

**Meeting Minutes**  
**Case Management, Data Analysis Capability Building**

Date: November 15, 2002, 12-1 PM

Attendees: Denton West (Case Management, Denver)  
Mark Hamburg (Case Management, Seattle)  
Bill Ryan (FSA University)  
Jeff Kober (Public Strategies Group)  
Howard Weitzner (Accenture)

Purpose: - Address immediate need from Case Management leadership to expand the role and effectiveness data analysis has for program reviews  
- Discuss capability and performance needs for data analysis within Case Management to formulate recommendations regarding developing the necessary data analysis capabilities to assist Case Management meet their FY03 performance goals which include:

- o Adopt data driven approach to Case Management
- o Decrease time to identify high risk schools through audit reviews
- o Decrease decision making time
- o Better integrate schools information through better access

Competencies: - Both Denton and Mark agreed that a combination of database and program knowledge was required to effectively extract and apply data to support program reviews  
- Expanded critical thinking skills, a mindset to look for the information is critical  
- Systems knowledge (e.g. NSLDS)  
- Basic data queries

Observations: - Mark described his teamwork with Randy as a best practice to provide detailed IT and program knowledge; this “pairing” approach should be applied elsewhere  
- Identifying violations is a product of a two key tasks:

- o Recognize an abnormality by program reviews
- o Retrieve data from systems to investigate further

- Most people in Case Management recognize the abnormalities but very few are expert at the IT/database functions  
- Denton and Mark often support data analysis needs for other regions  
- Violations at one school are often an indication of a pattern of similar violations at several schools; through the analysis of common data characteristics those schools likely to have violations can be isolated and avoid a “hit or miss” approach  
- There is a perception among many that data analysis is not in scope for program reviewers, rather data analysis should be done by people dedicated to IT/data  
- It is worth exploring how to break the dependency on IT/data extraction and data analysis; more people would be able to analyze the data if the data were more accessible

Challenges:

- The greatest positive impact seems to be in those regions where Area Case Directors (ACD) place significant value on data analysis
- All regions do not have someone with the IT/database skills to perform the more complex queries and analysis
- The usability of NSLDS is difficult for many to extract data
- Case Management leadership has determined that there needs to be more emphasis placed on data analysis but this does not seem to have been communicated throughout the organization

Next Steps:

- The next conference call will be Friday, November 22 at 12:30
- Formulate short term recommendations which may include:
  - o Capture best practice data and program skills as input to developing a learning track specific to data analysis
  - o Pair data and program experts
  - o Communicate emphasis on data analysis to support a data driven culture