**Performance Management Data Set**

**Overview**

For 2020 this is based off of the advisor goals found [here](https://docs.google.com/spreadsheets/d/1S4b0wDotUNjCyaXCEo5mLXMR6YE_rCR8v9Q9lY5wIGg/edit#gid=1914857536).

The report in Salesforce that provides the data set is [Manager Data Report.](https://na88.lightning.force.com/lightning/r/Report/00O1Y000007H7jTUAS/view?queryScope=userFolders) This report is intended to be exported monthly to provide a static performance view that changes over time.

**Salesforce Fields**

* **Site** - This is populated from the Student Progressions object field "Success Program Site". This is populated once and only once - when the student is first put into the warehouse (on or around October 1 of their freshman year). This will not change as it forms the basis of all cohort denominator reporting (all official outcomes reporting). The bucketing transforms the Success Program Sites of Jamaica Plain, Dorchester and Worcester to "Massachusetts" and leaves New York City and Chicago as is for reporting.
* **Success Program Lookup: Advisor: Full Name** - Transactional data. The advisor is assigned at the beginning of the school year via a combination of manual and bulk updates. Throughout the year if an advisor leaves, we need to reassign the caseload. Managers and PDs can change the advisor for year 1 students in bulk, or change a single student. If an entire caseload has to be reassigned, Dan bulk changes the data. This field is *overwritten* when a reassignment takes place.
* **Student Type**- This is populated from the Student Progressions object. It is a formula field that will show:
  + "Access Only" if only the Access Program Record Lookup field is populated
  + "A2S" if both the Access Program Record Lookup and the Success Program Record Lookup fields are populated
  + "SD" if only the Success Program Record Lookup field is populated
* **Success Program Lookup: Advisor: BL\_Team** - Transactional data (see details in "Advisor: Full Name"). This is linked to the advisor's User record. The Team field is set by a Salesforce systems administrator when the user is set up.
* **Student Progression ID**- The unique name of the student progression record. Provided for convenience only as a link back to the Salesforce record.
* **First Name** - The student's legal first name.
* **Last Name** - The student's last name.
* **Success Program Record Lookup: Program College Year**. "What year are you with Bottom Line" (up to 6). This changes annually during the year roll-forward (in August). Active and Inactive students are all rolled forward. Graduates from the prior year are not rolled forward. This field is critical in the outcome:
  + On track to graduation - used to compute on track for years 2-6; we exclude year 1s.
* **Success Cohort -**Populated from Student Progressions.
  + Used for: Filtering reports by cohort (first year in Success), grouping report data by cohort. This field contains the academic year (e.g. 2018-19) of the student's first year in the Success program.
  + Populated when: The record is created during the Mid October data freeze that creates new records for confirmed students.
  + Changed when: This field is not changed after it is initially populated. ​​​​​​​​​​​​​​
  + Tech Note: This is populated on record create via the Program Record object (rt: Success), field "Current Academic Year" (all data after May 2019) or "Program Year" (historic data for initial dw population)
* **Success Program Record Lookup: Address Captured**
  + **Why:**Without a current address, advisors will be unable to send a care package to their students.
  + **​​​​​​​​​​​​​​​​​​​​​​​​​​​​​​​​​Advisor Instructions:**Once you have updated the student's updated campus and/or home address (and indicated which is the preferred address), change the "College Address Last Updated" field on the Contact Information widget to today's date.
  + **How this is measured:**
    - If the field "College Address Last Updated" on the Contact record is greater than or equal to 8/1/2019, the field will say "Captured". Otherwise the field will say "Not Capture."
* **Success Program Record Lookup: Current Fall Lookup: Semester Enrollment Status -**Transactional Data. This is using the lookup from Student Progression to the Success Program Record to access the additional lookup on Program Record to Current Fall Semester called Current Fall Lookup. This pulls in the Semester Enrollment Status from the current fall semester entered by the advisor. Current Fall and Current Spring are filled via mass update when the Success class is finalized in October. **​​​​​​​The data in this field is needed to determine other data like whether the student will have a bill or not.**
* **Success Program Record Lookup: Current Fall Lookup: Semester Credits Attempted** - Transactional Data uses same logic as Semester Enrollment Status above. This pulls in the data that the advisors has entered for the semester credits attempted for the fall on the fall semester record.
* **Success Program Record Lookup: Current Fall Lookup: Cumulative Credits Attempted** - Transactional Data uses same logic as Semester Enrollment Status above. This pulls in the data that the advisors have entered for the cumulative credits attempted.
* **Success Program Record Lookup: Current Program Year: Fall Semester Balance -**Transactional Data. This is using the lookup from Student Progression to the Success Program Record to access the Current Program Year lookup. The Current Program Year lookup allows us to walk the relationship to the Program Year and pull in Fall Semester Balance. This is the balance that the student is charged at the beginning of the fall semester.
* Students with a Fall Enrollment Status with one of the following values will need to pay a bill:
  + Full time
  + Part time
  + Study Abroad
  + Mid-Semester Withdrawal
* Students with a Fall Enrollment Status with one of the following statuses will **not** have a bill:
  + Not enrolled, returning
  + Dropped out
  + Co-op/Internship
* **Success Program Record Lookup: Current Program Year: Fall Semester Balance Paid** - Transactional Data. This is using the same lookup as Fall Semester Balance above. The Fall Semester Balance Paid shows if the student has paid their fall bill or not. The options for "Yes" or "Payment Plan" both indicate that the student has paid their bill. This field might be blank if the student is not enrolled.
  + Students with a Fall Enrollment Status with one of the following values will need to pay a bill:
    - Full time
    - Part time
    - Study Abroad
    - Mid-Semester Withdrawal
  + Students with a Fall Enrollment Status with one of the following statuses will **not** have a bill:
    - Not enrolled, returning
    - Dropped out
    - Co-op/Internship​​​​​​​
* **Success Program Record Lookup: College Major from Lookup**-Transactional Data. What is the student majoring in? This is looking up through the Program Record to pull in the College Major from Lookup field. There are also Second Major, Minor, Second Minor fields. All of these fields are single select picklist, so only one option per field.
* **Success Program Record Lookup: Degree Pathway** - Transactional Data. This describes the degree path that the student is on. The options are AA Only, AA to BA, and BA. Used for advisor's degree audit. What is the end goal for this student?
* **Success Program Record Lookup: College Credits to Graduate** - Transactional Data. What is the total number of credits the students will need to earn. Needed as a denominator for other fields like Progress Toward Degree and to track progress and predict graduation based on credits.
* **Success Program Record Lookup: College Attending: Target College For** - Transactional Data. If Target College For is not blank, this school is a target college. The values are IL, MA, NY. The values tell you which site the school is a target for. This is updated by Dan based on information from Sarah and the sites. This path is using College Attending which is updated by what is the "current" semester. If it is currently Spring 2019-20 it will show the data from that semester. So if the student is attending Boston University in Spring, this field will pull in Target College For from that college. If you need to target specifically for the Fall or Spring semester use the Current Fall Lookup path, meaning use the field called Success Program Record Lookup: Current Fall Lookup: Semester College: Target College For.
* **Success Program Record Lookup: Career Pathways** - Transactional Data. What has the advisor and the student identified as potential career pathways. There should be at least one pathway in this field. This field is a multi-select picklist so there can be multiple entries separated by a semicolon. This data may be used in relation to Employability, Career Connections, or First Destination.
* **Success Program Record Lookup: Current Fall Lookup: Semester Credits Earned** - Transactional Data uses same logic as Semester Enrollment Status above. This pulls in the data that the advisors has entered for the semester credits earned for the fall on the fall semester record.
* **Success Program Record Lookup: Current Fall Lookup: Cumulative Credits Earned** - Transactional Data uses same logic as Semester Enrollment Status above. This pulls in the data that the advisors has entered for the cumulative credits earned as of the fall on the fall semester record.
* **Success Program Record Lookup: Current Spring Lookup: Semester Enrollment Status** - Transactional Data. This is using the lookup from Student Progression to the Success Program Record to access the additional lookup on Program Record to Current Spring Semester called Current Spring Lookup. This pulls in the Semester Enrollment Status from the current spring semester entered by the advisor. Current Fall and Current Spring are filled via mass update when the Success class is finalized in October. **​​​​​​​The data in this field is needed to determine other data like whether the student will have a bill or not.**
* **Success Program Record Lookup: Current Spring Lookup: Semester Credits Attempted** - Transactional Data. This uses the same logic as Semester Enrollment Status for Spring above. This pulls in the number of credits attempted for the spring semester entered by the advisor.
* **Success Program Record Lookup: Current Spring Lookup: Semester Credits Earned** - Transactional Data. This uses the same logic as Semester Enrollment Status for Spring above. This pulls in the number of credits earned for the spring semester entered by the advisor. **Note on timing: this data will not be complete until the Summer Assessments are over, typically around 7/1**.
* **Success Program Record Lookup: Current Spring Lookup: Cumulative Credits Attempted** - Transactional Data. This uses the same logic as Semester Enrollment Status above. This pulls in the number of cumulative credits attempted as of the spring semester entered by the advisor.
* **Success Program Record Lookup: Current Spring Lookup: Cumulative Credits Earned** - Transactional Data. This uses the same logic as Semester Enrollment Status for the spring above. This pulls in the total number of cumulative credits earned by the student as of the spring semester. This is entered by the advisors during assessments. **Note on timing: this data will not be complete until the Summer Assessments are over, typically around 7/1.**
* **Success Program Record Lookup: Current Program Year: Spring Semester Balance -**Transactional Data. This is using the lookup from Student Progression to the Success Program Record to access the Current Program Year lookup. The Current Program Year lookup allows us to walk the relationship to the Program Year and pull in Spring Semester Balance. This is the balance that the student is charged at the beginning of the fall semester.
* Students with a Spring Enrollment Status with one of the following values will need to pay a bill:
  + Full time
  + Part time
  + Study Abroad
  + Mid-Semester Withdrawal
* Students with a Spring Enrollment Status with one of the following statuses will **not** have a bill:
  + Not enrolled, returning
  + Dropped out
  + Co-op/Internship
* **Success Program Record Lookup: Current Program Year: Spring Semester Balance Paid** - Transactional Data. This is using the same lookup as Spring Semester Balance above. The Spring Semester Balance Paid shows if the student has paid their fall bill or not. The options for "Yes" or "Payment Plan" both indicate that the student has paid their bill. This field might be blank if the student is not enrolled.
  + Students with a Spring Enrollment Status with one of the following values will need to pay a bill:
    - Full time
    - Part time
    - Study Abroad
    - Mid-Semester Withdrawal
  + Students with a Spring Enrollment Status with one of the following statuses will **not** have a bill:
    - Not enrolled, returning
    - Dropped out
    - Co-op/Internship​​​​​​​
* **Success Program Record Lookup: Total Independent Engagements This Year** - Transactional Data. This is using the connection to Success Program Record to pull in engagements data. This is filled via an automation (DLRS) that counts the number of Engagements that were completed this year. Each engagement must have at least 1 eligible attached service. All Services besides Assessment are eligible. An engagement that has an Assessment attached **and**at least 1 other eligible service will count. This year is defined as occurring on or after August 24 of the academic year. So for 2019-20, engagements that were completed on or after August 24, 2019 will count. This automation does not consider Meeting Method, the way in which advisors interacted with the students. This data will be updated throughout the year as advisors enter engagements **and will be overwritten by the following academic year**. The DLRS is looking for the following criteria: Services Eligible for KPI >0, Is Current Acad Year = True, Meeting Status = Completed. Is Current Acad Year is a boolean field that confirms that the engagement was completed on or after August 24, 2019. To look at the entire year for the 2019-20 academic year, the engagements should also be on or before May 29, 2020.
* **Success Program Record Lookup: Total In Person Engagements This Year** - Transactional Data. This field uses the same logic as Total Independent Engagements above. This field is also filled by an automation (DLRS) using all the same logic as Total Independent Engagements This Year above. The one difference is that Total In Person Engagements is also considering the Meeting Method. In order for engagements to count toward the In Person numbers, the Meeting Method on the Engagement must be Office Visit, Campus Visit, or Blended Model Remote. The DLRS is looking for the following criteria: Services Eligible for KPI >0, Is Current Acad Year = True, Meeting Status = Completed and Meeting Method = Campus Visit, Office Visit, or Blended Model Remote. Is Current Acad Year is a boolean field that confirms that the engagement was completed on or after August 24, 2019. To look at the entire year for the 2019-20 academic year, the engagements should also be on or before May 29, 2020.
* **Success Program Record Lookup: Completed All Remedial Level Classes**-  Transactional Data. This field is populated via the lookup to Success Program Record. The field is a checkbox so will have a 1 or a 0. A value of 1 (TRUE) means that the student completed all remedial level courses or it was not necessary for them to take remedial courses. Advisors mark the milestone as Completed for **Year 1**students only. If this was completed in Year 1 it is valid for all years, but the goal is specific to Year 1 students. A Process Builder checks this box on the Success Program Record when the advisor marks this milestone as Completed.
* **Success Program Record Lookup: Current Program Year: SAP Maintained This Year** - Transactional Data. This field is populated via the Lookup to Success Program Record to access the Current Program Year. From Current Program Year we can access the field SAP Maintained This Year. This field will have a 1 or 0. A value of 1 means that the student has maintained Satisfactory Academic Progress for the current year. Advisors mark the milestone as Completed for all enrolled students who have maintained SAP. A value of 0 means that the student has not maintained SAP or was not enrolled. Use the Spring Semester Enrollment Status to confirm that the student was enrolled.
* **Success Program Record Lookup: Stage** - Transactional Data. This field is populated via the lookup to Success Program Record. Stage is meant to tell us where the student is in the program. There are multiple stages used in intake/recruitment to track where a student is in the process and "terminal" stages if they are not actually eligible. For students that are in the Success program, the most important stages are Active, Inactive, Graduated, and Timed Out. Active means that the student is actively engaged in the program and is on an advisor's caseload. Inactive means that the student is not actively engaged but we are still holding ourselves accountable for their 6 years in the Success Program. Graduated means that the student has graduated with a Bachelors degree. (Historically, there will be some Associates Degrees here too, but the foundational definition of graduated is Bachelors.) Timed Out means that the student has reached the full 6 years in the Success program, but did not earn a Bachelors degree.
* **Success Special Initiatives** - This field is from the Student Progression object.​​​​​​​
  + Valid data on:  All records
  + Used for: Filtering or grouping reports by special initiative or excluding pilot program students from official reporting. This field contains the special initiative that a student is part of.
  + Populated when: The record is created during the Mid October data freeze that creates new records for confirmed students..
  + Changed when: This field is not changed after it is initially populated.
  + Tech Note: This is populated on record create via the Program Record object (rt: Success), field "Special Initiatives"
  + Values:
    - Blended Model
    - CHI Community College Pilot
    - MA Community College Pilot
    - MA Freudberg Scholar
    - MA Summer Search
    - MA Vertex Scholar
    - NY Community College Transfer Pilot
    - NY CUNY Lehman College
    - NY Harlem Children’s Zone
    - NY New Visions
    - Other Exclude from Reports
* **Treatment Group** - This field is from the Student Progression object.
  + Valid data on: All records.
  + Used for: Identifying students who were part of the RCT treatment group. IMPORTANT: This field is only visible to those with the correct permissions. This field contains a checked box if the student was part of the treatment group, unchecked if not.
  + Populated when: The record is first created.
  + Changed when: This field is not changed after it is initially populated.
  + Tech Note: This is populated via the Contact object, field "Treatment Group" which was populated once for a specific RCT initiative. There should not be any additional students ever added to this field. If another RCT is conducted in the future, this field should be modified to indicate which RCT the student was assigned to.
* **Success Program Record Lookup: # Spring Overall Independent Interaction** - Transactional Data. This is using the connection to Success Program Record to pull in engagements data. This is filled via an automation (DLRS) that counts the number of Engagements that were completed in the Spring Semester of this year. The spring is defined as January through April and May up through May 29th for 2019-20. (The end date for May might change from one year to the next.) So for 2019-20, engagements that were completed on or after January 1, 2020 and on or before May 29, 2020 will count. Each engagement must have at least 1 eligible attached service. All Services besides Assessment are eligible. An engagement that has an Assessment attached **and**at least 1 other eligible service will count. This automation does not consider Meeting Method, the way in which advisors interacted with the students. This data will be updated throughout the year as advisors enter engagements **and will be overwritten by the following academic year**.
* **Success Program Record Lookup: # Spring In Person Interactions Success** - Transactional Data. This field uses the same logic as # Spring Overall Independent Interaction above. This field is also filled by an automation (DLRS) using all the same logic as # Spring Overall Independent Interaction above. The one difference is that # Spring In Person Interactions Success is also considering the Meeting Method. In order for engagements to count toward the In Person numbers, the Meeting Method on the Engagement must be Office Visit, Campus Visit, or Blended Model Remote.

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**PowerBI Transformations**

**Filters**:

* Stage
* Semester Enrollment Status
* Site
* Team
* Advisor
* Gender
* Race

**Degree Milestones (Spring)**

When all of the following are hit, the student has achieved achieved all degree milestones, otherwise, we want to show what is missing.

* Registered for Credits -
  + Success Program Record Lookup: Current Spring Lookup: Semester Credits Attempted > 0
* Earned 10% or more of Total Required Credits -​​​​​​​
  + Success Program Record Lookup: Current Fall Lookup: Semester Credits Earned / Success Program Record Lookup: College Credits to Graduate >= 10%
  + Success Program Record Lookup: College Credits to Graduate AND
  + Success Program Record Lookup: Current Fall Lookup: Semester Credits Earned > 0 AND
* Maintained SAP
* Completed Remedial Courses

**Affordability Milestones (Annual)**

When all of the following are hit, the student has achieved achieved all affordability milestones, otherwise, we want to show what is missing.

* Bill is Paid for Fall -
  + Success Program Record Lookup: Current Program Year: Fall Semester Balance Paid - is "Yes" or "Payment Plan"
* Bill is Paid for Spring -
  + Success Program Record Lookup: Current Program Year: Spring Semester Balance Paid - is "Yes" or "Payment Plan"
* Financial Aid for Next Year is Applied For
  + FAFSA Filed with is "N/A"
  + OR
  + FAFA Filing Date is not empty