



CECIDS

Chicago Early Childhood
Integrated Data System

CECIDS Practice Resource

Data Governor Yearly Overview

PROGRAM-YEAR-SPECIFIC REFERENCE DOCUMENT — TEMPLATE

Document Status	Reference / Non-Canonical
Owner	Business Analyst
Update Frequency	One per program year per provider; maintained during the year and finalized at year close
Program Year	[e.g., 2024–2025 (Aug 1, 2024 – Jul 31, 2025)]
Primary Audience	Analysts and team members interpreting provider data

How This Fits the Documentation Set: The Yearly Overview answers a narrow question: what specifically existed during this program year? It is reference only. Structural characteristics belong in the Fact Sheet; program-year changes and why they matter belong in the Annual Data Summary; technical behavior remains in ETL & Mapping documentation.

1. Purpose & How This Document Is Used

Purpose

This Yearly Overview captures program-year-specific operational detail and scale for a Data Governor. It confirms which parts of the provider’s structural service model were active during the defined August 1–July 31 program year and records the operating footprint that analysts may need to interpret the year correctly.

The document is intentionally a reference snapshot rather than an authoritative statement of structural business rules. It should be read alongside the provider’s Fact Sheet and Annual Data Summary.

This document is intended to:

- Provide a program-year snapshot of the provider’s operational footprint.
- Record the specific sites, community partners, subrecipients / delegates, and service settings active during the year.
- Capture program-year scale needed to understand what was operating during the period.
- Give analysts a reference point for determining what specifically existed during a defined year.

What This Document Is Not

- Not the structural baseline for the provider; durable characteristics and relationship definitions belong in the Fact Sheet.
- Not the record of what changed from the prior year or why a change matters for interpretation; that belongs in the Annual Data Summary.
- Not a technical ETL, mapping, or data dictionary document.
- Not an authoritative replacement for the source or technical documentation used to define field behavior.

Rule — Annual Snapshot Test: If the question is “What specifically existed this program year?”, it belongs here. If the question is “What changed this year, and why does it matter?”, use the Annual Data Summary. If the information should remain true across multiple years, use the Fact Sheet.

2. Program-Year Service Footprint

Provide a concise picture of the provider's operating configuration during the program year. The purpose is to establish what was active, not to restate structural definitions already documented in the Fact Sheet.

Include	• The combination of directly operated sites, community partners, and subrecipients / delegates active during the year. • The service models that were actually operating during the year. • High-level program-year scale needed as reference context.
Exclude	• Structural definitions of the provider's delivery model. • Detailed explanations of why the year differs from another year. • Technical field, mapping, or transformation logic.
Check	An analyst should be able to read this section and understand the provider's operating footprint for this specific program year.
Program-year operating summary	
[Describe the combination of service models and organizational relationships active during the year.]	

Program-Year Scale (Reference Only)

Total children served (birth–five)	[INSERT #]
Total children served in OST, if applicable	[INSERT # / N/A]
Other scale measure needed for reference	[INSERT # / N/A]
Reference Note: Counts and scale in this document provide program-year context. If a count is used for formal reporting, trend interpretation, or a governed analytic product, apply the relevant source, analytic, and disclosure rules rather than treating this overview as the authoritative measure.	

3. Service Models & Organizational Arrangements Active This Year

Confirm which parts of the provider's structural model were active during this program year. Check all that apply.

- ☐ Directly operated sites
- ☐ Community partner sites
- ☐ Subrecipient / delegate sites
- ☐ Home visiting / home-based services
- ☐ Out-of-School Time (OST)
- ☐ Other program-year service setting: [specify]

Include	• Only arrangements that were active during this program year. • Reference cues analysts use to recognize the active models in the year's data, when those cues are needed.
Exclude	• The durable definition of each relationship type. • One-off technical mapping rules or field-level logic.
Check	The list should describe what was active this year, not redefine what each model means.
How the active service models are identifiable in the data	
[Document high-level naming conventions or other reference cues used to recognize the models active this year. Do not reproduce technical mapping logic.]	

4. Directly Operated Sites

Include	• The directly operated sites active at any point during this program year. • The program or service model associated with each site when useful for reference. • Program-year notes needed to understand partial-year operation or other roster context.	
Exclude	• The structural definition of “directly operated.” • Prior-year rosters unless needed to explain a current-year note. • Technical site-ID mapping rules.	
Check	This table should answer which directly operated sites were active this year, not what “directly operated” means.	
Site	Program / Service Model	Program-Year Notes
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]

5. Community Partner Sites

Include	• The community partner sites active at any point during this program year. • The program or service model associated with each partner site when useful. • Program-year notes needed to understand when participation began, ended, or was limited.	
Exclude	• The structural definition of a community partner. • Counts or lists carried forward from prior years without confirmation. • Technical partner or site mapping rules.	
Check	This table should show who the community partners were this year. Relationship definitions remain in the Fact Sheet.	
Partner / Site	Program / Service Model	Program-Year Notes
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]

6. Subrecipient / Delegate Sites

Include	• The subrecipient / delegate organizations or sites active during this program year. • The program or service model associated with each when useful. • Program-year notes needed to understand the roster.
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Exclude	• The durable definition of a subrecipient / delegate relationship. • Historical rosters from other program years. • Technical identifier or mapping logic.	
Check	An analyst should be able to identify the active subrecipient / delegate network for this year without relying on memory or prior-year documents.	
Subrecipient / Delegate	Program / Service Model	Program-Year Notes
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]
[Enter]	[Enter]	[Enter]

7. Out-of-School Time (OST) Programming

Complete this section when OST programming was active during the program year. If OST was not part of the provider's service footprint, enter N/A.

Include	• Where OST operated during the year. • The programs or classrooms treated as OST for program-year reference. • High-level naming conventions or other cues used to recognize OST records in the data.
Exclude	• A structural definition of OST that belongs in the Fact Sheet or general onboarding materials. • Technical transformation or classification logic.
Check	An analyst should be able to determine what OST activity existed this year and how to recognize it at a reference level.
OST footprint and identification	
[Describe where OST operated and how OST programs / classrooms are identifiable in the data. If not applicable, enter N/A.]	

8. Home Visiting / Home-Based Services

Complete this section when home visiting or home-based services were active during the program year. If they were not part of the provider's service footprint, enter N/A.

Include	• The home visiting / home-based services active during the year. • The organizations or settings through which those services operated, when relevant. • Whether the year's records are recognizable as distinct sites or through naming conventions at a reference level.
Exclude	• The structural definition of the home-based delivery model. • Field-level rules, mappings, or transformations.
Check	This section should help analysts identify the home-based footprint that existed this year without turning the Yearly Overview into technical documentation.
Home-based footprint and identification	

[Describe how home visiting or home-based services were represented during the year. If not applicable, enter N/A.]

9. Program-Year Reference Notes

Use this section sparingly for operational detail needed to understand what specifically existed during the year but that does not belong in one of the rosters above.

Include	• Concise operational notes needed to make the program-year snapshot understandable. • Cross-references to the Annual Data Summary when a material change or interpretation issue is documented there.
Exclude	• Comparability warnings or analytic guidance that should be authoritative for the year; put those in the Annual Data Summary. • Structural changes that should be incorporated into the Fact Sheet after confirmation. • ETL or mapping logic.
Check	If the note changes how an analyst should interpret trends, completeness, or comparability, it should also be documented in the Annual Data Summary.
Reference notes	
[Enter concise program-year reference notes and cross-references, if needed.]	

10. Related Documentation

Fact Sheet	[Link / location]
Annual Data Summary	[Link / location]
ETL & Mapping documentation	[Link / location, if useful for navigation]

Yearly Overview Finalization Rule – LOCK THIS IN

Maintain one Yearly Overview per provider per program year. Update it as the year's operating footprint is confirmed, then finalize the document at program-year close so it remains a stable reference picture of what existed during that period.

Hard Rule: The Yearly Overview is reference only and never replaces canonical structural, annual interpretation, or technical documentation. Repetition across multiple years does not by itself make a statement structural; apply the Fact Sheet structural test before moving information into the structural record.

Final Check (Before Finalizing)

Before finalizing this Yearly Overview, the Business Analyst should be able to answer yes to each of the following:

- Can an analyst determine which service models and organizational arrangements were active during this program year?
- Are the current-year site, partner, and subrecipient / delegate rosters captured here rather than in the Fact Sheet?
- Are material changes, comparability issues, and interpretation guidance documented in the Annual Data Summary rather than buried here?
- Are structural business rules and relationship definitions left in the Fact Sheet?
- Are field-level and transformation rules left in ETL & Mapping documentation?

Related CECIDS Resource: Documenting Integrated Early Childhood Data: An Introduction to the CECIDS Documentation Templates

