Working With Data Using a Project Manager Approach
Presenters

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Nashville, TN – Cancelled Due to COVID-19
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Agenda

• Introductions and background information
• Data management practices
• Thinking like a project manager…managing like a boss
• Basic project management
Introductions

• Who *we* are
• Who *you* are
  ▪ How many are *data managers*?
  ▪ How many are *State Performance Plan/Annual Performance Report (SPP/APR) leads*?
  ▪ How many manage multiple tasks throughout the year?
  ▪ How many have *Project Manager* or *Project Management* in your position descriptions?
Background Information

Things you do

• What are things you think about in managing your work
  ▪ Day to day
  ▪ Week to week
  ▪ Month to month

• What tools or strategies do you use to manage your work
  ▪ To-do checklists or spreadsheets
  ▪ Calendar of activities to ensure work is progressing
  ▪ Documented data processes that explain the “Who, What, Where, When, Why, and How”
Data Management Practices
Sound Familiar?

• **Hero Approach**
  - One person
  - All the knowledge
  - All the responsibility

• **Group Approach**
  - Lack of coordination
  - Lack of consistency
  - Holes in the process

• **Haphazard Approach**
  - No organization
  - Random assignments
  - Inconsistent results

• **Oops Mode**
  - Last-minute effort
  - No plan
  - Mad scramble
Some Activities to Avoid Chaos

• Establish business rules
• Document data definitions
• Develop data processes
• Map system for data flowing to the state
• Develop methods to maintain data security
• Store, review, validate, and maintain data
• Submit data to appropriate authority
• Share results and reports with schools and districts
Thinking Like a Project Manager…
Managing Like a BOSS!
“A project manager is a person who has the overall responsibility for the successful initiation, planning, design, execution, monitoring, controlling and closure of a project....The project manager should make sure they control risk and minimise [British English] uncertainty.”

~ Duncan Haughey

Retrieved from https://www.projectsmap.co.uk/the-role-of-the-project-manager.php
Shifting Our Mindset

Everyday you are managing projects in your role as a data manager.
Projects We Do or Projects We Manage

• Collecting Child Count data from LEAs
• Submitting accurate and complete IDEA data
• Completing the State Performance Plan/Annual Performance Report (SPP/APR)
• Computing LEA Determinations
• Responding to specific data requests
• Providing LEA training
Key Questions

• Are you the only one working on the project, or are others involved?

• If others are involved, are you managing their work, or does someone else set their priorities?
Basic Project Management
Basic Project Management

• Define a project goal
• Identify what tasks are necessary to achieve the goal
• Plan, organize, and manage tasks based on time and resources available
• Communicate with others the progress toward achieving your goals
• Manage expectations in relation to deliverables and timelines
Defining a Goal

• What are the desired outcomes you hope to accomplish?
• Why is the project being done? Is there background context?
• When does the project start and end, and are there other key dates and benchmarks along the way?
• What is within the scope of the project, and what is outside the scope?
Identifying Tasks

- List the main tasks that you must complete to achieve the goal (e.g., collect data, validate data, submit data)
- Break down each task into steps
- Identify subtasks and steps in a cyclical manner

*IDC Data Processes Protocols can help identify and document these tasks.*
Identifying Critical Paths

• Are there some tasks that should happen in a specific order?
• Are there steps that you need to complete before the next step(s) can begin?
• Are there steps that you can do in parallel?

Can you think of examples of a critical path in your work or steps that can be done in parallel?
**Task List**

- Keep track of upcoming tasks
- Document status of ongoing tasks

<table>
<thead>
<tr>
<th>#</th>
<th>Task description</th>
<th>Current status</th>
<th>Service area/person responsible</th>
<th>Target date</th>
<th>Date closed</th>
<th>Additional comments</th>
</tr>
</thead>
</table>
### Create a Visual Timeline

| Task/Week          | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
|--------------------|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| Child Count collection |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| Child Count review  |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| Child Count submission |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| End-of-year collection |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| Exiting review      |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| Exiting submission  |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| Assessment review   |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| Assessment submission |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| SPP/APR submission  |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |
| MOE/CEIS submission |   |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |

**Maintenance of Effort/Coordinated Early Intervening Services (MOE/CEIS)**
Manage Expectations – Minimize Surprises

• Deliverables
  ▪ When do you expect to complete specific tasks?
  ▪ Is there a delay?
  ▪ What is the impact?

• Responsibilities
  ▪ What does the task include?

• Communications
  ▪ What is the level of communication?
  ▪ What is the frequency of communication?
Communication and Coordination

• Provide clear roles and responsibilities
• Establish open and regular channels of communication
  ▪ Consider a kickoff meeting to set expectations
  ▪ Provide regular status reports or memos
  ▪ Schedule regular meetings to touch base with both those who report to you and those to whom you report
  ▪ Provide meeting notes that include action items
RACI Matrix or Responsibility Charts

RACI matrix
- R = Responsible
- A = Accountable
- C = Consulted
- I = Informed

Responsibility chart
- R = Responsible
- S = Secondary responsibility
- A = Approval
### Coordination Tool: RACI/Relationship Matrix

<table>
<thead>
<tr>
<th>Project tasks</th>
<th>Data manager</th>
<th>Data analysts</th>
<th>Subject matter expert</th>
<th>Special education director</th>
<th>EDFacts coordinator</th>
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<tbody>
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<td>Child Count data collection</td>
<td>R,A</td>
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<td>C</td>
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Contact Us

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For More Information

Visit the IDC website
http://ideadata.org/

Follow us on Twitter
https://twitter.com/ideadatacentre

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http://www.linkedin.com/company/idea-data-center
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