

Moderator: Sharon Dawes, director, Center for Technology in Government

Panelists: Theresa Pardo, Jochen Scholl, Peter Lannon, Robert Pennacchia, Frank Winters, Michael Mittleman

Sharon asked the panel, "If New York State established 'preferred information competencies' similar to our 'preferred IT standards,' what might they be?"

- Michael said quantitative skills for managers are an important competency.
- Frank noted that the technology end is the easy part. Understanding data and the business processes that generate that data are more complex. "We really have to look at the data vertically for the organization," he said.
- Peter indicated that training should be included on any list of information competencies. Users need to be trained on new systems, but they also need training in some of the more basic PC and software skills.
- Jochen said cultural aspects of organizations need to be considered. "You never deal with technology in isolation. You never deal with information in isolation. You also have the cultural aspects," he said.
- Theresa noted that modeling skills should be taught. It's imperative for people to look at business models and know how to use them. Program managers and others need to understand the business questions and see the big picture. In addition, Theresa said tenacity is a valuable trait. "People have to stick with the business problem as long as they possibly can," she said.
- Robert said the ability to work as partners is crucial. The IT team and the management team have to be able to share skills and learn from each other in order to work together successfully.
- Frank added that basic relational database skills are also important.
- Members of the audience added their own contributions to this list of "preferred information competencies." One individual said bringing the right people to the table is crucial. Organizations need to identify the stakeholders and make sure they are involved in defining the business problem.
- Another audience member said facilitation skills are important to learn. People must be taught facilitation skills and then be encouraged to use them.
- Another person noted the dual context of these business problems. Managers need be aware that their day-to-day processes fit within the overall organization. He said that changing one process out of context of all the others can be catastrophic.
- Someone else mentioned the importance of outside-the-box thinking. People have to be flexible and look at the end product of what they want to achieve and not get hung up on how they'll work to achieve it.

Sharon asked the panel, "How do we acquire these competencies? What strategies have you used in putting these skills on current employees?"

- Robert said he would identify the best people to work on specific projects. Try to identify workers' unique skills and place them on projects that lend themselves to applying those skills. He also is an advocate of computer-based training and classes.
- Jochen noted that CTG uses two models to encourage skills development by staffers. The Center has affiliations with private sector companies that allow employees to take advantage of partners' skills and knowledge. The Center also gets assistance from academic institutions in the form of graduate students.
- Theresa said she's an advocate of learning by doing. She suggested organizations bring consultants in with the understanding that they're there to build skill sets and transfer knowledge. This allows for a kind of mentoring relationship to develop. She mentioned that state agencies could work together to learn new skills and then go back to their departments to teach others what they learned.
- Peter indicated that standing meetings with users are important in DOH's efforts to train the users of their new decision support system. He said users appreciate having a regular forum to share experiences, ask questions, and pass on skills.
- Michael suggested reaching out to those workers who are well respected and get them to participate in development teams. The participation of admired peers helps get the buy in of the rest of the staff. And, the system itself is better for having the expertise of key staffers incorporated into its design.
- Frank echoed previous comments about the importance of getting the right people. He said state agencies often view civil service as a hindrance. But, he said public sector managers should view civil service as a way to weed out unqualified people and hire those with the right skills. And in terms of acquiring skills, "the race to not be last" will take care of people who are at the bottom of the pile.

Panel Discussion

- Theresa noted that timing is critical when it comes to training workers. "If we're going to invest in skills, there must be opportunities for people to apply those skills and build on them," she said.

Sharon asked the panel, "How did you gather the information about your users and make the match of putting the best tools with your users' needs?"

- Robert said DOH asked its users what they needed, looked at the available technology, and then made their decisions.
- Frank said DOT tried to build a "critical mass" of support behind one kind of application. The fact that DOT workers were already using the software in the field helped them build consensus for that program.
- Michael recommended compiling a project checklist, with such components as the potential impact, budget, timelines, and political implications. He suggested plugging the components into a spreadsheet, looking at the various options, and examining how the options fill the needs.
- Jochen said the amount of training required for people to use the system should be a factor. A complex, high end tool that requires massive amounts of training may not be the right choice if a less complicated tool that is easier to use fulfills the necessary functions. "The choice we tend to make is to go for the mightier tool. But, we may want to go for the one that has just the fundamentals and much better ease of use," he said.
- Theresa talked about CTG's current Homeless Information Management System (HIMS) as an example of how important it is to consider the skill level and needs of the end users. In HIMS, many of the users will be small shelter providers who don't need high end analytical tools. These kinds of users just want a profile of who they're serving and the outcome of those services. Knowing this puts the lion's share of burden on the system designers and developers, and not the end users.

Sharon opened the floor to the audience. Several members posed questions to the panelists. One person asked how the agency representatives distribute data tables to users.

- Robert said that in the DOH system, users can click on the item they want to query and a box pops up telling them all the information about that item.

Gail Croteau of the Office for Technology asked panelists how they go about developing and nurturing the support of upper management personnel.

- Frank said knowing your audience is crucial. "We realized that by knowing our commissioner, that he would understand this, that he would like it, and that he would support it," he said. It's important to identify people comfortable in the realm of IT and information systems. And, you have to show managers how the proposed system will help deliver on a core business need of the agency.
- Peter said support often comes when people are required to do something. "Ours is a very complicated system and people higher up have been willing to let us just go to it," he said.
- Michael said the way to engender support from executives is to spend time building their trust in you. For example, Michael said he makes sure that he answers managers' MIS questions within an hour. A track record of reliable, prompt, effective service is crucial to gathering support for new projects. "Build credibility with them," he said.