

**DATA Project  
Progress Review  
May 2008**

# Table of Contents

1	Executive Summary .....	1
2	Summary of Progress for the month of May 2008 .....	2
2.1	Review of Activities and Outputs	2
2.1.1	Project Related Meetings	2
2.1.2	Project Reports	2
2.1.3	Project Documentation – Under Review	2
2.1.4	Project Tasks – Completed	2
2.1.5	Project Tasks – In Progress	2
3	Planned Activities for June 2008 .....	3
3.1	Project Meetings	3
3.2	Project Reports	3
3.3	Project Documentation – Review and/or Approval	3
3.4	Project Tasks	3
4	Attachments .....	4
4.1	NCES – SLDS Monthly Project Meeting	4
4.2	DQWG Technology Task Force Meeting	7
4.3	DQWG Instructional Task Force Meeting	10
4.4	DQWG General Assembly Meeting	12

# May DATA Project Progress Review

## 1 Executive Summary

During the month of May, the DATA and KIDS III Project Teams held their monthly meetings with both Data Quality Work Group (DQWG) Task Force and Advisory committees and with the National Center for Educational Services (NCES) State Longitudinal Data Systems (SLDS) Grant Team . Reports from all meetings can be found in Section 4 of this progress review.

Work continues on the Professional Development training plans for strands 1-3. Strand 1: Creating a Data Culture, One of Inquiry. This strand was also piloted to teams of different districts that were made up of a sampling of elementary and middle schools from Jefferson, Salem, Gervais, Silverton and Central.

**Insert update on Technical training RFP**

## **2 Summary of Progress for the month of May 2008**

### **2.1 Review of Activities and Outputs**

#### **2.1.1 Project Related Meetings**

- DQWG Prep Meeting
- DQWG General Assembly Meeting
- NCES – SLDS Monthly Project Meeting
- LDS Webex Meeting
- SLDS Annual Report Webex
- KIDS Project Meetings

#### **2.1.2 Project Reports**

- April Project Progress – 4/04/08
- SLDS Project Progress Report – 4/10/08
- DQWG Meeting Report

#### **2.1.3 Project Documentation – Under Review/Approved**

- Data Use Policy
- InfoSec Policy
- Risk Management Plan
- KIDS III Project Management Plan
- KIDS III Project Plan (Gantt Chart)
- Fact Sheet on DATA/KIDSIII/Growth/TLC
- Session descriptions for instructional strand 1-3

#### **2.1.4 Project Tasks – Completed**

- Focus Group Gap Analysis
- RFP For Implementation Vendor completed and sent to Procurement
- Quality Management Plan
- Business Intelligence Tool Implemented on KIDS III Cluster
- Metadata Repository Migrated to KIDS III Environment
- DATA/KIDS Communication Plan
- Risk Logs Established for both DATA and KIDS III Projects
- RFP for instructional strand 3 released

#### **2.1.5 Project Tasks – In Progress**

- Initial Risk Assessment
- Privacy Security and Use policies in final draft and will be presented to DQWG at the next meeting
- DATA Project Annual Report
- RFP for Implementation Vendor in Procurement for review
- Ensure all Versi-Fit and Business Objects Recommendations are included in work plan (Gantt chart)
- DATA/KIDS/Growth Integrated Project plan updates
- School District affiliation with one of the 6 Regional warehouses
- RFP for instructional strand 2 in draft

### **3 Planned Activities for June 2008**

#### **3.1 *Project Meetings***

- NCES – SLDS Monthly Project Meeting
- LDS Webex Meeting
- KIDS Project Meetings

#### **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 - Review
- InfoSec Policy - Review
- Initial Risk Assessment
- KIDS III Project Management Plan

#### **3.4 *Project Tasks***

- Ensure all Versi-Fit and Business Objects Recommendations are included in work plan (Gantt chart)
- DATA/KIDS/Growth Integrated Project plan updates
- School District affiliation with one of the 6 Regional warehouses
- DATA Project annual report
- DATA Project SLDS Monthly Conference Call

## 4 Attachments

### 4.1 NCES – SLDS Monthly Project Meeting

---

#### MAY 2008 SLDS MONTHLY STATUS CALL NOTES

---

**STATE:** OREGON

**DATE:** THURSDAY, MAY 8, 2008 @ 11:00AM ET

**FROM:** SARAH SCHALLER RUANO

---

**ATTENDING:** Baron Rodriguez, Megan Monson, Mickey Garrison (Oregon); Sarah S. Ruano (KGS); Kashka Kubzdela (NCES);

**ACTION ITEM STATUS:**

1. SLDS Annual Report: Due June 30, 2008. *Pending*
2. DATA Project Plan – Project Plan Update to be filed along with Annual Report *Pending*

NOTE: Please remember to include both Kashka Kubzdela ([Kashka.Kubzdela@ed.gov](mailto:Kashka.Kubzdela@ed.gov)) and Sarah Schaller Ruano ([sarah.schaller@ed.gov](mailto:sarah.schaller@ed.gov)) in your SLDS related correspondence.

**QUESTIONS:**

1. In response to requests from numerous states, we are compiling a list of vendors and software that FY06 and FY07 grantees have used for any part of their statewide longitudinal data systems (data warehouse, training, evaluation, etc). This list will be distributed at the Grantee Meeting in July 2007.

What vendors/software has your state used for any component related to your statewide longitudinal data system work, that we may include in our compiled list?

*Versafit* - Data Model & Data Warehouse Integrator  
*Business Objects* - Business Intelligence tool  
*RK Technical* - Quality Assurance

**NOTES:**

*Reference: The Data Quality Work Group (DQWG) provides overall governance of the DATA/KIDS III projects and is divided into two groups: Instructional and Technology. Each of the two groups has its own Advisory Committee and Task Force.*

**Updates:**

- DQWG Committee meeting held on April 8, 2008
  - Received and implemented input and feedback from K-12 stakeholders on *Instructional* Training curriculum strands 1-3 (Creating a data culture; Data Roadmap; Understanding and using classroom assessment to improve student learning)
  - Reviewed rollout and timeline of trainings
  - Reviewed Request for Proposal (RFP) plans for *Technical* Training curriculum (Strands 1-3, to be developed), evaluation of training plan and Regional training delivery
  - Direct Access to Achievement (DATA)/ Pre-Kindergarten thru Grade 16 Integrated Data System (KIDS) III Integrated Communications Plan accepted
  - Integrated Data Transfer System (IDTS) vertical integration strategy accepted
  - Data Requirements: All Data Requirements Are Documented/Planned For:
    - Discipline Data – Current set data will be included in current file format. Scope is limited to what is currently required by the state and/or federal government.
    - All other data requirements from Focus Group sessions are included in current file format definition
- DATA/KIDS III/Growth Project Dependencies planning
  - Integrated Project Plan
- Data Security and Use Policies – Incorporated DQWG recommendations; completion of policies is pending updates to Family Educational Rights and Privacy Act (FERPA) regulations (to ensure compliance with new regulations)
- Metadata repository is complete, allowing integration and standard definition across regional warehouses.
- *Business Objects* software (Business Intelligence tool) installed for Regional Warehouse clustered environment
- Metadata migration for Regional Warehouse clustered environment
- Vendor RFP for data warehouse services – Quality Assurance (QA) Vendor (*RK Technical*) is reviewing RFP for final department approval and submission to contracting
- DATA Project Risk Analysis (mainly on the technical side, especially with communications) – delays in contracting for the QA vendor has delayed the Risk Analysis as well. Expected to begin later in May and finish in June, 2008.

**Challenges/Obstacles/Opportunities & Areas Needing Improvement:**

- RFP for vendor providing data warehouse services has been delayed due to staff constraints.
- Contract approval delays for the QA Vendor

**Breakthroughs/Victories:**

- Bids received for data technical curriculum and project manager positions (to eventually replace Dennis Boston, who is on a 6 month contract through the middle of July 2008)

- Quality assurance/control provider contract signed and in place – key deliverables:
  - Review and submit recommendations for RFP for vendor providing data warehouse services
  - Review project related documentation
    - Project schedule
    - Project change management plan
    - Project communications plan
    - Extract/Transform/Load (ETL) and Metadata development plan
  - Project Risk Analysis

**Expected Accomplishments By Next Monthly Phone Call:**

- Signed vendor for *Technical* training
- Draft of technology training (Strands 1-3) will be available.
- RFP for Strand 3 of *Instructional* training, “Using Data to Improve Student Learning in the Classroom,” should be released. Expected bids from NWEA, University of Arkansas (NORMES), and NW Regional Labs.
- Training outlines to be posted to Oregon DATA Project website for *Instructional* training strands online.
- RFP for vendor providing data warehouse services will be submitted to the state’s legal department; expect to release RFP in late June & Early July 2008
- DATA/KIDS/Growth integration planning

**Additional Questions and/or Issues:** N/A

**NEXT CONFERENCE CALL:** Thursday, June 12, 2008, at 11:00am (ET)

## 4.2 DQWG Technology Task Force Meeting

# The Oregon DATA Project Technology Advisory and Task Force Meeting Notes

**Tuesday, May 6th**

[Technology Advisory & Task Force -- Review & modify plan – Pringle Room](#)

### [Project Status Overview - DATA & KIDS](#)

#### DATA Project

The majority of the work completed on the DATA Project was professional development planning. That update will be given by Mickey Garrison during the afternoon full committee session

#### KIDS Project

Mojo notified the group that Dennis Boston is now the KIDS project manager. He also introduced Nell Klumph as the Quality Assurance Oversight Contractor for the KIDS Project.

The KIDS Project focused on 3 key deliverables in the month of April:

1. Business Objects was on site to install and configure their BI tool in our clustered environment. We are still working with them to ensure compliance with the licenses. We may need to acquire more licenses, talks are ongoing.
2. Versifit was on site to perform the migration of both business and technical metadata to the global repository. They also provided knowledge transfer to ODE systems DBAs.
3. Currently completing the RFP for phase III we will be sending the RFP to procurement by the 9<sup>th</sup> or May. By the end of July we will have a vender in place.

Mojo also discussed with the group that if they have not submitted their claim for the GIA dollars, please log onto to EGMS site and submit a claim.

Joel reported that he is working on getting all the districts in the state affiliated with one of the data warehouses and we hope to have this done by the end of May.

### [Additional Data Requirements from Focus Group](#)

Dennis advised the group that since the last Task Force meeting him and Joel clarified the pending data requirements from the focus group. They sent out emails to the specific focus group participants where the data requirements had been noted. Feedback from those people provided clarification to those requirements and it was determined that for the most part everything was covered. Should there be additional requirements in the future they will bring those back to the group for discussion.

**The group had a conversation trying to define transcript and historical data and how it will be used. Joel will check with the programmer at ODE to see what they are allowing to be pulled.**

**This was related to the single record push of student data in a near real-time manner.**

**There was also a conversation regarding student registration and record sharing also came up and the group was divided on how to address the issue. Per Joel we will be having a lot more discussion on this in the next 6-9 months. Suggestion from group- We could get some of the users together to share what works and what does not work.**

#### [KIDS Discipline data](#)

The discipline data that will be included in the KIDS file format will be the current set data. Since there is not any standardization between schools/districts etc, there is no point in collecting anything outside of the set data. As changes to the set data come in from the feds, that data will be added. Although the addition of the newly required data will not be difficult to accommodate, there will be a cost associated with incorporating it into the file formats and adjusting the ETLs.

#### [Minimum Transcript data elements -IDTS data elements - Connie Atchley – OUS](#)

There has been much discussion around the data elements that will make up the records that are exchanged between Oregon high schools and higher education via the IDTS system. Joel (KIDS Project) and Randy (IDTS) project have been reviewing required vs optional data elements. Since the IDTS file format was originally modeled after the KIDS file format, everything that is required should be covered. Joel felt that he and Randy would need to sit down together to finalize the required data elements but did not feel there would be any issues. IDTS will need to allow for “holes” in the data when optional elements are not transferred.

**The group had a discussion about the process and the changes in that process. Currently, the IDTS project team visit schools individually to bring them up on the system. This would change as a part of the new approach to utilize the KIDS OSTX to facilitate that change. Counselors/Registrars currently make that request through their SIS (eSIS for example) and wanted to make sure that there would be information on how the new process would work. Although this will be completed during the KIDS phase III, there is no set date as to when the new transfer system will be in place, so in the mean time schools will continue to submit those transcripts via the current IDTS setup.**

#### [OSAT Data](#)

Larry Hartzell discussed with the group the plans to change the format of the file that is sent back to the districts with OSAT information. Currently the file only allows for specific year/subject combination selection in order to download or work with the data. The new format would allow for the data from all years and subjects to be loaded in a common way. This new format will allow for the individual selection of year, subject, institution and student combinations for downloading or working with data. The existing security routines for selection of institutions and related student records will remain the same but may require a few adjustments. Dennis will send the handout to the group electronically.

#### [SSN's](#)

Baron advised the group that he has been told that we will need to start to collect SSN's. He expects to be sending out a message in the next few months saying we have to collect SSN's. Group participants were advised that if they currently do not collect SSN's to please have your superintendants send a letter to ODE explaining why SSN's are not collected.

#### [Two DATA training Programs](#)

Baron discussed the current training tracts and the RFPs that are associated with the development of the training curriculum for those tracts and the delivery of that training. The DATA project has two training tracts, Technical and Instructional, with three training strands within those tracts. The RFPs are as follows:

RFP #1 – This RFP is for the development of the curriculum for the Technical Tract, strands 1,2 and 3. It also includes project management duties for the DATA project. This RFP has been published and is closed.

RFP #2 – This RFP is for the development of the curriculum for the Instructional Tract, strand #3. It also includes an evaluation component to look at the entire approach to training for the DATA Project. This RFP is not one that the ESDs could bid on because of the evaluation component. Evaluation of the training given under the DATA Project is a necessary component of the IESs SLDS grant program and must be conducted by an independent agency.

RFP #3 – This RFP is for the delivery of training for both the Technical and Instructional Tracts, strands 1, 2 and 3. ESDs can, and are encouraged to bid on this RFP.

RFP #3 – Training Delivery		
	Technical Training Tract	Instructional Training Tract
<b>RFP #1</b>	<u>Strand 1</u> KS-Data 101, ODE WEB/DNLDS	<u>Strand 1</u> Creating a Data Culture: One of Inquiry (Oregon District Developed/ESD/TLC)
	<u>Strand 2</u> KS-Data Coordinator	<u>Strand 2</u> Using Data to Improve Student Learning in Districts and Schools (Oregon District Developed /ESD/TLC)
	<u>Strand 3</u> KS-Data Certification/TBD	<u>Strand 3</u> Using Data to Improve Student Learning in the Classroom <b>RFP 2 – NWLABS, NWEA or University of Arkansas</b>

### 4.3 DQWG Instructional Task Force Meeting

## The Oregon DATA Project Instructional Advisory and Task Force Meeting Notes Tuesday, May 6

Instructional Advisory & Task Force -- Review & modify training strands & timeline-Marion Room

Overview—bringing people up to date on the process so far, defining the big picture

Collaborate—Work in table groups talking about the model, then whole-group sharing on the conversations

Questions addressed:

1. How do TLC, DATA & Growth fit together and support what is already happening in the schools?
2. How will this be communicated to the districts, and by whom?
3. How does this relate to work being done in districts?
4. How do larger districts understand and apply this compared to smaller districts?
5. How do we give people the time to work with data and collaborate?
6. What resources are available to districts?
7. How does this all align with the CIP plan process? (From compliance to involvement to commitment)
8. How will this be “marketed”? What is it? Who are the “we” promoting this? How is this different from what we’ve heard before? How is it different from other initiatives?
9. We need to understand that training is not implementation. Taking a baseline, documenting what you did differently, was there fidelity of implementation, and getting results data are the key.
10. Where does the ongoing support come in? How do people access the support after they get into the classroom? Regional follow up, encouragement, and celebration needs to be in place to sustain the momentum.
11. Will we have fidelity checklists for the system so administrators know what to look for with this system change? (We have a readiness checklist, and an implementation checklist in development.)
12. If the infrastructure doesn’t exist, running ahead with trainings will not be sustainable.

The results of being able to access the data warehouse enables teachers to go from being reactive to predictive. From looking out the rear view mirror to looking forward out the windshield.

Looking at Strands One, Two, and Three, we’ll look at structure, data, and growth within each Strand.

[Group discussion](#)

- Will these Strands happen sequentially or simultaneously?
  - Kick off is at COSA for new administrators.
  - Strand One will be delivered the superintendent’s summer institute in August.
  - There will be regional training as well.
  - Available on request.
  - In October we will begin adding Strand Two.
  - Strand Three will roll out in spring.

- Then they will run concurrently.
- COSA is committed to offering opportunities throughout the year.
- ESD Staff will have the training of trainers in September or October. Then the ESD staff will work as coaches as district people are being trained as trainers.  
Can we make the Training of Trainers a different strand?
- Strands One and Two descriptions could be swapped and be more accurate. Where is the part of setting down the data culture foundation? Strand Two sounds like culture, which should come first, and Strand One is hands on, so shouldn't it come second? These are not necessarily in order. Strand One should be a set up for Strand Two. Can we add in pieces about bringing behavior data? How can we coach people to bring appropriate data to the training. Can they come with best practice examples? Be sure they all come with the passwords they need to resource the data.
- How can you train people regarding the long-term aspect of the work so that teachers do engage in the work over years.
- Along with making these training available during conferences, we need to “market” this in terms of the key components of the Oregon model for district success, and these are the people/entities involved in the model.
- In Strand One, the top part talks about problems collecting data, but the essential questions are about using data.

## 4.4 DQWG General Assembly Meeting

# The Oregon DATA Project Joint meeting of Instructional and Technology groups Meeting Notes

**Tuesday, May 6**

### [Instructional Group reports and gets input on training strands and timeline](#)

Tony and Mickey share an overview of the big picture: how the Teaching Learning Connection (TLC), the Growth Initiative, the DATA Project and the warehouses fit together. The group is given the assignment of meeting new people in the room and discussing how all the components work together.

Mickey gave an overview of the Instructional training strands.

- Strands for data clerks and coordinators and their supervisors about data input and cleansing are being developed.
- Suggestions or questions for the first three Strands from this group:
  - Are we talking about a new way to collect data? These three strands are really to understand and interpret the data they are currently collecting. We'll save "new ways" for later down the road.
  - Do all districts have to report on the SIF funds they received? Yes. In August, that is what is going to be on people's minds. Can that be a framework on collecting data for the SIF?
  - Does the growth model talk about changing instruction? It can be either.
  - How can this be done in a way that honors and respects things that have already been done, but further the work?
    - At the last ILC meeting, we spoke about each ESD curriculum person doing a district intake regarding where they are in their CIP progress and professional development needs. Strand One will help you implement the things you have in place. They have what they need, but may need better implementation.
  - Where will we look for training on the Data Warehouse? ODE.
  - In Strand One particularly, there are lots of wrong conclusions you can get from looking at data. Will something in this Strand help keep people not used to drawing conclusions from data from making wrong conclusion? How do we dispel some of the myths? Can we temper that? Yes, it is intentionally embedded in all three strands.

### LUNCH

### [Tech group reports on plan and gets input](#)

Dennis presents report on Technical group work.

Baron reviewed the RFPs and the two Professional Development tracks: There are two professional development tracks with three strands within each.

On the technical side, Strands 1, 2, and 3 are Kansas' program: kids.ksde.org. They certify their staff members in data submission.

Strand One: Data 101, ODE's web site and downloads

Strand Two: Data Coordinator Role—more in-depth on submission, validation, and usage  
Strand Three: Data Certification

The RFP that just went out was to provide and put together the curriculum and project management for the technical track of these three strands. This RFP is not about providing the training. They will also continue handling the project management and reporting to the feds.

On the instructional track is the list of three Strands we've been discussing. We have an outline for at least the first two, but we need an outside entity to flesh out the third Strand. This will be an RFP, soliciting NWEA, the Labs and Univ of Arkansas to develop the Strand, and to provide the evaluation on all three strands for the grant reporting.

The big RFP to provide the actual training has yet to be released. It will be the largest of the RFPs.

#### [DATA & KIDS Project Status](#)

Mojo and Joel gave a KIDS update. Dennis is the project manager, but for a limited time. The KIDS project is interlocked with the DATA and Growth projects.

The six regional warehouses are working together to ensure data can transfer correctly. The infrastructure is in place. There is a question to be answered about what is exchanged between school districts—entire records, subsets of records, or only transcripts? This RFP is about the KIDS Project and linking to the regional warehouses.

We want to get all districts in the state affiliated with one of the regional warehouses.

#### [Discipline Data – Formal Agreement](#)

Dennis talked about what will and will not be on the file format. Unless there is standardization about discipline data this is not going to do us any good. This data will be mandated by the federal government.

#### [Communications Plan – Formal Adoption](#)

Dennis-We will give you a few more days to review this and this will be put on the data project website and this will be the basis we will use to get data to you. Let me know if you have any input. [www.oregondataport.org](http://www.oregondataport.org).

#### [IDTS – Formal Agreement](#)

IDTS is the vertical transfer of transcripts to the university system. Connie discussed the flow chart handout depicting this process, as well as what exists and what needs to be created. The basic design is that rather than the university system having one entry point for each high school in the state, they tap into the central warehouse. Schools can log on and determine which data for which students they want to send, then the university would utilize the same point of entry and access that information.

#### [Next steps & meeting dates](#)

The next Instructional and Technical meeting will be September. Mickey will send an email with the date.

#### Next step Instructional

**Group** will make sure the strand descriptions and objectives/essential questions are what is wanted. A syllabus will be created for college credits for each strand, as well as how to evaluate input and impact of the projects.

#### Next step Technical

Three-strand outline and syllabus should be complete by late summer and the RFP should be signed and in place for Strand 3 and KIDS.

