The HOPE Toolkit
SECTION 4.2

ASSESSMENT, TRACKING, & REPORTING

Building a Foundation of Support for McKinney-Vento Youth

SECTION 4.2 PREVIEW: TRACKING & REPORTING

Section 1: City & Community Partnerships

Section 2: Staffing

Section 3: Funding & Resources

Section 4: Assessment, Tracking, & Reporting

Section 5: Outreach & Marketing

Section 4.1 focused on needs assessment, how to identify needs and how to use that feedback to inform programming.

Section 4.2 focuses on tracking and reporting student outcomes and reporting processes to track individual student outcomes, services provided, and program impact.

WHAT DOES REPORTING LOOK LIKE?

How we track individual student progress & measure program impact

- It took some time to find a system that worked for us – it's a process!

- Figure out what data needs to be collected and begin collecting it.

- Build processes and systems around those needs and existing workflow.

- Begin with the end in mind!

HOPE FORMS & PROCESSES

- Began with spreadsheets and templates, and individual client paper files

- Moved to an online case management system to create a central repository of information, reduce paper files, and streamline processes

Program Reports (Word)

Monthly Services Logs (Excel)

Penelope Case Management System
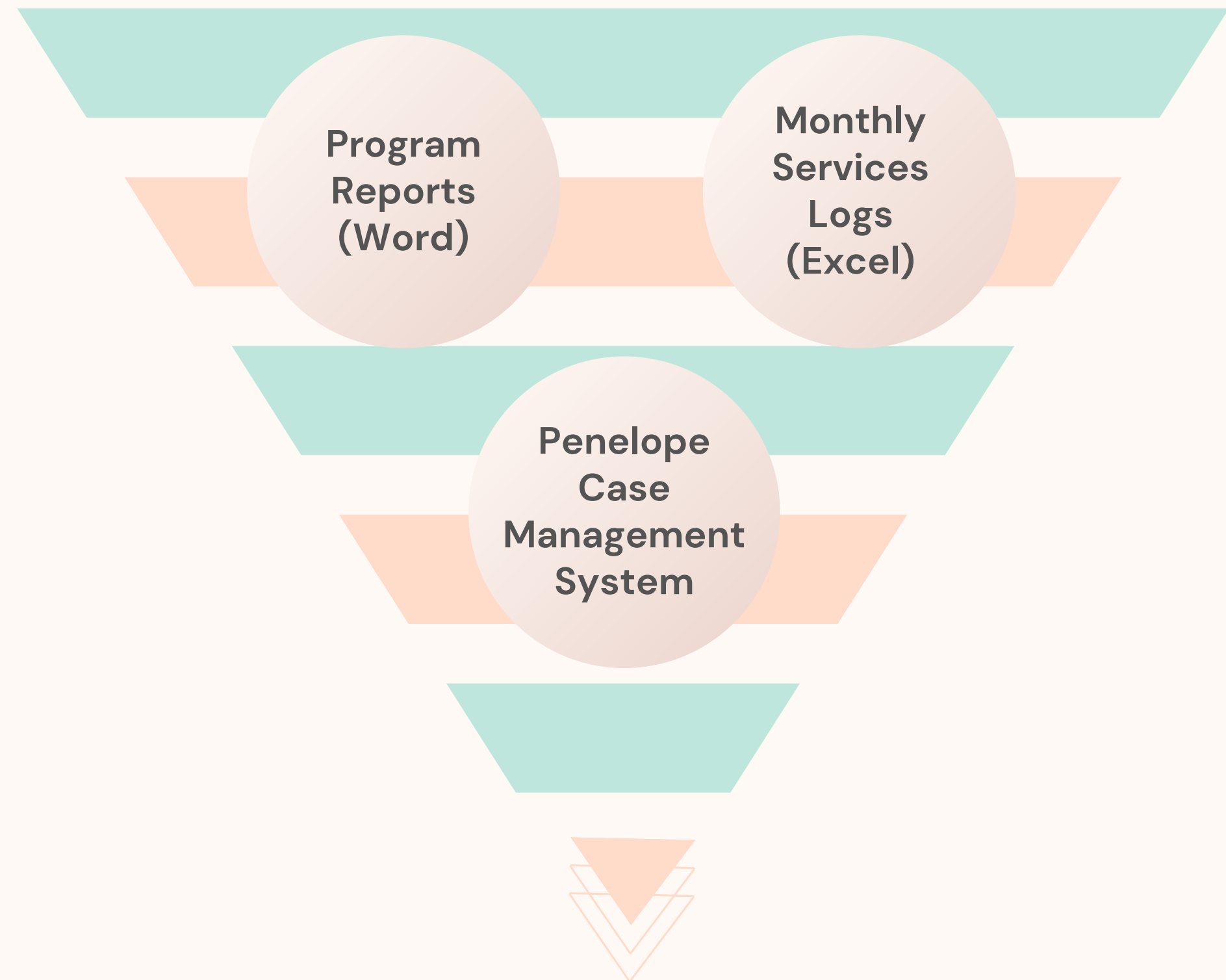
HOPE HYBRID SYSTEM

HOPE Sample Forms:
Monthly Service Log Case Manager Tab

CARE MONTHLY SERVICE LOG										
		New			Ongoing			Total Services		
First Name	Last Name	Chino	Chino Hills	Other	Chino	Chino Hills	Other	Chino	Chino Hills	Other
Student 1					1			2		
Student 2										

*Available in Supplemental Resource Guide

- Case managers submit monthly Service Log for all HOPE students (MV and non-MV) students served

- Program utilizes Excel spreadsheet

- Master File with tabs for each case manager with all of their assigned students who have received services

- Summary tab that compiles data from each case manager's tab

HOPE SAMPLE FORMS:
Monthly Service Log Summary Tab

▶ Formulas add totals from each individual case manager's tab to provide totals for CARE and HOPE program

▶ These totals are cross-checked with active casefile paperwork and Penelope

HOPE MONTHLY SERVICE LOG								
New			Ongoing			Total Services		
Chino	Chino Hills	Other	Chino	Chino Hills	Other	Chino	Chino Hills	Other
56	10	4	118	24	7	605	93	27
CARE MONTHLY SERVICE LOG								
New			Ongoing			Total Services		
Chino	Chino Hills	Other	Chino	Chino Hills	Other	Chino	Chino Hills	Other
20	4	1	53	21	0	272	78	4
Totals								
76	14	5	171	45	7	877	171	

*Available in Supplemental Resource Guide

HOPE PROGRAM REPORTS
EXCEL (afterschool & tutoring)

➤ Monthly report on Microsoft Word template

➤ Tracks students served and program activities

➤ Provides internal communication and staff updates, concerns, and successes

*Available in Supplemental Resource Guide

EXCEL Monthly Report
Liliana Ortega and Araceli Ochoa
September 2022

Program Numbers	CARE (Mckinney-Vento)	HOPE
New students enrolled		
Total students (Year-to-date)		

Workshops/Activites:

Date	Title	Description	# of students

PROGRAM UPDATES (Brief description and photos):

HOPE PROGRAM REPORTS
CARE Closet (clothing & hygiene)

➤ Monthly report on Microsoft Word template

➤ Tracks students served and program activities

➤ Provides internal communication and staff updates, concerns, and successes

*Available in Supplemental Resource Guide

CARE Closet Monthly Report
Mayra Lozano, CS Specialist
September 2022

Services provided	September 2022
Total individuals served	
# of children received clothing	
# of hygiene bags provided	

DONATIONS RECEIVED:

Date	Donated by:	Type of donation

PROGRAM UPDATES (Brief description and photos):

HOPE PROGRAM REPORTS
Outreach

> Monthly report on Microsoft Word template

> Tracks students served and program activities

> Provides internal communication and staff updates, concerns, and successes

*Available in Supplemental Resource Guide

Outreach Monthly Report
Adrian Echeverria, CS Specialist
September 2022

September Outreach Efforts:

	Date	Location	Description	# of contacts
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				

Future Scheduled Outreach:

	Date	Site	Description
1.			
2.			
3.			
4.			
5.			

TRANSITIONING TO AN ONLINE DATABASE

Considerations in Adopting a Client Management System

- Paper files were piling up creating a storage and access issue. There was a need to transition to a paperless system.

- Choosing a product that integrated with other platforms in use by the District minimized compatibility issues and allowed for generation of cross-reports with academic records.

- Given a large team spread out across multiple sites, creating online access for files allowed us to increase coordination and communication across staff.

ADDED VALUE & CAPACITY

What We Gained

- Ability to integrate data from student information database and Penelope – linking program and academic outcomes
  - Identify McKinney-Vento eligible students for recruitment and services
  - Assess broader needs and trends across schools and services
  - Generate reports for academic improvement for program participants

- Ability to access real-time case files across team and multiple sites
  - Allows us to easily step in if a case manager is absent to serve clients
  - Allows us to easily triage cases that need additional support or assistance with viewable history and case notes

A NOTE ABOUT COST

You don't have to have a fancy database to build a successful program!

> A case management database is a significant investment. Our cost was approximately $15,000.

> It has been a worthwhile investment because of the added value and capacity it brings.

> At the same time, if cost is a barrier, it's okay to use manual processes. We built our program using manual processes. The paper forms helped us learn what data we wanted to collect and what our processes should look like.

> The database then helped us take it to the next level once we had funding to support it.

PUBLISH IMPACT REPORT

Share the impact

> Annual Impact Report compiled from qualitative and quantitative data on student progress and program impact

> Shared with students & families, schools, administration, city & community partners

> Available on program website

CHINO VALLEY UNIFIED SCHOOL DISTRICT 01

2021/22 IMPACT REPORT

HOPE FAMILY RESOURCE CENTERS & SUPPORT PROGRAMS

CHINO VALLEY UNIFIED SCHOOL DISTRICT
Student Achievement • Safe Schools • Positive School Climate
Humility • Civility • Service

*Available in Supplemental Resource Guide

WHAT WE WISH WE KNEW:

SOME ADVICE FOR OTHERS STARTING OUT

Start with the end in mind. Plan around reporting needs from the beginning to find the system that works best for your needs.
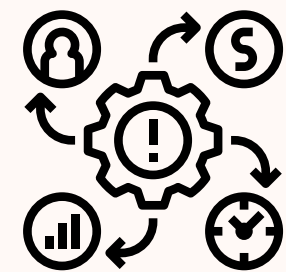
Measure the impact. Go beyond tracking services provided to assess impact on student outcomes.

Ask, how are we growing and how are we getting better? How can our program better serve students and families?

SECTION 4.2 SUPPLEMENTAL RESOURCES

Check out these additional tools and others in the Supplemental Resources Guide:

- Master Case Management Service Log – Redacted
- EXCEL Mentoring Program Report
- CARE Closet Program Report
- Outreach Program Report
- HOPE Annual Impact Report, 2021–22

Complete the Reflection & Evaluation form for this section.
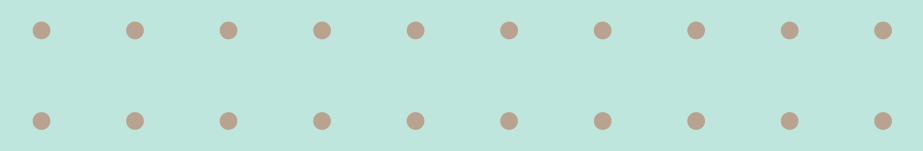
SESSION 4.2 SUMMARY

⇒ Find a reporting system that works to capture good data.

⇒ Start with the end in mind.

⇒ Measure impact at student level and program level.

⇒ Use data to get better.

⇒ Share the impact!

UP NEXT
Section 5: Outreach & Marketing