## REPORTING BASICS

■ **Report to the State Library Twice A Year.** Report your Roles & Goals data to the State Library twice a year. Because the State Library runs on a fiscal year of July 1st – June 30th, you will submit your mid-year report in February (the actual date will vary) and it will cover the prior 6 months of activity, from July 1st – December 31st. In August you will submit a final report which will cover the prior six months of activity from January 1st – June 30th.

This is not to say that you only collect Roles & Goals data from your tutor/learner pairs twice a year, just before reporting to the State Library…

■ **Meet with Tutor/Learner Pairs Throughout the Year.** What most programs do is collect Roles & Goals data throughout the year – a much more natural way to proceed that is more in tune with each of your tutor/learner pairs. For example, if a pair starts in October, then you are following up with them in April and then the next October and so on. At a minimum you should connect with your tutor/learner pairs every six months but many programs are doing a quarterly meeting or once every four months. Considering that what happens during tutoring sessions is at the core of your services, it is crucial that you are checking in here. The effectiveness of your library literacy services depends on your vigilance.

■ **Report on Learners Who Were Active During the 6-Month Reporting Period.** You will be analyzing the Roles & Goals forms for any learners who were active within the reporting period in question. So, if you are working on a mid-year report, you are reporting Roles & Goals for any learner who was active between July 1st and December 31st. If you are preparing your Final Report then you are reporting on Roles & Goals for any learner who was active between January 1st and June 30th. It follows then that *Roles & Goals data from learners who have left the program or were not active during the report period should be purged from the report – both goals set and goals met.*

■ **Carry-Over Goals.** You will be tallying the goals set and the goals met reported by your tutor/learner pairs. Of course, learners will set both long-term and short-term goals. Some items might be accomplished within a couple of months; others will take years. For Roles & Goals reporting, you will **carry-over** any goals that were set but not met in the last reporting period as long as the learner was active during the reporting period in question and his latest Roles & Goals form shows he is still interested in that long-term goal. We call these **carry-over goals** since they advance from reporting period to reporting period until either the goal is met; the learner leaves the program; or the learner tells you he has lost interest in the goal.

■ **Definitions Of "Goal Set" and "Goal Met."** Combine the carry-over goals with any new goals that have been set during the reporting period and this gives you your "goal set" number. "Goals met" is simply those goals that were met during the current reporting period. "Goals Met" do NOT carry-over.

**GOALS SET** = Goals Set in Previous Reporting Periods but Still Unmet in Current Reporting Period (and Learner was Active in Current Reporting Period) + New Goals Set in Current Reporting Period

**GOALS MET** = Goals Met During Current Reporting Period

Once a goal has been met in the current report, the goal set/goal met combo should be purged from the next report and archived in your files with the learner's personal record, whether that's in a database or paper file. They should no longer be counted in future reports to the State Library unless the learner re-sets the goal.

■ **For Every "Goal Met" There Must Be a Companion "Goal Set."** The Roles & Goals process is based upon outcomes – or tracking the change that has happened to a learner because of improved basic skills. Outcomes require a pre-test and a post-test or a start point and an end point: with Roles & Goals that information is the date the goal was set and the date the goal was met. So, as you are tallying the data, you will need to make sure that for every "goal met" there is a companion "goal set"

If you see that a goal was met and "goal set" information is not on the form, you can connect with the tutor/learner pair and have them attempt to recall or estimate the approximate date that the goal was set. If the pair believes that the goal was never set – the achievement just happened unintentionally – then this particular goal can be recorded in "unanticipated achievements" where a date for "goal set" is not required.

# DATA COLLECTION

**Total Number of Adult Learners Who Set At Least One Goal.** On the CLLS report form you will be asked, "How many adult learners in your program set at least one goal during this reporting period? _____" **(See Example 1, below.)** Enter the number of adult learners for whom you have Roles & Goals data for the reporting period in question. The system will automatically calculate the percent this represents of your cumulative Total Adult Learners Served during that same reporting period (#6 p.2).

**Example 1**



California Library Literacy SERVICES
A program of the California State Library

**REPORTING**

## California State Library
## Mid-Year Report FY 2007/2008

Name of Library: **Mallville Public Library**

**Main Menu | Reports | Log off**

**ROLES AND GOALS**

**Life-Long Learner**
**Family Member**
**Worker**
**Community Member/Citizen**

**Total # of adult learners who set at least one goal during this reporting period:**   **89**

Note: Ideally this number will be as close to your number of adult learners served as possible, if not exactly the same. (Adult Learner Activity Report on page 2, Question #3)

**Fixed Goals.** Under each of the four roles there will be a list of fixed goals that corresponds to the list on the Roles & Goals form. Tally and enter the total number of learners who "SET" each individual goal (for example, 15 learners wanted to vote; 13 learners wanted to get a library card) AND the number of learners who "MET" that goal during the reporting period -- (for example, 8 learners voted for the first time; 10 got their library card). **(See Example 2, below.)** Remember:

> Goals could have been SET in prior reporting periods and carried over AND goals could have been SET in the current reporting period.
>
> Goals MET are always those which were met in the current reporting period.

The reporting software automatically calculates the percentage of learners who met the goals that were set.

**Example 2**



## California State Library
## Mid-Year Report FY 2007/2008

Name of Library: **Mallville Public Library**

| Roles and Goals<br>**Roles and Goals – Life-Long Learner** | Total adult learners who set goals | Total adult learners who met goals | Percentage accomplished |
|---|---|---|---|
| Learn the alphabet, letters and sounds | 12 | 6 | 50% |
| Read a newspaper/magazines | 20 | 10 | 50% |
| Write a letter to _____ | 18 | 8 | 56% |
| Learn to type/use computer keyboard | 27 | 4 | 14% |
| Write, send and receive e-mail | 15 | 4 | 26% |
| Search the Internet | 10 | 4 | 40% |
| Get a library card | 10 | 9 | 90% |
| Check out or use library items | 8 | 6 | 76% |
| Pass part or all of the GED test | 16 | 2 | 12% |

**Other Goals.** The State Library will not collect individual "other goals" that your learners identify. Instead, you will be asked the following:

"Count the number of learners who SET at least one goal within each role," and,

"Count the number of learners who MET at least one goal within each role"

When you make this tally, you will review BOTH the "fixed goal" and "other goal" parts of the form to see if at least one goal has been set and if at least one goal has been met. In **Example 3, below**, in the Life-Long Learner role, even though Jane has set 4 goals, for the sake of this tally we count this as **at least 1 goal set**. In the same role, Jane has met 1 goal. For the sake of this tally we count this as at least 1 goal met. We're not counting the number of goals set and met in this tally; we're counting people, i.e. Jane Doe set at least one goal and met at least one goal in the life-long learner role. She set at least one goal and met zero goals in the worker role. Etc.

## Example 3

| Student Name: **Jane Doe** | | | | **ROLES & GOALS** | | | |
|---|---|---|---|---|---|---|---|

It's time to set goals for the first time or to update the goals that were set several months ago. Remember, this is not a check-list, instead have a conversation about desired goals. If you are reviewing previously-set goals, use this form to indicate whether you are making progress on them; whether you've met the goals; or whether they are no longer of interest. Finally, set any new goals and add any additional information that is significant in the life of the student with regard to his/her basic skills. *Use dates*

| 📖 My goals as a life-long learner: | Date Goal Set | Making Progress | Date Goal Met | 🛠 My goals as a worker: | Date Goal Set | Making Progress | Date Goal Met |
|---|---|---|---|---|---|---|---|
| · Learn the alphabet, letters and sounds | | | | · Find a job: search want-ads/on-line | | | |
| · Read a book, newspaper or magazine | 12/07 | | 06/08 | · Fill out a job application | | | |
| · Write a letter to _____ | | | | · Write a resume | | | |
| · Learn to type/use computer keyboard | | | | · Interview for a job | | | |
| · Write, send and receive e-mail | 06/08 | | | · Get a job or get a better job or promotion | 12/06 | 06/07 | |
| · Search the Internet | | | | · Perform current job tasks better | | | |
| · Get a library card | | | | · Read a work-related manual | | | |
| · Check out or use library items regularly | | | | · Obtain a license or certificate | | | |
| · Pass part or all of the GED test | 04/08 | 06/07 | | | | | |
| **Other goals in the life-long learner role** | Date Goal Set | Making Progress | Date Goal Met | **Other goals in the worker role:** | Date Goal Set | Making Progress | Date Goal Met |
| · *Read for pleasure* | 06/07 | | | · | | | |
| **Notes:** | | | | | | | |

**Tally for Life-long Learner:**
- ♦ At least 1 goal set
- ♦ At least 1 goal met

**Tally for Worker:**
- ♦ At least 1 goal met
- ♦ 0 goals met

**Other Goals (continued):**

You will also be asked to "total the number of 'other goals' met." Again this means going through your Roles & Goals forms and keeping track of the total number of 'other goals' met in all roles. See **Example 4, below**, which shows what the electronic reporting will look like for the data involving "other goals."

**Example 4**



## ROLES AND GOALS

Name of Library: Mallville Public Library

| | Total # of adult learners who had **set at least one** fixed and/or "other goal:" | Total # of adult learners who had **met at least one** fixed and/or "other goal" during this reporting period | |
|---|---|---|---|
| Life-Long Learner | 80 | 54 | 68% |
| Family Member | 53 | 22 | 41% |
| Worker | 35 | 16 | 46% |
| Community Member/ Citizen | 38 | 16 | 42% |

Total the number of "other goals" met for all learners: _____36_____

OPTIONAL: The last thing you'll be asked to do with regard to the "other goals" is to review and analyze the "other" goals you have collected from the learners in your literacy services and see if there are any patterns or if there is anything appearing with such frequency that you think it should be a fixed goal on the Roles & Goals Form. There will be a text box where you can share your recommendations as in the example below:

> OPTIONAL: *Review and analyze the "other goals" submitted to you by your learners. Do you see any patterns? Is there anything that is appearing with such frequency that you think it should be a fixed goal on the Roles & Goals form?*

There will also be a text box where you can share any especially distinctive "other" goals achieved by your learners. This is also optional.

**Unanticipated Achievements.** The State Library will not collect individual "unanticipated achievements" that have been reported to you.

However, you will be asked to count the total number of "unanticipated achievements" for each learner to create a grand total for your literacy services. Remember the "unanticipated achievements" do not break down by role, so you will just need to do a single tally for this figure.

Finally, like before in "other goals," you will be asked to review and analyze the unanticipated achievements that have been reported to you and to share one or more of the most significant.

> OPTIONAL: *Review and analyze the "unanticipated achievements" submitted to you by your learners. Do you see any patterns? Is there anything that is appearing with such frequency that you think it should be a fixed goal on the Roles & Goals form?*

> *Please share any particularly meaningful "unanticipated achievements." We will in turn share these with the field and with stakeholders as anecdotal evidence of the success that happens in library literacy services.*