352); Procurement of Recovered Materials (2 C.F.R. § 200.322); and Record Retention Requirements (2 CFR § 200.324). Failure to comply with any and all applicable provisions herein may be cause for the Client to terminate the Agreement. To the extent Panorama is permitted by Client to use any subcontractors, Panorama shall also ensure that

## Exhibit A

### Terms

all subcontracts and other contracts for goods and services for a federally-funded project have the mandated provisions of this directive in their contracts.

## 9 GENERAL

9.1 International. Client may not remove or export from, or use from outside, the United States or allow the export or re-export of the Platform or anything related thereto, or any direct product thereof in violation of any restrictions, laws or regulations of the United States Department of Commerce, the United States Department of Treasury Office of Foreign Assets Control, or any other United States or foreign agency or authority.

9.2 Relationship. No agency, partnership, joint venture, or employment is created as a result of the Agreement and a party does not have any authority of any kind to bind the other party in any respect whatsoever.

9.3 Publicity. Each party agrees that it will not, without prior written consent of the other, issue a press release regarding their business relationship. Notwithstanding anything herein to the contrary, Panorama may identify Client and the relationship between Panorama and Client in Panorama's marketing collateral, website, and other promotional, proposal and marketing materials.

9.4 Assignment. Neither party may assign the Agreement by operation of law or otherwise or assign or delegate its rights or obligations under the Agreement without the other party's prior written consent; provided however, that either party may assign the Agreement to an acquirer of or successor to all or substantially all of its business or assets to which the Agreement relates, whether by merger, sale of assets, sale of stock, reorganization or otherwise. Any assignment or attempted assignment by either party otherwise than in accordance with this Section 9 will be null and void. Panorama may share Client Data with a subcontractor(s) only with the advance written permission of Client. Should Client, in its sole discretion, approve such request, Panorama shall ensure that each approved subcontractor is contractually bound to adhere materially to all of the terms of this Agreement with response to its possession and use of any Client Data and is aware of its obligations under applicable law with regard to the possession, use and re-disclosure of any Client PII. Notwithstanding such an agreement, nothing in this paragraph shall relieve Panorama of any of its obligations under this Agreement, including its responsibilities to ensure the security of any Client Data provided by Client pursuant to this Agreement. For the avoidance of doubt, this provision is not intended to govern Panorama's use of third party service providers necessary to perform the Services.

9.5 Equitable Relief. In any action or proceeding to enforce rights under the Agreement, the prevailing party will be entitled to recover costs and attorneys' fees. Client acknowledges that any unauthorized use of the Platform will cause irreparable harm and injury to Panorama for which there is no adequate remedy at law. In addition to all other remedies available under the Agreement, at law or in equity, Client further agrees that Panorama will be entitled to injunctive relief in the event Client uses the Platform in violation of

the limited license granted herein or uses the Platform in any way not expressly permitted by the Agreement.

9.6 Force Majeure. Each party will be excused from performance for any period during which, and to the extent that, it is prevented from performing any obligation or service, in whole or in part, as a result of a cause beyond its reasonable control and without its fault or negligence, including, but not limited to, acts of God, acts of war, epidemics, fire, communication line failures, power failures, earthquakes, floods, blizzard, or other natural disasters (but excluding failure caused by a party's financial condition or any internal labor problems (including strikes, lockouts, work stoppages or slowdowns, or the threat thereof)) ("Force Majeure Event"). Delays in performing obligations due to a Force Majeure Event will automatically extend the deadline for performing such obligations for a period equal to the duration of such Force Majeure Event. Except as otherwise agreed upon by the parties in writing, in the event such non-performance continues for a period of thirty (30) days or more, either party may terminate the Agreement by giving written notice thereof to the other party. Upon the occurrence of any Force Majeure Event, the affected party will give the other party written notice thereof as soon as reasonably practicable of its failure of performance, describing the cause and effect of such failure, and the anticipated duration of its inability to perform.

9.7 Governance. This Agreement will be governed by the laws of the state of North Carolina without regard to its conflict of laws provisions. For all disputes relating to this Agreement, each party submits to the exclusive jurisdiction of the state and federal courts located in Durham County, North Carolina, and waives any jurisdictional, venue, or inconvenient forum objections to such courts.

9.8 Agreement. Both parties agree that the Agreement is the complete and exclusive statement of the mutual understanding of the parties and supersedes and cancels all previous written and oral agreements, communications and other understandings relating to the subject matter of the Agreement, and that all waivers and modifications must be in a writing signed by both parties, except as otherwise provided herein. If any provision of the Agreement is found to be unenforceable or invalid, that provision will be limited or eliminated to the minimum extent necessary so that the Agreement will otherwise remain in full force and effect and enforceable. Any additional or different terms proposed by Client, including those contained in Client's procurement order, acceptance, vendor portal or website, shall not be valid or have any effect unless expressly incorporated into the SO and agreed upon in writing by Panorama. Neither Panorama's acceptance of Client's procurement order nor its failure to object elsewhere to any provisions of any subsequent document, website, communication or act of Client shall be deemed acceptance thereof or a waiver of any of the terms in these Terms. If any term of the SO, including any exhibit attached thereto, expressly conflicts with a term of these Terms, the term of the SO (or if applicable the exhibit) shall prevail. If terms within the SO, including any exhibit attached thereto, and these Terms appear merely

## **Exhibit A**

### **Terms**

inconsistent or ambiguous, all such terms shall be given effect to the extent reasonably possible, with a term that is more specific and detailed on a certain matter prevailing over a more general term or silence on that matter. Silence in the SO, or in any exhibit attached thereto, or in these Terms, on a matter that is addressed elsewhere in the Agreement shall not be deemed to present an express conflict, inconsistency or ambiguity.

9.9 Notices. All notices under the Agreement will be in writing and sent to the recipient's address set forth in the SO and will be deemed to have been duly given when received, if personally delivered; when receipt is electronically confirmed, if transmitted by facsimile or email; the day after it is sent, if sent for next day delivery by recognized overnight delivery service; and upon receipt, if sent by certified or registered mail, return receipt requested.

**MINUTES  
DURHAM PUBLIC SCHOOLS  
BOARD OF EDUCATION  
May 5, 2022**

Durham Public Schools Board of Education held its Work Session on Thursday, May 5, 2022, at approximately 5:04 p.m. at the Fuller Administration Building, 511 Cleveland Street, Durham, NC 27703

**Board Members Present:** Bettina Umstead (Chair), Jovonia Lewis (Vice Chair), Mike Lee, Matt Sears, Frederick Ravin III and Alexandra Valladares

**Administration Present:** Pascal Mubenga (Superintendent), Dr. Nakia Hardy (Deputy Superintendent of Academic Services), Julius Monk (Deputy Superintendent of Operations), Tanya Giovanni (Chief of Staff), Dr. Alvera Lesane (Assistant Superintendent of Human Resources) and William “Chip” Sudderth III (Chief Communications Officer).

**Attorney Present:** Rod Malone

**Recorder:** Nicole Smith, Board of Education Executive Assistant

**Call to Order:**

Mike Lee called the meeting to order and asked for a moment of silence.

**Spanish Translator Present:**

Interpretation services were provided by the DPS Multilingual Resource Center

**3. Agenda Review and Approval**

Vice Chair Jovonia Lewis moved that the agenda be approved as presented. Matt Sears seconded, and the agenda passed unanimously.

**4. Board of Education Meeting Minutes dated April 7, 2022**

Matt Sears moved to approve the minutes dated April 7, 2022. Vice Chair Jovonia Lewis seconded, and the motion passed unanimously.

**5. General Public Comment**

There were three (3) in-person public comments.

Camilla Meek  
Raafe-Ahmaad Purnsley  
Alix Adrian

**6. Consent Items**

- a. Githens Middle School Boiler Replacement Contract with Comfort Mechanical Contractors
- b. Lyons Farm Elementary School – AV Contract with Konek Systems, Inc.

- c. Lyons Farm Elementary School – Intercom System Contract with Troy Hutchins Construction, LLC.
- d. Lyons Farm Elementary School – Solar Installation Contract with Southern Energy Management
- e. District Dashboard

Matt Sears made a motion to approve the consent items as presented. Vice Chair Jovonia Lewis seconded, and the motion passed unanimously.

## **7. Academic Services**

- a. CTE Local Application for Funding 2022-2023

Dr. Nakia Hardy and team reviewed a PowerPoint presentation that detailed the following:

- ✓ Celebrations
- ✓ Opportunities for Growth
- ✓ Highlight: 2022 Inaugural Hiring Fair
- ✓ Strategies for Success
- ✓ All Students FUTURE READY

Dr. Nakia Hardy shared that as of June 2022 there will be 39 students graduating from the program. Students are also in the planning stages of building a mobile office at the HUB Farm location.

Frederick Ravin asked questions regarding a breakdown of the number of male/female enrollees in the program. Dr. Julie Pack provided gender enrollment information based on interest.

Alexandra Valladares commented on being grateful for the hard work done to prepare our students for occupations and hoped that one day DPS can have an actual academy that focuses on providing certifications and trainings for jobs.

Chair Bettina Umstead asked if there are any barriers that hinder students from taking advantage of this program. Dr. Julie Pack said there might not be enough awareness of the program and its focus. There are more opportunities for additional marketing strategies.

Board members continued to provide feedback on the presentation and appreciation for the work.

Chair Bettina Umstead made a motion to approve the CTE Local Application for Funding 2022-2023. Frederick Ravin seconded, and the motion passed unanimously.

## **8. Operations Services**

- a. Naming Elementary School F

William Sudderth stated naming options for the school have been previously presented to the board. The following options were presented: Betty Massenburg Elementary School, Pauli Murray Elementary School or Third Fork Elementary School.

Board members took turns expressing their naming preference as well as any concerns regarding the

naming process and citing policy. It was mentioned that properly vetting individuals was important to ensure that there were no concerns when choosing a name for the new school. There were some reservations about naming a \$72 million school after a geographical reference.

Vice Chair Jovonia Lewis stated she was always in support of naming the school Betty Massenburg Elementary School.

Chair Bettina Umstead stated she could support naming the school Murray-Massenburg Elementary School. Alexandra Valladares made a motion to name Elementary School F, Murray-Massenburg Elementary School, Frederick Ravin seconded. Mike Lee stated his reasons for supporting the name Pauli Murray. He also said he could support Murray-Massenburg but not Massenburg alone.

Matt Sears is not in favor of a hyphenated name. Vice Chair Jovonia Lewis shared additional comments on why she is support of naming the school after Betty Massenburg.

The motion to name the new school Murray-Massenburg Elementary School passed unanimously.

b. 403(b) Plan Changes

Paul LeSieur stated that the 403b plans would no longer be serviced by the state as of June 30, 2022. By May 31<sup>st</sup> the district has to inform the state what the decision is moving forward. He mentioned other options as it pertains to other 403b plans. He introduced Amy ? and Rod McLean, from Verity Asset Management who reviewed a presentation that detailed the following:

- ✓ DPS Deconversion Timeline
- ✓ DPS Plan Statistics
- ✓ DPS 403(b) Plan Providers
- ✓ DDQ – Responders and Non-responders
- ✓ Responders
- ✓ Optimal Features
- ✓ Review Summary

Chair Bettina Umstead asked how employees would be notified of this switch. Paul LeSieur said the state has been sending out information 403(b) deconversion. DPS will be sending out information about Verity. He also shared that making this change will ensure that individuals that have invested will remain invested and make choices about new funding moving forward. Board members asked questions about the opting in/out process.

c. Superintendent's Final Budget Request 2022

Paul LeSieur explained the following:

- Budget Components – Total additional appropriation request – \$12,875,000
  - Fixed cost Increases – \$5.3M
  - Teacher Salary Supplement Increase – \$4M
  - Lyon Farms Elementary Positions – \$485K
  - Information Technology Support for 1:1 Initiative – \$515M



- Charter School Requirements –\$2.76M

He also mentioned per General Statute, the Board of Education must submit their budget to the County Commissioner's by May 15<sup>th</sup>. Administration is seeking approval to finalize the ask tonight so that we may communicate the County by the May 15<sup>th</sup> deadline. There has been no other information from the State that would change the Superintendent's request.

Vice Chair Jovonia Lewis motioned to approve the Superintendent's Final Budget Request for 2022. Frederick Ravin seconded, and the motioned passed unanimously.

d. Strategic Plan Update – Priority 5 “Ensure Fiscal and Operation Responsibility”

Dr. Julius Monk and his team reviewed a PowerPoint presentation that detailed the following:

- ✓ Priority 5: Ensure Fiscal and Operational Responsibility
- ✓ Ensure Fiscal and Operational Responsibility Components
- ✓ Priority 5: Goals and Strategies
- ✓ Goal 5A: Benchmarks
- ✓ In Place, In Progress and Next Steps
- ✓ Goal 5B: School Cleanliness
- ✓ In Place, In Progress and Next Steps
- ✓ Goal 5C: K-3 Classroom Space
- ✓ In Place, In Progress and Next Steps
- ✓ Goal 5D: Learning Environments
- ✓ In Place, In Progress and Next Steps
- ✓ Goal 5E: Transportation Efficiency
- ✓ In Place, In Progress and Next Steps
- ✓ Priority 5 Quick Wins

**9. Summary of Follow-Up Items**

Dr. Julius Monk provided the summary of follow-up items

**10. Closed Session**

At approximately 7:33 p.m., Chair Bettina Umstead moved to go into Closed Session for the reasons stated on the agenda. Vice Chair Jovonia Lewis seconded, and the motion passed unanimously.

**Reconvened Open Session**

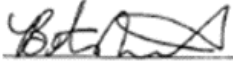
The open session reconvened at approximately 8:27 p.m.

Mike Lee moved to approve the personnel reports dated May 5, 2022. Alexandra Valladares seconded, and the motion passed unanimously.

Board of Education  
Work Session  
May 5, 2022

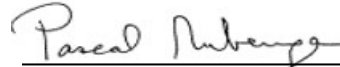
**11. Adjournment**

Having no further business, the meeting adjourned at approximately 7:35 p.m.



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Bettina Umstead, Chair  
Board of Education



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Pascal Mubenga, PhD  
Superintendent