Live Impact CCE Protocol (Version 1)
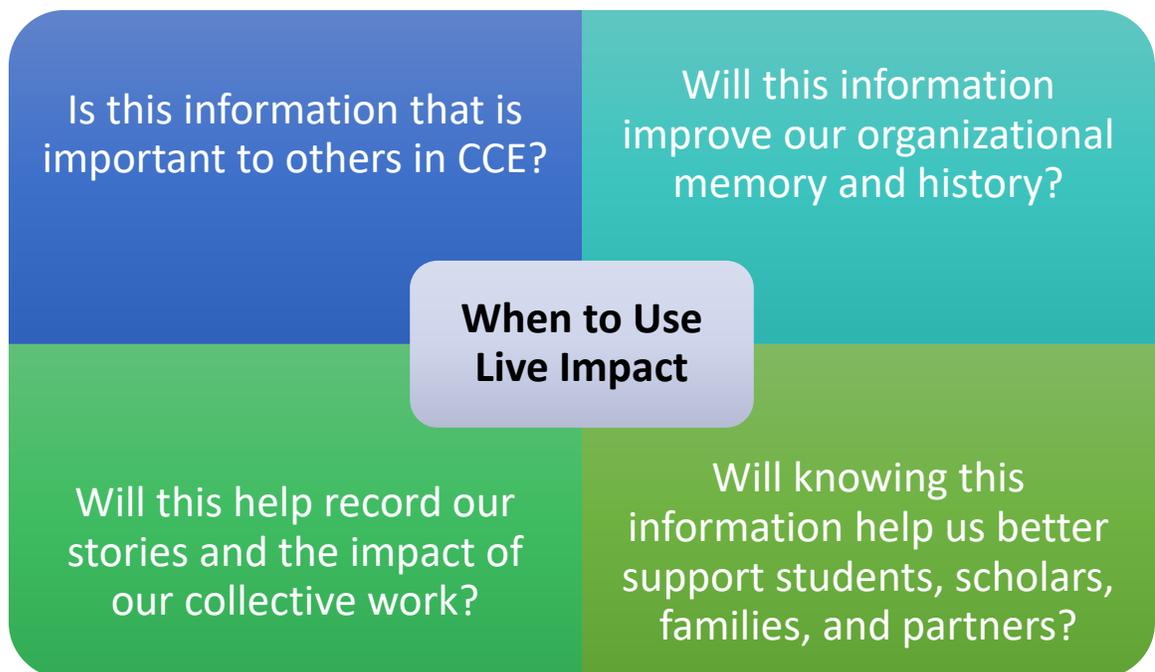
Contents

Live Impact: CCE's Relationship Management System

This is a CCE-wide set of procedures and guidelines. All CCE employees, volunteers, and others working on behalf of the CCE are expected to follow these guidelines for documenting contact with families, scholars, students, faculty, and organizational partners.

- Live Impact is the CCE-wide relationship management system. We use Live Impact to both store historical information about our relationships and to make decisions based on our observations. Important features of Live Impact include:
- Common data platform used by all CCE Programs
- Access to real-time information about constituents and easier ability for programs to search for information needed in reports
- Data security to protect confidential information about our constituents
    - Each CCE staff member will have a unique login and password
  - Access will be restricted to CCE staff members that have a legitimate education purpose for using the system or provide essential administrative support to ensure the success of the system
  - The CCE's goal is to better communicate across program teams about community, university, family, and scholar connections.

Is this information that is important to others in CCE?	Will this information improve our organizational memory and history?
When to Use Live Impact	
Will this help record our stories and the impact of our collective work?	Will knowing this information help us better support students, scholars, families, and partners?

FERPA Guidelines

FERPA Guidance on Sharing Information with Community Organizations

- See https://www2.ed.gov/policy/gen/guid/fpco/doc/ferpa-and-community-based-orgs.pdf for more details.

- **What is FERPA and to which entities does it apply?** FERPA is a Federal law that protects the privacy of student education records and gives parents certain rights with respect to their children's education records, including the right to inspect and review them. Under FERPA, a parent generally must provide a signed and dated written consent before a school discloses personally identifiable information (PII) from the student's education records. 34 CFR § 99.30. The rights accorded to, and the consent required of, parents under FERPA transfer from the parents to the student when the student becomes an eligible student. 34 CFR § 99.5. An "eligible student" is a student who has reached the age of 18 or is attending a postsecondary institution at any age. 34 CFR § 99.3 (definition of "Eligible student"). FERPA directly applies to all educational agencies and institutions that receive funds under any program administered by the Secretary of Education ("Department").

- **May the community-based organization receiving PII from education records redisclose PII from education records without written consent?** No. Regardless of whether the community-based organization received the PII under the school official, studies, or audit/evaluation exception, the answer is the same – the community-based organization may not redisclose it unless such redisclosure is on behalf of the disclosing entity and is consistent with FERPA. (34 CFR § 99.33).

What does this mean for CCE?

- All CCE staff and student employees must complete the Seattle University FERPA training every two years.

- Each CCE staff member must sign a data confidentiality agreement prior to using the system. If student employees assist with data entry, we also need them to sign a confidentiality agreement.

- Information stored in Live Impact relating to scholars and Seattle University students cannot be printed or shared with non CCE staff members.

- Seattle University Annual FERPA Notification:
  https://www.seattleu.edu/registrar/student-records/ferpa/annual-notification/

Role Definitions

In Live Impact, we have created six unique roles. Each role collects specific profile information. Additionally, some roles have additional ways of classifying individuals based on their involvement with CCE, SUYI, or other programs. As more types of involvement emerge, contact the Live Impact admins to create new roles and subcategories.

Caregivers

- These individuals most likely have a connection to our family engagement strategy or our early learning strategy.
    - Includes parents, guardians, family members that have children attending SUYI programs, neighborhood schools. Also Includes individuals that provide in-home childcare.
- If additional context is important, you can add role descriptions to the profile notes section. For example, you can select "Primary Guardian" as role and then note "Grandparent" in the note section

Contacts

- These are often individuals that are affiliated with different partner organizations or school groups. They are less likely to be directly involved in a program. Contact "CCE Involvement" may include:
    - **Advisory Board Members**: Members of the SUYI Advisory Board
    - **BCIA Member**: Members of the Black Community Impact Alliance
    - **Community Group Member:** non-organization affiliated individuals, or individuals affiliated with a community group, such as the Yesler Education Leaders
    - **Institutional Partner:** staff member at large institution, such as SPS, SHA, or City of Seattle
    - **Organization Partner:** staff or volunteer of a community-based organization, such as Bureau of Fearless Ideas, OneAmerica, or Childcare Resources.
    - **School Site Partner:** staff member of SPS that works in a building, such as Bailey Gatzert. This includes principals, teachers, family support workers, and paraprofessionals.
    - **SU Campus Partner:** Staff at Seattle University, excluding faculty members.

(Note: contacts often will have multiple forms of involvement)

Faculty

- CCE Status & Level of Engagement Fields will indicate type of involvement

Organizations

- This includes school sites, community-based organizations, and institutional partners. It also includes university departments and office.

Scholars

- Program Participation Field will indicate type of involvement

Students

- Program Participation Field will indicate type of involvement. We will track students involved directly in CCE programs and placement-based service-learning courses.
- We will not track volunteers not affiliated with the CCE or interest cards in this system.

Adding Records

To learn how to add records, please refer to the User Manual.

CCE Procedures

Why do we add records?

- Information in the profiles will be used for reporting and for maintaining current program rosters.
- Information will also be used to help analyze our network, looking for our strengths and gaps.
- Profile information also helps us to use filters to find information more easily. For example, we can identify all our SU Student Alum by running a report based on that field in the profile. We can do the same by program, language, involvement type etc.

Who do we add records for?

- Any individual that has contact with a CCE program or SUYI related interactions with a staff member.
- This is not meant to be an exhaustive list of everyone we have ever interacted with. Rather, this is meant to store relevant information about our primary constituents. For example:

- o We do not need to record all SU staff members, but we will likely include members of departments that we have frequent interactions with, such as Student Development.
- o We do not need to include every teacher at each school site, but if certain teachers emerge as leaders or support our program, we would want to capture that.
- o We will only include families or scholars at the school sites that complete a registration form that grants us permission to store their information.

What information do we enter into records?

- Only record what we know for sure, never guess or make assumptions. If you are not certain of something, leave it blank. Empty data fields are better than incorrect ones.
- Most of our profile data will come from registration forms.

When do we create new records?

- Records can be created at any time, as new connections emerge.
- Mass Imports can be done when we have more than 10 records to create at a time.
  - o To do a mass import, contact one of the Live Impact Admins. They will provide you with the necessary template to do the import. Please allow a week for the process to complete.

Using the "Activity" Feature

To learn how to log activities, please refer to the User Manual.

CCE Procedures

Deciding to log an activity (touchpoint)

- Definition: An individualized, concrete interaction with a member of any role that moves our relationship forward with that individual. For example:
  - o Coffee with a school representative
  - o A one on one meeting with a scholar to discuss future goals
  - o An informal gathering of several parents bringing up an idea
- We don't need to document every single interaction with each individual. Unnecessary examples include:
  - o Saying hi to a scholar in the hallway
  - o Talking with a parent briefly about their weekend
  - o Seeing a contact at a public or university function

- Activities are not intended to be the complete repository of all communications or interactions with an individual. If you are unsure, you can check with a program manager or the senior data and evaluation analyst.
- Activities should reflect a quick, honest and respectful account of the contact. Consider the following questions:
    - What happened?
    - What is next?
    - Do any other CCE staff members need this information?

Creating the Activity Log

- Is the activity with an individual or the organization?
    - FOR MEETINGS WITH CONTACTS & ORGANIZATIONS: By default, record activities under the organization. For example, if you meet with a principal of a school, record the activity at the school level. This will create a collective picture of our organizational relationships.
        - If you meet with several contacts of one organization at once, you only need to record it once at the organization level.
        - If you meet with several contacts from different organizations, please record the activity separately under each organization's record.
    - FOR CAREGIVERS, SCHOLARS, & STUDENTS: Record the activity under the individual's record.
- Double Logging
    - Sometimes it will be necessary to log both an "activity" and a "connect note" at the same time. Example: meeting with a family leader for coffee is an activity to be logged, if they tell you something about their scholar that is important to note, that would be a connect note to be logged under the scholar's profile.
    - A similar practice should be followed on organization interactions that involve contacts and interactions that involve faculty members and the department that they represent.

Selecting the Activity Type

Why we log activities: to better track the daily and monthly correspondence that leads to relationships and deeper connections; to demonstrate the individual work that contributes to building networks

Activity Types:

- Email
- Phone Call
- Text Messages & other forms of electronic messaging
- In Person Meeting
- Event
- Site Visit
- Hotspot (Family Engagement Use Only)
- Zoom call

Due/Start Date vs. Completed Date

- If the event is ongoing, use both the start date and later follow up to enter in the completed date. For example, a hotspot loan may have a start date of January 8, 2020 and not have a completed date until the hotspot is returned.
- If the activity had a one-time date, just enter in the completed date. For example, if you make a phone call on March 3, 2020, select that as the completed date.

Status

- Received: For Hotspot Use Only
- Returned: For Hotspot Use Only
- Pending: If you need follow-up with an individual, perhaps you emailed them a question, you could use pending to indicate that the issue is not yet resolved.
- Completed: The most likely status to be used. After any interaction has occurred, you can consider it as completed.

Activity Note

- Tips for creating a useful Activity Note
  - o Maximum 1000 characters
  - o Include who, what, and where
    - Ex: Met with {parent name} to discuss {scholar name} in the family room
  - o If you need to record extended observations or additional context, please provide by creating a separate Connect Note (see more info below). If you create an additional connect note, please be sure to reference the date, activity type, and individuals involved.

CCE Expectations

- Every CCE member must file an activity report for any significant interaction as described above. All contact reports must be entered by the end of the month. Activity reports will be created on the 5th of the following month. However, we should make every effort to file activity logs Friday of each week.
    - Possible exceptions include <u>urgent information</u> that other staff members should know immediately. For these cases please use your discretion and consult with your supervisor. Ask yourself if someone else need to know this right away.

Using the "Connect" Feature

To learn how to log notes in Connect, please refer to the User Manual.

A Connect Note should be recorded when: An individualized observation occurs or key information affects a strategy (e.g., progress in math course, family updates, a gift strategy, etc.). Think about this as a case note; it may accompany an activity log to provide additional context. Remember that this is also an opportunity for you to reflect on your actions when interacting with others. This is a chance for us to evaluate our own responses and behaviors, recall interactions, and prepare for future encounters

CCE Procedures

Title

A useful title is a subject line that provides an overview of the interaction or observation. The purpose of the free form text field is to provide a summary of the interaction/observation so other CCE staff can see at a glance what was critical. Live Impact will automatically use the first line of text as the title. Please include the date. Examples of titles include:

- Site Visit observations, 3/5/19
- Academic Check In, Math, 3/20/20
- Relationship History
    - Partnered with SU on service-learning project in 2018
    - Has frequently attended family engagement family room activities in the past.
- Contextual Information
    - Family info, such as jobs, interests, involvement, children/siblings
    - Strong affiliations to groups, etc.

Content

The text should be concise but as detailed as necessary to document what happened. Minimize the use of abbreviations for programs, departments, and faculty – colleagues across CCE may not be so familiar with them. Tips for creating a useful Connect Note include:

- Include the central theme/purpose of the interaction, outcomes, and next step.
- Describe who was meeting with whom (including full names and titles) and where the meeting took place.
- Describe the topics of discussion

Time Stamp & Signature

Live Impact will automatically provide a time stamp from when you enter the information. If that is different from the date that the interaction occurred, please be sure to include the actual date.

CCE Guidelines & Expectations

Observations vs. Perceptions

Be aware of your own biases and context when writing. Record information from your perspective, keep in mind language use.

- Write in a style that is:
  - Factual, objective, unbiased
  - Specific, clear and to the point
- Differentiate between labeling behavior and describing behavior
  - Focus on the person's behavior and not their personality.

VERBS TO DESCRIBE YOUR ACTIONS WITH OTHERS

Advised	Assessed	Assisted	Clarified	Confronted
Counseled	Discussed	Directed	Encouraged	Identified
Recommended	Redirected	Referred	Reflected	Structured
Summarized	Supported	Urged		

Confidential Matters

- In accordance with Washington State's Abuse of Children Law (RCW 26.44), all Seattle University employees, including faculty, staff, administrators, temporary staff, and student employees who have reasonable cause to believe that a child has suffered abuse

or neglect are required to immediately report the suspected abuse or neglect to law enforcement or Child Protective Services as specified in this policy. More about Seattle University policy [here](#).

- All users are responsible for preserving the confidentiality of this information in order to preserve the trust of our constituents. Therefore, discretion must be used when entering activity report and other individual information.
  - o Never record anything that could be harmful to the student or family (examples include suspected cases of violence or crimes, undocumented status, or information revealed to you in confidence). Records can be subpoenaed or requested by individuals at any time, so our records should reflect information for educational or support purposes only.
  - o Write it so that others can understand the message
  - o Ask yourself if you would be comfortable with that individual reading your notes.
- If there is a vital concern that you feel you must report but do not want to record specific details, use the "!" icon tag and enter in your name.
  - o Ex: "!" See Gia (LI will record the date)

Using Tags in Profiles and Connect

Live Impact offers tagging as a way to group individuals or notes.

CCE Procedures

Tags for Profiles

- Tags are temporary: Use while you are in the process of completing an action. For example:
  - o "Missing" can indicate that we are missing key information for the individual
  - o "Interview" or "Denied" can be a tag while we are hiring student employees
  - o "Invite" can be a tag for marking individuals we want to invite to an event
- Tags do not have a historical record. Thus, if we need something permanently, please talk to a Live Impact Admin about adding the field into a profile.

Text Tags in Connect

- When writing a Connect Note, you can also choose a tag. These can help to organize the notes and will be useful in identifying stories for our communication and data

purposes. Not a requirement at this time in CCE protocol.

Tag Image Glossary for Connect

Image Tags in Connect

When writing a Connect Note, you can also choose an image tag. Please refer to the glossary below to see the CCE-wide standard tagging system. As a default, you can just select the paper icon. Image tags are optional; they may be helpful tools to visually organized and identify connect notes about individuals. We have some suggestions of how the images may be used below:

📄	Paper- default tag
📞	Green Phone: no suggestions at this time
📞	Red Phone: Communication Notes (example no voicemails)
✉	Blue Envelope: no suggestions at this time
!	Blue Exclamation Mark: Family Concerns / Learn History
!	Yellow Exclamation Mark: Health Concerns
!	Red Exclamation Mark: High Importance / Flagged
?	Orange Question Mark: no suggestions at this time
👤	Orange Individual: no suggestions at this time
→	White Arrow: no suggestions at this time
❤	Purple Heart: Use to denote information about other family members on the profiles
💡	Light Bulb: no suggestions at this time
💬	Blue Conversation Bubbles: no suggestions at this time

Reflection & Data Entry Best Practices

Responsibilities

- Every CCE member must file an activity report for any significant interaction as described above. All contact reports must be filed by the last day of the month, however, we should make every effort to file activity reports within 48 hours of making contact.
- Roles of the Live Impact Admin Team include, but are not limited to:
  - Importing contacts
  - Creating forms
  - Troubleshooting
  - CCE-Wide and Program Specific Reporting
  - Training & information sharing
- Roles of the CCE Staff Members include, but are not limited to:
  - Updating Records
  - Recording Activities
  - Recording Notes
  - Viewing activities & notes to inform decision making
  - Recording Attendance

Tips

- Think of data entry as an opportunity to reflect on your everyday interactions with community and campus as you record it for the rest of the CCE to learn from
- Identify your own measurable goals based on building relationships and working as a connector in our spaces. For example:
  - I talked to 75% of the scholars about their summer learning plans in March.
  - I supported five parents in identifying health care options this year.
  - I talked to 10 SU students about AmeriCorps positions next year.
  - I invited 10 organization partners to our collaborative groups this year.
- Block out time on your calendar each week to complete individual data entry tasks.
- Allow 5-10 minutes per Activity and Connect Note you plan on entering.
- Create time each month with fellow team members to review individual entries, gather themes, and to analyze interactions.
- If you are unable to enter data, meet with the Senior Data & Evaluation Analyst to discuss solutions.