



**ACF Office of Community Services (OCS)  
Community Services Block Grant (CSBG)**

**Survey of Grantees Satisfaction with OCS  
Survey of Eligible Entities Satisfaction with the States**

**Customer Satisfaction Results 2015**

February 25, 2016

# Agenda

- Introduction
- Background
- Grantees Satisfaction with OCS Results
- Eligible Entities Satisfaction with the States
- Q&A
- Next Steps



# Introduction

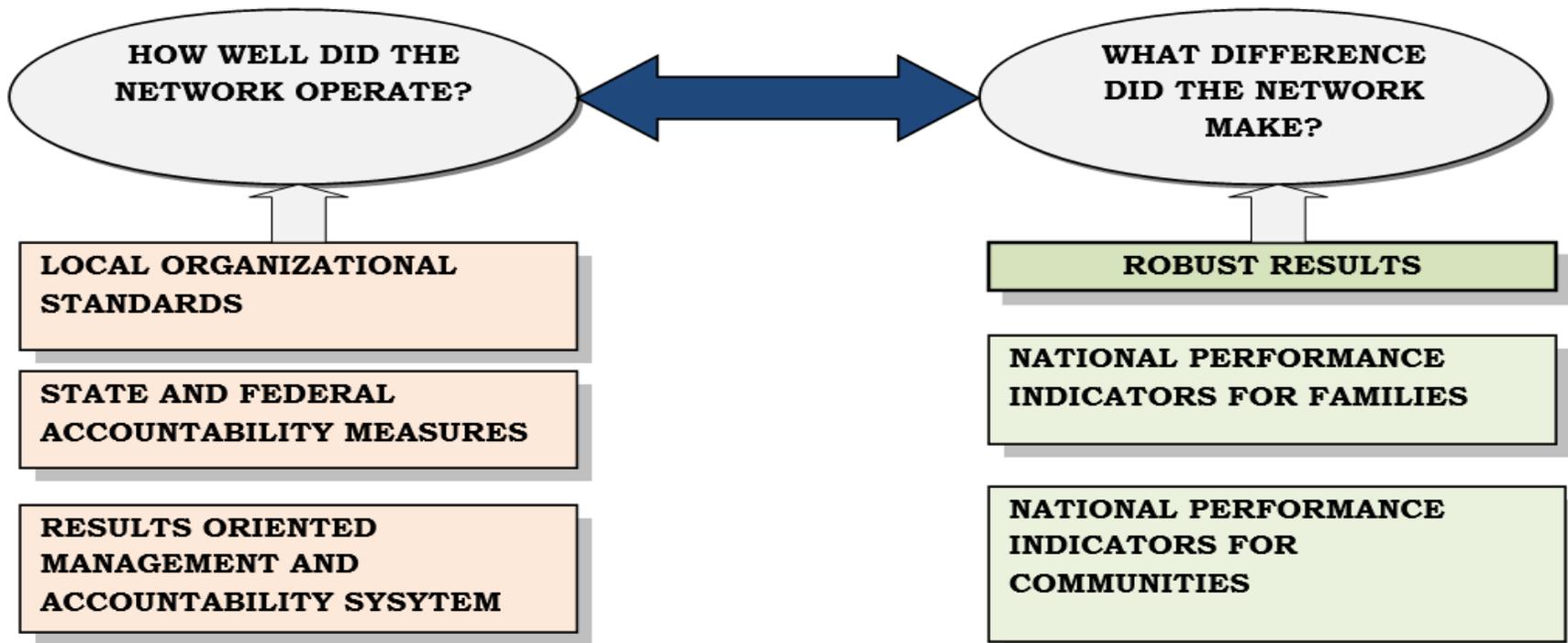
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## Why These Surveys Now

- Part of the new CSBG Performance Management Framework
  - > Measure the Success of Community Action and CSBG
  - > Enhance Accountability - State and Federal Measures
  - > Drive Improvements in how the State and Federal Levels of the CSBG Network operate
- Executive Order 13571: Improving Customer Service

# Performance Management Framework

## **PERFORMANCE MANAGEMENT**



# Goals for Survey of Eligible Entities

- Establish a baseline measure of satisfaction using the methodology of the ACSI
- Provide data to inform the 2017 State Plan

## Benefits for the Network

- Opportunity for the States and Eligible Entities to:
  - > Provide constructive feedback
  - > Open a dialogue about program improvements

## Benefits for the Network

- Provide OCS and the States with ***actionable insights*** to improve their customer experience and boost program results (*in the context of the State and Federal Accountability Measures*)

## Benefits for the Network

- Help the States become **better at what they do—partnering** with the local agencies to improve the lives of individuals and families with low-incomes.



# Background

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# The American Customer Satisfaction Index (ACSI)

- Is the national indicator of customer evaluations of the quality of goods and services available to U.S. residents.
- It is the only uniform, cross-industry/government measure of customer satisfaction.
- Since 1994, the ACSI has measured satisfaction, its causes, and its effects, for seven economic sectors, 41 industries, more than 200 private-sector companies, two types of local government services, the U.S. Postal Service, and the Internal Revenue Service.
- ACSI has measured more than 100 programs of federal government agencies since 1999. This allows benchmarking among organizations and provides information unique to each agency on how its activities that interface with the public affect the satisfaction of customers. The effects of satisfaction are estimated, in turn, on specific objectives (such as public trust).

# Definitions

## Customer Satisfaction Index (CSI)

- > The CSI is the weighted average of three questions that ask directly about customer satisfaction.
  - > How satisfied are you with the services provided by OCS as it relates to CSBG?
  - > How well do the services from OCS meet your expectations?
  - > How do the services from OCS compare to an ideal grant awarding agency?

# Definitions

## Drivers (of Satisfaction)

- > The aspects of the customer experience measured in the survey by a series of rated questions. Drivers for this study include:
  - > Plan Review and Acceptance
  - > Grant Monitoring and Corrective Action
  - > Data Collection, Analysis and Reporting
  - > Training and Technical Assistance Provided by OCS Staff
  - > Training and Technical Assistance Provided by OCS-Funded Providers
  - > Communication

# Definitions

## Driver Scores

- > Each driver score is the weighted average of several questions within the survey asked on a 1 to 10 scale which is then converted to a 0 to 100 scale.
- > For example, the driver score for Grant Monitoring is made up of rated question for relevance of procedures, usefulness of visit, clarity of feedback, usefulness of feedback, timeliness of feedback and clarity of assistance.
- > Scores are an index, like reporting a temperature, not percentages

## Question Scores

- > Average respondent score for questions asked in the survey.
- > Questions are asked on 1-10 scale and translated to 0-100.

# Definitions

## Future Behavior

- > Represents the desired behaviors that results from changes in CSI.
- > Future Behaviors in this study include:
  - > How confident are you that OCS is fulfilling its mission of supporting the States in their efforts to help individuals with low-incomes out of poverty?
  - > How much do you trust OCS to work with you to meet your organization's needs?

## Future Behavior Score

- > Average respondent score for each rated future behavior.

# Definitions

## Impact

- > Impacts are derived from a statistical analysis of the relationship between the drivers and satisfaction using the science of the ACSI methodology. **Impacts** quantify the relationship between each **driver** and the **Customer Satisfaction Index (CSI)**. The **impact** is the predicted change in the CSI score that results from a 5-point change in a driver's score. For example, if the Grant Monitoring driver has an impact of 1.3, we would expect CSI to increase by 1.3 points when the Grant Monitoring driver score increases 5 points.

## Future Behavior Impact

- > This number shows the expected change in respondent behavior for every 5-point increase (or fraction thereof) in Satisfaction.



## **Grantee Satisfaction with OCS**

# Program Overview and Methodology

## Background, Objectives, & Data Collection Overview

- The survey was fielded from November 10 to December 21, 2015.
- Three survey reminder emails were sent to all non-responders on November 23, December 8, and December 15.
- The program objective was to measure grantee satisfaction with the Community Services Block Grant (CSBG), providing OCS with data to help with target-setting on federal accountability measures as well as identify areas of improvement and additional training and technical assistance areas.

## Sample Size

- 57 surveys were sent and 39 were completed, resulting in an excellent response rate of 68.4%. The average response rate for a study of this nature is 20-30%.



# Customer Satisfaction Index Results

# Customer Satisfaction Index



➤ The Customer Satisfaction Index score is comprised of a weighted average of three questions; *overall satisfaction, compared to expectations and compared to the ideal.*

➤ Satisfaction compared to ideal typically scores lower than the first two, as was the case this year.

➤ CSI same as 2012.

# OCS CSGB Grantee (States) Satisfaction Model (n=39)

## Drivers of Satisfaction



## Future Behaviors

Future Behaviors represent the desired behaviors that result from changes in CSI



 Score – Measure of performance on 0-100 scale

 Impact – Expected increase in satisfaction from a 5-point increase in driver score.

## 2015 Successes

*Grantees report strong satisfaction with the training and technical assistance provided by OCS-funded providers (76), highlighting the knowledge of trainers (80).*

*Scores for plan submission and review/response from OCS also scored relatively well at 69. Specifically in the areas of the consistency (73) and usefulness of feedback (71) as well as the timeliness of response from OCS (70).*

*The clarity of communication (65) scored better among grantees as compared to other areas.*

*Grantees report improvement in OCS attempts to enhance collaboration with States.*

## 2015 Successes – Stated by the Customer

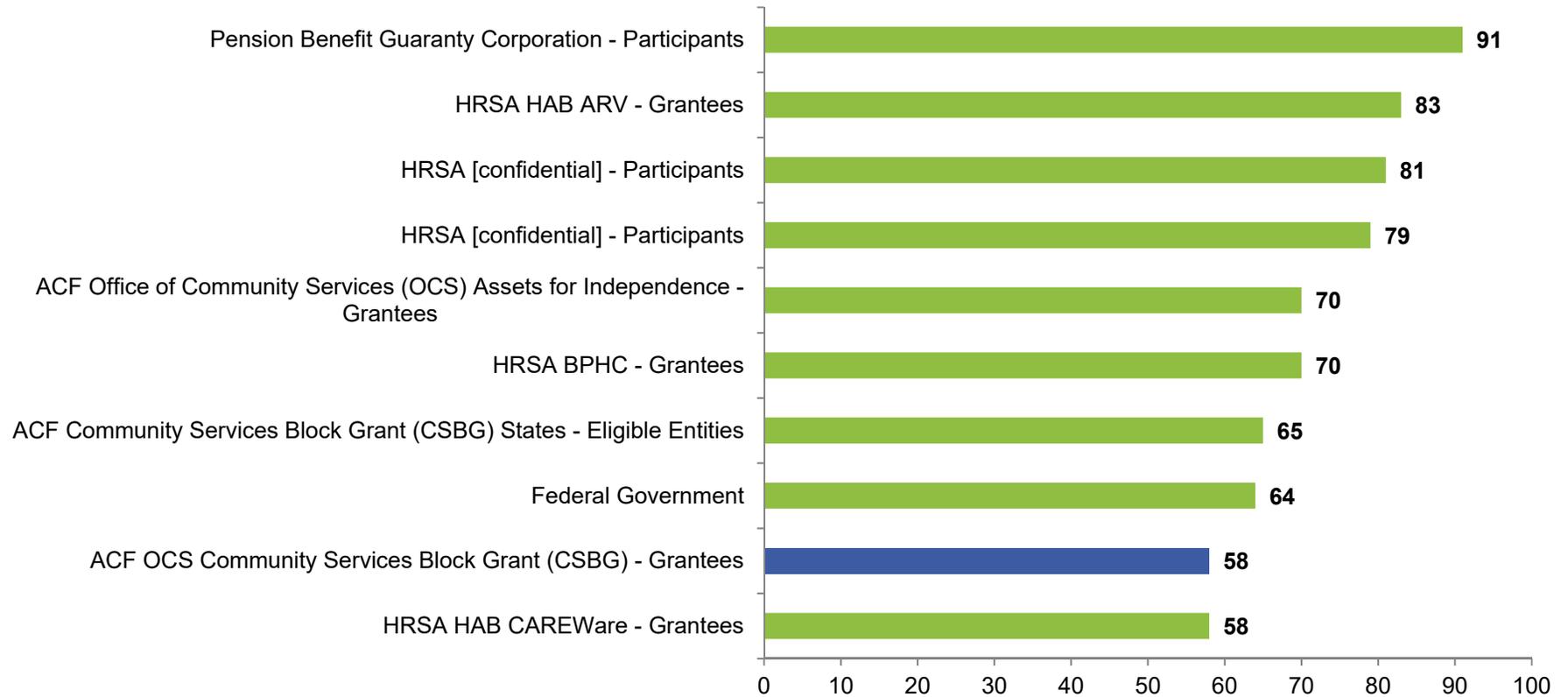
*“Appears that within the past year OCS has made strides to be more knowledgeable, more responsive and engaging around moving the network forward.”*

*“I appreciate the challenges that OCS has with a broad and diverse network and pressure to show that meaningful outcomes are being accomplished, and overall think that there is a proper mix of flexibility and oversight. There are areas to improve (particularly with NPI selection and inclusion), but OCS listens and works in collaboration with States, which is greatly appreciated.”*

*“Overall, OCS staff is helpful and committed.”*

*“This is an area of improvement” in response to ‘What kinds of information would you like to receive from OCS that you are not now getting?’*

# Benchmarks

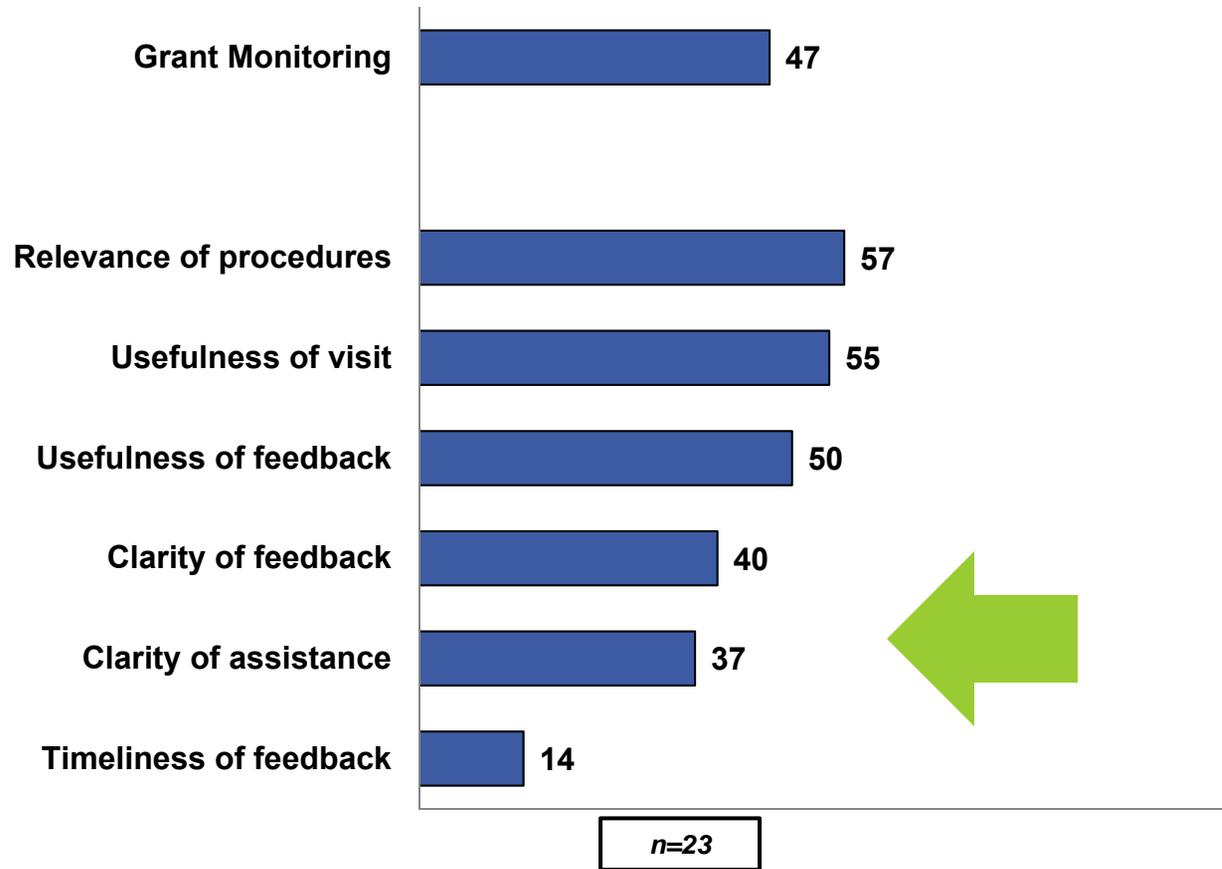




## **Key Drivers of Satisfaction Detail**

# Grant Monitoring and Corrective Action

Impact 1.3



➤ *Grant Monitoring* was the lowest scoring driver with a score of 47.

➤ While low scoring, the high impact for this driver suggests there is opportunity to increase overall satisfaction with improvement in this area, focusing particularly on the clarity and timeliness of feedback and clarity of assistance.

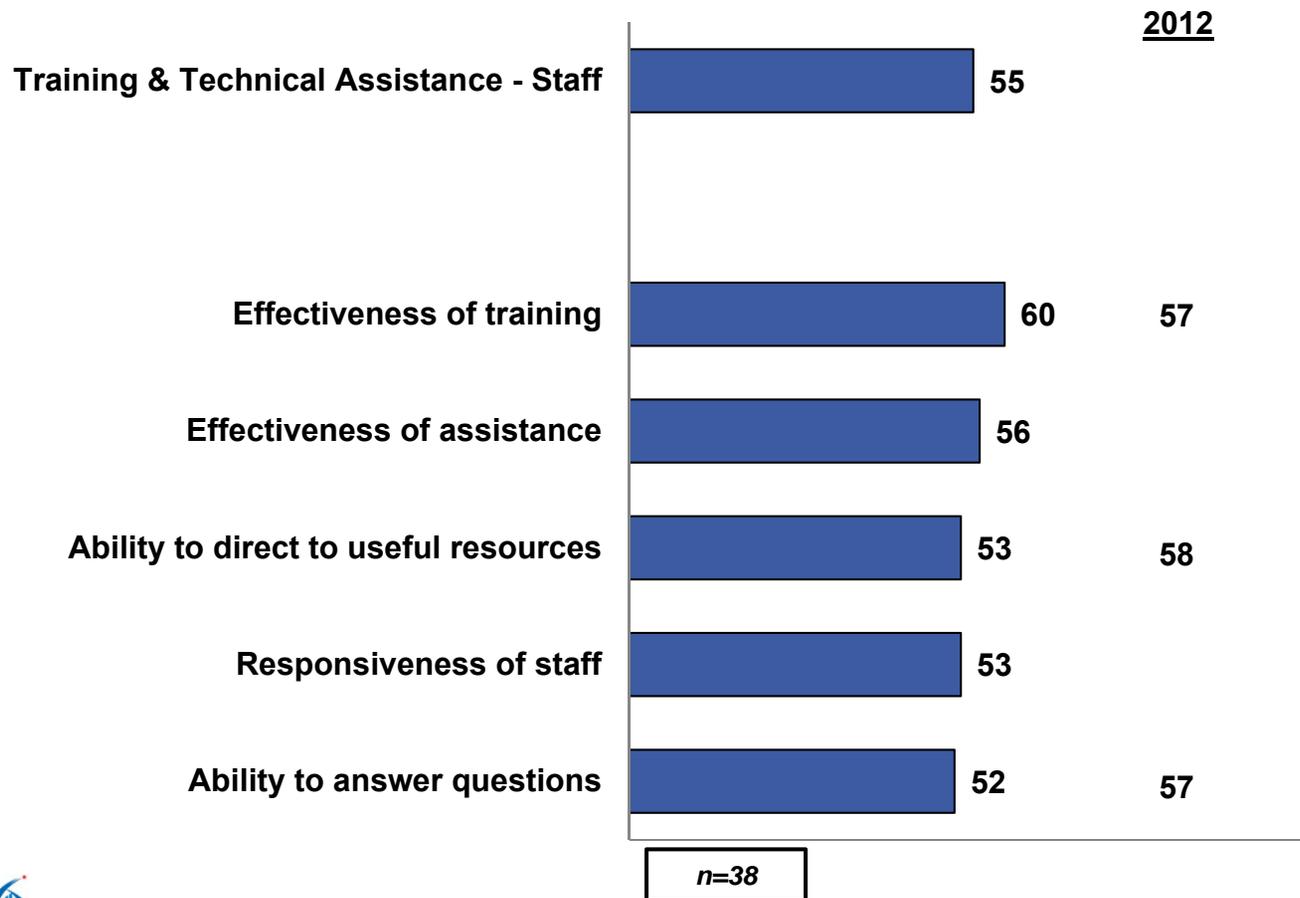
## Open-Ended Feedback Themes - Grant Monitoring

What suggestions do you have for how OCS could improve its monitoring process?

- Knowledgeable reviewers (perhaps w/CSBG field experience).
- Dedicate more time for discussions with the State authority on their procedures and policies.
- Timely reports and timely release of monitoring schedules.
- Make sure all findings that require corrective action is presented with the corresponding law or code reference. (Cite your findings.)
- Providing guidelines about the areas to be covered in the monitoring process. This will allow us to prepared for the process.
- Submit feedback within at least 90 days of the visit.
- Ensure that OCS staff understand all regulations and requirements.

# Training & Technical Assistance Provided by OCS Staff

**Impact 1.7**



- *Training & Technical Assistance – Staff* was one of the lowest scoring drivers at 55.
- *Effectiveness of training* received the highest score (60), and scored three points higher than in 2012.
- The remainder of the areas all scored in the low to mid-fifties and less well than in 2012.
- The high impact of this driver (1.7) suggests this should be an area of focus to improve satisfaction as it was in 2012.

## Open-Ended Feedback Themes - Training & Technical Assistance - Staff

What additional Training and Technical Assistance needs do you want OCS to address?

- *OCS might address the seeming disconnect between states and the RPICs.*
- *Network performance initiatives have produced measures for states and the feds; there needs to be resolution (meaningful measures) at the entity level.*
- *OCS needs to keep website updated with current contact info for contacts.*
- *Establish state learning communities / workgroups, for example around WIOA.*
- *Training and technical assistance on the contents of the State Plan, the Organizational Standards, and the expectation of the States to report on the Accountability Measures.*
- *Additional training on state performance measures and reporting.*
- *A comprehensive repository for documents would be very helpful.*

## Open-Ended Feedback Themes – OTHER #1

What more could OCS do to help the States meet the needs of people with low-incomes?

- *Continued efforts to make connections and share results with the network.*
- *Discretionary funds should provide the States with the flexibility to meet emergencies as they are presented.*
- *Increase and improve partnerships at Federal agency levels, make policies and regulations more consistent, and identify better coordination of systems.*
- *Provide resources that address best practices or examples of evidence based services that can be used in the development of guidance for eligible entities.*
- *Give states the ability to attach CSBG funding to performance.*

## Open-Ended Feedback Themes – OTHER #2

Is there anything else you want to comment on?

- *Appears that within the past year OCS has made strides to be more knowledgeable, more responsive and engaging around moving the network forward.*
- *Take in consideration the distribution of information in the Spanish language.*
- *Consider an RFQ process for grants to insure that the providers best suited to the content and scope are permitted to apply while minimizing the extent to which an entity that may have an inherent conflict of interest is not tapped to do such work.*
- *I appreciate the challenges that OCS has with a broad and diverse network and pressure to show that meaningful outcomes are being accomplished, and overall think that there is a proper mix of flexibility and oversight. There are areas to improve (particularly with NPI selection and inclusion), but OCS listens and works in collaboration with States, which is greatly appreciated.*



## **Key Findings and Actionable Suggestions**

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# Key Findings & Actionable Suggestions

## Key Findings

### Grant Monitoring

- This area scores the lowest (47) and has one of the higher impacts on satisfaction (1.3).
- Timeliness of feedback (14), clarity of assistance (37) and clarity of feedback (40) all score very low.

### Training & Technical Assistance - Staff

- Training and technical assistance provided by staff scores among the lowest of the drivers of satisfaction (55) and has the highest impact (1.7).
- Ability to answer questions (52), ability to direct to useful resources (53), responsiveness of staff (53) rate the lowest.

## Actionable Suggestions

- Verbatim comments suggest findings from the reports were shared long after the onsite took place rendering the feedback inapplicable in some cases. Ensure that resources are available and processes established for a timely follow up after monitoring so feedback can be acted upon. Assure that monitors have the expertise to provide clear, helpful feedback.
- Provide adequate training to reviewers to strengthen credibility and effectiveness.
- Verbatim comments indicate that grantees question whether OCS Staff can be effective with their current level of knowledge regarding their program specific questions. Ensure adequate training is available regarding specific programs.
- Respondents indicate that more frequent webinars or conference calls would be helpful along with up-to-date information being provided and made available.

# Agenda

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- Grantees Satisfaction with OCS Results
- Eligible Entities Satisfaction with the States
- Q&A
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## **Eligible Entities Satisfaction with the States**

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# Background

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# Definitions

## Customer Satisfaction Index (CSI)

- > The CSI is the weighted average of three questions that ask directly about customer satisfaction.
  - > How satisfied are you with the services provided by the State CSBG Lead Agency as it relates to CSBG?
  - > How well do the services from the State CSBG Lead Agency meet your expectations?
  - > How do the services from the State CSBG Lead Agency compare to an ideal grant awarding agency?

# Definitions

## Drivers (of Satisfaction)

- > The aspects of the customer experience measured in the survey by a series of rated questions. Drivers for this study include:
  - > Development of the CSBG State Plan
  - > Distribution of Funds
  - > Use of Remainder/Discretionary Funds
  - > Training and Technical Assistance
  - > Monitoring and Corrective Action
  - > Linkages and Communication.

# Definitions

## Driver Scores

- > Each driver score is the weighted average of several questions within the survey asked on a 1 to 10 scale which is then converted to a 0 to 100 scale.
- > For example, the driver score for Development of the CSBG State Plan is made up of rated questions for extent of involvement, caliber of opportunities and reflects your input.
- > Scores are an index, like reporting a temperature, not percentages

## Question Scores

- > Average respondent score for questions asked in the survey.
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# Definitions

## Future Behavior

- > Represents the desired behaviors that results from changes in CSI.
- > Future Behaviors in this study include:
  - > How confident are you that the State CSBG Lead Agency is fulfilling its mission of supporting eligible entities in their mission of helping low-income individuals out of poverty?
  - > How much do you trust the CSBG State Lead Agency to work with you to meet your organization's needs?

## Future Behavior Score

- > Average respondent score for each rated future behavior.

# Definitions

## Impact

- > Impacts are derived from a statistical analysis of the relationship between the drivers and satisfaction using the science of the ACSI methodology. **Impacts** quantify the relationship between each **driver** and the **Customer Satisfaction Index (CSI)**. The **impact** is the predicted change in the CSI score that results from a 5-point change in a driver's score. For example, if the Linkages & Communication driver has an impact of 2.5, we would expect CSI to increase by 2.5 points when the Linkages & Communication driver score increases 5 points.

## Future Behavior Impact

- > This number shows the expected change in respondent behavior for every 5-point increase (or fraction thereof) in Satisfaction.

# Program Overview and Methodology

## Background, Objectives, & Data Collection Overview

- The survey was fielded from October 5 to December 21, 2015.
- The program objective for OCS was to measure satisfaction of Community Services Block Grant (CSBG) eligible entities to better understand how well the States, as part of the CSBG network, are delivering services to eligible entities, to drive improvement in major areas addressed in the State Accountability Measures, and to determine where to best focus OCS training and technical assistance efforts for the State CSBG Lead Agencies.
- Reports have also been produced for each of the states with the exception of Alaska, Delaware and Washington D.C., as they did not have respondents. Each State report is comprised of 3 Tabs: Tab 1. Overview of Results; Tab 2. Scores and Impacts; Tab 3. State Specific Verbatim Comments.

## Sample Size

- 1,091 surveys were sent and 579 were completed, resulting in a response rate of 53%, which is excellent. Measures of this nature typically achieve a response rate of 20-30%.



# Customer Satisfaction Index Results

## Customer Satisfaction Index – States/Eligible Entities



- The Customer Satisfaction Index score is comprised of a weighted average of three questions; overall satisfaction, satisfaction compared to expectations, and compared to the ideal.
- Satisfaction compared to Ideal typically scores lower than the first two.

# States/Eligible Entities Satisfaction Model (n=579)

## Drivers of Satisfaction

69	0.8	Monitoring & Corrective Action
68	0.5	Distribution of funds
66	0.5	Training & Technical Assistance
65	2.5	Linkages & Communication
59	0.4	Use of Discretionary funds
50	0.4	Development of CSBG State Plan



## Future Behaviors

Future Behaviors represent the desired behaviors that result from changes in CSI

Trust in the State CSBG Lead Agency	70	5.1
Confidence in Lead Agency	69	5.1

Score – Measure of performance on 0-100 scale.

Impact – Expected increase in satisfaction from a 5-point increase in driver score.

## Summary: Eligible Entities Satisfaction with the States

*The Customer Satisfaction Index for the (CSBG) States who serve Eligible Entities is 65, compared to the federal government average of 64. Scores ranged by State from 19 to 96.*

*Scores for drivers of satisfaction range from 50 to 69, with Development of the CSBG State Plan scoring the lowest and Monitoring and Corrective Action scoring the highest.*

*Linkages & Communication is the highest influencer of satisfaction at this time. Improvements in this area will lead to higher overall satisfaction. State scores range from 6 – 91.*

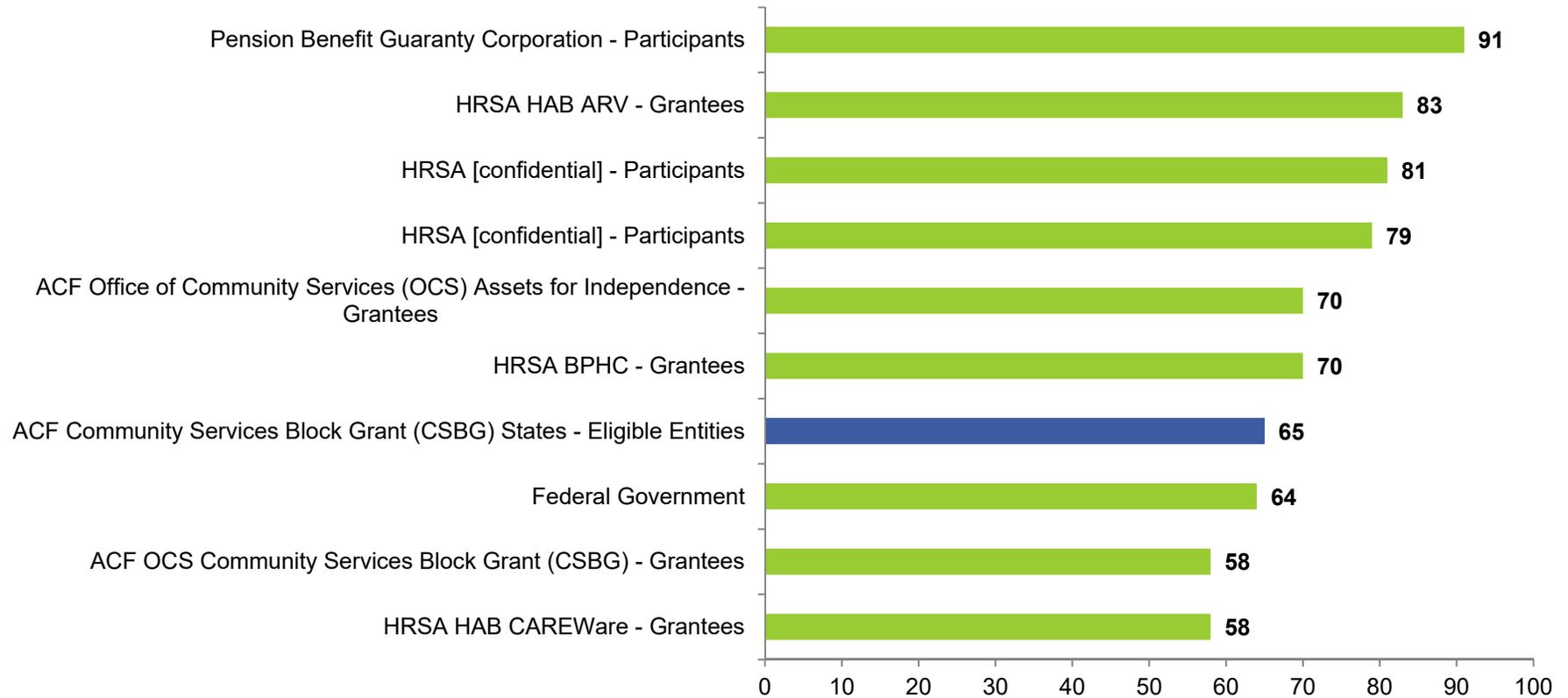
## Summary: Eligible Entities Satisfaction with the States

*Monitoring and Corrective Action also has a relatively high influence on satisfaction at this time and presents opportunities to increase satisfaction. State scores range from 20 – 95.*

*Development of the CSBG State Plan is a low influencer on satisfaction at this time. This coupled with the low score of 50 indicates that major improvements would need to be made in this area to affect satisfaction. State scores range from 18 – 76. Comments indicate that increased involvement early-on in developing the state plans would likely enhance satisfaction with this area of service.*

*Despite some of the score challenges in areas that drive Satisfaction, the Outcomes of Satisfaction, Confidence (69) and Trust (70) in the State CSBG Lead Agency, score relatively higher. State scores for Confidence range from 22 – 96 and 11 – 96 for Trust.*

# Benchmarks

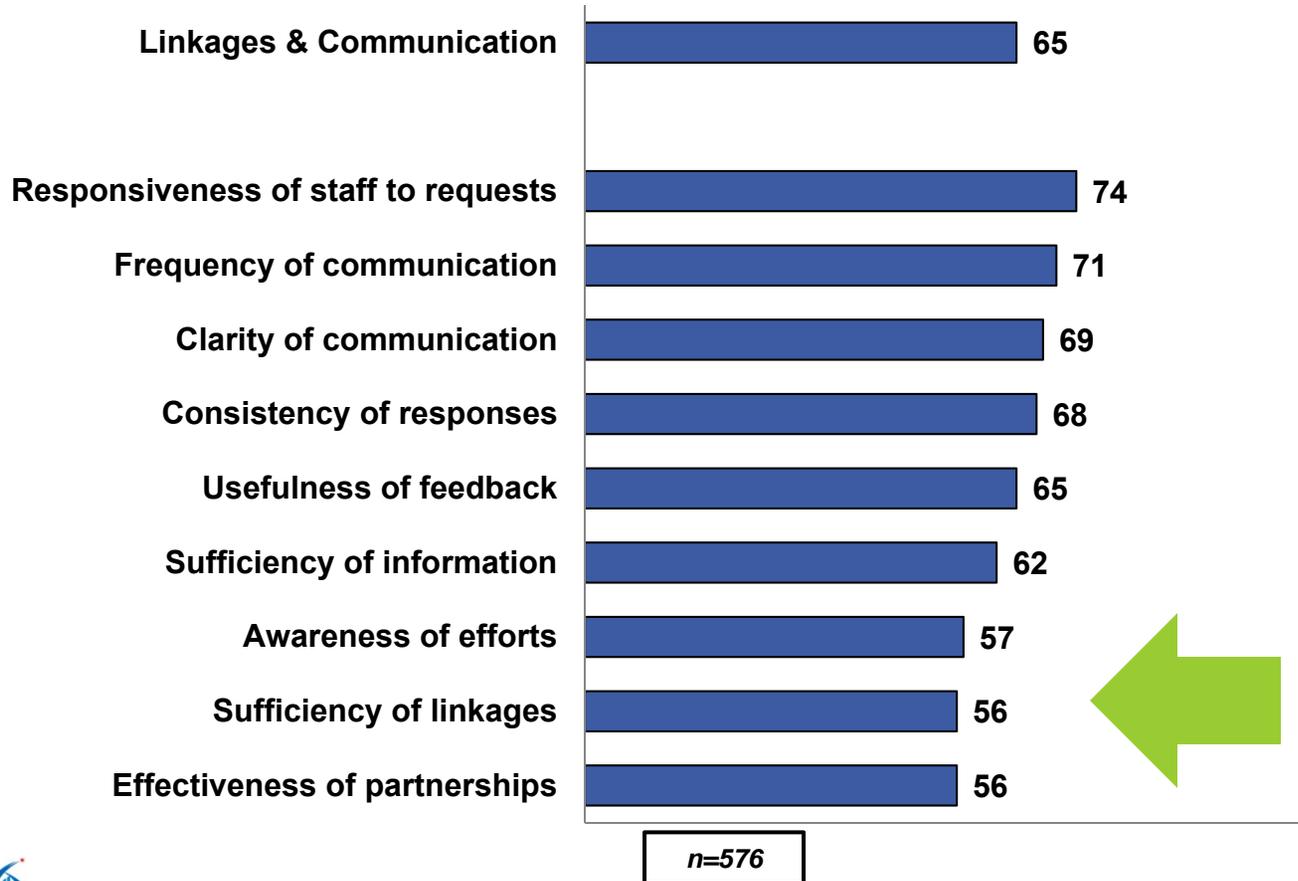




## **Key Drivers of Satisfaction Detail**

# Linkages and Communication

Impact 2.5



➤ *Linkages and Communication* while having an average score (65) as compared to the other areas, has the highest impact of all drivers in 2015 (2.5).

➤ Communication efforts score higher than the States' linkages, partnership efforts although the local agencies would generally like more information shared.

➤ *Awareness of efforts to make linkages, sufficiency of the linkages and effectiveness of partnerships* are areas of particular challenge.

## Open-Ended Feedback Themes-Linkages and Communication

What kinds of information, if any, would you like to receive from the State CSBG Lead Agency that you are not now getting?

- *More clarity on release of funding.*
- *More information from the various advisory groups that are assisting the State agency.*
- *Clear and timely communication to CAA's regarding monitoring tools and what policies are required.*
- *More lead time on changes and requirements before they come and monitor us on the changes.*
- *Potential funding opportunities, research, regional trends; new opportunities.*

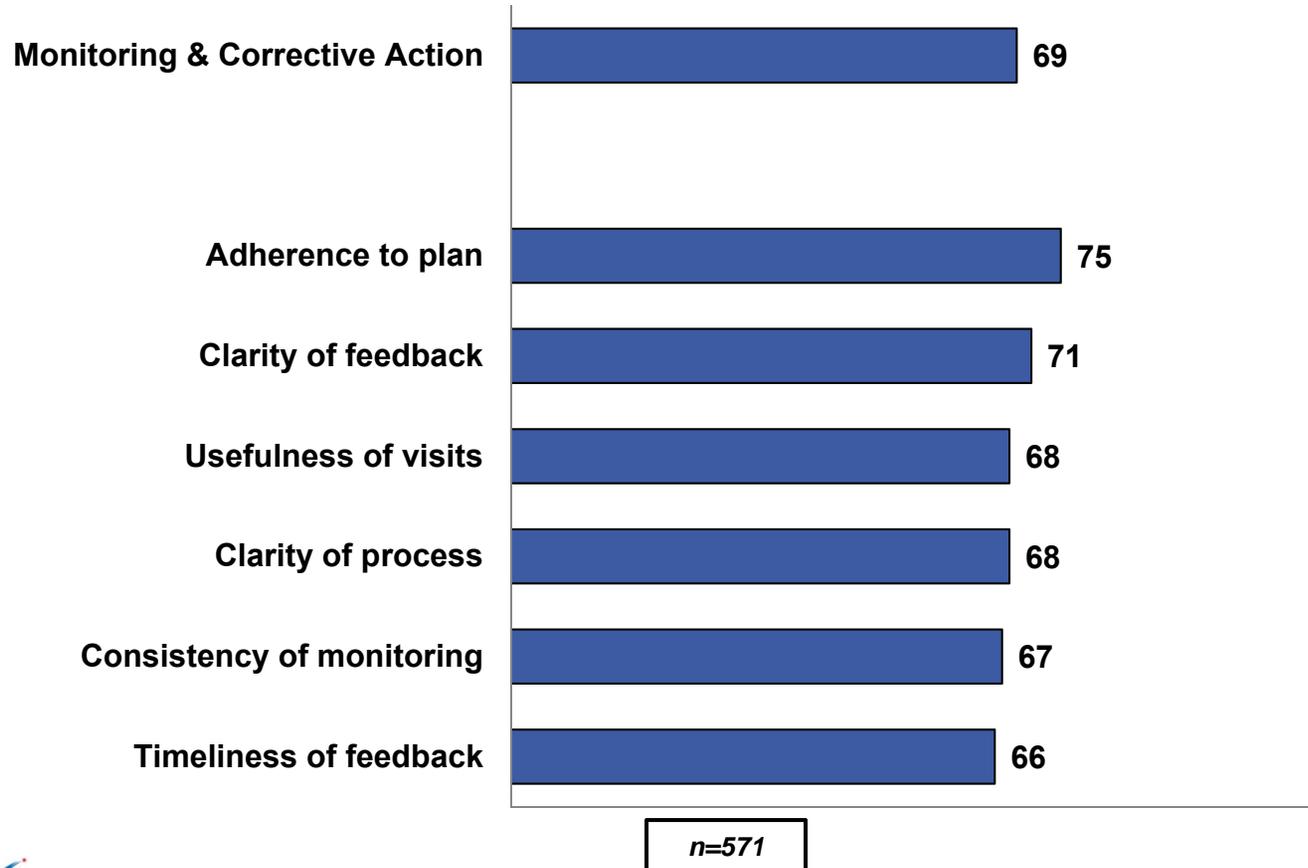
## Open-Ended Feedback Themes-Linkages and Communication

What technical assistance would you recommend OCS provide to the CSBG Lead Agency regarding its communication efforts?

- *Ways to share linkages and successes in doing linkage between state providers; we really don't know what they are and how they are doing.*
- *Provide information on the organization of the State Agency and the importance of CSBG services.*
- *Standardized tools and communication expectations.*
- *Create a social media page to share information.*
- *Assistance with internal communication/coordination of CSBG Lead Agency staff. Lack of internal communication/coordination sometimes results in burdensome or confusing requests to CSBG eligible entities from CSBG Lead Agency staff, which could be avoided with increased internal coordination of personnel.*

# Monitoring and Corrective Action

Impact 0.8



- *Monitoring and Corrective Action* was the highest scoring driver in 2015 with a score of 69. It also has a comparatively high impact (0.8).
- *Adherence to plan* and *Clarity of feedback* both scored well (75 and 71 respectively).
- *Timeliness of feedback* and *consistency of the monitoring statewide* are areas to focus on.

## Open-Ended Feedback Themes-Monitoring and Corrective Action

What, if any, suggestions do you have for how the State CSBG Lead Agency could improve its monitoring process?

- *Our state monitoring is excellent in regard to compliance. If anything, it could be suggestions for best practices.*
- *All monitors need to be trained to effectively implement the process.*
- *Make sure the Field Monitors are being consistent in the monitoring process. Do not change the rules in the middle of the process unless notice has been sent out to the network of potential changes.*
- *Feedback as the monitoring is taking place (both positive or negative).*
- *The feedback report should be timely.*

## Open-Ended Feedback Themes-Monitoring and Corrective Action

What technical assistance would you recommend OCS provide to the State CSBG Lead Agency regarding its grant monitoring process?

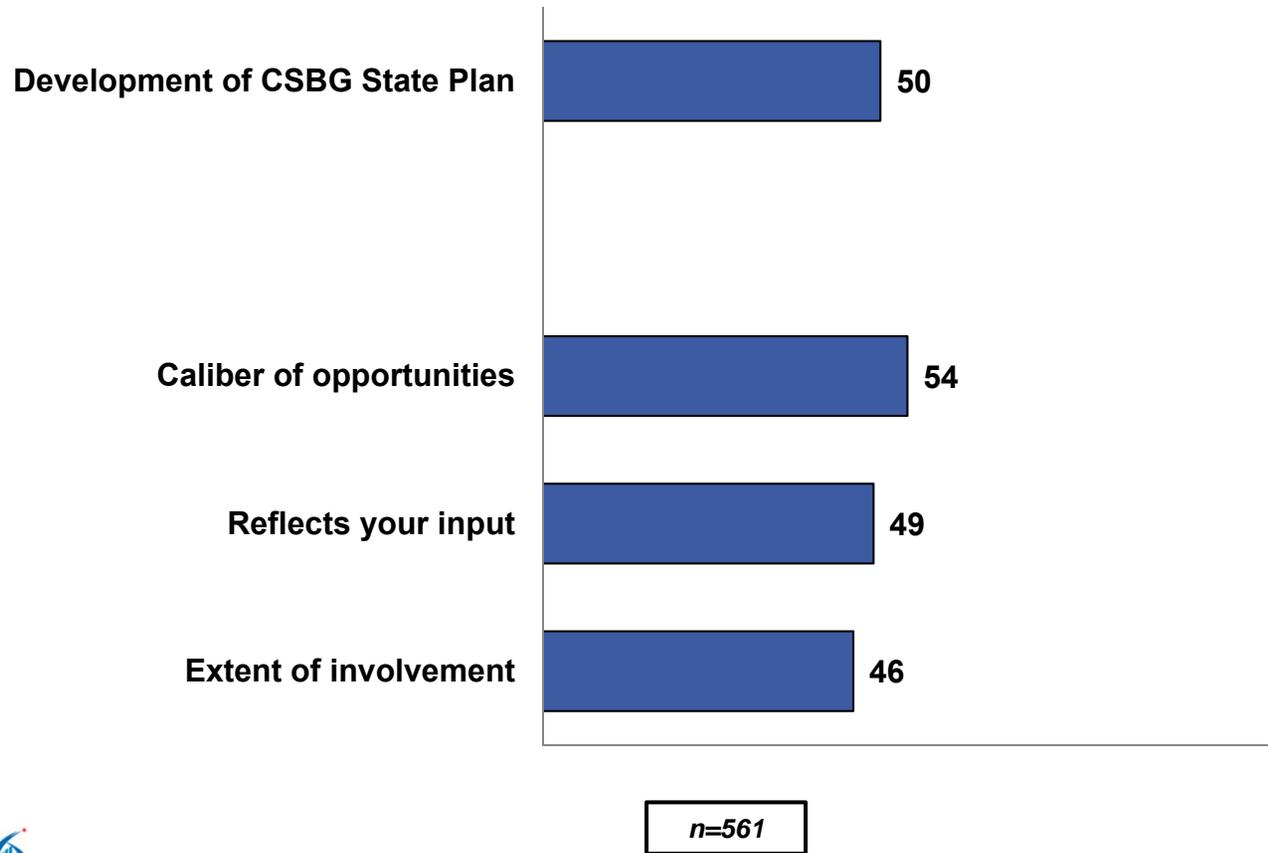
- *Training on the importance of effective communication between the state program staff and state monitoring staff.*
- *More resources to enable them to send monitors out more frequently.*
- *Monitoring should be in a timely fashion and reports provided in 30-45 days after the monitoring is complete.*
- *Provide clear guidelines and instructions prior to the grant monitoring process and allow the network ample time to implement the new processes and instructions.*
- *Clearly express the intent of monitoring as an improvement process vs. a punitive process.*



**Note: All responses are available in full report.**

# Development of the CSBG State Plan

Impact 0.4



➤ *Development of the CSBG State Plan* was the lowest scoring area in 2015 at 50. Given the low impact, major changes would need to occur to affect overall satisfaction at this time.

➤ Respondents indicate dissatisfaction with the extent of their involvement in the development of the State Plans (46) and how well the Plans reflects their input (49). This should be an area to review and focus for future improvements.

## Open-Ended Feedback Themes-Development of the CSBG State Plan

How could the process of developing the State Plan be improved?

- More entity involvement at the drafting stage.
- More active interaction between the State and Sub-Recipient Network, i.e. work groups.
- More proactive communication by State to CSBG agencies well ahead of Plan development.
- Accept input from eligible entities earlier in the process. Require lead agencies to show where input from eligible entities drove decisions in the State Plan.
- Earlier involvement in the process. A survey? Webinar?

## Open-Ended Feedback Themes-Development of the CSBG State Plan

What training and technical assistance for developing the State Plan would you recommend OCS provide to the State CSBG Lead Agency?

- *Statewide CSBG meeting for peer-to-peer interaction.*
- *How to engage local CAA's and how we should tie our local plans to the state plan.*
- *I think the state needs to develop written instructions for many of the procedures and provide these prior to the implementation of their various reports, processes, and standards.*
- *Training on working with diverse community action agencies and regions.*
- *How to forge a collaborative relationship with the CAA network.*



**Note: All responses are available in full report.**



## **Key Findings and Actionable Suggestions**

# Key Findings & Actionable Suggestions

## Key Findings

### Linkages & Communication

- With an impact of 2.5 and a score of 65, this area provides the greatest opportunity at this time to improve customer satisfaction.
- Effectiveness of partnerships (56), sufficiency of linkages (56) and awareness of efforts (57) score much lower than other areas.

### Monitoring & Corrective Action

- This area also has a substantial impact on satisfaction (0.8). While relatively higher scoring, the 69 score suggests that there is room for improvement.
- Timeliness of feedback (66) and consistency of monitoring (67) present opportunities for enhanced performance.

## Actionable Suggestions

- Scores and comments indicate there is a large opportunity to improve the awareness of existing State linkages and partnerships.
- Others call for the creation of linkages earlier on in the process. Learning of linkages after the fact results in missed opportunities.
- Ensure that timeframes for feedback are provided and are set up such that the information is still relevant when provided.
- Provide training in monitoring processes and procedures so that individuals approach it in a systematic manner.

# Key Findings & Actionable Suggestions

## Key Findings

### Development of CSBG State Plan

- With a lower impact of 0.4 and a score of 50, major improvements are necessary to improve customer satisfaction at this time.
- Extent of involvement (46) and reflects your input (49) score low.

## Actionable Suggestions

- Respondents indicate the need for more timely discussions at the beginning of the process to alleviate potential confusion later on.
- Fostering an open process where input is encouraged and utilized are also areas of opportunities.
- Respondents also express an interest in knowledge share of best practices.



# **Individual State Reports**

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## Individual State ACSI Reports

- CFI has prepared individual reports for each state (except Alaska, Delaware and D.C.).
- Each State Report Workbook is comprised of 3 Tabs: Tab 1. Overview of Results; Tab 2. Scores and Impacts; Tab 3. State Specific Verbatim Comments.
- Tab 1 and Tab 3 are self-explanatory.
- Tab 2 includes the following: the lowest and highest national scores in the study, the national average scores, state specific scores, the confidence interval and national impacts.



# Questions and Answers

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## **Next Steps**

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# Using the Survey Results

## *Program Improvements: OCS*

- Develop an Improvement Plan in consultation with the States to address the issues raised in the survey
- Use the survey results to set targets for the Federal Accountability Measures
- Work with the Network to develop a national T&TA Plan.

# Using the Survey Results

## ***Program Improvements: States***

- Share survey results with Eligible Entities in your state
- Hold discussions with Eligible Entities about improvements to make in the priority area identified
- Refine 2017 State Plan  
*“Using data from a nationally administered survey of eligible entities, and feedback for OCS and other sources, the State adjusted its plan to improve...”*

## Using the Survey Results

### *Share Information about Best Practices*

Question: Would it be helpful to know which states scored highest in each of the survey subjects? A Top 5 List?