

Community Development Project Success

PART 2: DATA MIGRATION

Understanding the Data

For regulators, quality system data is everything. In our experience, data migration is typically the most defining success factor for any regulatory project implementation.

However, data migration is often overlooked during the request for proposal (RFP) process. This can lead to missed expectations, data issues further along in the project, and possible delays.

Plan to review, evaluate, and cleanse your data before project kickoff. This will help you identify and solve data issues before vendor engagement, and also help paint your team's expectations of the data migration process.

It's critical to have a clear view of what you expect from your data before you go into any new IT project. It's also equally important to be transparent with your expectations and realistic about the status and health of your existing data.

Below are some high-level focus areas to help you successfully perform your data readiness activities.

Type of Data



Understand the type of data being converted. Provide as much statistical information on Entity, Permit/License data, Enforcement data, and Documents/Attachments as possible.

Data Accuracy



Addressing any data accuracy issues before the project will save you time and money. Are data fields used for what they were intended for, or have they been used for multiple purposes? Understanding this early on indicates how much or how little support your team will need to provide during the conversion effort.



Data Hygiene



Set your expectations of data hygiene up front so you know the extent of data cleansing your team will need to perform, and whether you'll do it manually or systematically. If your data is relatively error-free, it's considered clean. If there is duplication, incomplete or outdated information, or improper parsing of record fields from disparate systems, it's considered dirty.

Data Access



Access is an indicator of the level at which IT staff can access, manipulate and cleanse legacy system data. It's helpful to understand what level of access is available and if the legacy data is in a ready format that can be consumed by conversion tools. It's also important to know if historical data is available to analyze and/or confirm data gaps.

Data Preservation



The age of transactional data and any previous conversions can be an important consideration in establishing data scope and defining relevant data for conversion. To ensure only pertinent data is migrated, you should analyze historical data and clear any data retention rules.

Volume



Large volumes of data may require parallel loads to save time. More frequent and regular checkpoints will also be required to prepare data integrity. Make sure you communicate the size of the legacy databases so your vendor can plan accordingly.

Complexity



You should document any areas of data complexity to help provide context for your team and assist the vendor. For example, you may have complex license histories that require extensive unraveling, or licenses and data with parent/child relationships that will require correct sequencing.

Data Sources



Make sure to identify the number of data sources to migrate (don't forget to consider any Excel or MS Access tables). Varied sources of the same data will be handled with changes in the extraction process only.

→ You Understand Your Data - Now What?

Now that you understand your data, it's time to let your vendor know how you expect the conversion process to be managed.

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Options:

Re-Key Data

RISK LEVEL	COST IMPACT	CONSIDERATIONS
Low	Low	
	<ul style="list-style-type: none">• No external costs• Internal staff costs only	<ul style="list-style-type: none">• Only possible for small data volumes• Possibility of introducing errors• No ability to retain history

Agency Converts Data

RISK LEVEL	COST IMPACT	CONSIDERATIONS
High	Medium	
	<ul style="list-style-type: none">• No external costs• Internal staff costs• Possible contractor costs	<ul style="list-style-type: none">• Difficult learning curve for agency staff• Taxes scarce resources• Difficult to assure data integrity or completeness• Vendor is not accountable for success