Texas CASA Online Data Manager

PERFORMANCE MEASURES

REFERENCE

FEBRUARY 2018 VERSION 1.1

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INTRODUCTION

This document describes the Performance Measures submitted by local CASA programs (LCPs) to Texas CASA.

1. FEATURES OF THE ON-LINE DATA MANAGER

1.1. Objects and Records

The ODM application is built on the force.com platform. The application is based on **Objects**, which are similar to spreadsheets or tables. Data are stored in **Records** of the object, which correspond to rows in a database table.

The following objects are in the ODM: Account, Contact, County, Grant, Budget, Budget Line Item, RFR, Direct Grant, DR Line Item, Direct Reimbursement, **Performance Measures**, Job Description, Cash Match Source, Annual Audit, and Cooperative Working Agreement.

1.2. Fields

Data values are entered and stored in **Fields** in each **Object**. Each **Object** comprises a number of **Fields**, which correspond to columns in a database table.

Required Fields

Required **Fields** are marked with a red line on the left-hand edge of the **Field** data entry box. A record cannot be saved if a required **Field** is blank.

Field Help

Most data fields provide **Field Help**. There is a small, yellow bubble immediately to the left of any data field for which **Help** is available. Hovering over the bubble causes the **Help** to appear.

Reimbursements $19,502.00

1.3. Record Types

An **Object** can have more than one **Record Type**. Each **Record Type** displays a specific set of fields. Fields that are not needed are hidden.

For example, the **Performance Measures Object** has three record types used by local CASA programs to submit data:

1. Beginning of the fiscal year

2. Quarter, and

3. End of the fiscal year.

A fourth **Record Type** called **Fiscal year annuals** summarizes data for a fiscal year.

The record type is displayed in the **System Information** section of an **Object** record. Contact TCIMS@texascasa.org to correct an incorrect **Record Type**.

1.4. Performance Measure Records Naming Conventions

The name of everyone **Performance Measure** record has three components, always in the same order:

1. the fiscal year,

2. a code for the reporting period, either Beginning of the fiscal year (BOY), Quarter, (Q1, Q2, Q3, or Q4), or End of the fiscal year (EOY), and

3. a hyphen followed by the Administrative Identification Number of the program.

For example, 2015BOY-12 is the name of the record for Big County CASA Beginning of the year report for Fiscal Year 2015.

2. PERFORMANCE MEASURES RECORDS

2.1. LCP: Create Performance Measures Record

1. Open the local program **Account** record

   a) Go to **Accounts** tab

   b) Choose the "All CASA Programs" view then click **Go!** to view LCP Account records. LCPs should only see one Account record.

   c) Click the **Account Name** link to open up the local program Account detail page.

2. From the Account's detail page, click the "Performance Measures" hover link or scroll down to the **Performance Measures** related list.

3. Click the **New Performance Measures** button.

4. Select the appropriate **Record Type** and click **Continue**. The three **Record Types** are:
   Beginning of the fiscal year
   Quarter, and
   End of the fiscal year.

5. Fill in all required fields, as indicated by the red line to the left of the field entry box. Note: The ODM will overwrite the Performance Measures Name with a standard naming convention when you save the record.

TIP: You can Save and return later to continue work. Once you click Submit, the record is locked.

6. Click **Save**.

Expected Results: *The Performance Measures record is created and available for editing.*

2.2. LCP: Submit and Lock Performance Measures Record

1. See Section 8 below for a list of data validations.

2. Review the record for accuracy.

3. Every data validation must be met or the record cannot be submitted.

4. Once **Submit** is clicked, a Performance Measure Record is locked and cannot be edited.

Expected Results: *The Performance Measures record is locked. The ODM locks the record and the LCP cannot make edits.*

3.   BEGINNING OF THE FISCAL YEAR

Note: *Fields in bold are required. Fields in plain type are auto-filled.*

3.1. Performance Measures Detail

1. Performance Measures Period
2. Administrative Identification Number
3. LCP (Local CASA Program name)
4. Legal Name of Organization
5. **Fiscal Year**
6. **Reporting Period**
   a) Beginning of the fiscal year
7. **Executive Director Approval**
8. **Executive Director Approval Date**

3.2. Cases and Volunteer:Case Ratio on First Day of the Fiscal Year

1. **Cases**
2. **Cases with volunteers**
3. **Cases with staff**
4. Volunteer:Case Ratio (VCR)

3.3. Children on First Day of Fiscal Year

1. **Children**
2. Children with volunteers

3.4. Demographics of Children on First Day of Fiscal Year

1. **5 years and younger**
2. **6 years through 12 years**
3. **13 years through 17 years**
4. **18 years and older**
5. **Age unknown**
6. Children age groups total
7. **Female**
8. **Male**
9. **Gender unknown**
10. Children gender total
11. **Hispanic and**
    a) **African-American**
    b) **Asian**
    c) **Native American**
    d) **White**
    e) **Two or more races**
    f) **Race unknown**
    g) Hispanic total
12. **Non-Hispanic and**
    a) **African-American**
    b) **Asian**
    c) **Native American**
    d) **White**
    e) **Two or more races**
    f) **Race unknown**
    g) Non-Hispanic total

3.5. Volunteers Serving Cases of First Day of Fiscal Year

1. **Volunteers**

3.6. Demographics of Volunteers Assigned on First Day of Fiscal Year

1. **18 through 20 years**
2. **21 through 29 years**
3. **30 through 39 years**
4. **40 through 49 years**
5. **50 through 59 years**
6. **60 years and older**
7. **Age unknown**
8. **Volunteers**
9. Volunteers age group total
10. **Female**
11. **Male**
12. **Gender Unknown**
13. Volunteers gender total
14. **Hispanic and**
    a) **African-American**
    b) **Asian**
    c) **Native American**
    d) **White**
    e) **Two or more races**
    f) **Race unknown**
    g) Hispanic total

15. **Non-Hispanic and**
    a) **African-American**
    b) **Asian**
    c) **Native American**
    d) **White**
    e) **Two or more races**
    f) **Race unknown**
    g) Non-Hispanic total

4. QUARTER

Note: *Fields in bold are required. Fields in plain type are auto-filled.*

4.1. Performance Measures Detail

1. Performance Measures Period
2. Administrative Identification Number
3. LCP (Local CASA Program name)
4. Legal Name of Organization
5. **Fiscal Year**
6. **Reporting Period**
    a) Quarter 1
    b) Quarter 2
    c) Quarter 3
    d) Quarter 4
7. **Executive Director Approval**
8. **Executive Director Approval Date**

4.2. Cases Opened during this Quarter

1. **Cases**

4.3. Cases and Volunteer:Case Ratio this Quarter

1. **Cases continued**
2. Cases served

Note: Cases served is auto-calculated and is = cases opened this quarter + cases continued. It must also = cases with volunteer + cases with staff.

3. **Cases with volunteer**
4. **Cases with staff**
5. Volunteer:Case Ratio (VCR)
6. **Cases closed this quarter**

4.4. Children with Cases Opened during this Quarter

1. **Children**
2. Children with volunteers

4.5. Demographics of Children with Cases Opened during this Quarter

Same as the Beginning of the fiscal year.

4.6. Child Outcomes and Reasons for Case Closure

1. **Children with cases closed**

I Child Outcomes for CASA case closed and CPS/Court cases closed

1. **Returned home**
2. **Adoption relative**
3. **Adoption non-relative**
4. **Custody to relative**
5. **Custody to non-relative**
6. **Emancipation, age out, or 18th birthday**
7. **Runaway**
8. **Deceased**
9. Subtotal I

II Reason for Case Closure when Child is in TMC when CASA case closed

1. **Transfer to another jurisdiction**
2. **CASA requested dismissal**
3. **Court dismissed CASA from the case**
4. Subtotal II TMC cases

III Reason for Case Closure when Child is in PMC when CASA case closed

1. **Transfer to another jurisdiction**
2. **CASA requested dismissal**
3. **Court dismissed CASA from the case**
4. Subtotal III PMC cases

IV Child Outcomes for Court-Ordered Services cases closed

1. **Family preservation**
2. **Custody to relative**
3. **Custody to non-relative**
4. **Emancipation, age out or 18th birthday**
5. **Runaway**
6. **Deceased**
7. **Case transfer or CASA or court dismissal**
8. Subtotal IV COS cases
9. Total of child outcomes

4.7. Volunteers Assigned This Quarter Not Previously Reported This Fiscal Year

1. **Volunteers**

4.8. Demographics of Volunteers Assigned This Quarter Not Previously Reported This Fiscal Year

1. **18 through 20 years**
2. **21 through 29 years**
3. **30 through 39 years**
4. **40 through 49 years**
5. **50 through 59 years**
6. **60 years and older**
7. **Age unknown**
8. **Volunteers**
9. Volunteers age group total
10. **Female**
11. **Male**
12. **Gender Unknown**
13. Volunteers gender total

14. **Hispanic and**
    a) **African-American**
    b) **Asian**
    c) **Native American**
    d) **White**
    e) **Two or more races**
    f) **Race unknown**
    g) Hispanic total

15. **Non-Hispanic and**
    a) **African-American**
    b) **Asian**
    c) **Native American**
    d) **White**
    e) **Two or more races**
    f) **Race unknown**
    g) Non-Hispanic total

4.9. Volunteer Recruitment and Retention

1. **Applications submitted**
2. **Volunteers begin pre-service training**
3. **Volunteers complete pre-service training**
4. **Newly sworn-in volunteers assigned**
5. **Number of in-service trainings**
6. **Volunteers in in-service training**

5.   END OF THE FISCAL YEAR

Note: Fields in bold are required. Fields in plain type are auto-filled.

Note: Counts are for 12 months of the fiscal year.

Note: Even if you had no Courtesy Collaboration or Court-Ordered Services Cases, please enter zeros and submit the record.

5.1. Performance Measures Detail

1. Performance Measures Period
2. Administrative Identification Number
3. LCP (Local CASA Program name)
4. Legal Name of Organization
5. **Fiscal Year**
6. **Reporting Period**
   a) End of the fiscal year
7. **Executive Director Approval**
8. **Executive Director Approval Date**

5.2. Courtesy Collaboration

1. **Number of placement visits**
2. **Number of cases assisted**
3. **Number of children assisted**

5.3. Children in Court-Ordered Services (COS) Cases

1. **Children in COS first day of fiscal year**
2. **Children in COS open during fiscal year**
3. Child in COS fiscal year total

6.   DEFINITIONS AND NOTES

The Fiscal Year is September 1 through August 31.

Quarter 1 is September 1 through November 30.

Quarter 2 is December 1 through February 28 or 29.

Quarter 3 is March 1 through May 31.

Quarter 4 is June 1 through August 31.

"Children" includes children in the legal responsibility of the Texas Department of Family Protective Services and children receiving court-ordered services.

In the quarterly reports, a case with a volunteer is a case that had a volunteer assigned at any time during a quarter. A case with staff is a case that had only staff assigned throughout a quarter.

Each unique volunteer is counted only once during each fiscal year.

7. TABLE OF REPORTING PERIODS FOR PERFORMANCE MEASURE DATA FIELDS

7.1. Reporting Periods for Performance Measure Data Fields

Data Fields[a]	Beginning of the fiscal year[b]	Quarter only[b]	End of the fiscal year
Fiscal Year	X	X	
Reporting Period	X	X	
Executive Director Approval	X	X	
Executive Director Approval Date	X	X	
Cases	X	X	
Cases with volunteers	X	X	
Cases with staff	X	X	
Volunteer:Case Ratio (VCR)	C	C	
Children	X	X	
Children with volunteers	C	C	
Children age groups	X	X	
Children gender	X	X	
Race, Hispanic Children	X	X	
Race, Non-Hispanic Children	X	X	
Race, Hispanic + Non-Hispanic Children	C	C	
Volunteers	X	X	
Volunteer age groups	X	X	
Volunteer gender	X	X	
Race, Hispanic Volunteers	X	X	
Race, Non-Hispanic Volunteers	X	X	
Race, Hispanic + Non-Hispanic Volunteers	C	C	
Cases continued		X	
Cases served (=cases continued + cases opened)		C	
Cases closed this quarter		X	
Children with cases closed		X	
Child outcomes and reasons for case closure		X	
Total of child outcomes		C	
Volunteer training and retention		X	
Courtesy collaboration			X
Children with court-ordered services			X

[a]Bold font = Submitted   Plain font = auto-calculated

[b]X = Submitted   C = auto-calculated

8. DATA VALIDATION

A Performance Measure record must meet every validation rule. **Submit** is rejected for a record not in compliance with all validation rules.

8.1. Rules for a *Beginning of the Fiscal Year* Record

1. Cases = Cases with volunteers + cases with staff
2. Children = Sum of Children age groups
3. Children = Sum of Children genders
4. Children = Sum of Children Hispanic + Sum of Children non-Hispanic
5. Volunteers = Sum of Volunteers age groups
6. Volunteers = Sum of Volunteers genders
7. Volunteers = Sum of Volunteers race groups
8. Volunteers = Sum of Volunteers Hispanic + Sum of Volunteers non-Hispanic

8.2. Rules for a *Quarter* Record

1. Cases (added) + Cases continued) = Cases with volunteers + cases with staff
2. Children = Sum of Children age groups total
3. Children = Sum of Children genders
4. Children = Sum of Children Hispanic + Sum of Children non-Hispanic
5. Children with cases closed = sum of Child outcomes
6. Volunteers = Sum of Volunteers age groups
7. Volunteers = Sum of Volunteers genders
8. Volunteers = Sum of Volunteers race groups

9. DATA MIGRATION OF PERFORMANCE MEASURES

9.1. Quarterly Counts Fiscal Year 2015-2017

A sparse set of quarterly data was migrated for Fiscal Years 2015 through 2017. The data are needed to populate the tables in the CVC Growth Grant application record. The fields migrated are as follows:

1. Cases served with volunteers
2. Cases served with staff
3. Children served
4. Volunteers assigned

9.2. Annualized Counts for Fiscal Year 2015-2017

Quarterly data for FY 2015 through FY2017 were used to calculate and migrate annual values for the following data:

1. Cases
2. Children served
3. Annualized volunteer:case ratio (VCR)
4. Child demographics
5. Children with cases closed
6. Child outcomes
7. Children with court-ordered services, if applicable
8. Volunteers
9. Volunteer demographics
10. Volunteer training

9.3. Annualized Counts for Fiscal Year 2010-2014

Quarterly data for FY 2015 through FY2017 were used to calculate and migrate annual values for the following data:

1. Cases
2. Children served
3. Annualized volunteer:case ratio (VCR)
4. Children with cases closed
5. Children with court-ordered services, if applicable
6. Volunteers
7. Volunteer training

9.4. Annualized Counts for Fiscal Year 2002-2009

Migration of selected data fields from FY2002 through 2009 is under consideration.

10. PERFORMANCE MEASURE REPORTS

Note: This section is under development.