

DBHDS PRP Data Collection Guidebook

as of July 15, 2015

Goal: To demonstrate to state legislators, other funders and the public, the healing and life-saving work of peer-run programs.

For the data we present to be confidently shared with funders and stakeholders, all DBHDS-funded Peer Run Programs needs to report data consistently. This Guidebook aims to define the basic concepts and answer common questions. We track:

- Head count, gender and race of unique individuals who come at least once.
- The total number of times those peers come during the year.
- The hours of service provided by staff and volunteers, in key categories.
- The number of 12 step meetings hosted.
- Optionally, contributions of volunteer time or in-kind goods & services.

Core Definitions

Unduplicated count of peers served – The number of unique individuals who have been served by the peer-run program in one state fiscal year (July 1- June 30). *If Mary comes to the program once or 100 times between July 1 and June 30, she will be counted only once in the “Unduplicated count of peers served.”*

Each month, report the number of new unduplicated peers who came that month. See **Appendix A** for tips on using Excel and an optional template to track duplicated and unduplicated counts. **Appendix B** includes a sample new member form & **Appendix C** – daily sign in.

Gender – **Gender total must match race total.** If someone leaves the gender field blank, count as “Not Reported.”

Race – **Race count must match gender total.** If a peer leaves out their race, count as “Not Reported.” If someone chooses two or three, count as Multi-Race.

Latino Ethnicity – A **separate count from race.** Based on federal guidelines (See FAQ).

Unduplicated Count of Consumers/Peers Served	Number
<i>Gender:</i>	
Male	10
Female	8
Other/Transgendered	1
Not Reported	0
Gender Total	19
<i>Race:</i>	
African American	5
White/Caucasian	6
Asian/Pacific Islander	2
Native American	
Multi-Race	1
Other	
Not Reported	5
Race Total	19
<i>Ethnicity:</i>	
Latino/Hispanic Origin	3

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Have other clarifications to suggest be added to this Guidebook? Email coop@vocalvirginia.org or call 804-343-1777.

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Duplicated Number of Peers Served: Total number of visits by peers during the month. *If Mary signs in 5 times in June, she is counted 5 times that month in the duplicated number of peers served.*

Staff and Volunteer Hours of Service by Categories – Count of paid staff and volunteer hours of service, coded by category of work done.

For work with individuals, pick the most descriptive Service Definition.

For work with groups, pick the most descriptive Service Definition. Then, multiply the number of staff/volunteers leading the group by the number the length of each group, multiplied by the number of people attending.

For example, for a one-hour group led by one staff with five participants, you would report 5 hours (1 hour group x 1 staff x 5 people = 5 hours).

See ***Appendix D for template Group Sign-In Logs*** that some programs use to track number of participants in groups.

See ***Appendix E for current definitions for PRP service categories*** that were revised in July 2015 or download them from the DBHDS Evaluation section of the VOCAL CO-OP website at <http://vocalvirginia.org/peer-run-programs/prpdataportal/>

Frequently asked questions

Unduplicated count

Q: Many people who attend choose to be anonymous. Can our facilitators guess gender, race & ethnicity?

A: We empower people to speak for themselves, so please do not guess. If a peer chooses to be anonymous, add them to the duplicated count and then “Not Reported” for race and gender and leave ethnicity blank.

Q: What is the definition of “Race” versus the definition of “Ethnicity?”

A: Ethnicity reports the number of peers who are Hispanic/Latino. Someone of Latino/Hispanic ethnicity could be of any race. *If a member reports only ethnicity and not race, report race as not reported.*

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The U.S. Census Bureau defines ethnicity as the heritage, nationality group, lineage, or country of birth of the person or the person's ancestors. A race, on the other hand, is generally defined a group of people of common ancestry, distinguished from others by physical characteristics, such as hair type, skin color, etc.

General Overview

Q: Do we report every hour of our day?

A: No. Every program has administrative time that is not spent in service to peers or the broader community. Recording and reporting data on service hours, for example, is administrative overhead time.

Q: How do our numbers compare to other programs?

A: They don't. Each program operates on a different contract, required to do different things. And operates in a unique community, with different resources. Focus on your own numbers and what those can teach us about your program.

Q: Our program receives other funding. Do we report on those services, too?

A: You can. Please just specify your program's total budget in the blank in the data portal so we can calculate what percentage of service hours come from DBHDS funds.

Q: Do we count time spent preparing to meet with a peer or for an activity?

Maybe. To keep our reporting system simple, we're not separating out direct time with peers from preparation or research, also called "indirect service." We report on all.

Preparing for a meeting with a peer by researching housing options, for example, is indirect service -- report that.

Preparing for a group activity can be reported, as well. ***Please use discretion – group numbers could become highly inflated with preparation time. For example, if you spend 5 hours preparing a new curriculum for a group and 20 peers attend, that will be 100 preparation hours. That is not 100 hours of direct service and may not reflect an accurate picture of the service being given to peers. Discuss with your director if curriculum development is actually an administrative function.

Service Definitions

Q: Working with an individual, when do I report Peer Support or other category?

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A: Peer support is part of everything we do as peer-run programs. Consider being as specific as possible about the type of support being given, rather than defaulting to peer support as the choice every time.

Also, report time in one category or the other, but not both. If the one-on-one time focused on helping the peer find transportation to a new job, report in either transportation or peer support, but not both.

Q: What is the difference between Advocacy and Lobbying?

A: In short, lobbying is asking for a specific thing from the legislature. Advocacy is educating about peer values and recovery principles.

SAMHSA'S RESTRICTIONS ON GRANTEE LOBBYING (Appropriations Act Section 503). No part of any appropriation contained in this Act shall be used, other than for normal and recognized executive - legislative relationships, for publicity or propaganda purposes, for the preparation, distribution, or use of any kit, pamphlet, booklet, publication, radio, television, or video presentation designed to support or defeat legislation pending before the Congress, except in presentation to the Congress itself or any State legislature. No part of any appropriation contained in this Act shall be used to pay the salary or expenses of any grant or contract recipient, or agent acting for such recipient, related to any activity designed to influence legislation or appropriations pending before the Congress or any State legislature.

Q: What counts as Basic Needs?

A: Include time spent by a staff or volunteer providing food boxes, doing laundry in program-owned facilities, preparing and serving meals, or other basic physical needs. This does not include snacks around the center or light refreshments where the main goal is hospitality. If the snack time is staffed with peers connecting with other peers, consider counting as social support.

Q:What's the difference between Basic Needs & Referral to Community Services?

A: Report as Basic Needs if the program directly distributes the food or provides the housing or has laundry services. Report as Referral to Community Services if the program staff is spending time making the connection to another agency, i.e., facilitating applying for housing, food stamps, etc.

Q: Does facilitating court-required community service count as Legal Support?

A: Some regional ASAP programs allow people to serve community service time as part of the judgment against them in traffic or other legal cases. Community service directly

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connected to resolving a legal judgment can be considered legal support, if the person doing the service is a peer member.

Q: How do we categorize computer use?

A: What you're reporting is staff or volunteer time spent facilitating computer use. So have the staff or volunteer determine whether someone is using the computer for games (recreation), for social support (Facebook and email), or for learning computer skills (Life Skills or Job Readiness). Report/Categorize as appropriate.

Q: What's the difference between Recreation and Social Support?

A: Recreation is when the intent of the activity is fun or fitness – there is of course social interaction going on during recreation! Social Support is more therapeutic in nature, with the goal of empowering peers to build healthy social connections with others.

Q: Do we report all the time our staff is driving?

A: Only report time when you are driving a peer or peers to and from a location or activity. Time staff spends driving to get to a peer or peer's location is overhead time.

Q: Didn't we used to count Transportation in one-way trips?

A: In the past, yes. As of August 1, 2015, time in staff or volunteer hours spent driving peers OR research/efforts to obtain transportation, such as vouchers, bus fare or rides.

Q: Why do we not report a headcount for Anonymous/12-Step Groups?

A: This is because 12 Step Program Meetings are run by volunteers and are their own entities, as is clear in the 12 Traditions. As such, Peer Run Programs receive "credit" for meetings hosted, not how many peers attend.

Q: What about those SAMHSA Federal Peer Support Service Categories?

A: The federal government has its own categories and definitions of support. DBHDS used to report on these but that is no longer the case.

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Appendix A – Tool To Track Unduplicated and Duplicated Visits

See next page for a screenshot -- To get an electronic copy of the Excel tool, email the CO-OP at coop@vocalvirginia.org or download them from the DBHDS Evaluation section of the VOCAL CO-OP website at vocalsupportcenter.org

You may find a different solution you like. These tools are optional.

What is an Excel spreadsheet?

An Excel spreadsheet is a simple tool you can use to track the number of visits to your program.

Here is an excellent video from Goodwill Community Foundation about Excel:

https://www.youtube.com/watch?v=qQNfcLEZa_Q

To log data to keep a record of peer visits

For the first worksheet called “Unduplicated Visits”, enter a peer’s name (or identifying notes, if they choose to be anonymous) only the first time they visit in the fiscal year. Then, enter the demographic information you collected on their intake visit or from the membership form.

For the second worksheet called “Duplicated Visits”, enter a peer’s name and visit date only (or identifying notes, if they choose to be anonymous). You will enter their name again every time they visit in the future, which is why this is called a Duplicated Count.

To report for each month

Sort each column by date of first visit. Here is a YouTube video tutorial on how to sort data in Excel: <https://www.youtube.com/watch?v=KS9N4yAjuYQ>

A simple but slow way to get a count of all of that month’s visits is to count them yourself by looking at the computer screen.

You can also count using a simple formula or a pivot table.

Formulas:

https://www.youtube.com/watch?v=BY8nX0CLIpU&list=PLpQQipWcxwt_7KKPzPuw0Re86-WeWe9Gc&index=11

Pivot Tables:

https://www.youtube.com/watch?v=KoKTP3JLVJg&list=PLpQQipWcxwt_7KKPzPuw0Re86-WeWe9Gc&index=26

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Record of Unduplicated Peer Visits
Fiscal Year 201X - July 1 til June 30

Name or Identifier		Date	Gender				Race							Ethnicity		
First	Last or Initial	First visit	Male	Female	Trans/Other	Not Reported	Total*	Af-Am	White/Cauc	Asian/Pacific Islnd	Ntv Amer	Multi-Race	Other	Not Reported	Total*	Latino/Hispanic Origin
							0								0	
							0								0	
							0								0	
							0								0	

This Excel tool contains formulas to add up the total number of peers by gender and then by race, so you can make sure the two totals match.

To learn how to make your own formulas or sort data or other Excel tips, visit the VOCAL CO-OP YouTube channel:

<http://www.youtube.com/s/vocalcoop>

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Appendix B – Sample New Member Form

Name: _____

Address: _____ City _____ State ____ Zip _____

Phone Number: _____

Email: _____

Birthday: Month _____ Day _____

How did you find out about [Insert Program Name] _____

Interests: _____

Wellness goals: _____

Do you have a Wellness Recovery Action Plan (WRAP)? _____

➤ If not, would you like to participate in a WRAP Workshop? _____

Would you like to receive emails about upcoming events? _____

Email Address _____

Emergency Contact: Name: _____ Phone: _____

Criteria for Eligibility:

Our membership principles state:

[Insert your member criteria here]

I certify that this information is true:

Signature

Date

Code of Conduct signed _____

Signature of staff _____ Date: _____

SEE BACK for further information please!

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We are open because funders support our mission. They ask us to report anonymous information about the people we serve. Your name will not be used.

Please respond to the following for demographic purposes – it will be kept confidential.

Demographic Information

Gender	Age	Race	Ethnicity	Residence: City or County of (circle one)
<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Transgender	<input type="checkbox"/> 18 – 25 <input type="checkbox"/> 26 – 55 <input type="checkbox"/> 56 +	<input type="checkbox"/> Black/African American <input type="checkbox"/> White/Caucasian <input type="checkbox"/> Asian <input type="checkbox"/> Native American <input type="checkbox"/> Multi-Race <input type="checkbox"/> Other <input type="checkbox"/> Not Reported	Latino/Hispanic Origin Other: _____	List your Area counties And cities Here

Are you homeless or living in a shelter? yes no

Are you a Veteran?

Do you identify as LGBT?

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Appendix C – Sample Daily “Front Desk” Sign-In Log

*NOTE: Does your program’s strategic plan include outreach to certain groups?
Consider tracking that in this form by adding other fields.*

DAILY SIGN-IN SHEET		DATE:			
Is this your first time here? Welcome! Please see a staff for orientation.					
<i>*** Information is confidential – collected for reports to funders only ***</i>					
First Name	Last Name or Initial	Gender	Race	Ethnicity	City or County of Residence
			<input type="checkbox"/> Caucasian <input type="checkbox"/> African American <input type="checkbox"/> Asian <input type="checkbox"/> Native American <input type="checkbox"/> Multi-Race <input type="checkbox"/> Not Reported	<input type="checkbox"/> Hispanic / Latino	
			<input type="checkbox"/> Caucasian <input type="checkbox"/> African American <input type="checkbox"/> Asian <input type="checkbox"/> Native American <input type="checkbox"/> Multi-Race <input type="checkbox"/> Not Reported	<input type="checkbox"/> Hispanic / Latino	
			<input type="checkbox"/> Caucasian <input type="checkbox"/> African American <input type="checkbox"/> Asian <input type="checkbox"/> Native American <input type="checkbox"/> Multi-Race <input type="checkbox"/> Not Reported	<input type="checkbox"/> Hispanic / Latino	
			<input type="checkbox"/> Caucasian <input type="checkbox"/> African American <input type="checkbox"/> Asian <input type="checkbox"/> Native American <input type="checkbox"/> Multi-Race <input type="checkbox"/> Not Reported	<input type="checkbox"/> Hispanic / Latino	
			<input type="checkbox"/> Caucasian <input type="checkbox"/> African American <input type="checkbox"/> Asian <input type="checkbox"/> Native American <input type="checkbox"/> Multi-Race <input type="checkbox"/> Not Reported	<input type="checkbox"/> Hispanic / Latino	

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Appendix D – Sample Group Sign-In Log

Group Sign In

Group Title: _____

Date: _____ Time: _____

Facilitator(s): _____

First Name	Last Name or Initial

Virginia Peer-Run Program Services Data Definitions for DBHDS

Revised 7.13.15

Reported in 15-minute increments of staff and volunteer time spent providing service to peers or the broader community. Non-time based measures at end under "Other."

Services Provided to an Individual Peer

Peer Support: Time spent providing one-on-one peer support and wellness coaching services, where the topics covered are not otherwise defined.

Advocacy: Time spent training a peer to advocate on their own behalf to obtain or make a change in needed services or advocating on that peer's behalf if the peer requests intervention or talking with a peer about program changes. (NOTE: This may include time PRP staff spend advocating for the movement or with legislators only when they are accompanying peers who have requested such training.)

Basic Needs: Time spent providing peers with goods or services that meet basic physical needs (emergency food, personal care items, laundry, showers, etc.) that are delivered or distributed directly by the peer-run program.

Employment/Job Readiness Services: Time spent training or assisting peers to become economically self-sufficient through developing skills needed to find and maintain employment. Also includes assisting peers in obtaining volunteer experience in the community where the primary goal is to become employable.

Legal Support: Time spent providing support or assistance to a peer that is specific to a legal issue he or she is facing (may include criminal, family, advance directives, litigation or other legal areas).

Life Skills Development: Time spent training peers to develop life management skills (e.g. activities of daily living, shopping, budgeting, etc.).

Recreational Services: Time spent accompanying a peer one-on-one in activities that promote physical movement, fitness, relaxation or fun.

Referral to Community Services: Time spent providing peers with referrals to services this peer-run organization does not provide that are available in the community (CSB, faith congregation or other).

Social Support: Time spent assisting a peer to develop social connections with other peers, family or the larger community. Includes services to assist peers in obtaining volunteer experience in the community where the primary goal is to increase social interaction.

Transportation Time: Time spent either driving a peer or working with a peer to get access to transportation to medical appointments, treatment, the peer-run program location, recovery conferences etc.

Services Provided to a Group of Peers

NOTE: Calculation of time each facilitator spends setting up for and conducting a group times the number of peers attending. For example, a one-hour group with five participants, each facilitator would report 5 hours (1-hour group x 5 peers x 2 assigned facilitators = 10 hours).

Educational Groups (WRAP, wellness classes, etc.): Time spent in a group educating and facilitating dialogue designed to promote recovery and wellness.

Employment/Job Readiness Services: Time spent in a group to help peers become economically self-sufficient through developing skills needed to find and maintain employment.

Life Skills Development: Time spent in a group to train peers to develop life management skills (e.g. activities of daily living, shopping, budgeting, etc.).

Peer Support: Time spent facilitating a group that networks individuals with lived experience of a mental illness or addiction to provide each other help and support informed by their own personal experience and recovery.

Recreational Services: Time spent in group activities that promote physical movement, fitness, relaxation or fun.

Services provided to broader community

Family Support: Time spent providing supportive services for family members or caregivers of individuals experiencing mental health and/or substance use challenges.

Community Outreach: Time spent educating the community about the prevalence of mental health challenges, whole health and wellness activities, the recovery orientation, prevention skills and the benefits of and availability of peer support services.

Other

Anonymous Groups, 12-Step (AA, NA, DRA, etc.): Count of the number of groups you provide space for, NOT the hours or number of people attending. For example, if you provide space 1 day/week for an AA group and 1 day/week for an NA group, that would be a total of 2 groups for the month (2 groups per week x 4 weeks = 8).

Optional

In-Kind Contributions of Goods and Services (not volunteer time) [Optional]: Dollar figure of donated goods and services provided by the community. If you do not track this, please enter NR instead of \$0. If a program chooses to report, program is expected to report value according to IRS guidelines (Publication 561).

Volunteer Time: Total time volunteers contribute to service hour categories AND other volunteer service (cleaning, bookkeeping). Volunteers may be peers or community members.