**April 06, 2018**

# **DAQ Team**

# **Leads Feedback**

## **Presentation and Workplan Feedback**

* This cluster has huge responsibility. This is the data engine for ICPI and PEPFAR!
* It is very impressive what this group has accomplished in terms of data management systems and process. Kudos!
* Looks like you are anticipating doing data management for analytic workspaces. Is this the case and has this been discussed?
* Discussed a landscape analysis of data management practices in country for partner management? I think that is ideal but honestly think getting more field engagement and supporting the best practice
  + Best practices, current practices, training needs? (excel, R and R shiny, any other open source?) vs other BI tools (micro-strategy, tableau, excel BI)
* Country specific examples are a great idea built off of very successful Uganda TDY (but what we do that was so successful? I think we are struggling with how to communicate that effectively, it’s not easy! )
* There was mention of developing a ‘menu’ of specific sample activities that the DAQ can assist field teams with. And that this menu could be used to create demand for engagement in the field (Q2We first need to understand the landscape of the field. Specifically which country teams have staff with what skillsets who could benefit from portions of this menu from DAQ?
* Menu idea is fantastic – please work across coordination teams as you identify your unique services and share your plans for others to use as a template.
* As part of the mandate of the DAQ to ‘create improved data access procedures’, to-date this has focused primarily on PEPFAR data. It would be good to discuss the plan to improve access to VACs, DHS, PHIA and other data sources. This group could also confirm whether or not the ‘analytic workspaces’ actually can ‘link’ to other data sources – if not then we need to re-think our strategy for use of the analytic workspaces.
* It would also be good to see in the DAQ workplan a plan for creating the knowledge base for available:
  + iBBS data and the dates last performed as well as access to this data
  + PLHIV and CLHIV data, what data can be used at what level for which country and the date of last update
* The key question is which direction the DAQ will go now that the bulk of the “access” part of the role (making factviews – supporting the systems team) is almost over. Data integration appears to be an area of interest and need and having the DAQ serve a role as a manager and capacity builder in this area makes sense.
* While the structured datasets are transitioning to PRIME, we still need to recognize that there will still be continued effort before full transition will happen. It is too important not to fully support. We also need to recognize and plan for continued “maintenance” engagement once it does full transition. We don’t want to lose our connection to it and ability to make suggestions/modifications as needed.
* I know the data management component is going to PRIME, but think there is work to build capacity of SI Advisors and Country staff to better use the Genie extracts, FACTview data sets. Can this group address this?
* Think there is a real need for country teams to put better data management systems and processes in place. I see it on their workplan, but want to push as a priority.
* There are 34 things listed in the workplan; this is a lot. 6 of these have to do with field training. I think this is a good idea, but would want to know more about how you plan to work with ICEE and others to generate interest from the field on this.
* Suggest regularly coming in to leads to report out on DAQ activities and touchpoints with PRIME.
* Discussing transition plan for factview files - Q3 – please submit the write up of the transition plan with the names listed with roles/responsibilities and timelines, including the Q4 SIMS analytic dataset
* Nice work on thinking through integration instead of triangulation. This is going in a positive direction. Keep on thinking through what “integrated datasets” look like.
  + Next steps - need to socialize the term integration
  + Unified view of data from different sources
* Agree that the team needs to transition data access and management into maintenance mode and allocate more time/effort into data alignment and integration.
  + Continue to work with the DIV to conceptualize how this work will happen across the platforms
* Partner performance - they want to have access for external partners
  + We have been tied to the pepfar business reporting process
  + At country level, they need a monthly view of their data
  + How do we help them?? They are collecting monthly data
  + How do we help them earlier on in their process?
  + Agency/partner performance -
  + This is where filed engagement is important - data management is important and often overlooked part of the process
* Uganda example
  + Helped them set up their own factview files for Uganda
  + DRT, CHIPS, PPR before they even sumitted the data
  + This is a great example of a field engagement. Please “write up” a trip report of some sort (perhaps this will be in your menu) to be able to identify the areas that could be replicated
* It would be good to add a standing agenda item for each of the data streams represented to formally report out as part of the DAQ. It may be worthwhile convening some kind of data stream Focus Group
* Suggestion to collaborate with financial analysis team.

## **Membership and Roles Feedback**

* Although there are 22 confirmed members, only Abe & Kristy have more than 50% LOE assigned to the cluster, everyone else is about 5-20%. You may need more people who can invest significant time with Abe & Kristy across agencies. If the DAQ leads can articulate the workflow issues, then we can request that the leads assign someone else to fill that more clearly articulated “position.”
* Because of the different IT platforms, seems like you need help from heavy IT developers/coding experts.  Is this true? Kindly consider this as well in the write up of a more specific “position.”
* The above activities can help you “refresh” your membership as you specify the specific workflow gaps and can assign people to fill them.
* Need to identify not just the skill sets, but what you are trying to do since the task may be resolved by a different skill set than you identified

## **Strategic Objectives**

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| **Strategic Objective** | **Notes** |
| 1. Increase engagement with field teams | * Really like field engagement approach look for opportunities to identify best practices through agency specific channels * The DAQ provides support for engagements |
| 1. Be a forum for active engagement between program subject matter experts (SMEs) and strategic information (SI) communities | * Yes |
| 1. Advance innovations in data management, analysis and use | * Strength, and well described in workplan * Use of the datasets are crucial. They do the primary data management for ICPI and for OGAC. |
| 1. Strengthen capacity to access, analyze, and use data | * Like the training focus * The DAQ is the engine of data use. The line between OGAC and ICPI very fine. |
| 1. Streamline business practices to improve data use for program impact | * How to make integration work more efficient and productive? * With respect to data, this is the primary job of the DAQ. |

**Successes Feedback**

* Great work!
* The work of this group has been so fundamental in making data accessible to people - getting it in the different forms that people need it in
* Strong start to the field engagement strategy
* DAQ has been hugely successful. The leads would like to communicate our resounding appreciation for your team and all of the incredible work you do internal to ICPI and liaising with our stakeholders.

**Challenges, Potential Solutions, and Requests to Leads Feedback**

* **Need for staff with advanced skill in SQL, R, DHIS2**.
  + We would like to know more about specifically what the gaps are. Not saying “we need people with x skills (what is SQL used for beyond generating FV datasets?)” but rather “we often encounter a bottleneck in workflow because there is only one person who knows how to do a certain step”.
  + This may be less about having people with the requisite skills to do that step, but rather that you’ve set the workflow up to flow through a few critical paths.
  + My feeling is that we have enough people with the ‘correct’ skillsets or at least the potential to implement the best practices but they aren’t being used efficiently. In any event, we want to learn more about concrete needs and how that relates to staffing since there isn’t a viable solution on the horizon that will solve this problem as presented.
  + We understand the difficulties around membership, the “positions” are hard to fill, but perhaps will additional clarification around the “position” we may be able to more specifically assign people to activities.
  + We are open to assigning POCs to specific projects/tasks DAQ needs assistance with if you contnie to articulate the workflow challenges
  + Can you achieve your goals with no additional skilled staff? What are some of the ways you can use the individual skills on the list of members to push your objectives forward?
  + What is the gap in accomplishing workplan objectives?:
    - There are 3 CDC staff and 1 USAID staff who currently do the majority of the routine data management work focused on data access and quality work
    - Many other staff on DAQ are leads in communication, training and observers currently but there is a lot of interest in people getting more engaged as analysts in data integration but no activities in the work plan that relate to this area.
    - Seems like R is preferred software for data management since its open source and has flexibility to do both basic data visualization and more complex outputs like R shiny so could potentially meet many needs
  + PISA should help with the DHIS2 capacity.
* **Activities dependent on PRIME.** Not much to be done here. I think the team has established the bridges necessary to make this as efficient as possible. If there are concrete asks for the leads to take to PRIME leadership (Mark or Irum) then we are happy to entertain those.
* **Improved field engagement.** Agree that this is a good thing to pursue. Look forwarded to seeing the menu of services.
  + There is potential overlap between what the DAQ is proposing and what the DIV is proposing, but also potentially with the other technical clusters. Please collaborate with ICEE to ensure everyone is looped in.Leads and members who are involved will need to be on the lookout for those overlaps as they appear.
  + In reality, until the staffing efficiency is under control, expanding to areas like increased field engagements in the form of TDYs may need to wait. Please keep the leads updated on the staffing and priorities of activities so we can assign staff.
* If we fully transition the activities to the prime team, maybe we can focus on other tasks, like building capacity and building more innovative management platforms
  + Caution against thinking that anything will ever be 100% transitioned. We would like to make sure that at least in an advisory role that you retain some connection to some of the activities so we can continue to ensure that the products will meet the need of the users.

**General Next Steps**

* Your presentation and preliminary work plan have been reviewed and the workplan is conditionally approved.
  + The condition is, continue to work on existing activities and identify specific transition plans
  + Identify activities you would like to/need to retire
  + As you prioritize new activities, please submit to leads to ensure that we are able to loop in the right external collaborators (potentially field based) and staffing up front.
* Please respond to the outstanding questions above with either a specific response or a plan for how you will address the suggestions in the next 2 weeks.
* Leads will set up time to specifically discuss staffing and workflow.
* We would also like you to regularly attend leads meetings to maintain a connection to regularly report out on the great work you are doing. We will set this up.

*Please reach out to* [*ICPI@state.gov*](mailto:ICPI@state.gov) *and your lead liaison with any questions or concerns.*