



**Department of
Education &
Workforce**

NASCIO

**Category: Cross-Boundary
Collaboration**



Project Dates: May 2023 – May 2025

Contact
Department of Education & Workforce CIO Michael Carmack
Michael.Carmack@Education.Ohio.gov

Executive Summary

The Ohio Department of Education and Workforce (the Department) oversees public primary and secondary education, ensures compliance with both federal and state educational requirements, and effectively manages resources. Since the early 2000s, it has utilized the Comprehensive Continuous Improvement Plan (CCIP), a web-based tool for planning and resource allocation. This innovative software sets a national standard.

It was clear that the CCIP needed improvements, particularly with the reauthorization of the Every Student Succeeds Act. This act shifted more responsibility to the states for compliance, necessitating a redesign of the e-planning systems to enhance cross-agency collaboration and support. As a result, the Department initiated the development of the Education Department's System of Tiered E-Plans and Supports (ED STEPS) with input from various stakeholders. The goal was to create a unified system for needs assessment, planning, and resource management. After a detailed selection process, CGI Inc. was chosen to design and develop ED STEPS. The project also involved aligning with statewide standards and using the Department's common components.

ED STEPS, which fully replaced the CCIP, launched in phases. This submission focuses on the core product for grant applications implemented in May 2025. This new system integrated with the existing needs assessment and monitoring systems, improved user experience, reduced time and resources devoted to compliance activities, promoted cross-office and program support, removed barriers and duplication, and offered tools to help Local Educational Agencies (LEAs) think more holistically about resource allocation.

Idea

Problem/Opportunity

Federal and state resources are managed by program offices throughout the Department. To utilize these resources, LEAs must complete several steps, including conducting a needs assessment, drafting a plan, applying for funds, and adhering to fiscal requirements once funds are awarded. Historically, these processes were fragmented across different program offices. For instance, LEAs completed separate needs assessments, plans, and applications for both the federal Perkins Grant and Title I funds. Moreover, the grant cycles are not synchronized, resulting in a disjointed and burdensome process for LEAs. This fragmentation hinders the integration of programming and fund usage, rather than addressing needs with comprehensive plans supported by all available funds.

Compounding these issues are the outdated technology systems to support these processes. The Department utilized various needs assessment tools, including paper submissions, and until recently, the tools were only required for certain entities. For nearly 15 years, the Department relied on the CCIP for federal planning and resource allocation. The CCIP included key federal education laws and served

as the repository for multiple state and federal education grant applications. However, the CCIP's functionality, interfaces, and usability were outdated and compliance oriented. The planning component was limited, narrative-based, and unreportable, creating a "one-size-fits-all" approach that was not comprehensive.

Why Does it Matter

The ED STEPS project is essential to streamline and enhance the grant management process. The project addresses inefficiencies and complexities in the previous system and improves navigation and functionality for users to access and manage grant information more easily. Not addressing these issues will lead to continued delays, increased administrative costs, and a lack of transparency in grant management. The ED STEPS project provides significant improvements, including better processing times, user experience, and collaboration between state and local entities.

What Makes ED STEPS Different

The Department worked with our vendor to design, develop, test, and deploy a software solution that would greatly improve the planning, execution, and state and federal resource (grants) allocation processes for the state and the districts. The platform's development was a collaborative effort, incorporating feedback from a diverse range of users to ensure its effectiveness and user-friendliness. Through this collaborative approach, the ED STEPS system was tailored to meet the unique needs of our stakeholders and simplify the processes of planning, execution, and resource allocation. As a result, the system embodies a user-centric design, promoting ease of use and efficiency in managing both state and federal grants. Our goal was for customers to want to use the system, not because they were required to do so.

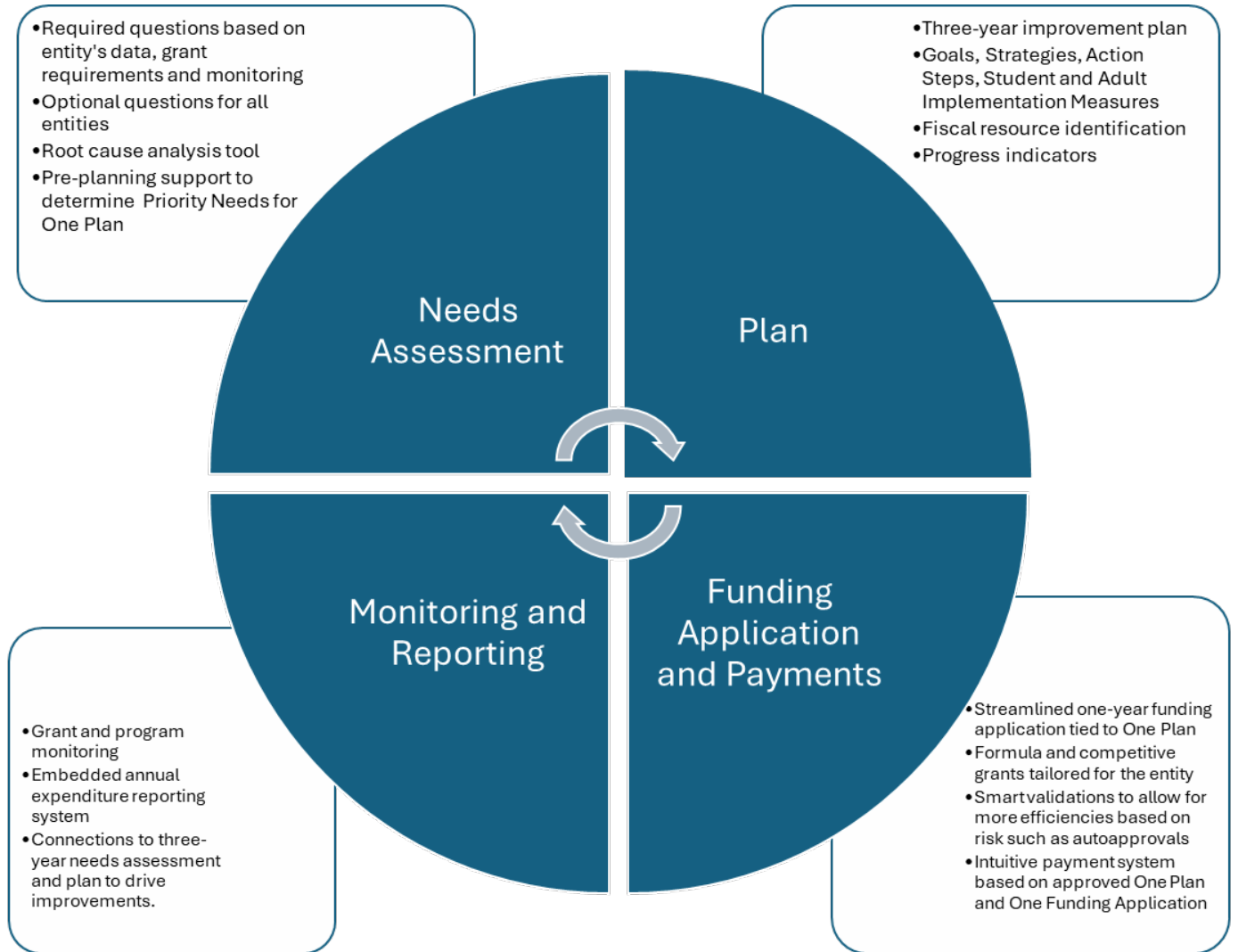
What Makes ED STEPS Universal

The ED STEPS project is designed to enhance the user experience and improve the efficiency of grant management for the Department. One of the key aspects that makes ED STEPS universal is its comprehensive approach to managing grants. Districts define specific needs and then identify grants that support their priorities. All federal and state grants can be managed in the system.

Another factor that contributes to the universality of ED STEPS is its focus on collaboration and integration. The project requires collaboration between various program offices, fiscal and IT, to ensure that all aspects of grants management are aligned and working toward a common goal. Additionally, the integration of common components such as data loads, document uploads, workflow, validations display, contacts, and comments into the One Funding Application (OFA) ensures that all users have a consistent and streamlined experience across all Department systems. This integration helps to speed up the processing of grant applications and ensures that all users have access to the same information and tools.

Implementation

Roadmap



OFA and Payments

For the past two years our teams have worked to build the OFA to fulfill the vision in the roadmap. This vision adopts a new approach to “fund the plan, not plan to fund,” with standardized timelines, a three-year planning cycle, and annual funding applications. The funding application and payment system allows entities to complete a streamlined annual grant application to receive funds aligned with their plan. The payment system enables entities to draw funds against an approved application through cash requests.

The Grant Lifecycle integrates the Department’s Central Payment System with the OFA, making it user-friendly, tracking new and existing awards across fiscal years, and ensuring accurate payments when a cash request is submitted. The OFA utilizes data from the Grant Lifecycle to allocate funds to LEAs

through a data load component. It includes entity allocations, budget grid, budget narrative, assurances, and additional program/grant requirements.

A standardized workflow streamlines the approval process, allowing grantees to draw down funds by creating a cash request. In most instances, cash requests can be automatically approved based on the level of risk; however, there will be a more targeted manual cash request review process with high-risk requests. The funding and payments system uses data from the allocation load, the application, and the cash requests to provide the entity with access to their funds for the total period of availability.

Common Components

The ED STEPS system uses enterprise common components, which are used in other department applications and are developed based on business needs. Users will have experience with common component functionality through other department applications, making training and adoption faster for the user. Some of the common component features include Document Upload, Document Generation, Process Workflow, Comments, History/Audit Log, Communication, Survey Builder, Flags, Contacts, Search, Data Load and Extraction, Validations, Menu, and Navigation. In addition, system administration is common across all the components, including roles, securities, permissions, and assignments.

Who Was Involved

Our contractor, CGI, built the ED STEPS system (including One Plan and OFA) and resources from our internal IT Department built or enhanced existing enterprise common components that were integrated into the system. Additionally, the project involved collaboration with the Ohio Department of Administrative Services (DAS) and the Ohio Office of Budget and Management(OBM). The ED STEPS contract is a multi-year agile interval deliverable agreement (IDA) with DAS. The IDAs were vital to the project's success, providing a structured and agile approach. The IDA outlined the objectives, scope of services, and deliverables for each project phase, allowing for flexibility and adaptability. This agreement was crucial in managing changes effectively, ensuring modifications to the project scope or requirements were carefully controlled, and preventing significant cost overruns or delays. The project also included representation from the OBM Major Project Oversight Office, which ensured the project aligned with state objectives and financial expectations.

Throughout the process, stakeholders were actively engaged via internal workgroups and external focus groups. They were instrumental in defining and refining requirements, providing feedback during development, and testing the application.

How Did We Do It

The OFA launched in May 2025, including the secondary system called Grant Lifecycle. The application launch date is based on internal timelines that align with compliance deadlines established in the Grant

Lifecycle. Grants operate on a state fiscal year cycle, starting in May to allow grant applications to be submitted and approved by July 1. After a grant application is approved by the Department, cash requests are submitted. Therefore, functionality for cash requests is built at the same time as grant applications to keep all business functions together to ensure a fully functioning system for fiscal year 2026.

Impact

What Did the Project Make Better

ED STEPS is more than just a system. It is an improved business process that spurred a mindset shift away from compliance and focused on LEA improvement to positively impact student outcomes. ED STEPS accomplishes this in three ways:

1. Stakeholder feedback was critical in the development of each component of ED STEPS, whether it was from our annual survey, focus groups, or conference sessions. This allowed for real-time development that was centered around the needs of our primary users. As a result of this feedback, the new system included improved navigation, standardization of grant applications and workflows, and connections back to the Uniform Statewide Accounting System.
2. Technology and education have changed significantly over time. It was crucial to ensure we had a system that was technologically more advanced (user interface, security, etc.), while also being nimble enough to adapt to changes in education. To ensure these requirements were met, the new system includes the consolidation of roles, increased grant contact security at various levels, autosave, and more.
3. The system itself is built around a Plan → Do → Study → Act process that is streamlined across the three key components - One Needs Assessment, One Plan, and OFA. Educators understand this framework and the implementation allows for a more transparent and cohesive process.

Throughout each release phase for ED STEPS, stakeholders have shared how the system is user-friendly, fostered more communication and collaboration, and is a more streamlined approach to planning and fiscal resources.

How Do You Know

The OFA allows the Department to more easily analyze, score, and manage a grant compared to the functionality in the old system. Previously, information was uploaded via a Word document that had to be analyzed manually. Now, the information is stored in a database and is easily extracted. In addition, action steps in a stakeholder's One Plan now form the basis of the associated grant application's budget narrative, saving the user time in transferring this information from one system to another. Lastly, the grant applications in the OFA offer more information than was available in the CCIP. The application in the CCIP consisted of the budget, document upload of a completed Word-based narrative application,

and assurances. The grant application in the OFA contains a budget, budget narrative, application questions, document upload, and assurances. The budget narrative and application questions replaced the Word-based narrative application.

Once all the first-year application submissions are collected, the Department will gather quantitative data comparing time spent completing the application in the CCIP versus the new OFA. This data collection will be completed by analyzing response times in each system and through surveys and focus group discussions.

On April 8, 2025, the Department and six LEAs showcased their use of ED STEPS at the Ohio Association of Administrators of State & Federal Education Programs conference to improve business processes. The feedback highlighted the continuous improvement structure with ongoing communication and collaboration. Standardized resources are now available statewide to support LEAs in this process. For more information, view the [slide deck](#).

What Now

The ED STEPS project has enhancements planned for fiscal year 2026 to further improve system functionality. One key enhancement will provide the ability for educational entities to upload accounting reports to input data directly into cash requests, eliminating the need to manually enter this information. In addition, a new Funding Application Builder is planned to simplify the grant application process and make it more intuitive and user-friendly for both applicants and administrators. There are also plans to develop a dashboard summary to provide a public view of the last three years of grant/funding/needs/plans to enhance transparency and provide stakeholders with a clear overview of a project's progress and impact.