



INTERACTIVE INSTITUTES **2020**

BUILDING AND SUSTAINING A CULTURE OF HIGH-QUALITY DATA

Minimizing Chaos and Maximizing Quality: Managing the SPP/APR Process



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CENTER

Collect, Report, Analyze, and
Use High-Quality Part B Data



Presenters



Fort Worth, TX – March 3–4, 2020

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Nashville, TN – Cancelled Due to COVID-19

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Agenda



- Introductions and background
- Applying project management concepts to the State Performance Plan/Annual Performance Report (SPP/APR)
- Group discussion
- Hands-on activity



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Introductions



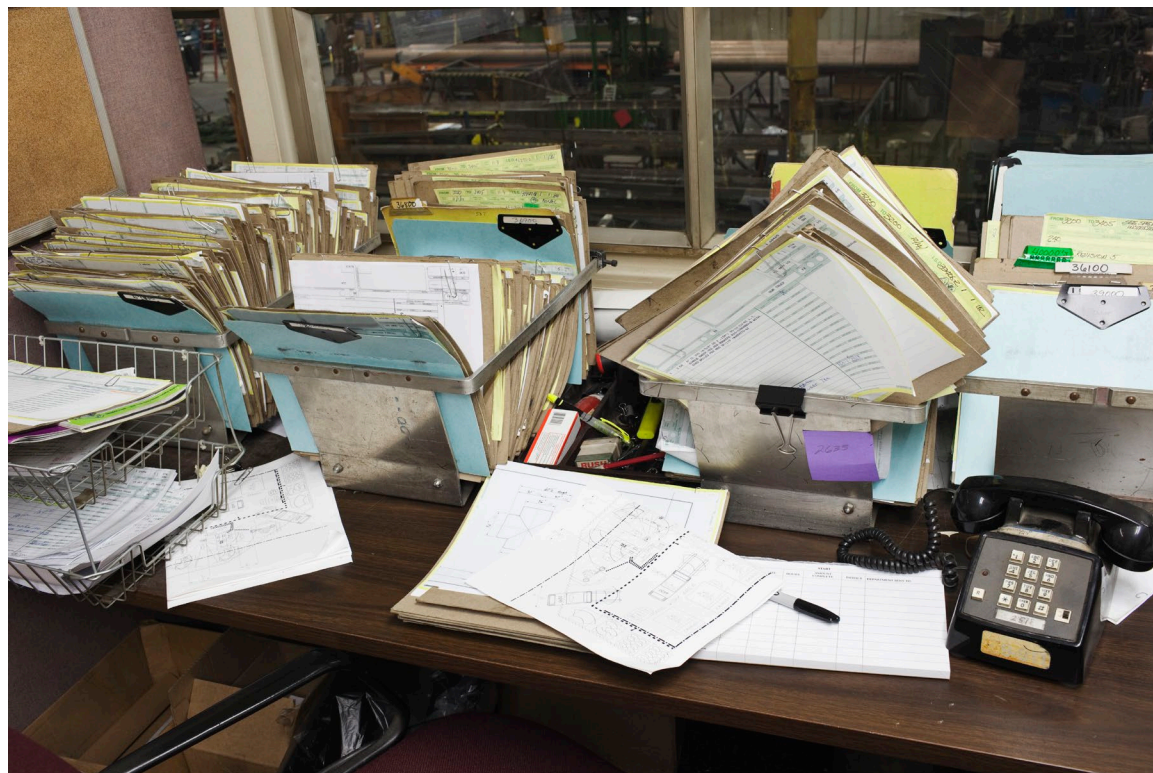
- Who ***we*** are
- Who ***you*** are
 - How many are ***data managers***?
 - How many are ***SPP/APR leads***?
 - How many manage multiple tasks throughout the year?
 - How many have ***Project Manager*** or ***Project Management*** in your position descriptions?



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Moving From Chaos to Order



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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*

An Alternative Approach



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Thinking Like a Project Manager



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.projectsmart.co.uk/the-role-of-the-project-manager.php>



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Basic Project Management



- Define the project goals
- 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



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Applying Project Management Concepts to the SPP/APR



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Understanding the Scope of Work



- SPP/APR Instructions
- SPP/APR Memo
- SPP/APR Measurement Table
- SPP/APR Template
- SPP/APR User Guide
- Webinar materials or recordings

Which of these are most useful for your work with the SPP/APR?



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Identifying Tasks for the SPP/APR



- List the main tasks that you must do to successfully complete and submit the SPP/APR
- Break down each task into steps
- Identify subtasks and steps in a cyclical manner
- Identify the person or persons responsible for each task

Reviewing data processes protocols can help in identifying tasks.



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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?



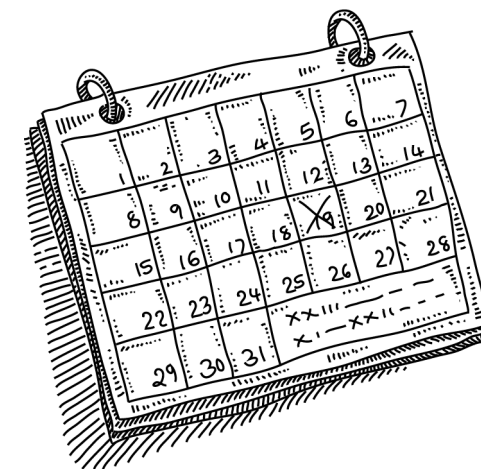
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Identify Key Dates

Before preparing a timeline, list important dates that will serve as markers to track progress.

- SPP/APR web application open date
- SPP/APR due date
- Date source data are available
- Dates of stakeholder meetings



What other dates are important to consider before setting a timeline?

What needs to be accomplished by each of these dates?

Define Internal Timelines

- When should the data be ready? When will it be analyzed?
- What is the deadline for the first draft of the narrative?
- How much time should you allot for review?
- Which indicators should you work on first?
- Will you have the same deadlines for all indicators, or will you have staggered internal deadlines?

Consider buffering the time required for each task to account for possible delays or unforeseen setbacks.

Identify Key Personnel

- Content experts
- Data experts
- Reviewers
- Stakeholders
- Others



Assess Availability of Staff



After identifying staff responsible for various tasks, consider how that work fits into their current workload.

- How do the deadlines fit with staff availability?
- Are there responsibilities that others can take over to free up time?
- What steps are dependent on the work for which key staff are responsible?

How might you have to adjust the schedule have to accommodate staff availability?



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Monitoring Progress



A task tracking list can help you monitor the status of ongoing tasks and ensure no tasks are skipped.

| # | Task description | Current status | Service area/person responsible | Target date | Date closed | Additional comments |
|---|------------------|----------------|---------------------------------|-------------|-------------|---------------------|
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |



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

What communication strategies work best for you?



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SPP/APR Kickoff Meeting



- Whom should you invite to a kickoff meeting for the SPP/APR?
- What would you include in the agenda?
 - SPP/APR Measurement Table and key documents
 - Roles and responsibilities
 - Timelines
 - Communication plan

How many of you have had an SPP/APR kickoff meeting?



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Coordinating the SPP/APR



What is your approach to coordinating your SPP/APR?

- Do you have a designated SPP/APR *project coordinator*?
- Do you have indicator-by-indicator task assignments?
- Do you have a different approach?

What works well about your approach for coordinating the work?



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Coordination Challenges



What are your biggest challenges for coordinating your work on the SPP/APR?



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Tools for Managing the SPP/APR



What tools do you use to manage the completion of your SPP/APR?

- To-do lists/checklists
- Timeline for important dates or events
- Task analysis tools with person or persons responsible
- Feedback tools for reporting progress



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Hands-on Activity With Tools for Coordinating Your Work



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Group Activity



1. Divide into small groups
2. Identify the tasks required for a specific indicator
3. Plan a tentative timetable related to the identified tasks



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Activity Discussion



- What about these tools was helpful?
- What other tools might be helpful to manage your SPP/APR work?
- Do you have staff in your agency with project management skills?
- Do you need technical assistance to incorporate project management techniques into your work on the SPP/APR or submission of IDEA data?



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Contact Us



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