Manage This:

Getting Data Right for Government Reporting

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Presenters

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Who is ExED?

A Nonprofit, Mission-Driven Business Partner for
Southern California's Leading Charter Schools

Results-focused:

As the full-service "CFO" for each
school, ExED creates efficiencies and
sound business practices that direct
more resources to the classroom

A Charter School Pioneer:

20 years of experience supporting
some of the region's most dedicated
and effective charter schools

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ExED By The Numbers

Charter School Clients	Students Served by ExED Clients	ExED Financed Facilities	Facility Financing Secured
91	31,600	29	$175M

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Overview

- **Why is it so important? CALPADS-an example**
- **Common Problems**
- **What are our reporting requirements?**
- **What are we already doing right?**
- **What else can we do to ensure accuracy ...and efficiency?**
- **What can we do to make it easier?**
- **Best Practices**

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Accurate data reporting is critical...

CALPADS

1. **FALL 1 reports your Unduplicated Pupil Count (UPC)**
- Meal Applications must all be collected, verified
- Census Day data submitted in December

2. **Potential for error**
- Not collecting all applications
- Not verifying –on time!
- Data entry errors
- Missing direct certification data
- CALPADS-SIS reporting issues

What if you underreport by 40 free/reduced eligible students out of 300 eligible students with 400 enrolled?
- UPC rate reduced by 10%
- Reduce your LCFF rate by $80/ADA OR loss of $32,000

Note: Actual impact will vary by LCFF implementation, grade levels, etc.

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...accurate reporting is critical for attendance too!

Average Daily Attendance (ADA)

1. **Period 2 (P-2) report sets your ADA total for the year:** this represents the first 7 or 8 months' average daily attendance

2. **Attendance must be taken daily and accurately:** a single day missed throws off your whole report

What if you underreport by just 5 ADA?

- Reduce your funding by 5X your LCFF rate
- Example LCFF rate of $9,500 – total loss of $47,500

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CALPADS: Our example

CALPADS Umbrella

- LCFF
- Unduplicated Pupil Count (UPC)
- Other Supplemental Funding Sources
- Compliance Reporting

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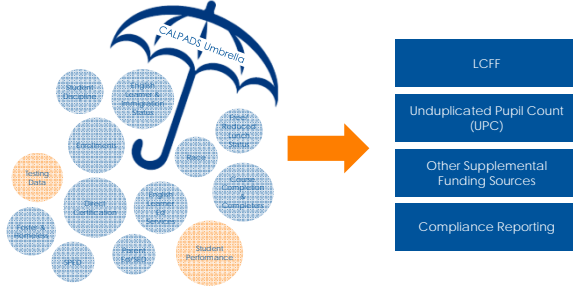
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What is CALPADS? California Longitudinal Pupil Achievement Data System

- **CALPADS is the data source for state and federal accountability reporting**
  - Unduplicated Pupil Count, and EL and FRPM for supplemental funding
  - Direct certification for free lunch eligibility (state-level monthly match)
  - Foster Youth (state-level weekly match)
  - TOMS (Testing Operations Management System) for SBAC/CAASPP

- **The system collects**
  - student enrollment,
  - demographic,
  - program participation,
  - course enrollment and completion,
  - discipline,
  - certificated staff, and
  - statewide assessment data (in-progress)

- **Data are used to track students over time (continuously enrolled)**

- **Fulfill state and federal reporting requirements (and some authorizers')**

- **Provide information about students and schools to state decision-makers, parents, community and researchers**

CSIS/FCMAT State Reporting Overview
for Administrators V2.0, 10/26/2015

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Let's throw out some ideas: What would you do differently from last year?

Let's reflect on your recent reporting process.

Is there anything you would do differently with your data management and data reporting practices?

Give us one issue you found along the way to certifying your reports…

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Common CALPADS Issues

- **Staff do not have the right skill set to**
  - Understand your local system (SIS)
  - Understand data and reporting requirements
  - Coordinate and communicate
  - Troubleshoot SIS or CALPADS issues
  - Self-direct
- **Staff are not trained**
- **Responsibilities and expectations are not clearly established**
- **Data collection and entry are an afterthought**
- **Single points of failure**
- **Staff do not have the time to keep up with <u>all</u> of the changes**

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Reporting Requirements: Get them right!

$$$ Reports	What are we doing right?

CALPADS Reports (1.17)
Period 1 (P1)
Period 2 (P2)
Annual
Monthly
CNIPS (NSLP)
PENSEC & 20 Day
(Pupil Estimates for New or
Significantly Expanding Charters)

Process
- Staff know how to use SIS
- Data entry process in place
- Staff responsible are held accountable for entering timely and accurate data

Review
- Review attendance reports
- Identify errors or inconsistencies
- Identify process areas for improvement
- Request guidance on topics (Ind. Study, ELAS, FRL)

Report
- Complete reporting
- Review for consistencies
- Share with school leadership
- Submit to required party

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Slide 1: Are we covered for both state and federal reporting?

Compliance Reports

- Con App — Consolidated Application
- CMDC — Cash Management Data Collection
- CALPADS — California Longitudinal Pupil Achievement Data System
- Reporting Requirements

What can we do to ensure accuracy?

Process
- Understand requirements
- Define processes
- Know how to use our SIS
- Understand roles and responsibilities
- We can_____

Review
- Assess needs
- Gather tools and guidance
- Maximize available funding
- We can_____

Report
- Complete reporting on time
- Review for inconsistencies
- Share with school leaders
- Submit to required party
- We can_____

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Slide 2: Most data comes from your SIS ...know how to use it!

SIS Student Information System

- Student Demographic Information
- Course Information
- Test Results/Statewide Assessments
- Emergency Info
- Health Info
- Meal Count POS
- Language Info
- Homeless Info
- FRL Status
- SPED IEPs/504s
- Staff Information
- Grades
- Attendance

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Slide 3: CALPADS Data Management: Who has our data?

HR Personnel:
TEACHER INFO: Name, DOB, Yrs Experience, Credentials

Student Information:
Student Name, Address, Gender, Ethnicity, Birth date, Parent Info, Attendance, Final Grades (7-12)

Special Education:
Disability Codes, IEP Info, Services
Student Name, Gender, Ethnicity, Birth date

SIS

Food Services:
FREE/REDUCED INFO: Household Applications, Meal Accounting

Student Behavior:

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CALPADS Data Management:
Who has our data?

HR Personnel:
_____
_____
_____

TEACHER INFO:
Name, DOB,
Yrs Experience,
Credentials

**Student Name, Address,
Gender, Ethnicity, Birth
date, Parent Info,
Attendance,
Final Grades (7-12)**

Student Information:
_____
_____
_____

Special Education:
_____
_____
_____

SIS

**Disability Codes, IEP Info,
Services
Student Name, Gender,
Ethnicity, Birth date**

FREE/REDUCED INFO:
Household Applications,
Meal Accounting

Food Services:
_____
_____
_____

Student Behavior:
_____
_____
_____

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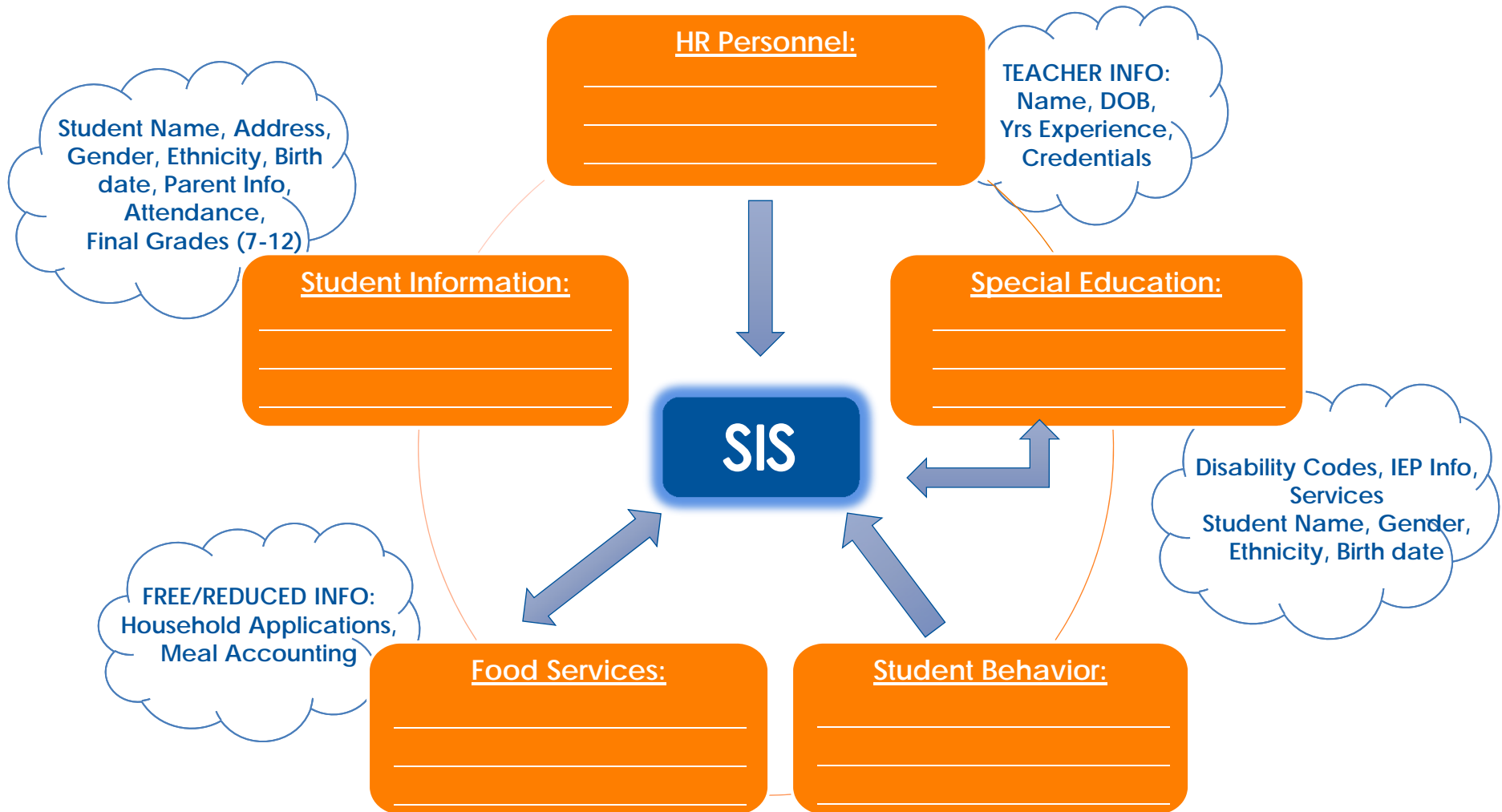
Let's think…

- Now that we know who has our data, how often do they check in with each other?
  - HR/Personnel (Staff data) ⟶ SIS point person
  - SPED team (Program data) ⟶ SIS point person
  - Student Information (Enrollment and demographic data) ⟶ SIS point person
  - Student Behavior ⟶ SIS point person
  - Food Services (Free and reduced lunch) ⟶ SIS point person
  - Foster and Homeless ⟶ SIS point person
  - SIS point person ⟶ School leadership
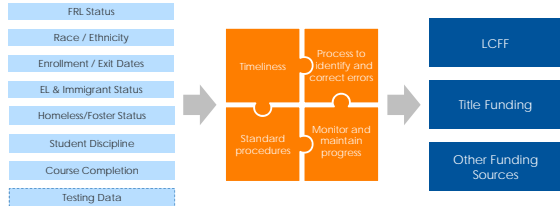- Are the check-ins in alignment with our reporting calendar?

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CALPADS management, aligns with all school revenue compliance practices

| FRL Status |
| Race / Ethnicity |
| Enrollment / Exit Dates |
| EL & Immigrant Status |
| Homeless/Foster Status |
| Student Discipline |
| Course Completion |
| Testing Data |

Timeliness · Process to identify and correct errors · Standard procedures · Monitor and maintain progress

| LCFF |
| Title Funding |
| Other Funding Sources |

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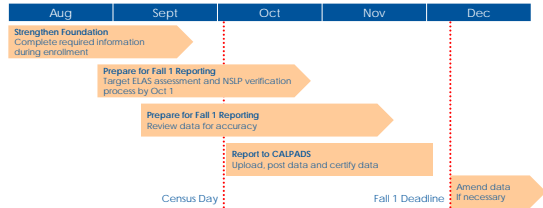
Unduplicated Pupil Count (often spoken in %) focus is early, ongoing data management and reporting

| Aug | Sept | Oct | Nov | Dec |

Strengthen Foundation
Complete required information during enrollment

Prepare for Fall 1 Reporting
Target ELAS assessment and NSLP verification process by Oct 1

Prepare for Fall 1 Reporting
Review data for accuracy

Report to CALPADS
Upload, post data and certify data

Amend data if necessary

Census Day   Fall 1 Deadline

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Getting to CALPADS Fall Submissions: Backwards Planning

Day	Date	Task Completed
No less than two (2) weeks prior to the first day of school		All employee data is in our SIS. Clearances are complete.
First day of school		All student data is in our SIS.
Day _____		All students are enrolled in course sections
Day 14 (Fall 1)		All student enrollments in CALPADS
Day 20 (PENSEC/LAUSD)		All enrollments up-to-date in SIS for 20-day reporting
Day 30 (Fall 2/NSLP/ELAS)		FRL program eligibility transitions, CELDT IA complete
Day _____		No changes to section enrollments in first term courses
Day _____	October 1, 2016	Begin NSLP verification
Day _____	October 5, 2016	CALPADS Census Day
Day _____	October 30, 2016	CBEDS deadline
Day _____	Mid-December	Fall 1 submission deadline
Day _____	Early March	Fall 2 Submission Deadline

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Getting to CALPADS Fall Submissions: Backwards Planning

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Day _____	October 30, 2016	CBEDS deadline
Day _____	Mid-December	Fall 1 submission deadline
Day _____	Early March	Fall 2 Submission Deadline

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Best Practices

- **Reporting requirements (and data points) are understood**
- **Successful Reporting requires Collaboration**
  - **Required data crosses the LEA**
  - **Subject matter expertise is required**
- **Data Owners are Accountable**
- **Data Management Calendar is Established**
- **Responsibilities are Established**
- **Staff are Trained**

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How we will avoid common CALPADS issues

Staff do not have right skill set to
1. Understand local system
2. Understand data and reporting requirements
3. Coordinate and communicate
4. Troubleshoot
5. Self-direct

Action
1. _____
2. _____
3. _____
4. _____
5. _____

1. **Staff are not trained**
2. **Responsibilities and expectations not clearly established**
3. **Data collection and entry are an afterthought**
4. **Single points of failure**
5. **Staff do not have the time to keep up with all of the changes**

1. _____
2. _____
3. _____
4. _____
5. _____

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1. _____
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1. _____
2. _____
3. _____
4. _____
5. _____

Moral of the story…
Accurate data =
accurate calculations

ExED can help!
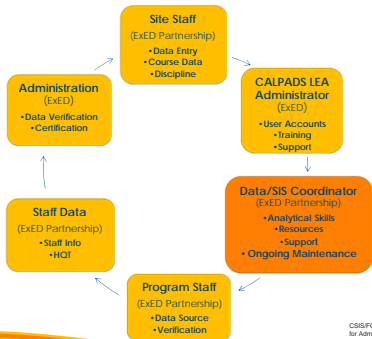
ExED's CALPADS Collaboration Wheel