Sample List of Internal Data-Monitoring Tables and Reports[1]

NOTE: This document is designed to accompany the resources and tools presented in MDRC's Tools for Postsecondary Schools Toolkit. It builds on information and concepts presented in the Data Management for Student Success videos. **Before reviewing this document, please use the link above to visit the web-based toolkit and watch those videos.**

This table lists internal reports that student success programs may find useful to have available for program-management purposes. These reports are not necessarily for external reporting, though they may provide the data used to complete an external-reporting template. Both coaches/advisers and program managers can use these reports to monitor program activity trends and student participation, in order to inform their program outreach campaigns.

Ideally, all of the reports below should be available both at the program level and at the individual coach/adviser level, so that coaches/advisers are able to review their own data without having to complete too many steps.

Following the table is a list of potential graphs that these reports could be used to create. These graphs could be created in Microsoft Excel and be automatically updated for the program and coaches/advisers to use on a regular basis.

REPORT NAME	DESCRIPTION	COLUMNS	USE
All Students	A roster of all students in the program, including those who have shown no interest in participating If possible, the report should include columns that show the number of coaching/advising sessions the students have attended in each of the months of the current term.	• Student Name • Student ID • Coach/Adviser Assignment • Cohort • Email Address • Phone Number • Enrollment in Current Term (Y/N) • Participation in the Program (Y/N) • Meetings Attended in Term Month 1 (for example, September) • Meetings Attended in Term Month 2 (for example, October) • Meetings Attended in Term Month 3 (for example, November) • Meetings Attended in Term Month 4 (for example, December)	Monitoring student enrollment, participation, and coaching/advising session attendance; can be exported and filtered to copy email addresses for a blast email message or to create a phone call list. For example, the Meeting Attended columns could be filtered to show students who have not yet met the monthly requirement. Then the contact information for those students could be used to generate an outreach list. Can also be exported for use in graphs and monthly reporting requirements
All Coaching/ Advising Sessions	A report of all of the coaching/ advising sessions that program students have scheduled	• Student Name • Student ID • Session Coach/Adviser • Session Date • Attendance Value • Reason Code or Other Meeting-Subject Categorical Field	General reporting on coaching/advising session patterns among coaches/advisers and students; provides the template for the more specific reports below.

REPORT NAME	DESCRIPTION	COLUMNS	USE
All Attended Coaching/Advising Sessions	The same as the above report, but filtered for attendance	Same as above	Providing the basis for reports on student completion of program requirements; (information is especially important if it is not possible to include columns related to coaching/advising session attendance in the All Students report)
Coaching/Advising Sessions on the Calendar for the Past Seven Days	A report of all of the coaching/advising sessions that the coach/adviser scheduled within the previous seven days	Same as above	Reporting on coach/adviser productivity
Past Coaching/ Advising Sessions Without Attendance Confirmation	A report of all of the coaching/ advising sessions that took place yesterday or earlier for which the attendance value has not yet been confirmed	Same as above	Maintaining data cleanliness to ensure that outreach efforts are directed at the relevant students
All Financial Incentives Earned	A report of all of the financial incentives earned	• Student Name • Student ID • Coach/Adviser Assignment • Incentive Month • Incentive Receipt Date	Reporting on financial incentives earned and identifying any financial incentives that have not yet been distributed to students

LIST OF POTENTIAL GRAPHS BASED ON THE REPORTS ABOVE

All Students

- Bar chart of coaching/advising session completion counts within the current month
- Bar chart of coaching/advising session completion counts within the last month
- Pie chart of student enrollment (Y/N)
- Pie chart of student participation (Y/N)
- Bar chart of students assigned to each coach/adviser
- Bar chart of actively participating students assigned to each coach/adviser

All Coaching/Advising Sessions (after several months, this report should be filtered to only include the past one or two months for these charts)

- Line graph of coaching/advising sessions scheduled
- Pie chart of attendance (Y/N)
- Bar chart of reason codes for attended meetings

Coaching/Advising Sessions on the Calendar for the Past Seven Days

- Bar chart of sessions scheduled by coach/adviser

Past Coaching/Advising Sessions Without Attendance Confirmation

- Bar chart of sessions, organized by coach/adviser

All Financial Incentives Earned

- Bar chart of financial incentives earned last month, organized by coach/adviser
- Bar chart of financial incentives earned versus financial incentives received last month

NOTE

1 Adapted from resources developed for the Scaling Up College Completion Efforts for Student Success (SUCCESS) project.