

# Data System Upgrades and Implementations of Laws 2020, Chapter 71 (Senate Bill 96)

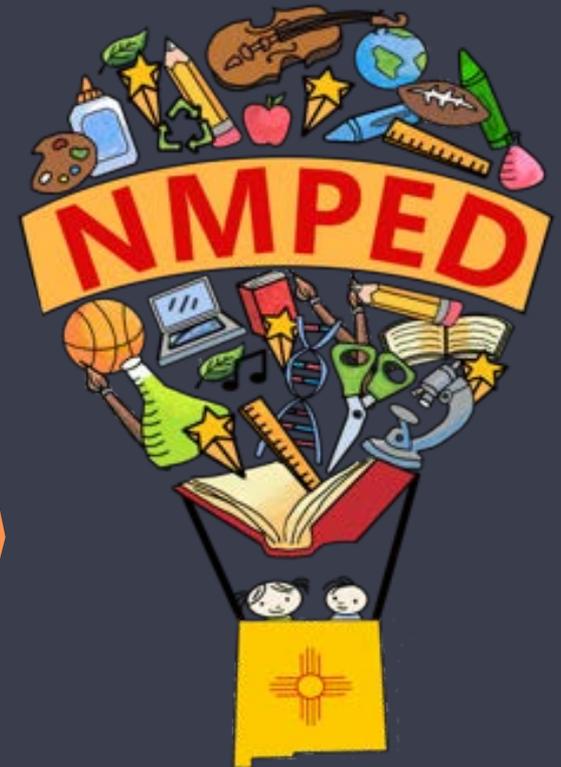
November 5, 2020

Legislative Education Study Committee

Adán Delgado, Deputy Secretary

David Craig, Director, School Budget and Finance Analysis

Mary H. Montoya, Chief Information Officer



*Investing for tomorrow, delivering today.*

# Introduction

## Mission

### Equity, Excellence & Relevance

The New Mexico Public Education Department (PED) partners with educators, communities, and families to ensure that all students are holistically prepared for college, career, and life; secure in their identity; and healthy.

### Core Values

- Student Centered
- Responsive
- Collaborative
- Transformative
- Innovative
- Reflective

# Context of PED Data Systems Upgrades

- Requirement of data-informed decisions on targeted educational investments in order to better serve the needs of students needing greater levels of support

## Context (continued)

- Upgrades will make data available in a timely, relevant, and digestible format
- Linking the education plans (HB5/SB1, 2019), real-time data project, and SB96 (2020) requirements
- Limitations of current system of education funding reporting:
  - Lack of clarity related to SEG-embedded funding
  - Lack of timeliness related to school data
- Increased interest in connections between investments and outcomes

## Context (continued)

- Need for less labor-intensive process to connect stakeholders with relevant data
- Need for more efficient process to validate data
- Investigation of whether statewide student information systems (SISs) are possible

# Challenges Prior to Enactment of SB96

- Inconsistent financial reporting across local education agencies (LEAs), which impeded:
  - Outcome-based funding decisions
  - Investment comparisons by funding source
  - Administrative cost comparisons across LEAs
  - Budget allocations to support students identified as at-risk, bilingual, multicultural, and eligible to receive special education services
  - Identifying actual personnel costs

# Challenges (continued)

- Lack of transparency for stakeholders leads to:
  - Uninformed decision making
  - Inequities in available services
  - Higher costs and inefficient spending
- Stakeholders include:
  - School officials from school districts and charter schools
  - Regional Education Cooperatives (RECs)
  - Parents and the general public
  - Legislators and state officials

# Project Considerations

- PED is considering allowing the reporting through the School Level Finance Survey
- Focus is being made on better enabling school level budget development and transparency
- Opportunities are also being explored to see if new budgeting and reporting requirements can be incorporated within existing financial reporting system structure

# Project Considerations (continued)

- Agency goals:
  - Expand data details at school levels to meet the financial reporting requirements in the existing structure
  - Continue to enable trend analysis
  - Keep current financial measures and metrics in place
  - Support school business officials in transition
  - Move to cloud-based solutions to:
    - lower management costs
    - maximize uptime
    - boost performance
    - minimize security concerns

# Spending Overview

**About Spending**

Expenditure describes the monies expended by the school, district, or BOCES. Expenditures are described by the following dimensions: Type, Areas, and Job. Each of these dimensions is then aggregated by sub-component.

**\$10,284**  
current spending per student ⓘ

**\$11,260**  
State Average



## Spending Overview

Learning Environment

Operations

Construction, Debt, Refinancing & Other

Funds

<https://coloradok12financialtransparency.com/>

# Estimated Project Timeline

- Stakeholder input – winter of FY21
- Modifications to OBMS – 4<sup>th</sup> quarter of SY20-21 with upgrades
  - With completion date set for 2<sup>nd</sup> quarter of SY21-22
- Financial data collection will continue with current OBMS structure for start of FY21
- Transfer of data to the upgraded OBMS – November 2021
  - With testing occurring through December 2021

## Timeline (continued)

- User interface beta testing – November and December of FY22
- Operational website – anticipated by December 31, 2021
- Testing and adjustment of the system – remainder of FY22
- Full implementation of new UCOA – anticipated by July 2022

