



N A S C S P

NATIONAL ASSOCIATION FOR STATE COMMUNITY SERVICES PROGRAMS

# Using CSBG \$

## ROMA COE Committee Meeting

June 26, 2014

# Objectives

1. Review suggested methods for answering the question: What does the CSBG funding support?
2. Discuss suggestions from the Section E Learning Community Cluster
3. Consider proposed changes and make recommendations

# Survey Results - January 2013



## Performance Management Task Force Survey

*Administered by the Urban Institute*

# Capacity Building

How specifically do CSBG dollars contribute to achieving the local eligible entities' mission as a comprehensive service organization?

- Leveraging
- Infrastructure
  - Planning and coordination
  - Contribution to improved services: supports maintenance of existing infrastructure; supports training, salaries, and underfunded admin services
  - Technology/Data Collection/Reporting

# Experimentation, Innovation, Support Services



- Plan and launch new initiatives: allows for integrated complex responses to complex situations; research and incubation of new programs; and seeding
- Case Management Services

# Current Tools/Activities to Assess CSBG \$



What information do local agencies currently use to assess the use and effectiveness of the CSBG dollars?

- Outcomes reporting through ROMA
- ROMA National Performance Indicators
- Return on Investment (ROI) – ROI illustrates whether the full cost of a program achieves a satisfactory amount of outcomes

# Current Tools/Activities to Assess CSBG \$

- Dashboard reporting which includes fiscal reports, program reports and strategic planning reports as well as tracking of the performance of National CSBG Goals and Outcomes
- Feedback from program participants (including surveys), community partners, other funders, and investors/stakeholders
- Audit, Fiscal, Annual, and Head Start reports, as well as reports presented to city and county governments

# Current Tools/Activities to Assess CSBG \$



- Needs Assessment Surveys
- Logic Model Manager
- Homeless Management Information Systems (HMIS) – HMIS is used to determine household demographic, education level, service type, income, income type and housing status at the time of enrollment, exit and follow-up status
- “Listening” data, i.e. focus groups, social media, public testimony





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# Current IS reporting of CSBG \$

## Section E

# The use of CSBG dollars

*Improve understanding of how CSBG dollars support community action  
and identify results*

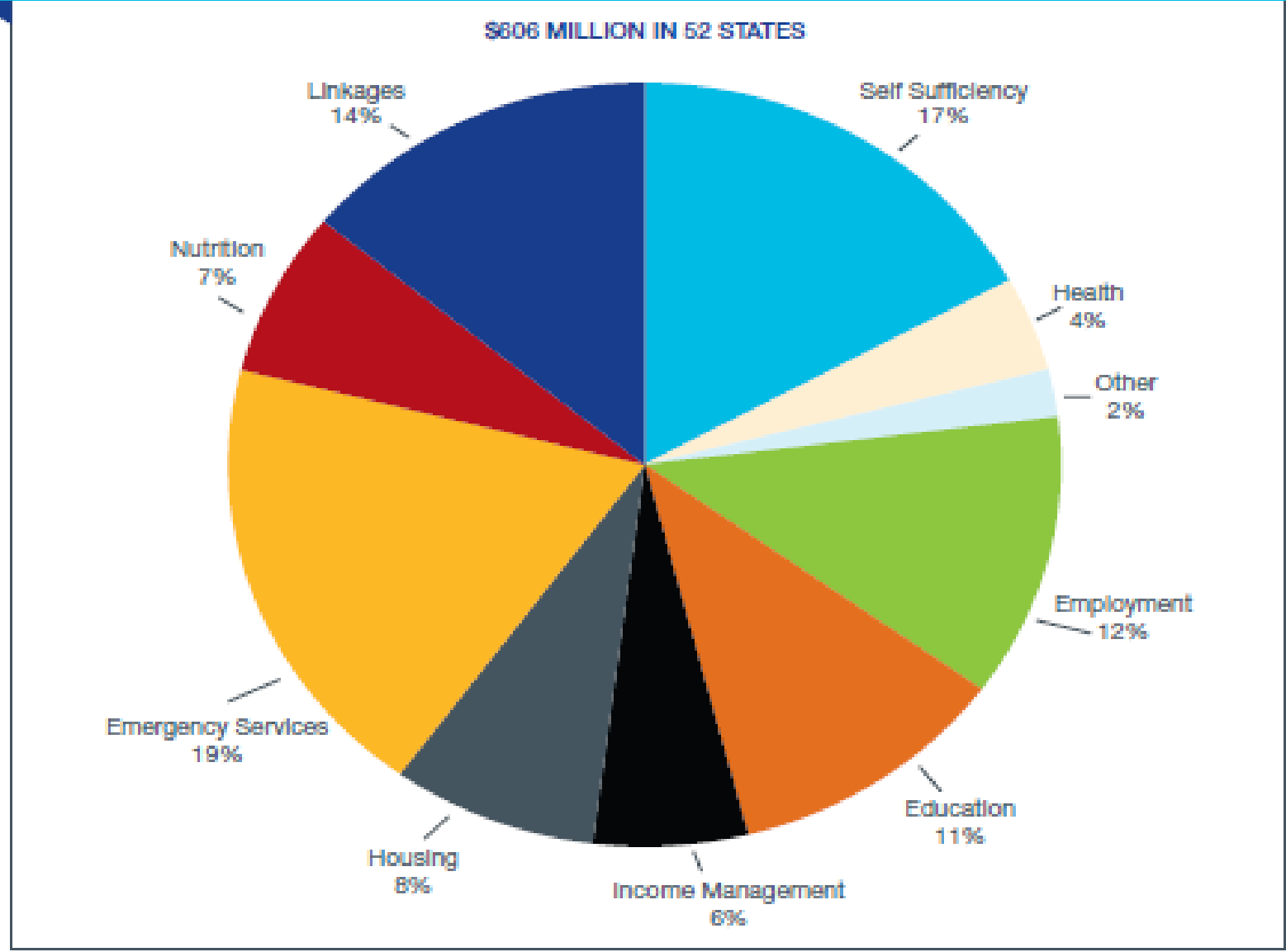
Section E of the IS report:  
Clarifying service categories and  
aligning with organizational standards

# From NASCSP Guide



- The premise of the classification of CSBG services upon which the CSBG/IS has been based is that all projects funded with CSBG funds fit into one of the categories mentioned in the CSBG Act.
- As some states have developed initiatives that do not fit neatly in these categories but are designed to eliminate a cause of poverty, two more categories (Self-Sufficiency and Health) have been developed for the CSBG/IS and a third (Other) may be used to report significant initiatives in your state which do not fit the nine categories offered.

**FIGURE 12: CAA USES OF CSBG FUNDS**



## Section E: CSBG Expenditures by Service Category

Agency Reporting:



Table 1: Total amount of CSBG funds **expended** in FY 2009 by Service Category

Service Category	A.) CSBG Funds	B.) CSBG ARRA Funds
1. Employment		
2. Education		
3. Income Management		
4. Housing		
5. Emergency Services		
6. Nutrition		
7. Linkages		
8 Self Sufficiency		
9. Health		
10. Other		
Totals	\$0	\$0

# Discussion Around Categories: Emergency Services



1. To further define the Section E categories, adding a category for "disaster" which would include direct services and disaster preparedness activities with the community?
2. To further define "Emergency Services" acknowledge that many services (such as food box or voucher) are provided to families that come back month after month – add “and Stabilization” or rename to "Stabilization Services“

# Discussion about Linkages

## **What is the intent of “Linkages”**

Creating and maintaining partnerships and coalitions in the community

Engaging in community planning

Coordination of services at the community level

Information and Referral services to individuals and families

Some administrative/upper management activities

# From NASCSP Guide

- Several types of support services theoretically can be provided for each of the nine CSBG categories. For example, **transportation** can be a support service to a project in the education and nutrition categories, and **information-and-referral** can be a support service in the employment and housing categories.
- Comprehensive transportation and information and referral projects that serve several of the primary categories should be included in the **Linkages Service category** *only if they operate as a separate administrative or program unit. If they are support activities, put them in with the primary project or program supported.*



# Community Activities in Linkage

- Grants to support participation in planning and/or coordinating services for low-income groups should be included in the Linkages service category. Also included in this part of Section E are statewide Brokerage/Advocacy Projects, statewide study grants, or funding for statewide forums, conferences, or coalitions.

# Where is Admin now?

- It is a subset of the rest of Section E reporting.

Of the CSBG funds reported above  \*\*\* were for administration.

Please consult the instructions regarding what constitutes "administration" (Pg. 20)



Table 2: Of the funding listed in Table 1: Funds for Services by Demographic Category, FY 2009

Demographic Category	A.) CSBG Funds	B.) CSBG ARRA Funds
1. Youth (Individuals aged 12 to 18)		
2. Seniors (Individuals aged 55 and up)		

# Admin or Agency Capacity?

- PLEASE NOTE: It is important to remember that all indirect expenses are not “administration,” especially if they are paying for the salaries of persons engaged in making linkages that mobilize funds or coordinate programs.
- CSBG is unique among federal programs in part because “**linkages**” is a service CSBG funds, not an administrative item. Similarly, when CSBG provides administrative funding for **programs of other community organizations** because there is a **partnership** with the sub grantee's own programs, these expenses may well be either Linkages projects or classified as the type of program being operated with the funds.

# Guidance from IM 37

- As IM 37 indicates, not all indirect expenses are “administrative,” especially if they are paying for the salaries of persons engaged in linkages, mobilizing resources, or coordinating programs.

# Agency Capacity

Suggestion: add categories related to the agency capacity building activities identified by the three areas of the Organizational Standards

# Agency Capacity Building



- Things in agency capacity building expenses:
- Cost of doing needs assessment
  - Cost of doing strategic planning
  - Support of tripartate board
  - Support of community engagement and input
  - Development of partnerships and coalitions
  - Development of community level strategies

# Discussion about Case Management



Where is "case management" (meaning a "generic" case management rather than case management specifically for one of the service categories, such as HUD Housing programs) reported?

Two main places: Under Linkages and also under Self Sufficiency

If we are trying to benchmark our networks "bundled services" we need to clarify where these kinds are services are being reported.



# Pilot Project

October 1 – December 31, 2013



# Pilot Service Categories

## Revised Service Categories:

1. Employment
2. Education
3. Income Management
4. Housing
5. Emergency Services
6. Nutrition
7. Linkages/**Partnerships**
8. Self-Sufficiency/**Case Management**
9. Health
10. **Disaster Assistance**
11. **Organizational Capacity – Maximum Feasible Participation**
12. **Organizational Capacity – Vision and Direction**
13. **Organizational Capacity – Operations and Accountability**



# CAP Learning Community CSBG \$ Learning Cluster

Suggestions for changes

Allocation of \$

Community Level work

Connect to NPIS

# It's all Self Sufficiency

- The service categories are all sub sets of the overall national Community Action goals that identify movement toward self sufficiency for individuals and families and increased community vitality to provide environment for self sufficiency.
- Stabilization is considered movement toward self sufficiency.

# Suggestions for List of Service Categories



- add the term "disaster relief" to the list of Service Categories
- add the term "stability" to the Service Category currently called Emergency Services so it would read Emergency and Stabilization Services
- eliminate "Other"
- move Administration from below the table to be included in Table 1 along with the current Service Categories.
- add Organizational Capacity (just one new item)
- Change Self Sufficiency to Case Management/Family Development. Include individual info/referral here
- Define Linkages as community level interactions
- Remove request for \$ associated with age categories

# Discussion about how \$ are assigned



- Many different ways of tracking the CSBG \$ to a service category
- Standardize the way this is done
- Make connection to NPIs

# Introductory Questions

- Add a question before the data collection table on Section E to identify how CSBG\$ are being reported. Provide these choices:
  - Actual tracking of dollars to expenses by category
  - Assignment to categories by percent, based on overall agency budget also identified by categories
  - Assignment to categories by percent, based on participants (number and service received)
  - Assignment based on other system

# Community Level Work



**Add:**

**Table 2: Identification of CSBG Funds that were used in the categories identified above for community outcomes.**

**Of the funding listed in Table 1, the funds used for community level work / associated with community outcomes (reported in NPI Goals 2, 3 or 4)**

# Discussion about how to identify community level work



- Some elements of Organizational Standards
- Linkages as newly defined
- Some activities in the service categories that are designed to produce community outcomes





# Proposed Section E

With changes suggested by Pilot  
Study, Listening Sessions and  
Learning Cluster

## Section E: CSBG Expenditures by Service Category

Agency Reporting:

Table 1: Total amount of CSBG funds expended in FY 20xx by Service Category

Service Category	CSBG Funds	
1. Employment		
2. Education		
3. Income Management		
4. Housing		
5. Nutrition		
6. Health		
7. Casemanagement/Family Development		involves multiple service categories formerly Self Sufficiency
8. Emergency and Stabilization Services		
9. Disaster Services		
10. Linkages		community level linkages,   Individual linkages reported
11. Organizational Capacity		
12. Administration		as defined in IM 37 can be administration of ar
<b>Totals</b>	<b>\$0</b>	

Table 2: Identification of CSBG Funds that were used in the categories identified above for community outcomes.

Of the funding listed in Table 1, the funds used for community level work	CSBG Funds
Funds associated with community outcomes reported in NPI Goals 2, 3 or 4	



# One Last Area

For consideration

# Connection to NPIs

- Do we add to the Guide/IS directions, suggestions about making connection between service categories and NPIs?
- Base on existing models already being used
- Some changes to the NPIs to include a question about use of CSBG \$

# Next Steps

- Include in the definitions (lexicon) for each service category, examples to clarify the descriptions
- Guide/directions clearly identify
  - Organizational Capacity and Administration
  - Case Management/Family Development
  - Linkages
  - Community Level work
- Develop a distribution plan for definitions and Guide

# Questions?

Visit [www.ROMA1.org](http://www.ROMA1.org) for  
more resources and information.

