Lyon Software

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Implementation Steps

✓ Form a task force or committee to be responsible for discussing and answering social accountability questions and to communicate policy
  - Consider including the civic/community engagement office, service learning departments, student affairs, office of academic affairs, board members, key leaders
  - Assign roles and specific jobs and decide who needs CBISA™ training
  - Discuss strategic planning, programs to track, goals, partnership development

✓ Identify the programs and activities your institution is currently performing in the community that "qualify" or "quantify" as social accountability
  - Look at community event calendars, bulletin boards, newsletters
  - Check with finance for subsidized services
  - Explore what education and research programs you are involved in

✓ Identify the program and activity directors
  - Who is in charge?
  - Contact each program director, schedule a time to get together to talk about their programs
  - Give them access to CBISA™ and schedule a training session

✓ Outline specific responsibilities of the Finance/Human Resource Department, if applicable
  - Who will be your main contact?
  - Will finance or coordinator enter reporting unit default information?
  - Get input on salary group rates, department rates, supply costs, indirect costs, and supporting documentation.

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✓ Begin entering your organization defaults and activities
- Only enter the departments that are involved in Community Benefit reporting
- Rename any custom terms
- Complete the Reporting Unit Financial screen
- Discuss customizing the software (see Options/Edit Defaults)
- Review all of your activities, assign them to a category and enter important information (in the Programs module)
- Enter your identified partnerships (in the Partnerships module)

✓ Collect and enter your occurrence records
- Provide training for reporters on data entry
- Have reporters enter directly into CBISA™
- Review pending records and make sure that your reporters are supplying you with the necessary statistics: student hours; persons served; expenses; and, offsetting revenue!
- Import pending records

✓ Use available resources
- Lyon Software customer support and web site
- CBISA Forum for Higher Education
- Campus Compact
- National Service Learning Clearinghouse