

**DATA Project
Progress Review
February 2008**

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February DATA Project Progress Review

1 Executive Summary

With the delivery of the Focus Group Reports in late January, the project was able to begin work on establishing requirements for Professional Development, Data file format, Policies, Procedures and Tools as they are related to the project. The Data Quality Work Group (DQWG) was convened and received an overview of the Focus Group findings. Within the DQWG Advisory and Task Force Committees were formed in order to assist planning for the project. The DQWG is also responsible for the overall governance of the DATA Project.

Other project related meetings held during the month of February were:

- OUS Data Share (IDTS) meeting – IDTS will provide for the exchange of student transcripts from the K12 community to higher education. This is required by the Federal Government with regards to the SLDS grant program.
- LDS Webex Meeting – Monthly meeting convened by the Federal Government in an effort to get all the grant states together to share ideas and project progress. All the states involved are in various stages of their projects so the ability to share ideas and lessons learned will prove to be invaluable.

The DATA Project's website became fully operational and has quickly become an integral part of the project's communication structure. The website address is <http://oregondataproject.org>.

The project's Governance Plan and Communications Management Plan were written and approved. Both plans are available on the project website.

Two draft policies, Data Use and Information Security (InfoSec), were posted to the website for review by members of Oregon's Educational community. Feedback is due by March 7, 2008. At that time the feedback will be collated and then discussed at the next DQWG Task Force meetings.

Next month the project will see continued progress on the definition of requirements for Professional Development, Data file format, Policies, Procedure and tools. Additional Project Management plans will be completed as well. The project team will meet with representatives from the National Center for Educational Services on March 6, 2008. This will be an ongoing monthly meeting in order to keep the federal government apprised of the project's progress. A report from that meeting will be included in March's Progress Review.

2 Summary of Progress for the month of February 2008

2.1 Review of Activities and Outputs

2.1.1 Project Related Meetings

- Focus Group Executive Summary Review with Education Management Team 2/5/08
- Data Quality Work Group (DQWG) 2/11/08
- OUS Data Share (IDTS) 2/14/08
- LDS Webex Meeting (Monthly) 2/15/08
- NWREL Conference Call 2/22/08

2.1.2 Project Reports

- Project Status 2/15/08
- Project Status 2/22/08
- Project Progress Review 2/29/08

2.1.3 Project Documentation – Approved/Posted

- Focus Group Reports
- DATA Project Governance Plan
- DATA Project Communications Plan

2.1.4 Project Documentation – Under Review

- Data Use Policy
- InfoSec Policy

2.1.5 Project Tasks – Completed

- Focus Group Session Reports
- Project Website operational

2.1.6 Project Tasks – In Progress

- Data Requirements for both KIDS III and IDTS
- Professional Development Training Requirements
- Policies, Procedures and Tools Requirements
- Project Management Documentation
 - Project Change Management Plan
 - Project Management Plan
 - Project Plan

3 Planned Activities for March 2008

3.1 *Project Meetings*

- Weekly KIDS Project Meeting – Every Monday
- IDTS Gap Analysis 3/5/08
- SLDS Project Status Call 3/6/08
- KIDS Project Review 3/11/08
- LDS Webex Meeting 3/21/08

3.2 *Project Reports*

- Project Status Reports (Weekly)
- Project Progress Review (End of Month)

3.3 *Project Documentation – Review and/or Approval*

- Data Use Policy
- InfoSec Policy
- Project Management Documentation
 - Project Change Management Plan
 - Project Management Plan
 - Project Charter
 - Project Scope
 - Project Plan

3.4 *Project Tasks*

- Data Requirements for KIDS III and IDTS
 - Gap Analysis
- Professional Development Training Requirements
- Policies, Procedures and Tools

4 Attachments

4.1 Data Quality Work Group Meeting Notes

4.1.1 General Session

DATA Quality Work Group

Feb. 11, 2008

WESD-Willamette Room

In attendance:

<u>Name</u>	<u>Attended a focus group session?</u>	<u>Name</u>	<u>Attended a focus group session?</u>
Baron Rodriguez	Yes	Steve Langford	Yes
Rinda M. Conwell	Yes	Art Anderson	Yes
Alana Croyle	Yes	Cheryl Williamson	Yes
Megan Monson	No	Joel Robe	Yes
Dawne Huckaby	No	Robin DeLoach	Yes
Les Moore	Yes	Bill Zumwalt	No
Yolonda Garcia	No	Al Pierce	No
Karen Brown Smith	Yes	Krissa Caldwell	No
Jim Harrington	No	Diane Smith	No
Dennis Boston	No	Mike Loretz	No
Rick Wahlstrom	Yes	Jim Newton	No
Mojo Nwokoma	No	Scott Perry	No
Penny Grotting	Yes	Mickey Garrison	Yes
Doug Kosty	No	John Bridges	No

Individuals who signed in but were not present for introductions:

Rod Aust	Tom Luba	EJ Ayers	Scott Smith
Tony Alpert	Theresa Levy		

Overview of Agenda **Baron Rodriguez**

The Governance document will be discussed first, to help us make decisions on the Data project and on the KIDS project. After that Steve and Jenny will go over the executive summary from the focus group sessions. During the group discussion we will review in more detail the Governance plan, Data project plan, professional development program and the website. We'll go over where information will be kept, we want everyone to have up to date information on the project and the website will be used for that purpose. Then will break into two different groups, the technology group and the instructional group.

Roles & Responsibilities **Dennis Boston**

Refer to the stapled handout—the DATA Project Governance Plan. This group is being asked to provide governance for these two projects. Page two has a proposed organizational structure. The work group area is requesting ESD and K-12 involvement. Today we want to complete assignment or volunteering for one of these committees (Task Force or Advisory). Page four delineates roles and responsibilities. Committee assignments should be complete by the end of today. The formal plan will be posted on the website. The advisory group will be kept up to speed on things as far as how the projects are going. The task force is the group that's going to provide us with the information that we need in order to move both projects forward, while keeping both projects coordinated as we move towards completion.

Executive Summary–Q&A Steve and Jenny Carmichael

The focus group process was conducted around the state. Instructional and technology people worked separately. Responses seemed to be similar whether the participants were from urban or rural areas. The second page of the summary describes five key themes:

1. A statewide approach and minimum training requirements
 - a. People want a common base of knowledge for how to use the data. Are we able to use the data to affect student achievement?
 - b. There were questions about managing the cultural shift toward using data “without fear.” Can there be a model for what data literacy looks like K-16 in the future—the goal we are aiming toward.
 - c. Is there a statewide approach for this model? Is there a baseline common to all schools?
2. Training delivery
 - a. Tailor the training to different audiences.
 - b. Take the training to the people. Avoid client travel. There was a suggestion to use the regional ESDs.
 - c. See page 9 of the Final Report
3. A central repository of student data
 - a. Teachers reported the difficulty of retrieving all the data they require from multiple sources.
 - b. Teachers requested longitudinal data on an individual student in one location.
 - c. Having one data location is desired.
 - d. Data submission is required frequently throughout the year through various reports. Can there be one submission?
 - e. Consider the user interface from the perspective of the teacher.
4. Common technical data policies and tools
 - a. The goal is statewide consistency, common definitions, usage models, language...
 - b. Business rules, security, confidentiality, formats could be consistent as well.
 - c. Twenty of the 65 participating districts indicated their network bandwidth was not sufficient.
5. State policies and leadership
 - a. With the consolidated improvement plan, people want to see an exemplar (anchor paper) for a good plan, and a model for an exemplary process.
 - b. Core learning standards are overwhelming; can they be trimmed down?

Summary from Jenny: Standardization, make it local, use the ESDs, look at specific needs, prioritize the needs. The participants are anxious to have something better. Although there is some resistance, people do want the tools. The shift has begun. People now need the resources consistently across the state. When asked what focus group participants were proud of, they spoke of systems which allowed students and parents to access the data and utilize it. There seems to be a lack of consistency, and people are asking for consistency.

DATA Project Plan Dennis Boston

We’re designing for this group, but also to the federal government to get approval for the direction we’re going (the pages after the governance plan in our handout). This page is a flow of work or steps in the process. We’ve already set up student ID. As we work through the list, we will continue checking off this list. The DATA Quality Work Group is going to help with the design phase to determine what to do with the grant to utilize data to inform instruction. Today our focus will center on how KIDS will play in this, the data definition (type and volume), then the types of reports we need.

Professional Development Road Map Mickey Garrison

I went through the final focus group report and identified major categories, the first one being training needs. Then there are training delivery considerations. Evaluation of training follows. Then feedback and development is addressed. Finally, thoughts are listed about drafting the training plan.

Website Megan Monson

Short tour of the website: top-of-the-page navigational links provide general information; lefthand sidebar links provide the tools and documents needed for this group’s work; the main newpage provides fresh information.

Megan took a vote by show of hands on the two URL choices: Oregodataproject.org or Thedataproject.org. The vote determined that it should be **Oregodataproject.org**.

10:45 Technology Group Discussion & Instructional Group Discussion

Discussion summaries will be posted separately for each of these two sessions.

4.1.2 Instructional Session

10:45 Instructional Group Discussion Mickey Garrison

General notes:

- Affirmation for consistent professional development.
- Training must be designed for a number of stakeholders (administrators, teachers, data clerks).
- Altering our current culture can't happen without leadership training.
- Frustration expressed about re-inventing the wheel "all the time."
- Need to have core standards to take next steps of unwrapping and lesson development and formative assessment. Without core standards the field will be doing things that will be redone in a short period of time & get frustrated.
- Provide training for district and building-level teachers on standards and the changes in standards.
- Provide teacher training on formative assessment & create an item bank-look at our existing measures, summative and formative measures, the information collected from these tools, and how to link assessment to instruction.
- Formative assessment must go beyond multiple-choice questions.

Conclusions:

Training should focus on **areas** of data use and the different purposes within each area:

- District - Superintendent, directors, board
- School - Principals, site council, data clerk
- Classroom - principals, teachers, instructional assistance
- Individual students the "Tough-to-teach" - principals, teachers, instructional assistance

Then for each area, look at:

- Training needed
- Training resources (who will create or has created and what else needs to be done)
- Training delivery (face-to-face, webinar, etc.)
- A roll out plan
- Evaluation

Information added Feb. 17 by Mickey Garrison:

NEXT MEETING is April 8th at Willamette ESD from 9 a.m. to 2 p.m. =to respond to a training schedule and direction.

The Task Force will schedule its next meeting at the close of each meeting, but for now please keep April 29 as a possible next meeting date. There is "no" March meeting!

Discussion:

- Dennis (DATA Project Manager) and Scott (KIDS Project Manager) to develop a preliminary listing of data requirements for the task force. Due date to the task force is Friday, February 22, 2008. This will be used as a basis of discussion at the Technology Task Force meeting during the first week of March**.
- Review of the Security TOC was non-specific and the group was asked to review for the next meeting.
- Discussion on letter, presented by Mojo Nwokoma, to districts not yet aligned with one of the 6 regional data warehouses. There was discussion as to the best approach of this letter and several members felt that the wording of the letter was too strong. The letter was going to be reworked and re-presented at our March meeting.
- The Technology Task Force meeting schedule was discussed. Plans were made to meet during the first week of March**. The DQWG as a whole should meet quarterly starting in May unless otherwise required by either the DATA or KIDS projects.
- The group recommended finding a different term than “workgroup” for the technology committee since “workgroup” is part of the entire group’s name. It was recommended that Task Force would be a suitable name for the workgroup committees.
-

****In an effort not to hold a meeting that didn’t effectively utilize everyone’s time, we decided not to hold a Task Force meeting in March. The next Technology Task Force Meeting will be held in conjunction with the Quarterly IT Manager’s Meeting on April 11th. Details will follow separately.**

Open Items:

- Data requirements - gap analysis, KIDS vs. Focus Group input
 - 100% participation into regional data warehouses - "cats and dogs" letter
 - Data Security Document
 - Data Use Document
 - ETL agreement/finalization/initiation
 - Training Needs technical/DATA 101
-

4.2 OUS Data Share (IDTS)

IDTS Planning Meeting

February 14th 2008

9:00am

Oregon State University

Meeting called by: Connie Atchley **Type of meeting:** Planning/Discussion

Facilitator: Connie Atchley **Note taker:** Dennis Boston

Attendees:

OUS

Curt Pederson, CIO

Catherine Williams, Director of Enterprise Computing

Connie Atchley, OUS Administrative Computing Manager

Andy Weiss, Analyst Programmer

Mark Endsley, Director K-16 Alignment

Lisa Mentz, Educational Tech Project Manager

Bob Kieran, Director of Institutional Research Services

ODE

Doug Kosty, Assistant Superintendent – Assessment and Information Services

Baron Rodriguez, CIO – Assessment and Information Services

Dennis Boston, Project Manager – Assessment and Information Services

John Flowerday, Applications Development – Assessment and Information Services

Discussion:

Conversation initially centered around the use of COTS software to manage the exchange of transcript information from high schools to the college/university level.

IDTS – current state, working with some high schools for exchanging information within Oregon and outside the state through the University of Texas.

KIDS/ODS – current state, how information is rolled up to the regional data warehouses and then brought into the KIDS database and ODS, update delay timing.

NWREL Meeting**February 22th 2008**

Course approval system database for college prep courses

10:00 am

Gap analysis IDTS requirements vs KIDS database

Teleconference**Meeting called by:** Baron Rodriguez**Type of meeting:** Discussion**Facilitator:** Baron Rodriguez**Note taker:** Dennis Boston

COTS software expense outweighed advantages of use at this time. Will continue to monitor the maturity and pricing levels of these software packages.

Baron Rodriguez – CIO, Assessment and Information Services

Stay the course with the development of IDTS
Mickey Garrison – EESC School Improvement Director

Dennis Boston – Project Manager, Assessment and Information Services

Need to understand the data gaps between IDTS and KIDS
Seymour Hanfing & Edith Gummer – NWREL**Action items****Deadline**

- | | |
|--|-----------|
| ✓ Connie to send logical system view to Baron | Completed |
| ✓ Baron to meet with his staff to discuss completing gap analysis with OUS personnel | TBD |
| ✓ Connie Atchley and Andy Wiess to travel to ODE to assist with the gap analysis | TBD |
| ✓ After gap analysis is completed, meet again to determine next steps | TBD |
-

4.3 NWREL Conference Call

Discussion:

Baron started off the teleconference discussion with an explanation of the DATA projects view on evaluation and quality assurance. The discussion also centered on what was expected from the Federal Government, which was less that what was previously thought based on conversations with NCES.

The discussion moved to the outcomes of the Focus Group sessions and if there were any surprises. Baron discussed the two surprises from the tech side were the level of knowledge of some of the tech folks on what data was available and where to get it and also bandwidth (connectivity) issues in some of the schools. Mickey discussed that one of the training initiatives would have to center around the development of a data culture and helping folks understand the importance of the data and then would have to move to a DATA 101 where the nuts and bolts use of data would be taught.

Seymour asked for clarification on two points:

1. What would the Federal Government be satisfied with the evaluation and quality assurance – Baron explained that we needed to be gathering information to assist us determining if the project was making a difference and what our lessons learned were. We needed to be able to provide a process that would measure the success of the project.
2. How did we see success in the project in the short term and long term – short term success would come from the initial Professional Development efforts. Long term success would be the ability to sustain the professional development over time. Some of the issues that need to be resolved were funding outside of the project, teach time (pre-service vs in-service), and higher ed involvement by providing a skill set to use data.

Some of the evaluation criteria could be:

1. # of people being trained and gathering information on the usefulness of the training
2. Levels of use of the training that was being provided
3. taking a look at post-testing in Ohio

Conclusions:

Next steps for the DATA Project would be to examine what other states are doing with respect to training/evaluation/quality assurance.

Possibly in the future, accomplish these goals with either a RFP or through and IGA.

4.4 Weekly Status Reports

4.4.1 2/15/08

STATUS REPORT	Status: Green [X] Red [] Yellow []		
	Cause: Time [] Scope [] Quality []		
Date covered:	<i>February 11 – 15 2008</i>		
Project Name:	<i>DATA Grant</i>		
Project Manager:	<i>Dennis Boston</i>	Project Director:	<i>Baron Rodriguez</i>
Milestones-Activity Since Last Report (<i>progress/outcomes & problems</i>):			
<ul style="list-style-type: none"> ▪ <i>DQWG Meeting was held on 2/11. The Facilitated Session Executive Summary was reviewed with the group. The Governance plan for DATA/KIDS projects was reviewed and committee assignments were made. The Instructional and Technology Teams met separately to review next step requirements. A report will be posted on the DATA project website for the group to review.</i> ▪ <i>Made requested changes to the DATA Project Governance plan. Plan will be submitted for final acceptance and posted to the project website.</i> ▪ <i>Communication plan is ready to be distributed to Baron, Mickey and Megan for an initial review.</i> ▪ <i>Completed responses to NCES' feedback to the DATA projects draft project plan. Baron is currently reviewing those responses. Once the review is complete, the responses will be sent to NCES for further feedback or acceptance of our project plan.</i> ▪ <i>Met with OSU on 2/14 to discuss IDTS and how the DATA project and OSU can collaborate on the exchange of information. The group decided not to pursue an off the shelf program to accomplish this data exchange, and determined that the current direction would be continued with a more direct involvement by the DATA project and ODE. A representative from OSU and ODE would meet to discuss current data collection requirements and that would drive next steps. IDTS is dependent on the full implementation of the ODS at ODE.</i> ▪ <i>Attend the first monthly LDS website meeting on 2/15. Many states discussed their current situation in regards to their data stores. Many of the states have been operational for over a year but are still trying to determine proper procedures for ensuring data quality and how to document the data store. More details will be provided once a review of the meeting report is complete.</i> 			
Next Period Milestones/Activities (<i>high level outline of how you will get from A-Z</i>):			
<ul style="list-style-type: none"> ▪ <i>Prepare data requirements for DQWG review prior to next meeting.</i> ▪ <i>Submit responses to NCES on project plan.</i> ▪ <i>Submit meeting notes to Megan for the DQWG Technology break out meeting.</i> ▪ <i>Write and submit report on OSU IDTS meeting.</i> ▪ <i>Submit Communication plan for review.</i> ▪ <i>Write Change Management plan.</i> ▪ <i>Submit Governance plan to Megan for posting to website.</i> 			
Challenges/ Obstacles:		Challenges/ Obstacles Mitigation:	
<i>1. None</i>		<i>1. None</i>	
Comments			

4.4.2 2/22/08

STATUS REPORT	Status: Green [X] Red [] Yellow []		
	Cause: Time [] Scope [] Quality []		
Date covered:	<i>February 18 – 22 2008</i>		
Project Name:	<i>DATA Grant</i>		
Project Manager:	<i>Dennis Boston</i>	Project Director:	<i>Baron Rodriguez</i>
Milestones-Activity Since Last Report:			
<ul style="list-style-type: none"> ▪ Prepare data requirements for DQWG review prior to next meeting – data elements have been identified. KIDS evaluation is completed. I am preparing the data element list that includes elements that require further clarification (what is asked for is too broad, needs to be narrowed down). ▪ Submit responses to NCES on project plan – Responses were submitted on 2/19/08, waiting on feedback from NCES. ▪ Submit meeting notes to Megan for the DQWG Technology break out meeting – These have not been completed. First priority this week, to get something to Megan for posting. ▪ Write and submit report on OSU IDTS meeting – Report is written, will submit to Doug and Baron for review. ▪ Submit Communication plan for review – Plan has been submitted, feedback received from Baron. Waiting for feedback from Doug. ▪ Write Change Management plan – This is in progress ▪ Submit Governance plan to Megan for posting to website – Plan has been submitted. Megan is waiting for communications plan so that one posting and notification can go out. 			
Next Period Milestones/Activities:			
<ul style="list-style-type: none"> ▪ Complete DQWG – Technology meeting notes for submission to Megan for posting ▪ Submit Communications Plan for posting ▪ Continue writing Change Management Plan ▪ DATA Project Monthly Progress Review ▪ Update DATA Project, Project Plan ▪ Data elements review, gap analysis, submit to Baron and Mojo for review prior to posting for DQWG review. ▪ Plan DQWG – Technology Task Force meeting for April 11, this meeting will happen in conjunction with Quarterly IT Managers meeting. 			
Challenges/ Obstacles:		Challenges/ Obstacles Mitigation:	
Comments			