

Value Added Reporting (“VAR”) Instructions

Reporting the Full Scope of Services Provided by Katrina Aid Today Partners

Purpose: To report on the full scope of work provided by the Katrina Aid Today program, including categories of client services that do not qualify as Katrina Aid Today case management and are not able to be reported in the Coordinated Assistance Network.

Description: Based on its original intent and scope of work, Katrina Aid Today only reports on case management and services provided to KAT clients. These are captured through CAN reporting based on the client signing a release of information, and KAT partners recording case management information and referrals or services provided in CAN.

National partners have recognized the additional labor-intensive services that are extended to the Katrina-impacted population beyond what is captured in CAN including: information and referral, eligibility screening of potential clients that do not become KAT clients for your agency, and the case management of clients prior to the receipt of Katrina Aid Today funding .

Katrina Aid Today has always encouraged partners to account for these “value added” aspects of their work under the program, but such reporting has primarily been limited to quarterly narrative reports with limited quantitative information shared.

National partners have asked that UMCOR-Katrina Aid Today provide a tool for optional reporting by Tier III affiliates of these value added services so that the full scope of the program can be shared beyond the case management services provided to the Consortium’s clients. In sharing this tool, it is acknowledged that the “value added” reporting will likely still not capture all the services provided by partners to Katrina-impacted people, but this effort will tell more of the story of Katrina Aid Today.

Please note: Value Added Reporting will not be included in the agency or Consortium’s count towards caseload targets but used to report the people served in addition to the KAT case managed cases.

Responsibilities in Value Added Reporting:

Tier I/II: Encourage reporting and provide technical assistance to Tier IIIs; Compile submissions on a quarterly basis, or at the time of each Tier III program closure and submit to UMCOR-KAT

Tier III: Maintain reporting according to standards described below using the VAR Reporting Tool; submit to Tier I/II on a quarterly basis or at the time of program closure.

UMCOR-KAT Monitoring and Evaluation Team: Compile submissions from 9 national partners; provide technical assistance in support of a standardized system

Categories and Definitions of Value Added Reporting: While Katrina Aid Today processes and CAN have implemented standardized reporting through CAN entry of case management, reporting of “value added” services will be dependent on local Tier III reporting. In order to inform and standardize this reporting to the greatest extent possible, terms and collection methods have been designed to aid Tier III reporting with consideration of minimal burden while allowing them the opportunity to report on these value added clients and services under the Katrina Aid Today grant.

Note: Agencies should not include client services on the VAR Reporting when another funding source was paying for the case management and/or other services (such as LFRC) of the clients.

Categories of value added services are:

- Information and Referral
- Eligibility Screening
- Pre-Katrina Aid Today Case Management
- Other

Definitions of the above categories:

- Information and Referral – Resource or contact information provided to applicants or households impacted by Hurricane Katrina and contacting partners, for households that are not case managed by your KAT partner, eligible for Katrina Aid Today case management, receiving case management from another partner or declines case management.
- Eligibility Screening - Fielding requests for resources and/or case management services by applicant or households impacted by Hurricane Katrina, but household does not receive KAT case management from your KAT program due to ineligibility, is receiving case management from another partner or declines case management.
- Pre-Katrina Aid Today Case Management – Services provided to Katrina-impacted populations since August 29, 2005, but is not currently reported through KAT case management reporting in CAN. May include services provided immediately following disaster, prior to obtainment of client's signature on a CAN release or pre-implementation of KAT case management forms. Note that in order to count a client in this category they must have been participating in the case management of your program on the first day of your KAT grant.
- Other – Agencies that have unique circumstances of clients that they believe should be represented in the work of their agency in reporting their Katrina Aid Today activities can report clients as "Other." In order to report clients as "Other" however, a description of how these clients are Value Added to the Katrina Aid Today Consortium must be included. If a description is not included, these clients will be disallowed.

Criteria for Value Added Reporting: Reporting is based on households and all information should be listed using the head of household's information.

VAR reporting should avoid duplicative reporting: Prior to developing your report, reference the duplication "cautions" referenced below for each category. Only services or activities should be reported in "value added" reporting that have not been recorded in CAN or reported under other Katrina Aid Today reporting mechanisms. For example, services provided to the KAT clients of another agency should be recorded in the "Services Provided" section of the client's CAN record

Information and Referral - (since the date of Katrina Aid Today's inception, October 27, 2005)

- Do not include a count of households who become your agency's KAT clients.
- Do not include a count of the # of instances information and referral services were provided if the client called on multiple occasions.
- In this reporting context, information and referral is viewed as complementary to KAT case management. Thus, only services provided to Katrina-impacted populations since the date of Katrina Aid Today's inception (October 27, 2005) should be reported.
- Do not include clients that were served with Information and Referral Assistance by your agency between August 29, 2005 and October 27, 2005.

Eligibility Screening - (since the date of Katrina Aid Today's inception (October 27, 2005)

- Do not include a count of households who become your agency's KAT clients.
- In this reporting context, eligibility screening is viewed as a preliminary step of KAT case management. Thus, only eligibility screenings of Katrina-impacted populations since the date of Katrina Aid Today's inception (October 27, 2005) should be reported.
- Do not include clients that were served with Eligibility Screening by your agency between August 29, 2005 and October 27, 2005.

Pre-Katrina Aid Today Case Management Services- services provided since August 29, 2005 (date of Hurricane Katrina)

- Do not include a count of households who become your agency's KAT clients.
- Do not include clients that were not provided with long term case management (i.e. only provided with Information and Referral and/or Eligibility Screening) between August 29, 2005 and October 27, 2005.

QUESTIONS FOR CLARIFICATION

How should the agency submit Value Added Reporting?

If an agency is already collecting this information using their own tool, they can submit their own forms to Tier I/II. If an agency tool is being submitted, additional information may need to be data entered to ensure all information is submitted. For agencies without existing reporting tools, use the standardized "VAR" Tool.

Value Added Reporting can be submitted on a quarterly basis and/or at the time of program closure.

What categories should not be included on the Value Added Reporting?

- Case management to KAT clients: All KAT clients receive information and referral, eligibility screening, the provision of services and referral to outside services, and contact with the clients. In so much, this work is reported in CAN and should not be included in the VAR.
- Services provided to other partner's KAT clients – Often times agencies have financial resources or goods that are extended to meet the needs of KAT clients of other agencies. These services however should be added to CAN in the "Services Provided" section and not reported separately in the VAR. Services provided to other agency's KAT clients can easily be attributed back to the agency that provided the services if the agency is identified in the data entry.

Is Value Added Reporting required of KAT partners?

No, VAR is optional for Tier III affiliates. National partners have asked that UMCOR-Katrina Aid Today provide a tool for optional reporting by Tier III affiliates of these value added services so that the full scope of the program can be shared beyond the case management services provided to the Consortium's clients. If an agency already has a tool to report "value added" services as set forth in this document, they are welcome to use their own tool for reporting.

Should the following client examples be counted under Value Added Reporting?

- Client who completed the intake process but never completed a CAN release: **YES**
- Client is provided with direct assistance from your agency but is already a KAT client of another agency: **NO**, the service provided to this client should be recorded in their CAN record.
- Client was provided with information and referral prior to October 27, 2005: **NO**, only report long term recovery case management that was provided prior to October 27, 2005.
- Client was provided with eligibility screening prior to October 27, 2005: **NO**, only report long term recovery case management that was provided prior to October 27, 2005.
- Client completed the intake and eligibility determination but it was later found in CAN that the client was already working with another KAT partner: **YES**, this client should be counted as having received "eligibility screening" from the agency