Policy & Analytics Advisory Group Meeting Summary
September 10, 2020

The Policy & Analytics Advisory Group includes a broad range of perspectives and provides a means for the public to offer recommendations to the Workgroup about how to ensure the California Cradle-to-Career Data System supports research, evaluation, accountability, and optimization of publicly funded services at the state level.

This document provides a summary of the key points that emerged both during a half-day meeting and a follow up survey. More information about the meeting, including a recording, materials referenced during the meeting, and the PowerPoint, are available at https://cadatasystem.wested.org/meeting-information/policyanalytics-advisory-group.

The following advisory group representatives attended the meeting:

Liza Chu, Asian Americans Advancing Justice; Heather Hough, Policy Analysis for California Education; Jacob Jackson, Public Policy Institute of California; Orville Jackson, GreatSchools.org; Su Jin Jez, California Competes; Rigel Massaro, Public Advocates; Brian Guerrero, California Teachers Association; Angela Perry, The Institute for College Access and Success; Emily Putnam-Hornstein, Children's Data Network; Christopher Nellum, The Education Trust-West; Kristin Schumacher, California Budget & Policy Center; Samantha Tran, Children Now; Andrea Venezia, Education Insights Center; and Evan White, California Policy Lab.

Governance Structures

The facilitator described the process used to develop the governance structure proposal, summarized the public comment on that proposal, and noted the recommendation of the Cradle-to-Career Workgroup to have a homework team made up of both workgroup and advisory group members revise the proposal.

Paige Kowalski from the Data Quality Campaign provided a national perspective, clarifying that building trust and establishing clear roles is more important than the size of the board. She explained that participating agencies must be on the governing board to serve as data stewards, and that very few states include members of the public on their executive boards. She highlighted Maryland as an example of a state that has expanded its governance structure to include stakeholders, with a focus on individuals that have expertise in large data systems.

Through small group discussions and the follow up survey, advisory group members provided this input regarding governance priorities:

Overall

- The governance process was too elaborate given the amount of data being shared. Greater clarity is needed about specific roles. (*Emily Putnam-Hornstein of Children's Data Network; Heather Hough of PACE*)

Membership and Voting Rights

- There needs to be more balanced representation between data contributors and the public. Key constituencies to include on the governing board might include data experts, people who understand the role of data in closing equity gaps, parents and students, and organizations that represent students, families, and other constituents. (*Su Jin Jez, California Competes; Brian Guerrero, CTA; Samantha Tran, Children Now; Orville Jackson, GreatSchools.org; Heather Hough, PACE; Rigel Massaro, Public Advocates; Jacob Jackson, PPIC; Christopher Nellum, The Education Trust-West; Angela Perry, TICAS*)
- Members of the public who are on the governing board should have a full vote. (*Samantha Tran, Children Now; Rigel Massaro, Public Advocates; Jacob Jackson, PPIC; Christopher Nellum, The Education Trust-West*)
- It may not be appropriate for the three public postsecondary segments to share one slot because they may not be able to represent each other effectively. (*Brian Guerrero, CTA and Andrea Venezia, EdInsights; Christopher Nellum, The Education Trust-West*)
- The legislature should have the ability to appoint public representatives in addition to the Governor's Office. Community members should make up at least 25% of the voting members. (*Samantha Tran, Children Now*)
- Rather than having the Association for Independent California Colleges and Universities represent independent colleges, require independent colleges to report to the Bureau of Private Postsecondary Education. (*Angela Perry, TICAS*)

Responsibilities

- The governing board should have responsibility for public engagement to ensure support for the data system. (*Samantha Tran, Children Now; Andrea Venezia, EdInsights, Orville Jackson, GreatSchools.org; Christopher Nellum, The Education Trust-West*)
- The executive board should identify new data points that are needed. (*Su Jin Jez, California Competes; Samantha Tran, Children Now; Rigel Massaro, Public Advocates; Jacob Jackson, PPIC*)
- To ensure the data system puts the public good ahead of agency interests, require open meetings of the governing board and accountability for the system heads. (*Su Jin Jez, California Competes; Samantha Tran, Children Now; Angela Perry, TICAS*)
- The executive board should identify new tools that would enable the public to interact with data. (*Samantha Tran, Children Now; Jacob Jackson, PPIC*)
- The executive board should approve research requests, with an emphasis on approving projects that advance the public good. (*Andrea Venezia, EdInsights; Heather Hough, PACE*)
- If the executive board is responsible for hiring and firing the director, then the public needs to be part of this decision to ensure the director has independence from partner entities that do not want research to be published because it casts their agency in a negative light. (*Andrea Venezia, EdInsights, Heather Hough, PACE*)
- The proposal discussed at the August 31 workgroup meeting focuses on appropriate areas of responsibility for the executive board. (*Samantha Tran, Children Now; Jacob Jackson, PPIC*)
- The executive board should ensure the query tools, dashboard, and operational tools close opportunity and achievement gaps for students and young people, in accordance with the data

system purposes identified in the enabling legislation, and report to the legislature each year on ways to improve the system. (*Rigel Massaro, Public Advocates*)

- The executive board should identify additional partners and data sets. (*Jacob Jackson, PPIC)*

Length of Terms

- One year terms are too short. (*Brian Guerrero, CTA; Samantha Tran, Children Now; Andrea Venezia, EdInsights; Rigel Massaro, Public Advocates; Jacob Jackson, PPIC*)
- Staggered three-year terms would allow the majority to persist in each year without individuals becoming entrenched. (*Liza Chu, Asian Americans Advancing Justice; Brian Guerrero, CTA; Andrea Venezia, EdInsights; Orville Jackson, GreatSchools.org*)

Advisory Boards

- Advisory boards only provide value if their recommendations are seriously considered by the governing board and there is a culture of collaboration between the advisory and governance boards. (*Samantha Tran, Children Now)*
- Priority topics for research studies should be developed with input from policymakers, practitioners, researchers, and partner entities and reviewing studies completed or underway. (*Heather Hough, PACE*)

Managing Entity

The facilitator described the process used to develop the managing entity proposal and summarized the evolution of the workgroup position that led to the unanimous recommendation that the managing entity be a new office or program in the Government Operations Agency (GovOps), with the option of reconsidering where the managing entity is housed after the start-up phase.

Through a full group discussion and the follow up survey, advisory group members provided this input regarding the managing entity:

Capacity

- GovOps will need to hire additional staff with appropriate technical expertise to manage the work. (*Evan White, California Policy Lab; Jacob Jackson, PPIC; Christopher Nellum, The Education Trust-West)*

Responsibilities

- The managing entity should have analytical capacity and responsibilities for establishing and ensuring the strategic direction of the data system. (*Su Jin Jez, California Competes; Andrea Venezia, EdInsights; Heather Hough, PACE; Angela Perry, TICAS)*
- The managing entity should support the governing board by providing a channel where the public can share their opinions and communicate what should be in the system, which will require expertise in community engagement, building relationships with long-term stakeholders, and competency to communicate in multiple languages. (*Samantha Tran, Children Now; Orville Jackson, GreatSchools.org; Rigel Massaro, Public Advocates)*
- The managing entity should engage in continuous improvement by learning from other states and nations, participating in communities of practice, identifying critical policy and practice

questions, and staying in communication with reputable experts. (*Samantha Tran, Children Now; Rigel Massaro, Public Advocates*)

- The managing entity should communicate with the public about the value and purpose of the data system to generate or maintain public support. (*Christopher Nellum, The Education Trust-West*)
- The managing entity should have a strong track record of complying with the Bagley-Keene Act, maintaining an accessible web presence for stakeholders, and managing projects at the scale of the proposed data system. (*Rigel Massaro, Public Advocates*)

Role in Analytical Work

- The managing entity could create brief reports each year that summarize data on key questions that are displayed in the dashboard without making policy recommendations, similar to [Data Point reports](#) produced by National Center on Education Statistics. (*Su Jin Jez, California Competes; Andrea Venezia, EdInsights; Orville Jackson, GreatSchools.org; Heather Hough, PACE and Christopher Nellum, The Education Trust-West*)
- Leaving responsibility for the priority research questions to individual researchers and the foundations that are willing to underwrite them will mean that questions remain unanswered. Additional funding and a researcher-practitioner partnership may be needed to ensure core questions are analyzed. (*Andrea Venezia, EdInsights; Heather Hough, PACE; Angela Perry, TICAS*)
- The Department of Finance, the Legislative Analyst's Office, the Office of Planning and Research, or the Senate Office of Research could be tasked with conducting research to implement the research agenda. These agencies should be given easy access to the necessary data. (*Samantha Tran, Children Now; Orville Jackson, GreatSchools.org*)

Paige Kowalski of the Data Quality Campaign suggested that California could develop a [statewide research practice partnership](#) such as the [Tennessee Education Research Alliance](#).

Vote

Of the eight advisory board members that responded to a post-meeting survey, two endorsed the workgroup recommendation to have the Government Operations Agency incubate a new program or office that would fulfill the responsibilities laid out for the managing entity and six voted "yes, with reservations."

Research Agenda

The facilitator described the process used to develop the draft research agenda, pointing out that it would offer more public information than most states provide and seeks to incorporate the full spectrum of data types (education, employment, and social service information) in phase one. Through small group discussions and the follow up survey, advisory group members provided this input regarding the content of the document:

Overall

- The scope of phase one is too broad and should be narrowed. (*Andrea Venezia, EdInsights; Evan White, California Policy Lab; Emily Putnam-Hornstein, Children's Data Network*)

Dashboard

- Care should be taken in the design to ensure that data is presented in a way that engages the user and makes equity issues clearly apparent. This is particularly true for the infographic showing the progression of students over time, so that people can understand the weak transition points in individual journeys and the way that disparities influence outcomes. (*Liza Chu, Asian Americans Advancing Justice; Samantha Tran, Children Now; and Rigel Massaro, Public Advocates; Christopher Nellum, The Education Trust-West; Angela Perry, TICAS*)
- Having visualizations created by a recognized, statewide source, and disaggregated at the Assembly and state Senate district levels, will be helpful when working with the legislature. (*Liza Chu, Asian Americans Advancing Justice; Orville Jackson, GreatSchools.org; and Christopher Nellum, The Education Trust-West*)
- Ensure that multiple Asian/Pacific Islander categories are available. (*Liza Chu, Asian Americans Advancing Justice*)
- Include infographics on longer-term outcomes for early learning and care. (*Samantha Tran, Children Now and Orville Jackson, GreatSchools.org*)

Query Builder

- The list of variables is comprehensive and would provide powerful analytical capability. (*Su Jin Jez, California Competes and Jacob Jackson, PPIC*)
- For early learning and care, reconsider the use of Quality Rating and Improvement System. For employment, secure additional information from the Franchise Tax Board. (*Kristin Schumacher, California Budget & Policy Center*)
- Add features like allowing for analyses at the zip code level, picking several cohorts at once instead of one, and conducting regression analyses. Collect and visualize information on how many students are parents and information on children in private childcare. (*Su Jin Jez, California Competes*)
- Include variables specific to science as well as math. Add the ability to examine course-taking sequences. (*Samantha Tran, Children Now*)

Priority Research Questions

- The priority research questions should be refreshed annually, which could be informed by a set of indicators that would appear on the dashboard and be reported to the legislature. (*Samantha Tran, Children Now; Heather Hough, PACE; Samantha Tran, Children Now; Angela Perry, TICAS*)
- The questions are too broad. A very specific list of priority projects should be identified, particularly related to equity issues. (*Andrea Venezia, EdInsights and Heather Hough, PACE*)
- The list of questions is too narrow, given that new issues may emerge that take priority. (*Evan White, California Policy Lab*)

Vote

Of the eight advisory board members that responded to a post-meeting survey, two endorsed the adoption of the Draft Research Agenda, five voted "yes, with reservations," and one voted "no" (Evan White, California Policy Lab), stating that there should be no limits on the topics that could be approved for research.

Data Request Process

The facilitator described the process used to develop the data request proposal, described a proposal that clarifies how individual colleges and local education agencies could get expedited access to information, and summarized the legal concerns that shaped the requirements for requesting unitary data.[1]

Expedited Review Process for Summary Data

- There may not be sufficient capacity at the managing entity or data contributors to respond to requests for summary data in the three week timeframe. (*Christopher Nellum, The Education Trust-West*)
- The data contributors should not be able to reject requests for summary data. (*Evan White, California Policy Lab)*

Comprehensive Review Process for Unitary Data

- Partner entities should not have the right to veto data requests. They also should not be cosignatories to the data exchange agreement because they may prevent research from being published. (*Kristin Schumacher, California Budget & Policy Center; Evan White, California Policy Lab; Samantha Tran, Children Now; Andrea Venezia, EdInsights; and Heather Hough, PACE)*
- The managing entity or research committee should track all requests, their approval status, and why they are rejected. (*Samantha Tran, Children Now; Rigel Massaro, Public Advocates; Jacob Jackson, PPIC; Christopher Nellum, The Education Trust-West)*
- The Research Advisory Committee should not be able to reject research due to the methodology, as this could be used to prevent research using critical race theory. (*Su Jin Jez, California Competes; Evan White, California Policy Lab; and Orville Jackson, GreatSchools.org)*
- Insufficient capacity for the review team could lead to some research proposals being delayed for extended periods or remaining unfulfilled. (*Evan White, California Policy Lab; Andrea Venezia, EdInsights)*
- The data system should allow for research requests from single partner entities, or alternatively, partner entities should accept the Cradle-to-Career data request form for agency-specific asks. (*Samantha Tran, Children Now; Heather Hough, PACE)*
- Research Advisory Committee appointed slots should be for more than one year. (*Christopher Nellum, The Education Trust-West*)
- Put a time limit on blocked access to the system due to breach of contract or specify that it is permanent. (*Jacob Jackson, PPIC)*
- There should be an appeals process if data contributors deny requests that have been approved by the Research Advisory Committee. (*Samantha Tran, Children Now)*
- Consider requiring researchers with approved proposals to produce information that goes beyond their own use, such as presentations for practitioners, briefs that make academic work more widely accessible, and reports that disaggregate findings by institution to make them actionable. (*Heather Hough, PACE)*

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[1] Unitary data are information on a single individual, from which information such as name or birth date has been removed. Summary data are information where a minimum number of individuals are represented in the results, to ensure that individual identities cannot be determined.

- There should be not be a research agenda to determine priority questions, there should be a stated presumption that requested uses of the data will be approved unless there is a compelling public interest in denying them, there should not be separate review by the Research Advisory Committee and the data contributors, a majority vote rather than consensus from the Research Advisory Committee should be used to approve research requests, there should be required timelines for the partner entity to respond to requests, there should be a specific list of reasons why a request can be denied (such as: the request is frivolous, the request will cause an undue financial burden that the requestor is unwilling to bear, the requestor intends to mislead the public, the request would risk the privacy of individuals or entities in the data), reports should be reviewed to ensure there is no identifiable data, and it should be more clear that partner entities cannot prevent studies from being published. (*Su Jin Jez, California Competes; Evan White, California Policy Lab*)

Vote

Of the eight advisory board members that responded to a post-meeting survey, one endorsed the data request process approved by the workgroup, three voted "yes, with reservations," three voted "no" (Su Jin Jez, California Competes; Evan White, California Policy Lab; Heather Hough, PACE), and one did not vote.

Planning Process

In the survey, advisory group members had an opportunity to weigh in on the planning process. Evan White of California Policy Lab and Rigel Massaro of Public Advocates expressed concern that the process was not integrating sufficient input from advisory group members or the general public, and was moving too quickly during a time of profound crisis in the state.