CLLS Reporting Instructions
Revised December 2016

Definition of an Adult Learner

- Is 16 years or older and not concurrently enrolled in high school
- Seeks literacy services for him/herself in English and is able to do the intake interview in English
- Has completed an intake interview, has been assessed, has established one or more personal literacy goals
- Does not include someone who requests services from your library but is referred elsewhere

Definition of Instruction

- One-on-one tutoring
- Small group instruction
- Computer lab time with some help from staff and volunteers

Adult Learner Activity Report

1. Continuing Adult Learners from prior Final Report: The number that appears here is the number of adult learners that you reported as "remaining" at the end of the prior reporting period (Item 5). This should represent the number of adult learners who received instruction at least twice in the previous six months, stayed in the program and continued to receive instruction at least twice in the current reporting period. This number may be changed **ONLY** by contacting state library staff at info@libraryliteracy.org.

2. Adult Learners who **began** instruction during this reporting period: New adult learners who received instruction at least twice during the current reporting period.

3. **Total** Adult Learners who received instruction during this reporting period: The number of Adult Learners continuing from previous reporting period (Item 1), plus the number of new adult learners who began during this reporting period (Item 2). This number will be automatically calculated. **Cumulative totals and demographic totals must match.**

4. Total Adult Learners who **left** during this reporting period: Those learners who are no longer receiving ANY instruction. This can include learners who left for various reasons such as, met goals, left with or without notification, moved from area, etc.

5. Adult Learners remaining at the **end** of this reporting period: Adult learners who received instruction during this reporting period (Item 3), minus learners who left program for any reason during this reporting period (Item 4). This number will be automatically calculated.

6. Adult Learner Demographics: The ethnicity, age, and gender totals must equal Item 3 total. Please note that if your ethnicity, age and gender numbers do not total to the automatic total number shown, the online reporting system will not let you continue until they do. Use the "unknown" and "not specified" categories ONLY if this information cannot be obtained from the adult learner or his/her tutor. Please make every attempt to determine the correct adult learner characteristics.

7. Adults referred to other programs: Adults who were never instructed or instructed no more than once, because it was determined that the learner would be better served by another program, and was provided with an appropriate referral to an adult school, ESL, GED, Job training or other program.

8. Adult Learners awaiting instruction or rematch at end of this reporting period: All adults who have been interviewed/assessed and are not currently being served at the end of this reporting period.

9.   Total number of Adult Learner instruction hours for this reporting period: Total hours spent by all learners in instruction (can include one-on-one tutoring, small group, staff or volunteer – assisted computer instruction, etc.) For example: 3 learners meet for 1 hour for small group instruction –count this as 3 learner instruction hours. (Note: This counts for 1 volunteer instruction hour.)

10. Number of books given to Adult Learners: Books provided free of charge to adult learners participating in the CLLS program for the purpose of building home libraries to encourage reading in the home. This includes books, work books, teacher manuals, videos and other materials given to participants to keep or consume.

Family Activity Report

1.   Total Number of Adult Learner Families Served: By definition, services provided in our state-funded Family Literacy program include an adult learner. Families counted here are **ONLY** those who include an adult learner (not ESL Student) and must also include at least one child up to the age of 5. **Do NOT** include "outreach" families here (families you serve in an attempt to attract additional clients for your service, but who do not include an adult learner – i.e., when you visit HeadStart or other preschool locations in your outreach efforts.) These families should be reported under "Other Services" as outreach.

   Note: This is an un-duplicated count of families you serve, meaning one family = 1, no matter how many members it has or how many times you have served them.

2.   Total Number of Children up to the age of 5 served in these families containing an adult learner: Note: This is an un-duplicated count of the children you serve, meaning one child = 1, no matter how many times you have served that child.

3.   Total Number of Children age 5 years and older served in these families containing an adult learner: Note: This is an un-duplicated count of the children you serve, meaning one child = 1, no matter how many times you have served that child.

4.   Number of books given to Family Literacy Families: Books given away free of charge to families participating in the CLLS program, for the purpose of building home libraries to encourage reading in the home.

ELLI Report

1.   Total number of ELLI Children served: **Note**: This is an un-duplicated count of ELLI children you serve, meaning one child = 1, no matter how many times you have served that child.

2.   Total number of ELLI Parents served: **Note**: This is an un-duplicated count of parents of ELLI children you serve, meaning one parent = 1, no matter how many times you have served that parent.

3.   First or Home Languages of ELLI Children served: For each ELLI child served, report the primary language spoken in their home. Total should equal total of ELLI children in Item 1.

4.   Number of Group Meetings held with just ELLI Children: Total number of group sessions held with ELLI children only.

5.   Number of Group Meetings Held with just ELLI Parents: Total number of group sessions held with ELLI parents only.

6.   Number of Group Meetings Held with ELLI Families: Total number of meetings of parents and children conducted by ELLI in public library settings or schools. (This should include but not be limited to family parties, events, and story times.)

7.   Number of ELLI Attendees as of report date: Total number of people (children and adults) attending the ELLI meetings counted in Item 5 (cumulative count).

Note: This is a cumulative count, meaning the total of all participants who attend all events during the report period. If the same person attended 3 meetings, they count as "3."

8.   Number of books given to ELLI participants: Books provided free of charge to ELLI children/parents/families participating in the CLLS program, for the purpose of building home libraries to encourage reading in the home.

MLLS Report

1.   Total number of MLLS Children up to the age of 5 served: Children up to the age of 5 who are served in your CLLS-funded MLLS (Mobile Library Literacy Services) program. Note: This is an un-duplicated count of children up to 5 served with the MLLS vehicle, meaning one child = 1, no matter how many times you have served that child.

2.   Total number of MLLS Children 5 years and older served: Children 5 years and older who are served in your CLLS-funded MLLS (Mobile Library Literacy Services) program. Note: This is an un-duplicated count of children age 5 and older served with the MLLS vehicle, meaning one child = 1, no matter how many times you have served that child.

3.   Number of Parents/Caregivers served: Parents/Caregivers who are served in your CLLS-funded MLLS (Mobile Library Literacy Services) program. Note: This is an un-duplicated count of parents/caregivers served with the MLLS vehicle, meaning one person = 1, no matter how many times you have served that person.

4.   Number of MLLS Site Visits: Total number of times the vehicle stopped to provide service during the reporting period.

Note: This is a cumulative count, meaning the total of all visits made to all "stops." If the same "stop" was visited 8 times during the reporting period, it counts as "8."

5.   Number of books given to MLLS participants: Books given away free of charge to MLLS children/parents/families participating in the CLLS program, for the purpose of building home libraries to encourage reading in the home.

ESL Report

1.   Number of ESL Adults served: Adults who speak English as a Second Language and who do not fit the definition of an adult learner.

First or Home Languages of ESL Adults served: For each ESL student served, report the primary language spoken in their home. Total should equal total of ESL students in Item 1.

2.   Number of books given to ESL learners: Books given away free of charge to ESL students for the purpose of building home libraries to encourage reading in the home. This includes books, workbooks, teacher manuals, videos, and other materials given to participants to keep or consume.

"Other Services": Include any outreach and educational programming to at-risk populations provided through your literacy services office and not funded by CLLS.

1-3.   Report here any literacy services provided by your program that are not adult ESL programs or one of the 4 CLLS program components (ALS, Family Literacy, ELLI, MLLS). For example, if you have a Teen Literacy program, list that as the program name, check the service recipient box "Other at risk Children ages 5 – 17," and report the unduplicated count of teens served during the reporting period. If you have a Reach Out and Read program, list that as the program name, check both the service recipient boxes "Other at risk Children ages 0 –5" AND "Other at risk adults" (unless the adult is an adult learner and has been counted elsewhere). Then provide unduplicated counts of the children and adults served. Also, reported under "Other Services" are "outreach" families (families you serve in an

attempt to attract additional clients to your family literacy services, but who do not include an adult learner – i.e., when you visit HeadStart or other preschool locations in your outreach efforts.)

Note: Un-duplicated count means one person = 1, no matter how many times you have served that person.

4. <u>Number of books given to people not part of the CLLS target group</u>: Books given away free of charge to people other than those participating in the CLLS program components, for the purpose of building home libraries to encourage reading in the home.

Volunteer Hours – All Programs

1. <u>All Volunteer Adult Literacy Instructional Hours (ALS/Family Literacy/MLLS)</u>: Actual time contributed by volunteers in providing adult literacy instruction. Can include one-on-one tutoring, small group, computer instruction, etc. provided by a volunteer. Does not include prep time however. (Prep time is included in Item 4 – All other volunteer hours in literacy services.)

2. <u>ELLI Volunteer Tutor Instructional Hours for Adults and Children</u>: Actual time contributed by volunteers in English Language literacy instruction for ELLI adults and/or children including one-on-one, small group, computer instruction, etc.

3. <u>ESL Volunteer Tutor Instructional Hours (not State Library grant supported)</u>: Actual time contributed by volunteers in providing English as a Second Language instruction including one-on-one, small group, computer instruction, etc.

4. <u>All Other Volunteer Hours in Literacy Services (Non-Instructional Hours)</u>: Time contributed by volunteers to the literacy program in ways other than literacy instruction. Examples are people helping with craft or family activities, or doing office filing and/or photo-copying. Can also include time spent in preparation for tutoring. Do not include professional services that are reported as In-kind Services (in dollar equivalents), i.e. an attorney contributing legal work.

5. <u>Family Literacy (Non-Instructional Hours Volunteered)</u>: This is a subset of Item 4. Please report the total non-instructional hours volunteered in Family Literacy only.

6. <u>MLLS Volunteer Hours (Non-Instructional Hours Volunteered)</u>: This is a subset of Item 4. Please report the total non-instructional hours volunteered in MLLS only.

7. <u>Total of Volunteer Hours</u>: Total of volunteer hours for all programs. This is automatically calculated by adding items 1 through 4.

8. <u>How many volunteers do you have in your literacy program who serve in a position other than adult literacy tutor?</u>: Count the number of people who volunteer, not the number of hours.

Volunteer Tutor Activity Report – Adult Literacy:

1. <u>Continuing Volunteer Tutors Instructing from prior reporting period</u>: The number that appears here is the number of tutors that you reported as "remaining" at the end of the prior reporting period (Item 5). This should represent the number of volunteer tutors who have provided instruction to an adult learner at least twice in the previous six months, did not leave the program, and continued to tutor in the current reporting period. This number may be changed ONLY by contacting state library staff at <u>info@libraryliteracy.org</u>.

2. <u>Volunteer Tutors who began instructing during this reporting period</u>: Newly trained or reactivated volunteer tutors who provided at least two instructional sessions during the reporting period.

3. <u>Volunteer Tutors who instructed during this reporting period</u>: The number of volunteer tutors continuing from previous reporting period (Item 1), plus the number of new volunteer tutors who

began tutoring during this reporting period (Item 2). This number will be automatically calculated and will appear in grey box. The demographic total must match cumulative number.

4. <u>Volunteer Tutors who left during this reporting period</u>: Volunteer Tutors who instructed during the previous reporting period, and left for any reason, and are no longer tutoring or waiting to tutor.

5. <u>Volunteer Tutors remaining at the end of this reporting period</u>: Volunteer Tutors who instructed during this reporting period (Item 3), minus tutors who left program for any reason (Item 4). This number will be automatically calculated and will appear in grey box.

6. <u>Volunteer Tutor Demographics</u>: The total ethnicity, age, and gender must equal Item 6. Please note that if your ethnicity, age and gender numbers do not total to the automatic total number shown, the online reporting system will not let you continue until they do. Use the "unknown" and "not specified" categories ONLY if this information cannot be obtained from the tutor. Please make every attempt to determine the correct tutor characteristics.

7. <u>Volunteer Tutors trained during this reporting period</u>: Those volunteers who have completed the pre-service volunteer tutor training program during this reporting period.

8. <u>Volunteer Tutors awaiting training/matching/re-matching at end of this reporting period</u>: Persons who have volunteered to be trained, but have not yet been trained to provide adult literacy instruction AND those who have been trained but have not yet begun active tutoring, or who are awaiting re-match. Do not include inactive tutors.

9. <u>Number of tutor trainings conducted during this reporting period</u>: Number of training programs/workshops offered during the reporting period in which volunteers were initially trained to provide adult literacy instruction. (For example, a 12-hour tutor training workshop held over 3 days counts as "1.") Do not include in- service sessions. They are included in the next question.

10. <u>Number of in-service workshops offered during this reporting period</u>: Training programs/workshops offered during the reporting period for volunteer tutors already in service, to provide new information or support to their work. Do not include pre-service volunteer tutor trainings here.

11. <u>New tutors are required to complete number of tutor training hours before beginning to tutor</u>: The number you report here is the number of tutor training hours a volunteer must complete before being matched with an adult learner.

Staff Commitment

<u>Library Personnel</u> are those who are city, county or library district employees.

<u>Contract Personnel</u> are those with whom you contract separately – they are not employees of the city, county or library district. AmeriCorps Members are reported here.

> *The CLLS Reporting System allows users to import their staffing from the previous report. When you click "Import Previous Data," the staff information you entered in a previous report will appear for you to revise:*
>
> - *When you're working on the CLLS Application, your previous final report information appears*
>
> - *When you're working on the Revised Budget, your previous application information appears*
>
> - *When you're working on the Final Report, your Revised Budget (called "Approved Budget" once accepted by the state library) information appears.*

List <u>every</u> literacy position title. For each, identify the percent FTE that position serves in each literacy program component. (FTE—Full Time Equivalent—1 FTE equal 40 hours per week.) For example:

- You have a literacy position who works 20 hours per week (.5 FTE). If that person serves all 20 hours in your Adult program, insert .5 FTE in the Adult program box.

- If you have 3 people with the same title, *list all 3 separately*. If one of them works 10 hours in FFL and 10 hours in ELLI, after their job title you will insert .25 in the FFL box and .25 in the ELLI box.

Salary entry instructions: For each position, show the salary amount for that person in that position. For example, you have a position who works 20 hours per week (.5 FTE) in family literacy, and the other 20 hours per week (.5 FTE) outside of literacy, in the library's children's department or on the bookmobile. Show the salary amount ONLY for the time spent in your literacy program – in other words, 50% of their full time library salary.

The salary amounts you enter on the staff commitment page are also entered on the Financial Report/budget expenditures page. The salary amounts for percentages of staff working in adult and family literacy are included in the salaries line in the Adult & Family Literacy column. ELLI, MLLS, ESL and Other salary amounts for percentages of staff working in those programs are entered in the salaries line in the appropriate program column. The amount on the Salaries line in the Total column on the budget page, must match the salaries total on the Staff Commitment page.

Community Partners (for all program components)

Community partners include any agencies, businesses, schools or other entities with whom you have an agreement (casual or formal) to receive or provide service and/or support at no charge, we are also interested in the role that they have played. Examples include: the local Adult Education office posting your flyers or referring adults to your program (and/or you doing so for them); the local coffee shop that provides space for your tutors and students to meet; the Head Start program where you provide storytelling once a month, etc. First enter the partner's name. Then from the pull down menu, select the role(s); you may choose more than one role for each partner.

In-Kind Resource Development Report

In-kind resources are an important component in the support of local library literacy services. **Report any cash contributions on the Budget Report; this form is for In-kind resources only.**

- What is an in-kind donation: Resources **in lieu of cash** attained in the current fiscal year. To qualify as "In-kind services," a person or organization must give the program space, goods, or professional services for which they would otherwise expect a cash payment. It is important to include only in-kind contributions for which cash payments are in fact foregone.

- How to report in-kind donation: Express in-kind donations (see examples below) in dollar equivalents for a service or product in each sector that lends its support (i.e. business, education).

Below are four examples of In-kind contributions:

Example 1: A private attorney, as part of her customary professional practice, prepares non-profit incorporation papers. She donates two hours professional time to provide this service for your program. This professional ordinarily charges a client $100/hour. Therefore, you would report $200 as an in-kind contribution under the Business column, in the Professional Services line.

Example 2: An organization which ordinarily charges rent for its space, prints materials or sells a product, waives the customary charges to you. What is customarily charged (or the difference between what is ordinarily charged and what the program gets charged) is considered in-kind. This can be the case for any of the items under "In-kind Resources."

Example 3: The actual cost of producing and developing a radio or television spot such as studio space, technical equipment used, the talent provided for your program when provided without charge is in-kind. However, the broadcasting of a public service announcement, newscasts and documentary stories are not considered In-kind since customarily any reputable service organization can receive coverage which is free of charge.

Example 4: Along with local library jurisdiction dollars actually budgeted for the literacy program, a library jurisdiction can support the program by dedicating other resources as in-kind. For example, the professional time of a jurisdiction's graphic designer, public information officer, fund development professional, when used to support literacy efforts, can be reported as in-kind. It would appear in the column entitled "County/Municipal." However, if library staff time is dedicated to literacy services in the library's budget, it should be reported on CLLS Financial Report as a cash contribution.

There are some local resources that you may have developed or are developing in partnership with others in your community that are not considered in-kind contributions for the purposes of this report.

Below are three examples of contributions that are <u>not</u> In-kind:

Example 1: A church's social ministry provides space or the use of a copier for which a cash payment is not expected, since church financial resources already provide for rent and utilities of space or reproduction services.

Example 2: A boys' club or community center or library provides space to organizations as a matter of community service policy. It is customarily provided free of charge.

Example 3: Customary charges for space rental, utilities, equipment depreciation, accounting and any other administrative activities performed by the municipality or county and budgeted as "Indirect" on the Financial Report, are not considered In-kind.

Budget Expenditures Page/ Financial Report

The CLLS Reporting System allows users to import their budget expenditures from the previous report. When you click "Import Previous Data," the expenditures from a previous report will appear for you to revise:

- When you're working on the CLLS Application, your previous final report information appears

- When you're working on the Revised Budget, your previous application information appears

- When you're working on the Final Report, your Revised Budget (called "Approved Budget" once accepted by the state library) information appears.

Below are definitions for each budget category followed by instructions for their completion.

Literacy Budget: The budget is a combination of both the State CLLS award and Local revenue raised to support all the literacy components (i.e. Adult Literacy, ESL, etc.).

1. <u>Salaries and Benefits</u>: Salaries including benefits for all literacy services staff employed directly by the library, city, county or district.

2. <u>Contract Staff</u>: Limited-term literacy staff employed under personal service contracts.

3. <u>Operations</u>: Expenditures incurred in operating the literacy services. This category can include the following:

> **Travel**: Expenditures for travel expenses incurred by personnel performing services for the program. (CLLS policy does not allow using CLLS funds for out-of-state travel. Local funds should be used for this purpose.)

> **Office supplies**: Paper, pencils, staplers, etc.

> **Printing**: Duplicating, photocopying, and printing costs.

> **Communications**: Telephone, FAX, postage, and other communication expenses.

> **Other**: Other miscellaneous operating expenses incurred by the literacy program which do not fit into the above categories.

4. <u>Literacy Materials</u> (for both circulation and giveaway):

> **Circulation materials**: Acquisitions included in the library's general collection to support the California Library Literacy Services (CLLS) and other literacy programs you offer.
>
> **Giveaway materials**: These may include books, booklets, workbooks, videos, and other materials given to participants to keep or consume. Included are:

- Collection for new readers' instruction
- Materials for professional development of staff
- Collection about literacy for public awareness
- Additions to children's collection to be utilized for the Family Literacy programming, and
- Non-print literacy materials.

5. <u>Small Equipment</u>: Tablets, computers, and other small equipment purchases that are not part of the annual operating budget.

6. <u>Equipment</u>: Long-term, depreciable items in excess of $5,000 that are not part of the annual operating budget.

7. <u>Indirect Costs</u>: Indirect costs or fiscal agent fees charged to the literacy program for payroll processing, accounting, facility space, utilities, etc. **The amount budgeted may not be more than 10% of your CLLS award.** We know that libraries often provide additional support for the literacy program, in terms of space, utilities, etc., but any amount over and above the 10% indirect cost amount should be reported as In-Kind.

> Materials/supplies/printing/communications provided by the library/city/county/district at no direct charge to the literacy services should not be included.

Instructions for Reporting Expenditures on the Financial Report

Application -- click on "Import Previous Data," and your most recently submitted Final Report budget will appear. Revise it to reflect what you expect will be your budget in the upcoming fiscal year.

Revised Budget -- click on "Import Previous Data," and your most recently submitted Application budget will appear. Revise it to reflect budget changes for the year based on current information.

Final Report – The Financial Report/Budget Expenditures page will show you the "Approved" budget for the year you're reporting on on the top, (Approved Budget is your Revised Budget once it's accepted by the State Library), and below that a blank budget form, into which you will enter the actual expenditures for the entire fiscal year.

We recognize that both the Application and Revised Budget are "projections," and that actual expenditures will be reported in the Final Report. When Final Report expenditures differ from the "Approved Budget," a Budget Change Request (BCR) must be completed to reflect the changes.

NOTE: CLLS reporting does not distinguish between "expenditure" and "encumbrance." If a library reports a dollar amount as encumbered – based on your jurisdiction's definition of encumbrance --it is understood that that amount will be spent as final bills for ordered/used resources etc. are received.

Budget Categories

Funding Source

- State Revenue (CLLS): The dollar amount awarded to your literacy program by the State Library.

- Local Revenue: All other funding sources other than CLLS. This can include funds from your library

jurisdiction and other funds raised locally (i.e. funds from Library Friends, fundraising, foundations, other grants, etc.).

- Adult & Family Literacy Services: The dollar amounts budgeted from both sources (State and Local Revenue) for Adult and Family Literacy Services will appear in Column titled "Adult & Family Literacy Services". The Local Revenue reported here is the portion of expenditures that will be matched in the funding formula for CLLS.

- ELLI: The dollar amounts budgeted from both sources (State and Local Revenue) for English

- Language Literacy (ELLI) will appear in Column titled "ELLI".

- MLLS: The dollar amounts budgeted from both sources (State and Local Revenue) for Mobile Library

- Literacy Services (MLLS) will appear in Column titled "MLLS".

- ESL: Although CLLS funds do not support ESL services we appreciate local libraries that have identified other resources to provide ESL services in communities where there is a need. In an effort to gain a complete picture of local CLLS services, we have included a column for those.

- Other Services: Although CLLS funds do not support literacy services beyond the identified programs and target populations, we appreciate local libraries who have identified other resources to provide such services as Reach Out and Read, and tutoring for high school students. In an effort to gain a complete picture of local CLLS services, we have included a column for those services.

The online reporting program will calculate totals automatically.

Any CLLS funds not reported as expended or encumbered by June 30 are required to be returned to the State. At any time, if you believe that your program for any reason (staff vacancies, etc.) is not able to spend the entire award amount, notify state library staff immediately: info@libraryliteracy.org. If returned before June 30 those funds could be redistributed to other programs. If we only learn you have unexpended funds after June 30, those funds are no longer available to CLLS, and must be returned to the state's general fund.

Roles and Goals Reporting Instructions:

1. How many adult learners in your program set at least one goal this year?

Enter the number of learners who SET at least one goal (including fixed goals from the Roles and Goals form, "Other Goals" you've set with learners, and any "Unanticipated Achievements" during this reporting period.)

Please note that you are entering a number of LEARNERS here, not a number of GOALS.

Ideally, this number will be as close to your number of adult learners served as possible, if not exactly the same. Please note that the system will automatically calculate the percent this represents of your cumulative Total Adult Learners Served (Adult Learner Activity Report on page 2, Question #3).

It is expected that every CLLS program has a minimum of 75% of adult learners set at least one goal in the Roles and Goals process.

First, please note that you are only reporting on the learners who were active during the reporting period in question. Carry over any "set goals" from the previous year as long as the adult learner was active at some point during the year on which you're reporting. Continue to carry- over the set goals from one year to the next as long as the learner is active and/or until the goal is met. You may remove a "goal set" if the learner communicates that the goal is no longer of interest.

2. Now enter the total number of LEARNERS who MET at least one goal (include fixed goals from the roles and Goals form; "Other Goals" you have set with learners, and any "Unanticipated Achievements" during this reporting period.

3.   Next, click on each role individually (Life-Long learner; Family Member; Worker; and Community Member/Citizen") and complete the following:

Next to each listed goal, please enter the number of times each goal was "SET" by a learner in your program – (for example, 15 learners want to vote for the first time; 13 learners want to learn to use the ATM machine) AND the number of times each goal was "MET" by a learner in your program during this reporting period -- (for example, 12 learners voted for the first time; 15 learners used the ATM machine for the first time.) Please note that the system automatically calculates the percentages.

Individual learners will probably have set more goals than they have met; however, in no instance should they have met more goals than they set. If a goal is tallied as "met" there must be a correlating "goal set."

If there is an un-anticipated goal, in order for it to be reported as MET, it must also be SET. If you want to count those un-anticipated ones, you must report it as both SET and MET. There are some purists who will feel that's not "honest" – that they really can't say that the goals was SET, because the Learner's meeting the goal was serendipity. However, we believe that even if the student didn't vocalize that specific goal during the goal-setting conversation, at some point they decided to address that goal, and achieved it.

If you don't want to "post-date" the SETS for these METS, then it's best not to report those METS, because it skews the statewide SET/MET statistics. While not everyone is perfectly happy with this decision, it was made in discussion with the field some time ago to try to maintain the data well for the state as a whole.

4.   Finally, you have the option of telling us about any "Other Goals" met or "Unanticipated Achievements" that were set and met frequently enough by learners in your program that you think we should consider them to be moved onto the Roles and Goals form as "Fixed Goals."

You have the option of entering a maximum of two frequently set "Other Goals," and two frequently achieved "Unanticipated Achievements." If you enter some, you are asked to tell us how many learners actually set or achieved them, so we can determine if they are being set frequently enough to include as fixed goals on the Roles and Goals form.

You also have the option of sharing any particularly meaningful unanticipated achievements that could be shared as anecdotes that help us tell the CLLS story.