Guidance on Data Submission Requirements
This guidance was prepared on August 2, 2021 by Cynosure Consulting and the leadership of the BWF SSEP program in response to feedback solicited on the newly introduced data capture tool.

Is the Data Capture Tool Required for November 2021 SSEP Reporting?
Yes, the data capture tool is a required element of the November 2021 project reporting. It is understood that the timing of the release of the data capture tool seems out of sync with the standard reporting timeframe. However, the timing was purposeful. Within the past year and half projects were facing pauses in programming and unprecedented barriers for planning and/or carrying out their proposed activities. The decision to delay the release of the tool until this summer made the best sense given the realities facing SSEP awardees in Fall of 2020 and Spring of 2021. By releasing this summer, it was intended to afford projects sufficient time for them to enter their data for the annual reporting efforts due in November of 2021 while also providing them with ample lead time to become familiar enough with the instrument to be able to begin a new year using the tool to collect and store project data. It will be advantageous for continuing projects to do an initial run through this summer entering the current year’s data into the tool. For projects completing this year, releasing the tool this summer ensures that some level of data from those projects in the capture of SSEP outputs and impacts to date. It may not be possible to capture all of these data elements retrospectively and ask that you give your best effort, given your resources and capacity, to completing as much as possible.

For What Timeframe Should the Data be Provided?
The decision of what timeframe of data to include is left to each individual project. These decisions should be made on the basis of what data is available, ability to access prior data, and capacity to populate available data into the tool. As to what data you include in this year’s submission, the more data you are able and willing to provide to us, the better. More data leads to more comprehensive documentation of the value of SSEP funding and richer showcasing of your project’s impacts.

Some programs are currently in a no-cost extension, and some did not offer any programming this year due to COVID impacts. Others are in their final year and will be summarizing across all years of project activities. Additionally, some programs may know that requested data simply does not exist for past activities.

Personal Student Information/Identifiable Data

Why Is This Information Collected?
There are several important reasons for collecting personally identifying information on SSEP participants.

First and foremost, the BWF and the SSEP Advisory Committee express a strong desire to track the longer-term impacts of participation on students in the areas of future course taking, academic achievement, post-secondary educational pursuits, and career pursuits. Impact tracking of this nature extends beyond the life cycle of most funded programs and requires that they have access to identifiable student data that would allow them to study or track SSEP longer-term impacts on former participants. Evidence that links SSEP participation to positive future outcomes would provide very strong justification for the importance of the SSEP funding efforts and the need to continue or potentially expand funding for this work.

Secondly, the BWF and the SSEP Advisory Committee have increasingly recognized the importance of promoting cross-program and project linkages, particularly in working to connect student SSEP participants with subsequent opportunities to be engaged in high quality hands-on STEM. To evaluate and document progress in this area, personally identifiable information for participants is needed to be able to identify former participants in one funded SSEP project who subsequently become engaged in additional SSEP programming or STEM enrichment activities offered by other organizations funded through BWF, such as NC STEM Ecosystem partners.

Beyond evaluation purposes, the BWF wish to increase their role in seeding and supporting a wide array of STEM enrichment activities in NC for the benefit of students who have participated in SSEP programming. This will help to facilitate linkages for them to other STEM opportunities in their local area and help them to feel connected and welcomed within the emerging STEM ecosystems in their surrounding communities and beyond. Therefore, they also require access to personal information on the students that are supported through the BWF awards.

What To Do If Sharing This Information Is Prohibited Under an Existing Memorandum of Understanding (MOU) or Other Formal Policy?

Since this request is being made as projects are in progress, policies that are currently in place may make the provision of this data difficult. MOU’s and other policies generally prevent projects from sharing data provided by the MOU partner. There is likely complexity in revising an MOU or data sharing policy once a project is in place. For those projects with MOU’s currently in place, you should review the language in the policy and determine if it would prevent you from engaging in data collection directly from participating families. If no such restrictions exist, consider creating a brief participant information form with the data fields that are needed. These forms could contain an explanation that the information requested will be provided to the funder so that they can track program impacts and potentially connect participants to future STEM opportunities.

Going forward, new awardees who rely on MOUs will be asked to list BWF as a recipient of data.
Are There Laws that Prevent Project Staff from Asking Certain Questions (i.e., dates of birth, phone #s, home addresses etc.)?

The short answer to this question is “no.” This type of information is collected from people all the time for a wide array of purposes including signing up for discount cards at the local grocery store, entering in sweepstakes to win prizes, registering for access to certain websites, etc. The longer answer to this question is that while asking participants or participants’ families (in cases where the participant is too young to know the answer) for this information is not regulated, there are important considerations in regard to how you ask for the information and how you store the information that you have collected. When asking for this information it is recommended that questions be asked on a form that provides a statement that informs the respondents of how the data will be used, what entities will be using the data, and how those entities will safeguard their information. Once the respondent completes the answers on the form, they should sign it with a statement of consent to their data being collected and used for those purposes. The respondents should also understand that they have the right to refuse to answer any of the questions and, if they choose not to answer, it won’t affect their participation. Once obtained, it will be important that you follow your organization’s policies for how to store and protect participants’ personally identifiable information to preserve their privacy and reduce the risks of harm resulting from their data being exposed.


Why is Sensitive Participant Information Requested?

Specific concerns were raised about collecting data about race or other sensitive personal characteristics of students and the reason for including this information in the data capture tool. The data capture tool’s inclusion of this information represents an important advance in the capacity for us to better assess individual project success and evaluate the value, effectiveness, and impacts of the SSEP funding on promoting access and inclusion in STEM across NC.

In each awardee’s proposal for funding, the awardee leadership laid out a recruitment plan detailing their intention to recruit and serve a particular set of participants. The portfolio of projects that are selected for funding each year through this process are aimed at funding a diverse set of high-quality STEM enrichment activities that will engage a broad range of participants, many of whom have been traditionally underserved by STEM programming in NC. Therefore, it is essential that the BWF collects detailed data from projects that allows for the assessment of annual participation in SSEP programming disaggregated by a variety of different subgroups of students.

Additionally, the collection of information about participants is directly related to the learning that emerged out the review of SSEP project reports. Reviewing SSEP project report highlighted
that some projects were going to extra lengths and engaging in some very innovative work to ensure participation from underserved and/or vulnerable groups of students. For example, the reports illustrated that some projects were specifically serving students with disabilities, migrant students, or students affected by housing instability. The sharing of these efforts in the reports led us to want to have a mechanism to better capture, document, and share these important project impacts. Thus, the data capture tool was designed as the mechanism through which these data would be routinely and consistently collected. It also provides a more comprehensive way for individual projects to demonstrate the important and nuanced ways in which their efforts were benefiting their communities and advancing STEM participation.

Will Collecting Some of this Data Create Discomfort for Families of Participants?

In cases where the participants are too young to answer personal questions, concerns were expressed regarding the dynamic that would be created in asking families to provide some of the personal information that was included in the data capture tool.

First, it’s important to remember that no one is required to answer any of the questions. The respondents should understand that they have the right to refuse to answer any of the questions and, if they choose not to answer, it won’t affect their participation.

Second, the concerns raised are common concerns of human service providers. However, evidence suggests these concerns are often unfounded (https://uwm.edu/icfw/what-happens-if-i-ask/).

Ultimately, awardee leadership has the responsibility to determine if the risk of asking the questions outweighs the value of collecting this data from families.

However, there may be cases where the awardee leadership is able to populate data from their own knowledge and understanding of participants. If a project administrator is able to provide insights with sufficient accuracy regarding participant background characteristics they may complete the field.

The Specific Question on Family Housing

To be very brief, the data capture question on housing changes in the last year is taken directly from the US Census (as are the specific options included in the dropdown choices for this column) as a means for capturing student mobility. Knowing more about student mobility aids in the ability to track participants linkages over time to other programs and also provides greater insight into the subgroups of students served by SSEP projects.

For more information see: https://www.census.gov/acs/www/about/why-we-ask-each-question/migration/
However, based on the level of concern that was raised around this specific field, Cynosure concluded from the SSEP awardee feedback that the overall value of collecting this field of information is outweighed by the challenges associated with its collection. We have subsequently removed this item from the version of the data capture tool that will be required for 2020-2021 project reporting which is attached to this guidance.

Submission of Data Capture and Narrative Report Template

Who are the Audiences for SSEP Reporting Information?

Both the narrative report and the data capture tool are required as part of the annual reporting due in November of 2021. The primary audience for the data capture tool is the external evaluators who will be tasked with engaging in analysis of cross project outputs and impacts. The secondary audience is the BWF program administration team who will use the data to provide updates to BWF’s Board of Directors and to connect awardees and participants to opportunities. The primary audience for the narrative report is the members of the advisory committee who annually review reports for project monitoring purposes to ensure that significant progress has been made to justify the release of additional project funds. The secondary audience is the external evaluation team who will assess program impacts and identify awardee needs for technical assistance or other supports.

How to Use the Data Capture Tool to Support Reporting

The data capture tool is designed to be used during the year, making the completion of the annual report template less work intensive given that much of the report information can be simply copied, exported, or calculated directly from the data capture tool. Both pieces of reporting, the data capture tool and the narrative template, are essential to meet our needs.

Limiting Project Burden

Importantly, there is wide diversity of organizations who participate in the SSEP program and know that in some cases, the capacity or expertise needed to pull data from one source to the other may simply not be available in some organizations. Awardees are encouraged to stop before taking on any cumbersome effort to try to pull information from the tool into the report. Addressing the requirements of using the data capture tool and/or pulling information from the tool into the report, is not intended to overburden project staff or exceed existing capacity. If at any point during the process of collecting data or reporting you encounter significant challenges, please reach out to the external evaluation team for guidance before proceeding.

Relatedly, some project leaders who already have systems in place to collect the same information as the data capture tool, noted that additional burden might be associated with
having to take the data from one system and transfer it into the tracking tool format. Transferring data from most systems into Excel is likely relatively simple with most systems allowing data to be downloaded directly into Excel formats or compatible formats such as .csv data files. Also, the additional effort that projects would expend transferring data into the tracking tool would also be well justified in ensuring that the BWF is collecting data consistently across all awardees. Should a project encounter a situation such that transferring the data out of existing collection systems into the data capture tool is exceeding capacity or excessively burdensome, please reach out to the external evaluation team for guidance.

Structure of the Data Capture Sheets and Fields

The structure of the data capture sheets was designed with input from prior project awardees. The layout that is used was informed by the way that project personnel typically “think about” and plan their activities. It was designed to align with the ways that a majority of projects have traditionally tracked their activities and recorded their participants. For example, project implementers commonly track activities they offer keeping a running list of the activities they sponsored with their dates and other information about the event and then separately have a system for tracking the attendance at project activities. Similarly, project staff tend to have a master roster of students who have signed up to participate in the project which includes information about the student such as their grade in school, enrollment date, or contact information, and then separately track the names of students who participate in different project activities. The data capture tool mimics this approach.

The SSEP program is characterized by a wide diversity of awardees and project designs and there was some feedback suggesting alternate ways to format the sheets. For those individuals, it is understood that the tool’s structure is a little less aligned with how their project data is currently tracked. Please work to provide the data requested in the current format and know that this will be a topic that will revisited in the future as part of routine formative evaluation review and feedback processes.

Online Data Collection

Due to the care that must be taken to ensure that personal data is safeguarded along with the existence of connectivity and capacity barriers for some SSEP awardees and service regions, the BWF is not yet ready to mandate the use of online data collection tools for capturing this information. Cynosure recognizes the value of considering these approaches and encourage any programs that have the capacity to utilize and safeguard online data collection approaches to feel complete freedom to create online versions of the data capture tool that they utilize.
Definition of Key Terms

In some cases, data collection tools have very specific definitions of key terms that are designed to ensure that entire community of respondents share a similar vision and conceptualization for what are seen as common components of the collective work. That approach is not compatible with the SSEP community of awardees and the great diversity of undertakings that are associated with the project work.

As a result, key terms that are included in the data capture such as “Activity” are intentionally not defined by the tool. Instead, in the guidance that was provided with the tool, awardees are encouraged to use their own definitions for how they think about the distinct set of project activities that are implemented by the program. For example, if your program offers three-weeks of consecutive summer camp and you think of that as one activity, then include it as one activity. If alternately, the timing and structure of each week’s camp is identical, as are the attendees, but you think of each week as a separate activity because each week is being put on with a different content focus and/or partners, then record it as three separate activities.

For determining who to include as a partner, the same advice as above is regarding defining activities. Use your own project’s lens for deciding who to consider as a partner. The data capture tool does not provide criteria for how to define a partner.

In regard to how closely the project’s presentation of data should reflect what was listed in project’s proposal versus the emerging reality of how the project implementers have come to view the work they are doing; it is recommended to use the emergent lens and landscape for how you define your partners and activities rather than what was envisioned in the original proposal. Keep in mind that the guiding philosophy in completing this tool is that the data you provide represents how you view your project’s efforts and participation and accurately communicates your project’s unique story.