

CIID Data Integration & Technical Assistance Scope Tool

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What is a scope tool and why is it beneficial?

The scope tool defines the extent and limits of an IDEA Part B data integration project, guides the execution and evaluation of the project, and sets expectations for SEA staff and CIID technical assistance (TA) providers. The project scope is the foundation for the project management plan, resource allocation, and budgeting and prioritization of the work (covered in CIID's Data Integration Toolkit, Step 2). A scope tool supports common understanding of the project parameters, frames expectations, and reduces scope creep.

How do you use it?

This tool sets the parameters around a data integration project and the TA CIID will provide. Team members can refer to it when completing the project management plan and to identify areas of work that are outside of scope. If your SEA is working with CIID, it also will describe the scope of technical assistance CIID will provide to help your SEA integrate its IDEA Part B data and implement Generate.

Who should be involved?

The team developing the scope tool should include staff with knowledge of the SEA's data systems, special education data, ED*Facts* submissions, and program needs. Once developed, SEA leadership should review and approve the scope.

[State]'s Data Integration and Technical Assistance Scope

The scope document title (modify the heading above) can be simply stated as **[State]'s Data Integration and Technical Assistance Scope**.

Generate Project Scope

This section outlines and documents the scope of the data integration-related tasks to be conducted and completed over the course of a 12–18-month intensive TA effort.

File Specifications	
Indicate the IDEA Part B ED <i>Facts</i> files your state plans to submit through Generate.	
Directory	☐ FS029
Child Count	☐ FS002 ☐ FS089
Discipline	☐ FS005 ☐ FS006 ☐ FS007 ☐ FS088 ☐ FS143 ☐ FS144
Exiting	☐ FS009
Personnel	☐ FS070 ☐ FS099 ☐ FS112
Assessment	☐ FS175 ☐ FS178 ☐ FS185 ☐ FS188

Objectives and Projected Timeline

List the groups of EDFacts files you plan to submit through Generate (from above) and the month and year in which you plan to submit them.

EDFacts Files	Projected Submission Date Using Generate
1. e.g., Child Count	1. e.g., March 2022
2.	
3.	
4.	
5.	

Part B Data Integration Self-Assessment

Document any takeaways from completing the Part B Data Integration Self-Assessment activities.
e.g., *An area of focus that will be critical for success is...*
e.g., *A strength that will support this work is...*

Enterprise Architecture

Document any takeaways from completing the enterprise architecture activities.
e.g., *The work primarily focuses on the following data sources...*
e.g., *To do our work, we need to improve communication across...*

Technical Assistance Scope

This section documents the resources that will be provided by both **[State]** and CIID to complete the above objectives over the course of a 12–18-month intensive TA effort.

CIID Support

To support these objectives CIID will provide

- Senior project management, SLDS, EDFacts, IDEA Part B Data, information technology and CEDS technical assistance experts who will attend virtual meetings (at least

monthly) with **[State]** staff and communicate more frequently during intensive periods of work.

- Training for IT and program staff on the Generate application
- User manuals, tutorials, and training on the Generate tool for program staff
- Collaboration on webinars or conference presentations on the work done in **[State]**

[State] Support

To support these objectives, **[State]** will provide

- **[State]** (SLDS, ED**Facts**, Special Education and IT) staff to support the TA activities outlined above. Specifically, **[State]** agrees that required staff will attend virtual meetings (at least monthly) with CIID staff and communicate more frequently during intensive periods of work.
- Access to a **[State]** Generate VM for CIID Information Technology staff to access data and systems to support project activities and testing the Generate application
- Access for CIID staff to CEDS Connections that are used to define the reports and outputs of the Generate tool and CEDS data warehouse reports
- Access for CIID staff to metadata or a data dictionary from source files for mapping in the CEDS Align tool, as needed
- Ongoing feedback and review of the Generate tool and associated processes and support materials
- Access for all CEDS users to CEDS Align maps (i.e., Sharing)
- Access for all CEDS users to CEDS Connections (i.e., Sharing)
- Collaboration on webinars or conference presentations on the work done under this project

Scope Exclusions

Identify what is excluded or outside the bounds of the project. Exclusions may refer to data groups or reporting needs that will not be addressed by the integration project. Consider developing a separate “parking lot” to capture issues that are out of scope, ideas for future enhancements, or additions to the data integration project for consideration in a future phase.

Exclusion(s)

e.g., Personnel files are excluded from the scope because the SEA does not have the data at the unit record level.

This content was produced under U.S. Department of Education, Office of Special Education Programs, Award No. H373M200001. Amy Bae and Meredith Miceli serve as the project officers. The views expressed herein do not necessarily represent the positions or policies of the U.S. Department of Education. No official endorsement by the U.S. Department of Education of any product, commodity, service, or enterprise mentioned in this publication is intended or should be inferred.