ii20 INTERACTIVE INSTITUTES 2020
BUILDING AND SUSTAINING A CULTURE OF HIGH-QUALITY DATA

Minimizing Chaos and Maximizing Quality: Managing the SPP/APR Process Using a Project Manager Approach

IDC IDEA DATA CENTER
Collect, Report, Analyze, and Use High-Quality Part B Data

Westat®

Presenters

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Agenda

- Introductions and background
- Identifying challenges with coordinating the State Performance Plan/Annual Performance Report (SPP/APR) effort
- Applying project management concepts (SPP/APR)
- Planning for future changes to the SPP/APR

Poll Question: Introductions

Please select all that apply to your role

- I am a data manager
- I am an SPP/APR lead
- I manage multiple tasks throughout the year
- I have Project Manager or Project Management in my position descriptions

Moving From Chaos to Order

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*

Breakout Discussion: SPP/APR Challenges

SPP/APR Reflections

- How would you describe your agency's approach to managing the SPP/APR?
- In reflecting back on the SPP/APR this past year, what worked well in the process of compiling and reporting your SPP/APR ?
- What challenges or sticking points did you encounter?

Share Out

- What worked well for your group in the process of compiling and submitting the SPP/APR this past year?
- What common challenges or sticking points did your group encounter?

An Alternative Approach

Shifting Our Mindset

Everyday, you are managing projects in your role as an SPP/APR lead or data manager.

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

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

Applying Project Management Concepts to the SPP/APR

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?

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.

Identifying Critical Paths

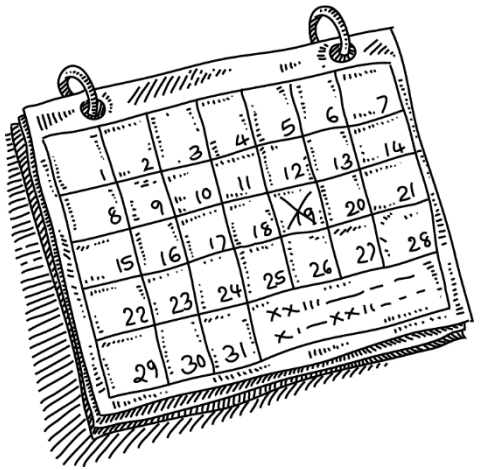
- Are there some tasks that should happen in a specific order?
- Are there steps that you need to complete before the next step(s) can begin?
- Are there steps that you can do in parallel?

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

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



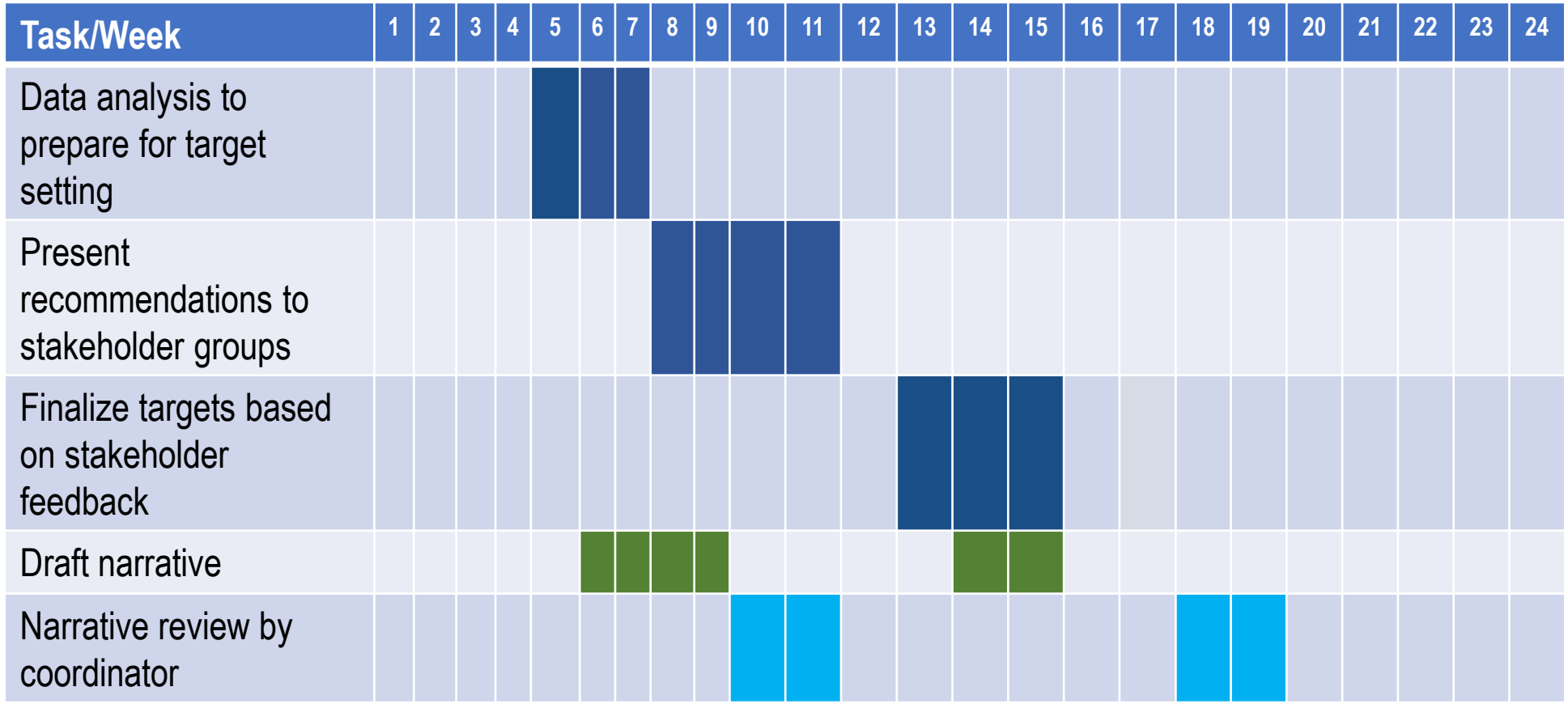
What other dates are important to consider before setting a timeline? What do you need to accomplish by each of these dates?

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.

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
Data analysis to prepare for target setting																								
Present recommendations to stakeholder groups																								
Finalize targets based on stakeholder feedback																								
Draft narrative																								
Narrative review by coordinator																								

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 to accommodate staff availability?

Monitoring Progress

A task tracking list can help you monitor the status of ongoing tasks and ensure you don't skip any tasks.

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

Communication and Coordination

- Manage expectations; minimize surprises
- 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?

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?

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

Project tasks	Juan	Christine	Samantha	Jade	Dylan
Indicator 1	R, A	I	C	I	
Indicator 2	C	R	C	I	I
Indicator 3	C		C		R, A
Indicator 4	R, A	I	C	I	I
Indicator 5	C	R	C	I	I
Indicator 6	C		I		R, A
Indicator 7	R, A	C	C	I	
Indicator 8	C	C	R, A	I	

Tools for Managing the SPP/APR

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

Applying Project Management Concepts in Kansas

- Choose an organization tool
  - Don't overthink it. Just choose something and use it!
    - Investigate what you have
    - Investigate what is free
    - Talk to those who know more than you about project management
- Choose one process as a start
  - Select the process that, on its own, runs the most smoothly

Looking Forward

- With the new SPP/APR OMB package that will be finalized in August, there is the potential for significant changes to many indicators
- Consider how these project management tools can help support your preparations

“Let our advance worrying become advance thinking and planning.”

– Winston Churchill

Breakout Discussion: Planning for Change

Preparing for Changes in the SPP/APR

1. Develop a list of tasks that you will need to do to prepare for the changes in the SPP/APR.
2. What timelines do you need to consider?
3. What staffing needs can you identify?
4. What communication needs can you identify?
5. How might the tools shared today help you manage the development of your SPP/APR

Share Out

Please share some of the highlights from your group discussion related to

- Important tasks
- Key timelines
- Staffing needs
- Communication needs

Closing Thoughts:

"If you fail to plan, you plan to fail."
– Benjamin Franklin

"A good plan today is better than a perfect plan tomorrow." – Proverb

Please enter into the chat box one take away from today's session to help with next year's SPP/APR.

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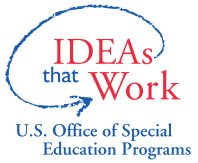
Project Officers: Richelle Davis and Rebecca Smith