PFS Protocol:
CLI Participation Tracking Document

Overview

The goal of this evaluation tool is to track participation in your strategies as part of your implementation. This tool will also assist with the completion of the biannual CLI required by SAMHSA. By tracking your strategy implementation in this way, you will be able to easily track your efforts, identify your reach, and see where you are spending your resources, time, and energy.

Wilder has created Excel spreadsheets or SmartSheets (online) for completing data entry based on the type of strategy being implemented. If you have any questions about this spreadsheet, or you don't see your strategy listed, please contact your Wilder consultant.

Excel Spreadsheet Navigation

TOC Tab: This is the table of contents tab, and it includes a list of all strategies currently being implemented by grantees. Click on the strategy for which you would like to enter data to navigate directly to the appropriate tab. For reference, the remaining tabs are labeled as follows:

- **PE:** Prevention Education Strategies (e.g., 3rd Millennium courses, Injunctive Norms Education, e CHECKUP TO GO)
- **DFA:** Alternative Drug-Free Activities (i.e., Wilderness Therapy)
- **PAR:** Prevention Assessment and Referral (i.e., BMI, BASICS, ScreenU)
- **ES – R:** Environmental Strategies – Responsible Beverage Server Training
- **ES – E:** Environmental Strategies – Policy Enforcement Strategies (i.e., Compliance Checks)

It should be noted that information dissemination and communication strategies, such as social norms campaigns, social marketing campaigns, injunctive norms campaigns, and policy promotion campaigns should be entered into the Materials Creation and Distribution spreadsheet instead of this spreadsheet.

SmartSheets Navigation

To access the SmartSheets forms for tracking participation, click on the document entitled "CLI Tracking SmartSheet Links." You can bookmark this page and share it with other collaborators who may need to enter participation data. On this page, you will see a series of button based on the type of strategy being implemented. Click on the button associated with the strategy you would like to enter and it will open a new form to enter the data into. Once you enter and submit your data, it will be automatically shared with Wilder Research for additional processing for CLI completion.

What to Track

It is important to note that this spreadsheet is intended to track each unique round of implementation for each strategy. This will look different for different strategies, but a basic reference is included here:

- **Group sessions:** For any strategy that is administered to a group (e.g., Injunctive Norms Education or Wilderness Therapy), you will track each session in which a group is convened.

- **Individual sessions:** For strategies administered to one individual at a time (e.g., BMI or BASICS), you will track each individual served and each session with each individual.

- **Online courses:** For each strategy administered online over a period of time (e.g., 3rd Millennium, e CHECK UP TO GO, ScreenU), you will track all participants over a defined period of time, such as a semester or a quarter.

Typical Tracking Fields

Each tab of this spreadsheet is different based on the type of strategy being implemented. However, there are some common fields throughout the spreadsheet and these are described below.

1. **Strategy Name -** Enter the name of the specific strategy you're tracking. In some tabs, this will be a drop-down list, while in other tabs, it's a blank cell you can type into.
2. **Date Started -** Enter the date the strategy session started. In many cases, this will be the date the whole strategy occurred (such as a group or individual session). However, when tracking an online course, this could be the start date in which students could first access the course.
3. **Date Ended –** If the strategy was implemented over a period of time, such as an online course administered over a semester, enter the end date for which the participation data

was examined. If the strategy started and ended on the same date, please enter the same date in both fields.

4. **Length of Session –** Enter the length of the particular session (for single session tracking) or the average length of sessions for online courses administered over a span of time. The length should be entered in minutes.
5. **Location –** Identify the location of the session. If the session took place on campus, that is sufficient specificity for this field.
6. **Number of Participants –** Enter the total number of participants engaged in the session. This includes people who only partially completed the strategy. This count can be duplicated across sessions, if applicable.
7. **Number of NEW Participants –** This is the unduplicated number of participants served by this specific strategy during the federal fiscal year (October-September). If the participant was served by a different strategy or during a different year, they can still be considered new for this strategy and this timeframe.
8. **Demographics –** Enter any demographic data you have available for this session. We want to enter as much data as possible in this section, but we understand that this data may be difficult to obtain. If you do not have specific demographic information, enter the full number of participants under the "Unknown" column relevant to the demographic variable (e.g., age, gender, race). All participants should be counted (either with data or as unknown) for each demographic variable.

Data Submission

You will need to submit this spreadsheet to Wilder prior to completing the CLI to allow for data aggregation. You can work with your Wilder consultant to identify when and how to transfer Excel spreadsheets. SmartSheets forms will be automatically submitted to Wilder.