



## Appendix E: Meeting Minutes

### Mad Dog Research and Policy Meeting

Tuesday, June 10, 10:00 - 12:00pm, 830 UCP Room 221 C

#### I. Invitees/attendees:

| Name             | Business/System Area            | E-Mail                           | Phone (Work) | Attendance |
|------------------|---------------------------------|----------------------------------|--------------|------------|
| Barry Goldstein  | FSA/Analysis                    | Barry.Goldstein@ed.gov           | 202 377 4047 | X          |
| Cyndi Reynolds   | FSA/Analysis                    | Cyndi.Reynolds@ed.gov            | 202 377 4046 | X          |
| Kirk Siegwarth   | ODS/Budget                      | Kirk.siegwarth@ed.gov            | 202 401 0338 | X          |
| Lois Curtis      | FSA/Schools/Title IV Deliv/CSCC | Lois.curtis@ed.gov               | 202 377 4335 | X          |
| Frank Giarratano | FSA/Pell OPS                    | Frank.giarratano@ed.gov          | 202 377 3115 | X          |
| Dottie Kingsley  | OPE/PPI                         | Dottie.kingsley@ed.gov           | 202 502 7505 | X          |
| Steve Carter     | OPE/PPI                         | Steve.carter@ed.gov              | 202 502 7822 | X          |
| Tony Oliveto     | FSA/Analysis                    | Tony.oliveto@ed.gov              | 202 377 3078 | X          |
| Paul Hill        | FSA/Schools/Title IV            | Paul.hill.jr@ed.gov              | 202 3774323  | X          |
| Jane Holman      | FSA/Schools/Title IV            | Jane.Holman@ed.gov               | 202 377 4322 | X          |
| Keith Wilson     | FSA.CIO                         |                                  | 202 377 3591 | X          |
| Valerie Sherrer  | FSA/CIO/NSLDS                   | Valerie.sherrer@ed.gov           | 202 377 3547 | X          |
| Kitty Wooley     | FSA/School/Title IV             | Kitty.wooley@ed.gov              | 202 377 3153 | X          |
| Richard Nelson   | FSA/Schools/CMO/Seattle         | Richard.Nelson@ed.gov            | 206 615 2647 | X          |
| Phil Schultz     | OPE/PPI                         | Philip.Schultz@ed.gov            | 202 502 7682 | X          |
| Donald Conner    | OPE/PPI                         | Donald.conner@ed.gov             | 202 502 7818 | X          |
| Roger Hartmuller | Common Identifiers              | roger.l.hartmuller@accenture.com | 202.962.4160 | X          |
| Terry Helwig     | Framework Team                  | terry.helwig@accenture.com       | 202.962.0880 | X          |
| John Brooks      | Framework Team                  | jsbrooks@bearingpoint.net        | 202.962.0821 | X          |
| Nate Brown       | Framework Team                  | nathan.r.brown@accenture.com     | 202.962.0868 | X          |
| Rhonda Singleton | Framework Team                  | rhondasingleton@bearingpoint.net | 202.962.0782 | X          |

#### II. Agenda:

- General overview for the purpose of this meeting and the 2 subsequent meetings. This meeting is the 'kick off' meeting. The purpose is to confirm and prioritize issues relating to the data used for analytics and report gathering. The second meeting may include some of the same group of people who will break into 4 sub-groups (Aid, School, Person, Financial Partner). The groups will 1) Identify new data issues and confirm previously identified issues. 2) Clarify issue wording/meaning. 3) Capture affected parties and or system. And 4) Prioritize issues. Sub groups will then report back to whole group. The third meeting will be a Consensus Meeting to combine content of first and second meetings, identify key findings and prioritize findings with enterprise wide focus. The second intent of the Consensus meeting will be to make recommendations and cost benefit analysis for prioritized findings. We want to come out of this project with a Data Quality Plan
- It was explained that the purpose of the meeting was to document instances when there is missing or unattainable information that may be hard or impossible to get to for the purpose of reports. Questions were asked



*Why?*

Answer: It was answered that the reason we are doing this is to resolve the stovepipe issues with Access, Analytical, Specific Elements, and Systems and to instead facilitate accessibility across the enterprise.

*Can we add to the list?*

Answer: If there are issues that are not identified on the spreadsheet provided we can add them

*How do we know if there is a problem with the data if we can't get to the information?*

Answer: Not being able to get to desired data for reports/analysis is a good example of a problem.

- The Data Quality Issues – Research and Policy Spreadsheet was reviewed. It was explained that the content of the spreadsheet came from a variety of sources. Some information came from Data Strategy team meetings, some came from NSLDS and COD meetings and some came from other design discussions. Additional information and clarification of issues was provided and noted on the Data Quality Issues – Research and Policy spreadsheet
- The group was able to pull out some main issues that are high and medium high in priority. The New issues are:
- High Priority
  - Access to Information
  - FP Data Mart/ FMS/ NSLDS impacts to program reviews
  - Quality of data in DMCS
- Special Emphasis given to the following items
  - RID/DUNS/Common ID
  - History of Outstanding Principal Balance
  - Single data source from which to pull Dashboard Matrix, Final Data & Budget Data
  - Identifying those who need access, their level of access, roles based to improve decision making efficiency
  - Document the one off pieces of information – ties into single data source issue above
  - Graduation Date/Status
- Additional Items Include
  - FP Data Mart – Concern that the data is older than desired
  - Data from COD (Migration of data from RFMS)
  - The Common Ids from outside sources (outside FSA) for cross program comparisons



- When marrying FFEL and DL data, cannot do based on committed account through a single system
- IRS match with data definition (total income, gross income)
- Following review of the spread sheet additional points were made. One point was how to handle Knowledge Management
  - How do we document information that resides in an individual
  - How do we document quirks

A final question was raised about how changes/repairs would be passed on to users across the organization. The answer provided was that a Communication Plan would be part of the implementation strategy

**III. Action Items:**

| Action Item   | Owner                   | Date Due |
|---|-------------------------|----------|
| Update Data Quality Issue Spreadsheet and Compile Meeting Minutes, route for review by Integration Partner.   | Rhonda Singleton        | 6/11/03  |
| Provide Feedback to meeting minutes and Data Quality Issue updates  | Nate Brown, John Brooks | 6/12/03  |
| Make necessary revisions and distribute to FSA  | Rhonda Singleton        | 6/13/03  |
| Parking Lot Issue – Access enrolment information and overall access to information  |                         | 6/18/03  |
| What is the scope of some NSLDS related issues including 1) Stats on incorrect identifiers related to 'first come first serve' information gathering, 2) The status on rehabbed loans going back to GA vs SLMA as FISLs that are not reported | Valerie Sherrer         | 6/18/03  |

**Mad Dog Meeting – Entity Breakout Session**

Wednesday, June 18, 9:30 - 10:30pm, 830 UCP Room 107



**I. Invitees/attendees:**

| Name             | E-Mail                           | Phone (Work) | Area                |
|------------------|----------------------------------|--------------|---------------------|
| Allen Proddgers  | Allen.prodgers@ed.gov            | 202 377 3276 |                     |
| Keith Wilson     | Ketih.Wilson@ed.gov              | 202 377 2591 |                     |
| Dwight Vigna     | Dwight.vigna@ed.gov              | 202 377 3436 |                     |
| Ida Mondragon    | Ida.mondragon@ed.gov             | 202 377 3243 | APS                 |
| Kathleen Wicks   | Kathleen.wicks@ed.gov            | 202 377 3110 |                     |
| Isiah Dupree     | Isiah.Dupree@ed.gov              | 202 377 3137 |                     |
| Paul Hill        | Paul.hill.jr@ed.gov              | 202 377 4323 |                     |
| Dena Bates       | Dena.bates@ed.gov                | 202 377 3204 |                     |
| Linda Paulsen    | Linda.Paulsen@ed.gov             | 202 377 3402 | COO                 |
| Chris Hill       | Chris.hill@ed.gov                | 202 377 4314 | PEPS                |
| Jay Long         | Jay.long@ed.gov                  | 202 377 4313 | PEPS                |
| Jeanne Saunders  | Jeanne.saunders@ed.gov           | 202 377 3246 |                     |
| Patricia Trubia  | Patricia.trubia@ed.gov           | 202 377 3189 | CMO                 |
| Kitty Wooley     | Kitty.wooley@ed.gov              | 202 377 3153 | OPS                 |
| Mike Sutphin     | Mike.sutphin@ed.gov              | 202 377 3726 | FP                  |
| Roger Hartmuller | Roger.l.hartmuller@accenture.com | 202 962 4160 | Integration Partner |
| Heather Stevens  | Heather.m.stevens@accenture.com  | 202 962 0845 | Same                |
| Nate Brown       | Nathan.r.brown@accenture.com     | 202 962 0868 | Same                |
| David Marker     | David.r.marker@accenture.com     | 202 962 0664 | Same                |
| John Brooks      | jsbrooks@bearingpoint.net        | 202 962 0821 | Same                |
| Rhonda Singleton | Rhondasingleton@bearingpoint.net | 202 962 0782 | Same                |

**II. Agenda**

- Reviewed purpose: to review previously captured and gather additional data quality issues. Broke into small groups, by FSA Business Data entity: School, Person, Aid, and Financial Partner to reviewed the issues list, confirming wording / meaning, and then prioritize the top 5 from each section. During this breakout, the groups also identified issues they considered to be “quick fixes” regardless of priority. A “quick fix” was defined as little disruption to existing processes / systems with relatively low cost.
- Reconvened to report how issues were prioritized and communicate identified quick fixes.
- See “Data Quality Mad Dog June 18.xls” for complete results regarding issues, additional comments, prioritization and “quick fix” designations.

**Mad Dog Consensus Meeting**

Monday, June 25, 9:00 – 11:00 am, 830 UCP Room 221B

**I. Invitees/attendees:**



| Name             | E-Mail                           | Phone        | Area                |
|------------------|----------------------------------|--------------|---------------------|
| Allen Prodggers  | Allen.prodggers@ed.gov           | 202 377 3276 |                     |
| Keith Wilson     | Ketih.Wilson@ed.gov              | 202 377 2591 |                     |
| Dwight Vigna     | Dwight.vigna@ed.gov              | 202 377 3436 |                     |
| Rosemary Beavers | Rosemary.beavers@ed.gov          | 202 377 3126 |                     |
| Cyndi Reynolds   | Cyndi.Reynolds@ed.gov            | 202 377 4546 | Analysis            |
| Tony Oliveto     | Tony.Oliveto@ed.gov              | 202 377 3078 |                     |
| Paul Hill        | Paul.hill.jr@ed.gov              | 202 377 4323 |                     |
| Jim Lubell       | James.Lubell@ed.gov              | 202 502 7683 |                     |
| Linda Paulsen    | Linda.Paulsen@ed.gov             | 202 377 3402 | COO                 |
| Chris Hill       | Chris.hill@ed.gov                | 202 377 4314 | PEPS                |
| Dena Bates       | Dena.bates@ed.gov                | 202 377 3204 |                     |
| Jeanne Saunders  | Jeanne.saunders@ed.gov           | 202 377 3246 |                     |
| Patricia Trubia  | Patricia.trubia@ed.gov           | 202 377 3189 | CMO                 |
| Kitty Wooley     | Kitty.wooley@ed.gov              | 202 377 3153 | OPS                 |
| Mike Sutphin     | Mike.sutphin@ed.gov              | 202 377 3726 | FP                  |
| Jane Holman      | Jane.Holman@ed.gov               | 202 377 4322 | Title IV            |
| Valerie Sherrer  | Valerie.Sherrer@ed.gov           | 202 377 3547 | NSLDS               |
| Kirk Siegwarth   | Kirk.Siegwarth@ed.gov            | 202 401 0338 | Budget              |
| Anthony Laing    | Anthony.Laing@ed.gov             | 202 377 3112 |                     |
| Pam Eliadis      | Pam.Eliadis@ed.gov               | 202 377 3554 | NSLDS               |
| Larry Parker     | Larry.Parker@ed.gov              | 202 377 3550 | NSLDS               |
| Brenda Avoletta  | Brenda.Avoletta@ed.gov           | 202 377 4048 | Analysis            |
| Matt Fontana     | Matteo.Fontana@ed.gov            | 202 377 3005 |                     |
| Katie Crowley    |                                  |              |                     |
| Roger Hartmuller | Roger.l.hartmuller@accenture.com | 202 962 4160 | Integration Partner |
| Nate Brown       | Nathan.r.brown@accenture.com     | 202 962 0868 | Same                |
| David Marker     | David.r.marker@accenture.com     | 202 962 0664 | Same                |
| Terry Helwig     | Terry.Helwig@accenture.com       | 202 962 0880 | Same                |
| John Brooks      | jsbrooks@bearingpoint.net        | 202 962 0821 | Same                |
| Rhonda Singleton | Rhondasingleton@bearingpoint.net | 202 962 0782 | Same                |

## II. Agenda

- Chose Top 10 priorities and identified 5 “Quick Hit” items from the list of 29 data quality issues. This list of 29 items was already a condensed version of issues raised through the previous set of Mad Dog meetings where entity and analytics specific priority issues were noted for enterprise prioritization
- Small teams of FSA business experts were formed to provide Subject Matter expertise regarding the documentation of details regarding the priority quality issues
- See “Data Quality Mad Dog June 25 v2.xls” for complete results regarding issues, additional comments, prioritization and “quick hits”.
- Reviewed purpose: To come to a consensus on the top 10 high priority data quality issues. To verify/clarify Quick Hit items. Broke into small groups, to review the issues list, confirming wording / meaning, and then prioritize the top 10 most important issues. As a group the list of 20 HI priority items was reviewed. Clarification and or re wording of the issues was done and agreed on by all attendees. One issue was removed form the list. It was agreed that it is too big to handle with the other issues. Issue 12 as follows, was removed from this issue
  - Factors such as the definition of married and separated are determined differently by FSA than by the IRS and therefore the value of Total Income



and Average Gross Income are not the same between these two agencies. This will result in difficulty implementing potential matches/data verification between FSA and IRS.

It was agreed that issue #24 should be removed from the Quick Hit list and placed on the HI list in the place of item #12. Issue # 24 states

There is currently no SSA or INS validation for PLUS Borrowers. To verify ss# and citizenship. This can lead to the lending of Title IV funds to ineligible borrowers

- Additional clarifications include:
  - Issue # 6 - Issue is with all changes to data not just professional judgment changes
  - Issue # 7 - Issue also includes the validity of the data available
  - Issue # 17 - Issue needs to be restated
  - Issue # 21 - Issue needs to be restated to include all systems requesting an error file from FMS and or a revision to the way FMS works the errors. This is no longer a Quick Hit
  - Issue # 22 - The DLSS to DMCS data transfer has been resolved, however, still at issue is the DMCS to DLSS transfer. This transfer is currently being worked on via IBM internal systems
  - Issue # 28 - Still a Quick Hit even with the requested addition of VFA Fee Payments and Performance Measures.
- Broke into sub groups to chose top 10 HI priority items
- Reconvened to discuss how issues were prioritized. Top 11 items were identified and sub groups were agreed on for addressing each issue as follows.
  - Issues # 3 and 4 - Linda Paulsen, Valerie Sherrer, and Pam Eliadis
  - Issues # 5 & 12 - Rosemary Beavers and Jeanne Saunders
  - Issue # 6 - Jeanne Saunders and Ida Mondragon
  - Issue # 8 - Paul Hill, Mike Sutphin, Matt Fontana
  - Issue # 10 - Pam Eliadis, Larry Parker
  - Issue # 11- Jeanne Saunders, Dwight Vigna, Allen Prodggers, Larry Parker
  - Issue # 13/14 - Allen Prodggers and Dwight Vigna
  - Issue # 20 - Kitty Wooley and Tony Laing
  - Issue # 21 - Linda Paulsen and Jay Hurt
- See "Data Quality Mad Dog June 25 v2.xls" for complete results regarding issues, additional comments, prioritization and "quick hits".