Texas CASA Online Data Manager

PERFORMANCE MEASURES

REFERENCE

NOVEMBER 2019 VERSION 2.1

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INTRODUCTION

This document describes the Performance Measures submitted by local CASA programs (LCPs) to Texas CASA using the Texas CASA on-line data manager (ODM).

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 pertain to Performance Measure reporting in the ODM: **Account**, **County**, and **Performance Measures**.[1]

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.

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

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[1] Objects pertaining to Grants Management are: Contact, Grant, Budget, Budget Line Item, RFR, Direct Grant, DR Line Item, Direct Reimbursement, Job Description, Cash Match Source, Annual Audit, and Cooperative Working Agreement. Program-related objects include: QA Review, CaSA Tool, and Texas CASA Initiative.

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 every **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. Login at https://texascasa.force.com/casaprograms/login.

2. 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.

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

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

5. Select the appropriate **Record Type** and click **Continue**. The three **Record Types** are:
    a) **Beginning of the fiscal year**

    b) **Quarter**, and

    c) **End of the fiscal year**.

6. Fill in all required fields (**Fiscal Year** and **Reporting Period**). The required fields are identified by a red line to the left of the field entry box. Note: The ODM will auto-fill the Performance Measures Name using the naming conventions when the record is saved.

7. Click **Save**.

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

Expected Results: *The Performance Measures record is created and available for editing. The **Status** assigned is "**Created.**"*

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. The **Status** is "**Submitted.**"*

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**
9. Status

3.2. Cases on First Day of Fiscal Year

1. **Cases**

3.3. Children on First Day of Fiscal Year

1. **Children**

3.4. Percent Children with Volunteer (PChV) on First Day of Fiscal Year

1. **Children with volunteers (actual)**
2. **Children served by staff (actual)**
3. Percent children with volunteer PChV

3.5. 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

3.6. Volunteers Serving Cases of First Day of Fiscal Year

1. **Volunteers**

3.7. 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**

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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**
9. Status

4.2. Cases Opened during this Quarter

1. **Cases**

4.3. Children with Cases Opened during this Quarter

1. **Children**

4.4. Percent Children with Volunteer PChV this Quarter

1. **Children continued**
2. Children served
3. **Children with volunteer (actual)**
4. **Children served by staff (actual)**
5. Percent children with volunteer PChV

Note: *Children served* is auto-calculated and is = *children* opened this quarter + *children continued*. It must also = *children with volunteer* + *children served by staff.*

4.5. Demographics of Children with Cases Opened during this Quarter

Same as the Beginning of the fiscal year.

4.6. Case outcomes for Children with Cases Closed during the Quarter

1. **Children with cases closed**
2. **Cases closed this quarter**

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**

TEXAS**CASA**
Court Appointed Special Advocates
FOR CHILDREN

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office: 512.473.2627 • toll free: 844.230.6467 • txcasa@texascasa.org
texascasa.org

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 child with a volunteer is a child that had a volunteer assigned at any time during a quarter. A child with staff is a child that had only staff assigned throughout a quarter.

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

Report "0", if applicable, rather than blank in reported fields.

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7. TABLE OF REPORTING PERIODS FOR PERFORMANCE MEASURE DATA FIELDS

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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	X
Reporting Period	X	X	X
Executive Director Approval	X	X	X
Executive Director Approval Date	X	X	X
Cases	X	X	
Children	X	X	
Children with volunteers (actual)	X	X	
Children served by staff (actual)	X	X	
Percent of children with volunteer PChV	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	
Children continued		X	
Children served (=children continued + children 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 = Reported   Plain font = auto-calculated

[b]X = Reported   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. Children = Children with volunteers + children served by 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. Children added + Children continued = Children with volunteer + children served by 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 MEASURES REPORTS

Go to the **Reports** tab. Then, go to the **Reports Folder** named "**ODM Local Program Reports**."

10.1. Performance Measure Reports

The following **Performance Measures** reports are available:

1. Cases_VCR_byQ_FY18-FY19
2. Child_Vol_Case_byQ_FY18-19
3. Child_Vol_Case_byQ_FY20
4. Child_Vol_byFY_FY10-present