

Meeting Minutes
Case Management, Data Analysis Capability Building

Date: November 22, 2002, 12:30-2 PM

Attendees: Denton West (Case Management, Denver, Systems Coordinator)
Randy Wolf (Case Management, Washington, Director of Data Analysis)
Richard Nelson (Case Management, Seattle, Co-Team Lead)
Mark Hamburg (Case Management, Seattle, Systems Coordinator)
Karen Chauvin (Case Management, Washington, Case Management Leadership)
Jeff Kober (Public Strategies Group)
Howard Weitzner (Accenture)

Purpose: - Created outline for Data Analysis learning track to build data culture
- Identify next steps to begin developing capabilities to achieve tasks on outline
- Recommend actions/proposal to Area Case Directors who have primary responsibility for the Case teams

Approach: - General Approach: Two pronged: Learning track strategy for core functions within Case Management and short-term capability development in support of FY03 performance goals
 o Start by looking at immediate data analysis needs
 o Concurrently, will look at long-term, larger effort for broad capability building within Case Management
- Don't restrict data analysis training to program reviews; should broaden to address data analysis skills for all Case Management
- May segment training for people at different levels in organization
 o Upper Management
 o ACD/Co-team leads
 o Staff
 o IT database experts
- Need to baseline capability across all regions; some regions have more data skills than others

Competencies: - Refer to grid
- Segment Data Analysis tasks:
 o Identify Need for Data and Data Required
 o Retrieve Data
 o Analyze and Quality Check Data
 o Apply Data to Program Review
 o Present Data

- Segment conceptual skills (e.g. data query) vs. mechanical skills of data extraction that is system specific

Observations: - Similar data analysis competencies outside of Case Management would be valuable across the organization, this should be considered later

- Needs for additional data not currently available may be identified to further support program reviews; this could drive system requirements and will be considered later

Challenges: - Different management problems may be required for same problems (i.e. schools may have different characteristics that necessitate different approaches, per OPE policy); thus requiring more strategic solutions

Next Steps: - Jeff to draft agenda to scope working session in Seattle
- Jeff to meet with Mark and Richard in Seattle early December for 1-2 days
- Identify KSA (knowledge, skill, abilities) to fill in the grid
- Get input from Denton as well, either when he is in DC or Seattle
- Recommendations to quickly develop competencies to be identified from this grid
- Then review completed grid with this larger group and Case Management leadership

Notes: - Minutes from last meeting should be revised to reflect that Mark works with Richard (not Randy) in Seattle as a best practice to provide detailed IT and program knowledge