Instructions for Completing Program Reports

Data Collection Expectations: Portland Children's Levy (PCL) expects that grantees will collect and track data on program participants to annually report on the number of people served, the number of service activities provided, participant attendance, participant outcomes, and demographics of participants as outlined in your grant agreement.

I. Mid-Year and Annual Narrative Reports (Word documents)

Instructions for Completing the Mid-Year and Annual Narrative reports are on the front pages of the report forms, provided to you by your grant manager.

II. Annual Data Report (Excel document)

A. Program Data Worksheet
Your report form is customized for your grant.

Service Goals
Number of People Served by Program and Number of Program Activities Provided: This section lists service goals from Section I. A & B of the grant agreement. Enter data in the blue cells, and the worksheet will automatically calculate the percentage of the goal met. If you notice any errors in the automatic calculations, let your grant manager know when you submit the report.

Definitions for Service Goal Reporting
Served: A person is considered "served" if an intake, enrollment or registration form was completed for the person, and they received some Levy-funded program services during the contract year.

Total Unduplicated People Served: Unique children/youth/parents/caregivers served that participated in the PCL-funded program during the contract year.

Total Duplicated People Served: **After school:** Children/youth who participated in multiple classes offered during the contract year and who are counted for each class they participated in, or participants in summer programming who also participated in school-year programming. **Hunger relief:** the number of

individuals that receive food at a distribution site regardless of whether they received food at the same site multiple times in the reporting period.

Participation Goals: This section lists the participation goal(s) from Section I.C.1.b of the grant agreement. Enter the number of people who met the participation goal(s) in the blue cells. The worksheet will automatically calculate the percentage of the goal met using a ratio of the number of people who met the goal divided by the total people served (or the number of people enrolled long enough to have met the participation goal).

Outcome Goals: This section lists the outcome goals from Section I.C.2 of the grant agreement. Enter the requested information in the blue cells. The worksheet will automatically calculate the percentage of the goal met using a ratio of the number of people who met the outcome divided by the number of people who were assessed for the outcome and met the applicable participation goal.

After school and mentoring programs with outcomes that rely on data from Multnomah Education Service District (MESD) do not need to enter data for those outcomes. PCL staff will enter the data when MESD provides it and will send the completed report form to grantees.

B. Demographic Worksheet
The number of total unduplicated children/youth and total unduplicated parents/caregivers reported as served on the Program Data Worksheet will automatically appear on the Demographic Worksheet. Enter data on the people served in the blue cells, and the worksheet will automatically calculate the percentage of total people served that fall into each demographic category.

If you are missing some demographic information on people served, record the number of people with missing data in the "Not Given" option for each demographic category. The total number of people in each demographic category should equal the total people served. If they are not equal, the total cell will be colored orange and alert you that there is an error. If the totals are equal, and your data entry is accurate, the cell will be gray.

Definitions for Demographic Categories:

1. Gender Identity

Gender options are male, female, transgender, genderqueer, non-binary, and not given. Report the number of children/caregivers who identify in each option. Use "not given" if the participant did not provide the information on the enrollment form.

2. Race/Ethnicity

PCL expects grantees to use clients' self-identification of race/ethnicity in reporting these data. The form's race/ethnicity options are based on distinctions used by a variety of public and private agencies, including communities discussed in the Coalition of Communities of Color's Unsettling Profile reports.

Race/Ethnicity Identity Definitions and How to Use Them	
Use the definitions to choose the one category that most closely aligns with the racial/ethnic identity indicated by the client on your intake form. If your agency does not collect data on these identity options, report clients in the PCL categories you use.	**PCL does not recommend that you list the full text of the definitions as written below on your program intake/enrollment forms**. PCL recommends that your form offer fill-in-the-blank or checklist options without the definitions.

African: A person who is a refugee, immigrant or seeking asylum from the countries of Africa.

Asian: A person having origins in any of the original peoples of East Asia, Southeast Asia, or South Asia, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippines, Thailand and Vietnam.

African American or Black: A person having origins in any of the Black racial groups of Africa.

Latino: A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin.

Middle Eastern: A person having origins in any of the original peoples of the Middle East ranging from Turkey and Iran in the north and Saudi Arabia, Oman and Yemen in the south and east.

Native American/Alaska Native/Indigenous: A person having origins in any of the original peoples of North and South America (including Central America).

Native Hawaiian or Pacific Islander: A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

Slavic: A person having origins in any of the original peoples of the states of the former Soviet Union, or other Slavic culture or origin.

Multiracial: If a participant identified more than one race/ethnicity on your intake form, count that participant as "Multiracial" on the PCL form.

White: A person having origins in any of the original peoples of Europe.

Not Given: Use this option if the participant did not provide the information on the enrollment form.

3. **Primary Language in the Home**
a. Language Options Listed on the form: Options in this category are informed by the City of Portland Office of Equity and Human Rights. Report the number of unduplicated participants served who identify the primary language spoken in the home as one of the options listed. **For foster care programs**, report the primary language in the home of the birth parents.

b. "Other" Languages Option: If the primary language spoken in the home of the client served is not one of the options on the worksheet, use the "other" option to report the number of participants. Report the specific other language spoken on the form as labeled in cells G28-48. Optional: Use cells H29-49 to include the number of clients that speak any additional languages that you list.

c. "Not Given" Option: Use this option if the participant did not provide the information on the enrollment form.

4. Age

If the child/caregiver enrolled during the contract year, report the age at enrollment. If the participant enrolled prior to July 1 of the contract year, then report their age as of July 1 of the contract year.

5. Residence Zip Code

a. Zip Code Options: The options listed in this category include the zip codes in the City of Portland. **School-based programs** may use the zip code of the school if your program does not collect this information from individual participants, or if it is missing from the information provided by the participant. **For foster care programs**, report the zip code of the birth parents if located within the City of Portland. If the birth parents do not live in the City of Portland, report the zip code of the foster care home.

b. "Homeless" Option listed: PCL uses the following definition of "homeless" based on the Federal McKinney-Vento Homeless Assistance Act: individuals who lack a fixed, regular, and adequate nighttime residence, and includes: (i) children sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; living in emergency or transitional shelters; are abandoned in hospitals; (ii) children who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; (iii) children living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings.

6. Socioeconomic Status

Options in this category are based on the federal poverty level definitions for 2022 and correspond to U.S. Department of Agriculture (USDA) free & reduced meals guidelines for FY21-22. It may be necessary to calculate clients' level of poverty using either the table below or USDA guidelines, depending on how data are collected from participants. **For foster care programs**, report the socioeconomic status of the birth parents if the data are available.

If your enrollment form does not ask for family income information, record all participants served in the "Grantee enrollment form didn't ask" option. If you ask

about family income, but the participant didn't respond, record those participants in the "Grantee form asked; client no response" option.

Income breakdown based on the 2022 federal poverty level

Persons in family	100% of FPL	101%-130% of FPL		131%-185% FPL		186%-200% of FPL		Over 200% of FPL	
1	$13,590	$13,726	$17,667	$17,803	$25,142	$25,277	$27,180	$27,316	and above
2	$18,310	$18,493	$23,803	$23,986	$33,874	$34,057	$36,620	$36,803	and above
3	$23,030	$23,260	$29,939	$30,169	$42,606	$42,836	$46,060	$46,290	and above
4	$27,750	$28,028	$36,075	$36,353	$51,338	$51,615	$55,500	$55,778	and above
5	$32,470	$32,795	$42,211	$42,536	$60,070	$60,394	$64,940	$65,265	and above
6	$37,190	$37,562	$48,347	$48,719	$68,802	$69,173	$74,380	$74,752	and above
7	$41,910	$42,329	$54,483	$54,902	$77,534	$77,953	$83,820	$84,239	and above
8	$46,630	$47,105	$60,631	$61,097	$86,266	$86,749	$93,260	$93,744	and above

For additional information, including guidelines for households with more than 8 people, refer to guidelines at US Dept. of Health & Human Services website. [Poverty Guidelines | ASPE (hhs.gov)](https://hhs.gov)

7. Disability

The options in this category are based on the following definition of disability in the Americans with Disability Act: A person who has a physical or mental impairment, or both, that substantially limits one or more major life activities, a person who has a history or record of such impairment, or a person who is perceived by others as having such an impairment.

If your enrollment form does not ask about disability, record all participants served in the "Grantee enrollment form didn't ask" option. If you ask about disability, but the participant didn't respond, record those participants in the "Grantee form asked; client no response" option.

III. Participant List: After School & Mentoring Programs Only

A. **Data Collection Expectations:** PCL expects that grantees will collect and report the information on the Participant List Form for all youth who met the program participation goal:
   - First and last name
   - School attended
   - Grade in school

- Date of birth
- School identification number (SSID or Synergy ID number; MESD prefers SSID if you have it)
- List all information you have for a student even if you do not have all information requested.

B. **Complete the Form Shared by Grant Manager**: Your PCL grant manager will share a Microsoft OneDrive folder with your Participant List Form. Record the information on the shared form. **Do not email participant lists to protect the security of participants' confidential information.**

C. **Completed Participant Lists Are Shared with Multnomah Education Service District**: PCL shares completed participant lists with MESD staff who report the total number of students in all PCL-funded after school and mentoring programs who participated in the free and reduced-price lunch program, and the total number of students who received special education services or have a 504 plan. MESD staff also report the following data by PCL-funded program:

- Number of students who attended 90% of school days
- Number of students who had no referrals for suspension or expulsion
- Number of high school students who earned 6 credits
- Number of high school seniors who graduated

PCL does not receive or report any data on individual student participants. Participant data is deleted from OneDrive after PCL receives aggregated data from MESD.

IV. Referral and Eligibility Verification Forms – Foster Care Programs Only

A. **A completed Oregon Department of Human Services (DHS) Referral Form OR Eligibility Verification Request Form is** required for each child/youth who enrolls in PCL-funded foster care services.

B. **DHS Referral to PCL-Funded Foster Care Services**: DHS will send PCL-funded foster care programs a referral form. See the link on the PCL website for the DHS Referral Form and Instructions.

C. **Non-DHS Referral to PCL-Funded Foster Care Services:** If a youth is referred to a PCL-funded foster care program by anyone other than DHS, grantee program staff must complete the Eligibility Verification Form. See the link on the PCL website for the Eligibility Verification Form and Instructions.

D. **List of Eligible Participants**: Using the verification forms received, PCL staff will maintain a list of eligible participants for each program. PCL will send the list of eligible participants to each program at least once a year by July 5. Grantees may request a copy of the list at any time. Grantees must review the list, notify PCL staff of any discrepancies and finalize the list before completing the annual report. Grantees shall provide annual report data for all eligible children/youth served during the contract year.