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MEMORANDUM

TO: Superintendents and Business Managers
FROM: Heather Bouchey, Acting Secretary, Agency of Education HB
Emily Byrne, Chief Financial Officer EB
SUBJECT: SSDDMS Legislative Update
DATE: July 20, 2018

The AOE is providing this memo to give an update on **Vermont School Finance legislation**. One of the goals of the Legislature this year was to promote greater equity across Vermont school districts by providing a mechanism for all SUs/SDs to have access to a high quality financial management system. A statewide financial system will give schools the tools to ensure the production of high quality, consistent, and comparable school finance and personnel data, a critical prerequisite for data-driven decision making that may be used to promote equity-driven policy.

The first part of this initiative, of which many of you are already aware, is the legislative requirement for all Vermont School Districts, Supervisory Unions, and Supervisory Districts to conform to the Vermont **Uniform Chart of Accounts (UCOA)** by July 1, 2019 in time for fiscal year 2020 as outlined in 2014 Acts and Resolves No. 179, Secs. E.500.1-E.500.3 as amended by 2015 Acts and Resolves No. 58, Sec. E.500.1.

The second and more recent step toward ensuring high quality school finance and personnel data to promote equity came as a result of language included in [2018 Spec. Sess. Acts and Resolves No. 11, Sec. E.500.1](#). This language requires that all SUs/SDs adopt the **Shared School District Data Management System (SSDDMS)** by July 1, 2020 (FY 2021), with two exceptions:

- (1) any SU with districts merging into a new governance structure as of July 1, 2018 that has executed a contract on or before May 1st, 2018 to acquire a new finance data management system (that is not eFinancePLUS), may delay adoption of the SSDDMS until July 1, 2021 (FY 2022) and
- (2) any SU/SD that entered into a contract for a finance data management system on or after July 1, 2017 may delay adoption of the SSDDMS until July 1, 2021 (FY 2022).

Adoption of the SSDDMS means that SUs/SDs will implement the Vermont-specific version of eFinancePLUS, and will use this system to record and report their school finance and personnel data. The official language is included at the end of this memo for your convenience.

While almost 50% of Vermont SUs/SDs have already signed up to implement the SSDDMS by FY 2020, this legislation suggests that the remaining 50% should begin planning for

implementation of the statewide system. The AOE SSDDMS project team is prepared to assist with planning your SU's or SD's migration to the shared system.

In order to meet the initial UCOA mandate via the SSDDMS, SUs/SDs must contact AOE and sign an End User Agreement (EUA) by **November 30, 2018**. One of the benefits of joining now is the *unlimited* data conversion support. This means that in addition to the many group-based trainings and data conversion workshops available to you, your SU/SD can set up an unlimited amount of remote one-on-one time with Vermont-designated PowerSchool consultants to assist you with your data conversion work. Should you wish to adopt the SSDDMS following the UCOA FY 2020 deadline, there will be additional implementation opportunities as outlined in the table below. For those SUs/SDs remaining on their legacy systems in FY 2020, where opportunities for automation of State reporting will not be possible, a flat file meeting state specifications will need to be submitted for upload into eFinancePLUS. A list of collections affected, and their collection methodology for eFinancePLUS users and non-users will be communicated at a later date.

The table below outlines the remaining opportunities for implementation.

Round	Go Live Date	Notification Deadline	To Note
1	October 1, 2018	April 20, 2018	Deadline Passed
2	January 1, 2019	June 8, 2018	Deadline Passed
3	April 1, 2019	August 31, 2018	**Cancelled**
4	July 1, 2019	November 31, 2018	<u>Unlimited</u> Data Conversion Support
5	July 1, 2020	August 31, 2019	
6	July 1, 2021	August 31, 2020	Only available to those qualifying for the exceptions as outlined in Act 11.

If you would like to set up a time to discuss what timeline works best for your SU/SD or if you have any questions please contact the SSDDMS project management team at AOE.SSDDMS@vermont.gov.

For more information on the project including the FAQ, please visit the [AOE website](#).

Thank you for another year of hard work and continued efforts to improve education finance data. It often goes unnoticed by many, as children are off celebrating the summer break, but we know you feverishly close one fiscal year while at the same time are tasked with starting another. These efforts are not unnoticed. Thank you for your hard work and continued efforts. AOE is excited to work with you and leverage this opportunity to bring equity to Vermonters through providing fiscal transparency and high quality data to education stakeholders.

(a) Not later than July 1, 2020, all Vermont supervisory unions, supervisory districts, school districts, and independent tech center districts shall utilize the same school finance and financial data management system. The system shall be selected by the Agency of Education per State procurement guidelines.

(b) The Agency shall work with participating supervisory unions to:

(1) conform to a uniform chart of accounts as outlined in 2014 Acts and Resolves No. 179, Secs. E.500.1-E.500.3 as amended by 2015 Acts and Resolves No. 58, Sec. E.500.1;

(2) improve the comparability, consistency, and timeliness of school financial data;

(3) enhance the abilities of the General Assembly, Agency of Education, supervisory unions, and supervisory districts to better understand and manage cost centers and related school expenditures; and

(4) categorize expenditures in a way that draws a distinction between direct educational expenses and expenses that are primarily human or social services expenses.

(c) Notwithstanding subsection (a) of this section, supervisory unions with districts that are merging into a new governance structure as of July 1, 2018 and that have executed a contract on or before May 1, 2018 to acquire a new school finance and financial data system other than the management system selected by the Agency of Education to serve the merged system may delay adoption of the system selected by the Agency until July 1, 2021.

(d) Notwithstanding subsection (a) of this section, a supervisory union or a supervisory district that entered into a contract for a school finance and financial data management system on or after July 1, 2017, may delay adoption of the system selected by the Agency until July 1, 2021 or upon expiration of the current contract, whichever is earlier.