

### EMIS Advisory Council: EMIS Professional Qualifications and Development Workgroup

<b>Location</b>	Ohio Department of Education 25 South Front Street, Columbus, Ohio 43215 Conference Room B-004
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<b>Date</b>	Monday, October 28, 2019; 1:00pm-4:00pm
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<b>Facilitators</b>	<b>Deidre Wunderlich</b>	<b>Ashley Castle</b>	<b>Erica Weaston</b>
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<b>Attendees</b>	<b>Sheri Ballman</b>	Lydia Gaddis	<b>Jamie McClary</b>	Brad Ritchey
	Michele Baughman	<b>Carrie Herringshaw**</b>	<b>Lisa McCullough**</b>	<b>Penny Rucker**</b>
	<b>Toni Brady</b>	<b>Kirsten Hill**</b>	Tom McGee	Deron Schwieterman
	<b>Michelle Bell</b>	<b>Robin Hill</b>	<b>Marianne Moots</b>	<b>Ryan Shively **</b>
	Christy Bosch	<b>Paul Hopkins</b>	LuAnn Mulica	<b>Mary Smith</b>
	Dan Coffman	John Kellogg**	<b>Lynne Odorizzi</b>	Catherine Wright
	<b>Elizabeth Davis**</b>	<b>Tami Kunesh</b>	Adam Pittis	
	<b>Diane Fabian</b>	<b>Rena Lyons**</b>	<b>Kim Rhoads**</b>	

\*\* Indicates the work group member is also on the EMIS Advisory Council

<b>Agenda Items</b>	<b>Facilitator</b>	<b>Approx. Start Time</b>
Welcome/Roll Call	Deidre Wunderlich	1:00
Approval of September meeting minutes	Deidre Wunderlich	1:10
Recap of purpose of workgroup	Deidre Wunderlich	1:15
Existing OAEP certification process	Amber Myers	1:30
Discussion <ul style="list-style-type: none"> <li>• How OAEP certification would contribute to higher quality data reporting</li> <li>• Advantages and disadvantages of OAEP</li> <li>• Issues/challenges addressed by OAEP certification</li> </ul>	Ashley Castle/ Erica Weaston	1:45
Break		2:45
Discussion <ul style="list-style-type: none"> <li>• How state administered license/certification would contribute to higher quality data reporting</li> <li>• Advantages and disadvantages of state administered system</li> <li>• Issues/challenges addressed by state administered license/certification</li> </ul>	Ashley Castle/ Erica Weaston	3:00
Next steps/Adjournment	Deidre Wunderlich	4:00

\*Reminder that the next workgroup meeting is scheduled for **Wednesday, December 4, 2019, from 9:00am-12:00pm.**

**Meeting Minutes:****Welcome/Roll Call:**

- The meeting was called to order by Deidre Wunderlich at 1:05pm.
- The first order of business was roll call. All members were present except for Michele Baughman, Christy Bosch, Dan Coffman, Lydia Gaddis, John Kellogg, Tom McGee, LuAnn Mulica, Adam Pittis, Brad Ritchey, Deron Schwieterman, and Catherine Wright.

**Approval of September meeting minutes:**

- The next agenda item was to review and approve the meeting minutes from the September 28 meeting. Minor edits were moved by Kirsten Hill. Mary Smith made a motion to approve the amended meeting minutes with Marianne Moots providing the second. All present workgroup members voted in favor of approval. These meeting minutes are to be posted on the EMIS Advisory Council webpage.

**Workgroup Recap – Purpose, Charge, Scope:**

- To recap the purpose of the workgroup, Deidre Wunderlich explained that the Department and EMIS Advisory Council were presented with a request to explore licensure for EMIS coordinators a few months ago.
- The EMIS Professional Qualifications and Development workgroup is specifically charged with discussing topics related to the qualifications and core competencies of an EMIS Coordinator, existing professional development and training opportunities available to EMIS professionals, and certification and licensure.
- After identifying pros and cons of both a state licensure and the current Ohio Association of EMIS Professionals (OAEP) certification processes, the workgroup will take recommendations to the EMIS Advisory Council for review. Next, EMIS Advisory Council will determine what recommendations are taken to the State Superintendent for consideration.
- In previous meetings, the workgroup went through the qualifications and competencies, professional development and training, and state issued credentials.
- Today (10/28), the workgroup was tasked with looking at the current credential option that exists through OAEP.

**Existing OAEP certification process by Amber Myers:**

- OAEP was established in 2001 and is dedicated to learning, using, and sharing the best methods for the professionals responsible for reporting school district data.
- OAEP offers both a fall and a spring conference throughout the year, which target areas that assist attendees on best practices as well as other EMIS areas that might need more in-depth discussion.
  - The spring conference is more in-depth and is a three-day conference that hosts a variety of EMIS learning opportunities including:
    - Software vendors discuss new EMIS changes as well as other tips and tricks
    - Ohio Department of Education supplies us with multiple internal ODE department presentations
    - EMIS Coordinators give best practice opportunities on EMIS reporting
    - Certified EMIS Professional Testing
    - New EMIS Coordinators presentation provided on Sunday in a smaller setting
- Their membership levels include:
  - Professional - \$50 per year
    - Requirements: Responsible for EMIS reporting in your district, ITC, ODE
    - Able to vote & hold office
    - Can obtain OAEP Certification
    - Attend OAEP conferences at a free or reduced rate

- Associate - \$40 per year
  - Requirements: Responsible for EMIS reporting in your district, ITC, ODE
  - Cannot vote or hold office
  - Cannot obtain OAEP Certification
  - Attend fall OAEP conference at a reduced rate
  - Non-members can attend conferences if space allows
- Created by the 20 member OAEP Board, three different certification levels exist.
  - Certified EMIS Professional (CEP)
    - To become a Certified EMIS Professional (CEP), an EMIS Professional must:
      - Fulfill the Years of Service requirement
      - Minimum 3 years EMIS experience
      - Be a Professional Member of OAEP
      - Submit the CEP Workbook totaling 300 points, along with supporting documentation
      - Successfully complete the CEP assessment at the Spring Conference with a passing score of 80%
      - Testing is developed by members of the Executive Board for the Initial CEP
      - Maintenance of CEP to continue certification through IPDP process
    - In 2017-2019, 32 passed, 12 did not pass, but over half re-tested the following year.
    - Test questions come from the EMIS Manual (open book test). Questions for each year's tests are selected from the EMIS Manual in relation to relevant, pertinent data sought by ODE close to the time of testing. The test is comprised of 50 questions with two points for each correct answer. The testing generally includes questions from each data set in the EMIS Manual. Additional components of testing include other documentation that is provided to the applicant prior to testing. The SOES Manual and FTE Detail Report are examples of additional material that comprise the CEP test. The same CEP test is never given twice.
  - Master Certified EMIS Professional (MCEP)
    - To become a Master Certified EMIS Professional (MCEP), an EMIS Professional must:
      - Hold a Certified EMIS Professional certificate
      - Fulfill the Years of Service requirement
      - Minimum 6 years EMIS experience
      - Be an Active Professional Member of OAEP
      - Submit the MCEP Endorsement Application and CEP IPDP form
      - Successfully complete the MCEP project with a passing score of 80%
      - Project is developed by members of the Executive Board
      - Maintenance of MCEP to continue certification thru IPDP process
    - This project is very in-depth and time consuming. The applicant is given three months to complete the project. This project is designed to see if the mastery of EMIS in relation to student/staff/financial data is evident.
    - The guidelines are specific in every area, even down to the spacing and format expected. The MCEP project covers a multitude of items both in the EMIS Guide and in documentation that is used to disseminate EMIS data on a routine basis. It is not software specific, and the documentation mimics that of the Data Collector. The applicant is provided with documents that have been created to see how far they can track a student from the enrollment process through the funding process for that student. Student and Staff scenarios are also created for the applicant and they must be able to duplicate each one in their student software and in the Data Collector. They

must also be able to look at their district's SFPR and break it down for financial questions.

- The Project is made up of five sections: Student, Staff, Building, Reports, Financial.
- The end of the project contains 10 questions that can be found in the EMIS Manual.
- Grading Rubric:
  - Following the directions for the format of the test – 5 points
  - Student Section – 20 points
  - Staff Section – 20 points
  - Building Section – 5 points
  - Reports Section – 20 points
  - Financial Section – 20 points
  - Q & A Section – 10 points

- Data Manager (DM)

- To obtain a Data Manager Endorsement on the Certified EMIS Professional certification, an EMIS Professional must:
  - Hold a Certified EMIS Professional certificate with an MCEP Endorsement
    - OR have a BA and no less than three years of experience with EMIS Reporting
  - Fulfill the Years of Service requirement
    - Minimum 6 years EMIS experience
  - Be an Active Professional Member of OAEP
  - Submit the Data Manager Endorsement Application and MCEP IPDP form
  - Successfully complete the MCEP project with a passing score of 80%
  - Additional 10 hours of PD per year required in data accountability
  - Maintenance of DM to continue certification thru IPDP process
- 69 out of 413 OAEP members hold a current professional membership at Level 1 certification.
- 14 out of 413 OAEP members hold a current professional membership at Level 2 certification.
- 42 out of 413 OAEP members hold a current professional membership at Level 3 certification.
- Issue presented by OAEP:
  - Currently there are no educational, certification, or licensure requirements to become an EMIS coordinator. EMIS has changed drastically over the years. There was minimal reporting to the Department for school districts at first and building or board office secretaries could manage the data submission requirements along with other duties as assigned more easily.
  - Today, EMIS data reporting has become more complex. EMIS Coordinators' expected knowledge range has expanded to Local Report Card areas, Funding, Federal and Ohio Laws, and Federal Reporting as well as becoming proficient in Special Education, CTE, Preschool, College Credit Plus, Tuition, Assessments, Staff and Course coding, Excel expert, and more.
    - 2004 EMIS Manual was just over 400 pages.
    - 2018 EMIS Manual with report explanations is over 1,000 pages.
  - Poor data quality can lead to Local Report Card letter grade decreases, loss of funding, and audit flags. Therefore, there is value in having an EMIS coordinator that is confident in their district's data reporting.
- Discussion
  - For each discussion section, workgroup members were split into small groups based on their role in the district to ensure the group was hearing from these different perspectives.
  - The following questions/discussion points were raised by the workgroup members following Amber Myer's presentation:
    - Do all districts or most districts require an OAEP certification in their job posting?
      - Answer: Some require CEP within first three years.

- Are all members coming from certain parts of the state?
  - Answer: They come from all over and include both urban and rural.
- Are people not testing for the OAEP certification or testing and not renewing?
  - Answer: Either it's a lot of work, time consuming, or district doesn't take it seriously, so it's not made a priority.
- How many people come to the OAEP conferences?
  - Spring conference: Approximately 520-550 people
  - Fall conference: Limited to 250 people
- Who prepared the tests for OAEP's certification?
  - Preparation of materials is done by volunteers at OAEP.
- How will requiring certification gain respect for the position?
- Will mandating a certification weaken the pool for a better qualified EMIS coordinator?
- When there are positions that are licensed, what happens when you don't meet those responsibilities? What additional responsibilities and risks come with licensure/certification?
- Sometimes superintendents and treasurers sign off on data and they don't know what they're signing off on. If there is misreporting, what are the repercussions for individuals involved?
- A team approach was suggested, such that all key players in the district need to get together at least once a month to make sure things are organized, accurate, and communicated well.

○ Advantages and disadvantages of OAEP created by the workgroup members

Pros	Cons
Recognition for self and others as valued professionals	Process to get certification is confusing
There is currently already a process so this could be a foundation for future certification	OAEP certification is not recognized by districts
Requires training, increases depth of knowledge and understanding	Compensation does not equal the amount of responsibilities
Gives validation to baseline competencies needed for position	Test quality/Grade quality is questionable if created within OAEP
Recognition for need of credentials	Participation and perception of OAEP members is less than 30% of the entire state, thus not representative
Professional accomplishment	Oversight of OAEP
Sense of community	Should not have to pay to see ODE presentations at conferences
Acknowledges commitment	Have to belong to organization in order to become certified
Increases employability	Why are the baselines set at three years of experience?
Retention of employee negotiations	Certificate doesn't equal knowledge or training
	Districts don't value certification via OAEP

- How would OAEP certification contribute to higher quality data reporting?
  - Creates framework for competency
  - Commitment to learning and education
  - Depth and rigor increase over time as laws and reporting requirements change
  - Sense of community and learning from others
  - To maintain a certificate, there is a level of commitment
  - OAEP requires minimum level of knowledge in all areas

- Documentation of skills needed for EMIS coordinators
- Issues/challenges addressed by OAEP certification?
  - If you have to get certification, it forces you to be more organized and to know the EMIS Manual
  - Adds a new challenge: what if you can't pass the test but are still a good EMIS coordinator? What if your district doesn't support the continuous education?
  - Ability to travel from district to continue education might be troublesome
  - Cost
  - OAEP's goal was to achieve equity across districts but maybe the mark wasn't hit.
  - OAEP certificate is a "do it yourself" approach instead of a "team" approach

**Formal Licensing/Certification Process in Ohio**

- Recap from previous presentation:
  - Currently, ODE has 40 types of credentials and over 100 teaching fields and endorsements.
  - Terms range from one year to five years. Some permanent certificates, but no longer issued.
  - Many credentials have license tiers/progression.
  - There are traditional and alternative pathways to licensure.
  - Credentials ODE issues currently based on education levels.
  - Costs of credentialing:
    - Fees range from \$20-\$200
    - Credential costs range from \$25-40 per year
  - The "average" timeline and process of drafting/implementation of rule/licensure can be lengthy at times depending on people's interest or level of controversy. At any time, the initial recommendation can change.
- Discussion
  - For each discussion section, workgroup members were split into small groups based on their role in the district to ensure the group was hearing from these different perspectives.
  - The following questions/discussion points were raised by the workgroup members about the formal licensing/certification process in Ohio:
    - How does criminal misconduct by an individual impact their certificate/license?
      - Answer: Those instances are handled by Office of Professional Conduct for evaluation. There are specific laws that cover types of offenses and repercussions.
    - What happens if you have your license and there is an offense/misconduct after obtaining license?
      - Answer: There are a variety of things that could happen, which include admonishment by school board, license suspended, license taken away, license denied, etc.
  - Advantages and disadvantages of state administered system created by the workgroup members

Pros	Cons
Independent of an organization	Cost to district or EMIS coordinator
Checks and balances of a license	Person who has license may not necessarily be the person doing the work
Sense of accomplishment	Redesign of EMIS coordinator role
Equity across state	Unknowns of credentialing
Require attendance for professional development if required by licensure	Jobs passed off to those who already have credential instead of current person in that role
Formal pathway for the profession	Unknown risk of accountability on reporting correct data

Standardization of basic knowledge to improve data quality	Changes could be made through credential process by state board or public comments
Easier across state	Timeline through process could change
Assessment for licensure handled by a third party	Impact on current EMIS coordinator/rapback process
Licensure would result in better quality data	Subject to rapback which EMIS coordinators might not want to be subject to
	Could create hiring challenges across state, especially rural areas
	Budgetary restraints
	Impact on ODE's part who already have so many kinds of licenses to maintain
	Liability on EMIS coordinator and additional pressures
	License wouldn't solve better data quality issue

- How would state administered license/certification contribute to higher quality data reporting?
  - Three groups consisting of treasurers, HR personnel, State Board member, EMIS coordinators and ITC staff did not feel that a state administered license/certification would contribute to higher data quality reporting.
  - One group of EMIS coordinators felt that a state administered license/certification would help create a starting point, framework, and pathway to best data quality.
- Issues/challenges addressed by state administered license/certification?
  - Unknown outcomes/risks of the process – timing and how changes could be made along the way
  - Lack of support from district for EMIS coordinator position
  - Mentality change of the value of the position
  - A state license/certificate would allow EMIS coordinators to be a “voice at the table”
  - It would encourage and allow EMIS coordinators to go to professional development opportunities
  - Treasurers/librarians and other positions that might be credentialed already, yet they still don't get the respect they deserve from district administrators
  - Validity and districts would have to follow suit, however, still might not improve data quality
- Overall, the workgroup wants a better pathway for better data quality with all players at the district. There should be accountability among key players at the district and an understanding of who owns what data. Perhaps it would be beneficial to have a third party “audit” to look at everyone's role in the district to help better document and understand roles, deadlines, and EMIS.

#### Wrap Up/ Next Steps:

- The next meeting for this workgroup will be Wednesday, December 4 from 9:00am-12:00pm.
- The meeting adjourned at 3:48 PM.