Completing Comprehensive Counseling Initiative Reports: Guidelines and Tips
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School Districts and charter schools receiving grants through Lilly Endowment’s (Endowment) Comprehensive Counseling Initiative (CCI) will use an evidence based reporting process designed to measure success in accomplishing the AIM of the Initiative.

The AIM of the Initiative is to increase significantly the number of K-12 students in Indiana who are:

- emotionally healthy,
- realize academic success,
- graduate from high school,
- obtain valuable postsecondary credentials, certifications and degrees necessary for meaningful employment, and are
- prepared to compete and prosper in the global society in which they will live and work.

Each year, grantees will be required to submit a report that includes the following components:

- Cover Sheet
- Narrative Report
- Financial Report
- Report Template that will reflect a concise record of progress on your strategies, activities, outputs and outcomes for the goals included in your proposal.

In addition to informing the Endowment about your district’s progress in establishing a comprehensive counseling program and accomplishing your proposed goals, your report is intended to serve as a management tool over the four years of your grant to:

- Document your success and the impact of your work on students, teachers, counselors, schools and communities

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1 This hand-out corresponds with the PowerPoint presentation by the same name given at the Lilly Endowment Convening held in Indianapolis on October 17, 2018.
• Consider what **might not have gone as planned** and determine if mid-course corrections are needed
• Provide new staff and partners with a **comprehensive record** of what you proposed, what has been accomplished and what still needs to be done
• Contribute to the long-term **sustainability** of your comprehensive counseling program because goals and results can be easily shared with potential funders and partners

Because CCI grants were awarded through a **competitive process**, it is important for districts to implement their grants as proposed.

**REPORT TEMPLATE WORKSHEET (ATTACHED)**

The Report Template is an important part of the annual report to be submitted by grantees by August 31 of each year. The actual CCI Report Template is undergoing revisions. The lay-out of the final version may differ from the attached worksheet, but it is anticipated that the listed elements (goals, etc.) will be included. Early next year, grantees may be asked to do a preliminary version of the Report Template for the current school year.

**REPORT TEMPLATE TERMS**

**Goals**

A goal is a statement drawn from your grant proposal that indicates your specific area of focus toward the broader aim of the Counseling Initiative.

• Goals can look different for each grantee.
• Some grantee goals are student-focused while others are community or program focused
• Some focus on one domain, such as social emotional health, postsecondary readiness, or academic success.

All of these approaches are acceptable, **as long as they reflect what you identified in your funded proposal**.

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*Note: there is no firm consensus among experts on the definitions of the terms being used on the Report Template, or what term we use to describe a particular element. The definitions used herein have been chosen in order to have a common framework for understanding the work of the Comprehensive Counseling Initiative, thus it is important that they are used as consistently as possible within the Initiative.*
**Examples of goals:**
- Improve the social-emotional health of all elementary students.
- Implement a comprehensive school counseling model aligned with the American School Counselor Association frameworks and tiered interventions that meet the need of every student.
- Create a detailed program for college and career exploration in partnership with county and regional industry/businesses.

**Strategies and Activities**

**Strategies and Activities** are what grantees originally said in their proposals they would DO – the actions they PLANNED to take – to reach their goals. They may have called them something different, but for Endowment reporting purposes, they are considered strategies and activities.

As with the goals, sometimes grantees listed the specific strategies and activities they planned to undertake in various places in the narrative of the proposal or on the Gantt chart.

There are different options for what grantees put in the Strategies and Activities column on the Report Template:
- Some may prefer to list a strategy, then several activities underneath each strategy.
- Some may use the terms strategy and activities interchangeably.
- Ideally, though – whatever terminology is used – the activities or strategies listed are the most strategic things being done – meaning they are the ones most likely to help the school corporation or charter school reach its GOALS.

**Examples of strategies and activities** *(note that these follow from the examples of goals in the previous section):*
- Review and select an SEL curriculum appropriate to the needs of elementary students.
- Formalize and align our counseling mission, beliefs and vision with ASCA standards.
- Take students on tours of local industry/business.

**Outputs and Outcomes**

The elements of reporting that have caused the most confusion to grantees and even to technical assistance providers are outputs and outcomes.

On the Report Template Worksheet, outputs and outcomes follow from activities and strategies, and they show progress toward goals. In a nutshell:
- While the items in the Strategies and Activities column state what grantees planned to DO to reach their goals...
• The Outputs and Outcomes columns together tell us WHAT GRANTEES ACTUALLY DID (those are the outputs), and how things are different as a result (those are the outcomes).
• Sometimes, a planned strategy or activity was dropped or not accomplished. If this happens, it should be noted in the output column, and further explained in the narrative section of the annual report.

**Outputs**

**Outputs** describe the extent to which planned strategies and activities were carried out during the reporting period. Outputs should be described in **measurable terms.** The outputs tell us how much of a strategy or activity was accomplished during the reporting period.

• Outputs answer the question, “What did you accomplish?”
• Outputs are often stated using measurable data such as numbers or percentages.
• Some typical words used with outputs:
  - Developed...
  - Attended...
  - Participated...
  - Completed...

**A tip for completing the Output column of the Report Template:** When grantees described their activities in their proposals, they may not have been sure of some details. For example, you knew you wanted to use a college and career platform or a prevention curriculum, but didn’t know which ones. Now that those platforms or curriculums, such as Naviance or Second Steps, have been selected, it’s important to refer to them by name in describing related outputs.

It’s also important in all sections of the Report Template and Narrative to be as specific as possible in describing things such as students affected, grade levels affected and types of training. *For example, who was trained – counselors, teachers, bus drivers? What type of training was it? Were you training trainers or directly training staff?*

**Examples of outputs:**

• The Second Step program was selected as the SEL curriculum and was implemented in grades 1-3 in year one.
• 13 of 15 ASCA tasks on mission, beliefs and vision were completed (87%) compared to an expected completion rate of 35% in year one.
• Took 50 total students on 5 tours of local industries/businesses.
Outcomes

Outcomes are how you describe, in measurable terms, the CHANGE that you believe will occur as a result of all of the work being accomplished through the CCI grant.

The distinction between outputs and outcomes can seem minor at first, but the distinction is meaningful and important.

In the planning stages, the changes—the outcomes—you want to achieve are identified.

In reports at the end of the year, grantees will plug in what actually happened—the outcomes—achieved. Outcomes then answer the question, how are things DIFFERENT because of your work?

THE MOST IMPORTANT OUTCOMES ARE THOSE FOR STUDENTS! The American School Counselor Association says the KEY QUESTION around school counseling has changed with the ASCA National Model from:

“How do school counselors DO?”

to

“How are students DIFFERENT (or impacted) because of the work of school counselors?”

• What counselors DO can be answered with OUTPUTS. (It’s the evidence of the strategies and activities completed.)
• How students are DIFFERENT is answered with OUTCOMES.

Sometimes, changes must first happen in staff, systems or communities; these are also outcomes – but the longer term desired outcomes are for students.

Characteristics of outcomes:

Outcomes are defined as “How students, other individuals, or the community been impacted because of your Strategies and Activities.”

Outcomes can also be described by numbers and percentages.

Outcomes typically describe changes in:

PERCEPTIONS – measured through surveys or needs assessments.

KNOWLEDGE or UNDERSTANDING – measured through assessments or pre/post-tests.

BEHAVIOR or ACTIONS – such as through attendance reports or behavioral referrals.
Examples of outcomes:

- 48% of third graders (24 students) were able to identify at least one method of dealing with anxiety.
- 82% of all counselors in the district agreed or strongly agreed that they fully understand the mission, beliefs and vision parts of the ASCA National Model.
- 38 of 38 (100%) of students felt the tours helped them make more informed decisions about career choices.

Baseline Data

Baseline data simply means the district’s starting point. It allows for comparisons from where you are now to where you started. Having baseline data shows how much the output or outcome changed.

Baseline data will be your earliest data – pre-grant is ideal, but in many cases, grantees indicated they would determine baselines early in the grant implementation period. Your baseline data will not change throughout the grant period.

The Report Template will ask for baseline data for both outputs and outcomes.

Each baseline data point should be shown underneath or next to the actual or progress data points in the Output or Outcome columns.

Data Sources

Data sources are where you are getting the information that shows the changes you’re making.

The Report Template Worksheet includes one column for data sources, but the actual Report Template will ask you separately for data sources for both outputs and for outcomes.

The meaning of the term data source is the same for both outputs and outcomes: it’s asking, WHERE are you getting the information that shows the changes you’re making?

Do not include the data itself in the Data Source column. Your actual data will go in the Output and Outcome column.

Think of data sources this way – If someone were to ask you to prove that you accomplished the items listed in your Outputs or Outcomes section – what evidence would you have to show them?
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