To: Justin Marsico  
From: Janelle Becker  
Date: 30 JUN 17  
RE: MTS Meeting Summary (26 JUN 17)

**Summary:**

On Monday (6/26) Renata, Justin, and Janelle met with Chris Kubeluis and other members of his team at the Office of Fiscal Projections. The goal was to twofold. First, to satisfy a request made by their team: after seeing a presentation, they asked for us to show them more about using Tableau. Second, to discuss opportunities for partnership in regards to the Monthly Treasury Statement (MTS)/Daily Treasury Statement (DTS) and better understand if connecting the Fiscal Projections team with the DATA Act Analytics team would be a fruitful endeavor.

While Renata tactfully navigated the meeting, the overall sense of this meeting was that Tableau would not be as useful as a tool for the individual team members’ day-to-day work, but perhaps useful for summarizing and reporting data for leadership to quickly ingest and understand large amounts of information typically displayed in table/spreadsheet format. While Chris was more optimistic about the software and exploring opportunities to work together, the team members seemed more skeptical, perhaps because they did not have the ultimate vision/goal for the meeting.

The larger meeting concluded, and Chris spoke more with Renata, Justin, and Janelle in his office to show a particular software service (Haver Analytics Database) that was mentioned for data aggregation, which included the MTS and DTS. Renata attempted a few more questions to explore whether or not a useful partnership might exist for the two teams, and Chris said he was happy to receive assistance in terms of projections and using Tableau.

Several names were mentioned throughout the various meetings for people that may be good to connect with, including someone at OMB, and Chris mentioned he’d send an email to Renata to follow up on this.

**Options:**

1. Use MTS and DTS data for our own analyses, but without a formal partnership
2. Meet with Jerome Jackson and others on the MTS team to discuss opportunities for partnership to help re-visualize the graphs
3. Help with fiscal projections (though out of our wheelhouse/mission scope – could put analytics website launch at risk of delay)
4. Circle back with Christina Ho to better understand the vision/goals surrounding the MTS and Data Analytics team
5. Do nothing/drop MTS