Montana Carl D. Perkins
Policy and Procedures Manual

Subject: Perkins Funds Distribution and Management
Policy: Accurate, Reliable and Complete Student Data
Effective: July 1, 2007
Revised: Not Applicable

Montana will assure all data from the local eligible agencies meets specifications designed to assure consistent, accurate, and complete Perkins program and student data. Data deviations of 10% or more from the previous year data must be reviewed by the grantee and accuracy must be validated. The deviations may occur in any of the following data sets:

- Number of concentrators
- Number of participants
- Number of completers
- Students retained
- Students employed
- Students transferring
- Student special population totals
- Indicator results

Secondary Procedures:

Data Quality Validation Checks

Measurement & Accountability Staff - Responsibilities of the AIM staff (part of the Measurement and Accountability Division at the OPI) include daily and on-going student data quality validation checks. These validation checks are two-fold:

1. Foundational Reporting Checks
   Basic data enrollment checks/reports are done constantly to validate data areas such as missing codes, correct grade levels, enrollment overlaps, missing gender, birthdates, ethnicity codes, etc. All AIM staff perform these basic data validations with specific people assigned to different categories.

2. Program-Specific Reporting Checks
   The CTE spring accountability collection and the CTE fall accountability collection is reviewed by members of the AIM staff during and following the collection deadlines. The spring accountability deadline is April 30. The fall accountability deadline is December 31.

CTE Perkins Accountability Specialist - In addition to the AIM staff, the Secondary Perkins Accountability Specialist in the CTAE Division of the OPI also carefully reviews each individual school district's CTE submissions to assure that data is not missing for both the fall and spring CTE data collections. Data deviations of 20% are reviewed, noted, and districts contacted. As quality issues and/or questions are identified, the high school districts are notified and revised or missing data is requested. Missing and/or quality issues are targeted to be completed by June 1 (spring collection) and February 1 (fall collection) knowing that individual follow-up may occur after the completion target date.

Trainings And Resources Available - Trainings provided to local high school district personnel to ensure complete, accurate and reliable data reporting. Numerous and varied trainings are held in different formats to local high school staff at different times of the year.

- New User training each fall—done by the AIM staff
- Updates to AIM reporting each fall—done by the AIM staff
- Self-paced on-line training courses for new users all year round—provided by the AIM staff
- Program-specific Webinars are recorded for access 24/7—provided by the AIM staff
- Teleconferences
- Quick Reference Guides available on AIM web site: http://www.opi.mt.gov/Reports&Data/AIM/index.html
- Updates and relevant information posted on monthly OPI Summary

Contact Database - The AIM staff maintains an active contact database and utilizes it regularly to communicate with primary data staff at local school districts. This database is also shared with the Perkins Accountability Specialist to use as a resource to contact schools.

Formal Presentations Made - The AIM Unit Manager, Sara Loewen, has presented her 'Quality Data' presentation frequently to the following Montana administrative groups:

- Superintendents' conferences—including a 'New Leaders' conference for new superintendents
- Assessment conferences—target audience is curriculum directors and superintendents
- MTConference for Educational Leadership (MCEL) conferences—target audience is principals, superintendents
- MT Association of School Business Officers (MASBO) conferences (finance personnel and district clerks)
- New district clerks training

Postsecondary Procedures:

The Perkins Accountability Specialist will follow these steps to assure complete and accurate data:

- Beginning in January, grantees will review and sign off on their program table and the PELL/BIA Verification form for all grantee programs. The PELL/BIA verification form verified all students enrolled in programs in the previous calendar year. Because this information is used for the local allocations, the data is the most accurate at this time.
- Grantees review student enrollment for each program to assure data is not missing and to remove duplicates.
- The Perkins Accountability Specialist will run all of the quality control queries in Section 8 of the queries. These queries perform additional sweeps of the data to clean data or to verify data is clean. All of these queries are labeled with the prefix _8_QC_. As additional quality issues are identified, new queries will be added to this section.
- As data issues are identified for a particular grantee, the colleges generating the errors are notified. Revised or missing data is requested and, when necessary, changes to the queries or data files are required. Documentation of these issues and resolutions will be placed in the correspondence file for each grantee.
- During the summer, special populations, completer, spring term and stop-out files are uploaded to the database. Students are then matched against Montana Unemployment Insurance Records Division (MUI), National Student Clearinghouse (NSC), Montana University System Data Warehouse (MUSDW) and Federal Employee Data Exchange System (FEDES). NSC and MUSDW are compared and discrepancies are exchanged between the database administrators for both systems. Second runs of these reports will be requested if significant deviations from previous years are identified.
- Once the matching information has been validated, indicator reports are run. Grantees review the reports for obvious discrepancies. A grantee may request student level data by indicator to validate indicator data. Any data concerns or significant deviations are researched and corrected. The research and corrections are documented in the data quality files for each year or under the correspondence file for the appropriate grantee.
- The final reports are placed on Citrix. A link to the reports is placed on the Student Data Reports tab of the Grant Database. The Office of Commissioner of Higher Education (OCHE) Accountability Specialist then enters the actual results into the table labeled, *tbl_grants,* for each grantee, and a copy of the final database is placed into the history folder on KNOX and Citrix.