



Comprehensive Program Assessment System (*Compass*) Customization Form

Please complete the following information so that we may customize the Compass system to your particular program needs. If you have any questions, you may contact Urban Pelicon at (619) 203-2047 or upelicon@CoBroConsulting.com. Thank you for choosing our evaluation systems and services!

Main Contact Information for Compass

Name: _____ Title: _____
Program Name: _____
Phone: _____ Cell Phone* : _____ Email: _____

**Cell phone will only be used in a case where we need to contact you during non-business hours, such as complications with training travel, etc.*

Program Name

Please select a program name. This will be used as the initial login for all Compass users. You can choose any program name, but we suggest that it is short and easy to remember. Please do not use spaces (e.g., cobroconsulting).

Types of Student Unique Identifiers (IDs)

Please list any types of student IDs used to track students that you would like included in Compass (e.g., IDs issued by the school, district, or state).

Limited English Proficiency (LEP)

What are your school/district LEP categories? Please list all categories and the designation of the category (e.g., Yes LEP or NO LEP). For example, LEP 1 (Yes LEP), LEP2 (Yes LEP), Fluent (No LEP), Re-designated (No LEP), etc.

Tests

Compass is able to track multiple standardized tests. By default, the system includes scores for the PSAT, SAT, and ACT. Please list any additional tests you would like Compass to track for your program. Please include any middle and high school-level tests you will require as well.

Student Services

By default, Compass organizes the grant services offered to students according to categories required by the Annual Performance Report (APR). Please list services provided by your program, and the APR categories in which they correspond, if applicable (an electronic file of these services may also be provided).

Please list any services that may have subcategories, and the subcategories for which they correspond. For example, *Tutoring* subcategories: Math Tutorial, AVID, ESL; *Counseling* subcategories: Academic, Behavioral, etc. If you are not sure, this can be provided later.



APR Category	Services (including sub-category)
Tutoring/ homework assistance	
Rigorous academic curricula	
Comprehensive Mentoring	
Financial aid counseling/ advising	
Counseling/ advising/ academic planning/career counseling	
College visit/college student shadowing	
Job site visit/job shadowing	
Summer programs	
Educational field trips	
Workshops	
Family/cultural events	
Other (please specify)	

Parent Services

Likewise, Compass organizes the grant services offered to parents according to categories required by the APR. Please list commonly used parent services and the APR categories in which they belong, if applicable (an electronic file of these services may also be provided).

Please list all subcategories you will require for your parent services. For example, *Workshop on College Prep* subcategories: College applications, SAT/ACT preparation, etc. If you are not sure, this can be provided later.

APR Category	Services (including sub-category)
Workshops on college preparation/financial aid	
Counseling/advising	
College visits	
Family events	
Other (please specify)	

Staff Development Training



If you plan to use Compass to keep records of staff development training, please list the most common types of staff development training tracked for your program (e.g., Math, ESL, Technology). If you are not sure, this can be provided later.

Additional Information

Are there any other data elements that you would like Compass to track?

School Information

School schedule(s): ☐ Trimester ☐ Quarter ☐ Semester

Please list each school that is, or will be, in your program, along with its district and the type of school term they use (i.e., semester, trimester, or quarter system). If you need to list more than ten schools, please attach an electronic file with this information.

Prior Data

What is your current data format? (e.g., Excel, Text file, Access)

How many years of back data will need to be uploaded into the system?

Users

Please list the name and e-mail address of people who will need to have access to our secure data upload site. This list should include any person who will be providing data directly to CoBro Consulting.

Please list (or attach) the full name and e-mail address of each person who will need a Compass User Name and Password to access the system. Please also identify their level of access to student data. (e.g., administrator, all grant, district, school, etc.)

Thank you for providing the above information. We appreciate your prompt response. Please send this completed questionnaire to upelicon@CoBroConsulting.com

