



CSBG Annual Report, Understanding Module 4, Individual and Family Level

July 14, 2017

Housekeeping

- All attendees' audio is muted.
- If you have a question, please enter it into the Chat addressed to "All Panelists."
 - The Chat box is located on the right-hand side of your screen.
- Questions will be answered during the Q&A period at the end of the webinar. Questions that are not answered during the webinar will be answered in an FAQ.

CSBG Annual Report, Understanding Module 4, Individual and Family Level

Presenters

- Seth Hassett, Director, Division of Community Assistance, OCS
- Jarle Crocker, Director, Training and Technical Assistance, CAP
- Courtney Kohler, Senior Associate, CAP
- Barbara Mooney, ANCRT
- Katy Kujawski, Research Director, NASCSP
- Lauren Cook, CSBG Deputy Director, NASCSP

Agenda

- Module 4: Individual/Family Level
 - Consider the elements in the New Annual Report, Module 4
 - Section A: National Performance Indicators and NPI Report Form
 - Section B: Services List and Services Report Form
 - Section C: All Characteristics Report
- Tools and Resources

Introduction

Setting the stage

PERFORMANCE MANAGEMENT FRAMEWORK

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Performance Management Framework

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability system
- ROMA Next Generation
- CSBG Annual Report, which includes an updated and refined set of CSBG outcome measures.

ROMA Next Generation:

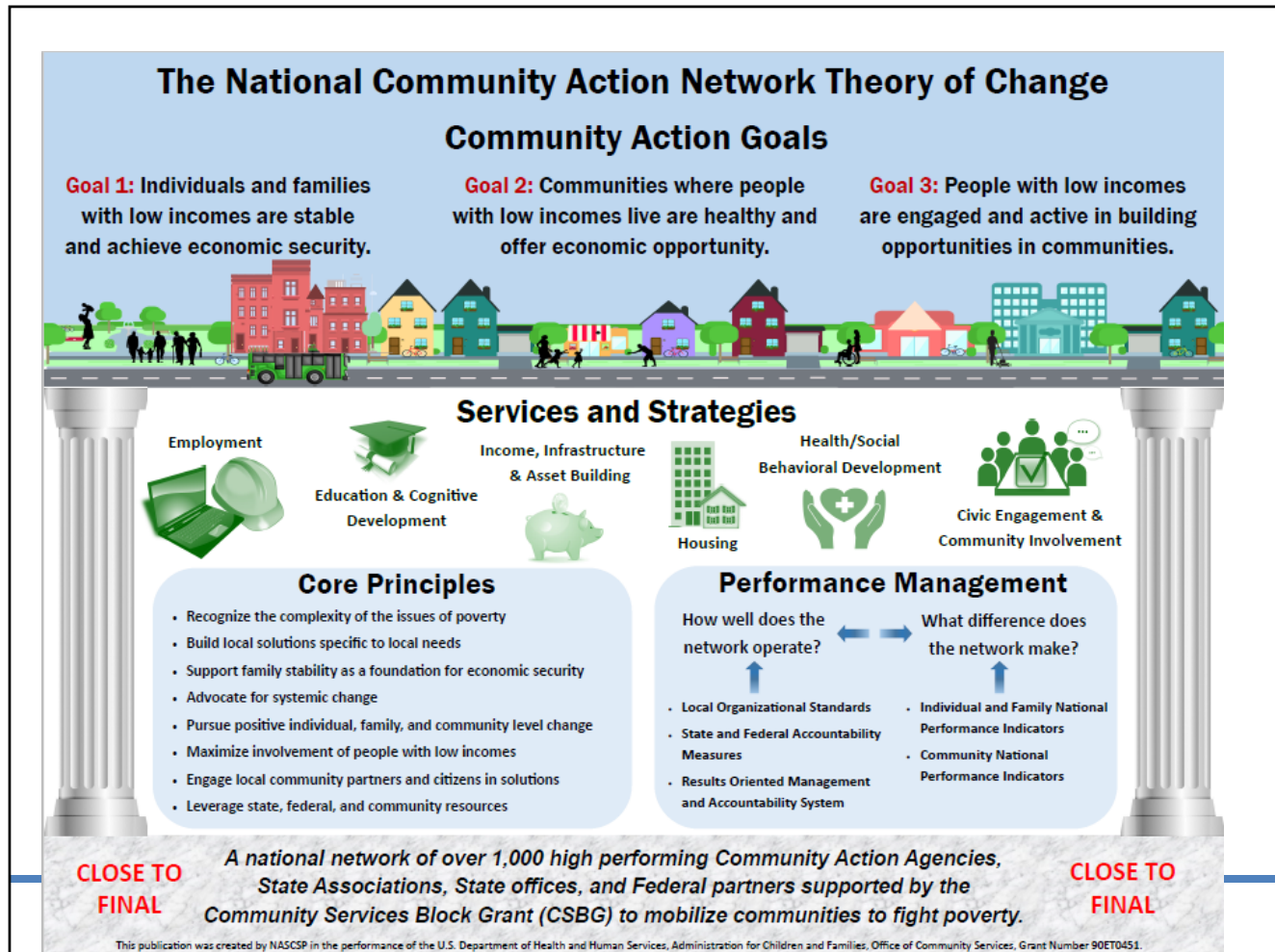
- Improves CSBG **Performance Management**.
- Improves CSBG **Performance Measurement**.
- Demonstrates Continuous Quality Improvement across a complex system.
- Demonstrates a commitment to Outcomes.
- Strengthens local solutions for families and communities.
- Builds agency capacity for the long term.

Reporting Timelines: October 1 – September 30

Federal Fiscal Year (FFY)	State Reporting Period October 1 – September 30	Data Submission for States:	Data Submission for local CSBG Eligible Entities:
FFY 2016: October 1, 2015- September 30, 2016	 State Reporting Period: October 1, 2015- September 30, 2016	Due March 31, 2017: CSBG IS Survey is submitted to NASCSP. Module 1 is completed based on the 2016 Federal Fiscal Year and submitted through the On-Line Data Collection system (OLDC).	CSBG IS Survey
FFY 2017: October 1, 2016- September 30, 2017	State Reporting Period: October 1, 2016- September 30, 2017 (In Progress)	Due March 31, 2018: CSBG IS Survey is submitted to NASCSP. Module 1 is completed based on the 2017 Federal Fiscal Year and submitted through OLDC.	CSBG IS Survey
FFY 2018: October 1, 2017- September 30, 2018	State Reporting Period: October 1, 2017- September 30, 2018	Due March 31, 2019: CSBG Annual Report (Modules 1-4) is submitted through OLDC.	CSBG Annual Report (replaces CSBG IS Survey)

HOW DOES THIS ALL FIT TOGETHER?





CSBG Annual Report

Module 1

- State Administration

Module 2

- CSBG Eligible Entity Expenditures, Capacity, and Resources

Module 3

- Community Level

Module 4

- Individual and Family Level



Module 4

**INDIVIDUAL AND
FAMILY LEVEL**

What the New Annual Report Offers

- To be able to tell the story of the continuum of outcomes that are needed to achieve economic security.
 - Data that is easy to understand and allow some meaningful summary at national level.
- A common set of measures to track the CSBG Network's performance with respect to the impact of services provided to individuals and families.
 - Related to all of the agency's services (not just CSBG-funded activities).
 - Data to help agencies and states analyze what is working and identify steps to improve interventions and impact.

Outcomes, Services, People

- At the individual and family level, ROMA Next Generation connects outcomes, services and participants to facilitate robust analysis.
 - **Outcomes** (Examples): Obtained jobs, completed education, increased income, improved parenting, secured housing (Proposed Family Level Performance Indicators)
 - **Services** (Examples): Job Training, Work Experience, Scholarships, Financial Education, Support Groups, Housing Counseling, Food Assistance (Family Level Services).
 - **People**: Unduplicated count of people served. All participant characteristics (income, job status, education, etc.); and, participants at the time they first engage.

NEW CSBG ANNUAL REPORT | MODULE 4

- **Section A:** Individual and Family National Performance Indicators
- **Section B:** Individual and Family Services
- **Section C:** All Characteristics Report

Module 4 - Individual and Family Level	CSBG IS Survey
Section A: Individual and Family National Performance Indicators (NPI)	National Performance Indicator 1.1 – Employment National Performance Indicator 1.2 – Employment Supports National Performance Indicator 1.3 – Employment Asset Enhancement and Utilization National Performance Indicator 6.1 – Independent Living National Performance Indicator 6.3 – Child and Family Development
Section B: Individual and Family Services	National Performance Indicator 1.2 – Employment Supports National Performance Indicator 6.2 – Emergency Assistance National Performance Indicator 6.4 – Family Supports National Performance Indicator 6.5 – Services Counts
Section C: All Characteristics Report	Section G. Program Participant Characteristics
CSBG Annual Report, Understanding Module 4, Individual and Family Level	

INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

Organized by Domains:

1. Employment
2. Education and Cognitive Development
3. Income and Asset Building
4. Housing
5. Health and Social/Behavioral Development
6. Civic Engagement and Community Involvement
7. Outcomes Across Multiple Domains

INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

- **Indicators provide a means to measure achievement of or movement towards the long term goals.**
- **Document the number of people who receive services and the number who achieved outcomes.**
- **Provide data for analysis:**
 - What change was expected?
 - What change happened?
 - How does the actual change compare with the expected change?
 - How accurate were the projections?
 - What percent of people served achieved the outcome?

INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

- Agencies only report on **those NPIs that are relevant to achieving the goals and outcomes set by the CAA** based on local needs and conditions.
- The Annual Report does not mandate the use of any of the proposed outcome indicators – but rather does provide a set of standardized menu of indicators based on those that have proven effective at the family level for many years.

INDIVIDUAL AND FAMILY NATIONAL PERFORMANCE INDICATORS

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Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.
Employment Indicators

Name of CSBG Eligible Entity Reporting:

Employment	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/ I = IV] (% auto calculated)	V.) Performance Target Accuracy (III/II = V) (% auto calculated)
1. The number of unemployed youth who obtained employment to gain skills or income.					
2. The number of unemployed adults who obtained employment (up to a living wage).					
3. The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).					
4. The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).					
5. The number of unemployed adults who obtained employment (with a living wage or higher).					
6. The number of unemployed adults who obtained and maintained employment for at least 90 days (with a living wage or higher).					
7. The number of unemployed adults who obtained and maintained employment for at least 180 days (with a living wage or higher).					

Expands on NPI
1.1.A, B, and D

Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.
Education and Cognitive Development Indicators

Name of CSBG Eligible Entity Reporting: _____

Education and Cognitive Development	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/I = IV] (%) (auto calculated)	V.) Performance Target Accuracy [(III/II = V)] (%) (auto calculated)
1. The number of children (0 to 5) who demonstrated improved emergent literacy skills.					
2. The number of children (0 to 5) who demonstrated skills for school readiness.					
3. The number of children and youth who demonstrated improved positive approaches toward learning, including improved attention skills. (auto total).					
a. Early Childhood Education (ages 0-5)					
b. 1st grade-8th grade					
c. 9th grade-12th grade					
4. The number of children and youth who are achieving at basic grade level (academic, social, and other school success skills). (auto total)					
a. Early Childhood Education (ages 0-5)					
b. 1st grade-8th grade					
c. 9th grade-12th grade					
5. The number of parents/caregivers who improved their home environments.					
6. The number of adults who demonstrated improved basic education.					
7. The number of individuals who obtained a high school diploma and/or obtained an equivalency certificate or diploma.					
8. The number of individuals who obtained a recognized credential, certificate, or degree relating to the achievement of educational or vocational skills.					
9. The number of individuals who obtained an Associate's degree.					
10. The number of individuals who obtained a Bachelor's degree.					

Expands on NPI 6.3.C, D and I

Expands NPI 6.3.J and K

Expands NPI 1.2.B and C

Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.
Income and Asset Building Indicators

Name of CSBG Eligible Entity Reporting: _____

Income and Asset Building	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/I = IV] (% auto calculated)	V.) Performance Target Accuracy [(III/II) = V] (% auto calculated)
1. The number of individuals who achieved and maintained capacity to meet basic needs for <u>90 days</u> .					
2. The number of individuals who achieved and maintained capacity to meet basic needs for <u>180 days</u> .					
3. The number of individuals who opened a <u>savings account or IDA</u> .					
4. The number of individuals who <u>increased their savings</u> .					
5. The number of individuals who used their savings to <u>purchase an asset</u> .					
a. Of the above, the number of individuals who <u>purchased a home</u> .					
6. The number of individuals who <u>improved their credit scores</u> .					
7. The number of individuals who <u>increased their net worth</u> .					
8. The number of individuals engaged with the Community Action Agency who report <u>improved financial well-being</u> .					

CSBG Annual Report, Understanding
Module 4, Individual and Family Level

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Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.
Housing Indicators

Name of CSBG Eligible Entity Reporting: _____

Housing	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/II = IV] (% auto calculated)	V.) Performance Target Accuracy (III/II = V) (% auto calculated)
1. The number of households experiencing homelessness who obtained <u>safe temporary shelter</u> .		CSBG IS, NPI 6.2.E			
2. The number of households who obtained <u>safe and affordable housing</u> .					
3. The number of households who maintained safe and affordable housing for <u>90 days</u> .		Combines and Expands CSBG IS, NPI 1.2.H and 6.4.E			
4. The number of households who maintained safe and affordable housing for <u>180 days</u> .					
5. The number of households who <u>avoided eviction</u> .					
6. The number of households who <u>avoided foreclosure</u> .					
7. The number of households who <u>experienced improved health and safety</u> due to improvements within their home (e.g. reduction or elimination of lead, radon, carbon dioxide and/or fire hazards or electrical issues, etc).		NEW			
8. The number of households with <u>improved energy efficiency and/or energy burden reduction</u> in their homes.		NEW			

CSBG Annual Report, Understanding
Module 4, Individual and Family Level

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Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.
Health and Social/Behavioral Development Indicators

Name of CSBG Eligible Entity Reporting: _____

Health and Social/Behavioral Development	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/I = IV] (% auto calculated)	V.) Performance Target Accuracy (III/II = V) (% auto calculated)
1. The number of individuals who demonstrated <u>increased nutrition skills</u> (e.g. cooking, shopping, and growing food).					
2. The number of individuals who demonstrated <u>improved physical health</u> and well-being.					
3. The number of individuals who demonstrated <u>improved mental and behavioral health and well-being</u> .					
4. The number of individuals who <u>improved skills</u> related to the adult role of parents/ caregivers.					
5. The number of parents/caregivers who <u>demonstrated increased sensitivity and responsiveness</u> in their interactions with their children.					
6. The number of <u>seniors (65+)</u> who maintained an independent living situation.					
7. The number of <u>individuals with disabilities</u> who maintained an independent living situation.					
8. The number of <u>individuals with chronic illness</u> who maintained an independent living situation.					
9. The number of individuals with <u>no recidivating event</u> for six months.					
a. Youth (ages 14-17)					
b. Adults (ages 18+)					

NEW

Expands on CSBG IS NPI 6.3.J

NEW

Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.
Civic Engagement and Community Involvement Indicators

Name of CSBG Eligible Entity Reporting: _____

Civic Engagement and Community Involvement	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/I = IV] (% auto calculated)	V.) Performance Target Accuracy [(III/II) = V] (% auto calculated)
1. The number of Community Action program participants who increased skills, knowledge, and abilities to enable them to work with Community Action to improve conditions in the community.					
a. Of the above, the number of Community Action program participants who <u>improved their leadership skills.</u>					
b. Of the above, the number of Community Action program participants who <u>improved their social networks.</u>					
c. Of the above, the number of Community Action program participants who gained other skills, knowledge and abilities to <u>enhance their ability to engage.</u>					

NEW

Other Housing Outcome Indicator	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/ I = IV] (% auto calculated)	V.) Performance Target Accuracy (III/II = V) (% auto calculated)
9. The number of individuals or households _____.					

Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.

Outcomes Across Multiple Domains

Name of CSBG Eligible Entity Reporting: _____

Outcomes Across Multiple Domains	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/I = IV] (% auto calculated)	V.) Performance Target Accuracy {(III/I) = V} (% auto calculated)
1. The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains.		NEW			

INDIVIDUAL AND FAMILY LEVEL SERVICES

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SERVICES LIST

- New list in the Annual Report
- The things (services) we deliver to individuals and families
- Critics have cited that some of our outputs and outcomes are mixed together
- Services and outcomes have been separated so that we can better understand and tell the story of what services are being provided by the Network to achieve results for individuals and families.

**Module 4, Section B: Individual and Family Services -
Data Entry Form**

**Goal 1: Individuals and Families with low-incomes are stable
and achieve economic security.**

Employment Services

Name of CSBG Eligible Entity Reporting: _____

Employment Services	Unduplicated Number of Individuals Served
Skills Training and Opportunities for Experience	
Vocational Training	
On-the-Job and other Work Experience	
Youth Summer Work Placements	
Apprenticeship/Internship	
Self-Employment Skills Training	
Job Readiness Training	
Career Counseling	
Workshops	
Coaching	
Job Search	
Coaching	
Resume Development	
Interview Skills Training	
Job Referrals	
Job Placements	
Pre-employment physicals, background checks, etc.	
Post Employment Supports	
Coaching	
Interactions with employers	
Employment Supplies	
Employment Supplies	

Expands on CSBG
IS, NPI 1.2.A

**Module 4, Section B: Individual and Family Services -
Data Entry Form**

**Goal 1: Individuals and Families with low-incomes are stable
and achieve economic security.**

Education and Cognitive Development Services

Name of CSBG Eligible Entity Reporting:

Education and Cognitive Development Services	Unduplicated Number of Individuals Served
Child/Young Adult Education Programs	
Early Head Start	
Head Start	
Other Early-Childhood (0-5 yr. old) Education	
K-12 Education	
K-12 Support Services	
Financial Literacy Education	
Literacy/English Language Education	
College-Readiness Preparation/Support	
Other Post Secondary Preparation	
Other Post Secondary Support	
School Supplies	
School Supplies	

NEW and Expands
on CSBG IS, NPI
6.3 and 1.2

NEW

**Module 4, Section B: Individual and Family Services -
Data Entry Form**

**Goal 1: Individuals and Families with low incomes are stable and
achieve economic security.**

Income and Asset Building Services

Name of CSBG Eligible Entity Reporting: _____

Income and Asset Building Services	Unduplicated Number of Individuals Served
Training and Counseling Services	
Financial Capability Skills Training	
Financial Coaching/Counseling	
Financial Management Programs (including budgeting, credit management, credit repair, credit counseling, etc.)	NEW
First-time Homebuyer Counseling	
Foreclosure Prevention Counseling	
Small Business Start-Up and Development Counseling Sessions/Classes	
Benefit Coordination and Advocacy	
Child Support Payments	CSBG IS, NPI 1.3.B
Health Insurance	
Social Security/SSI Payments	
Veteran's Benefits	NEW
TANF Benefits	
SNAP Benefits	

CSBG Annual Report, Understanding
Module 4, Individual and Family Level

Module 4, Section B: Individual and Family Services - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.
Housing Services

Name of CSBG Eligible Entity Reporting: _____

Housing Services	Unduplicated Number of Individuals Served
Housing Payment Assistance	
Financial Capability Skill Training	NEW
Financial Coaching/Counseling	
Rent Payments (includes Emergency Rent Payments)	CSBG IS, NPI 6.2.C
Deposit Payments	NEW
Mortgage Payments (includes Emergency Mortgage Payments)	
Eviction Prevention Services	
Eviction Counseling	
Landlord/Tenant Mediations	NEW
Landlord/Tenant Rights Education	
Utility Payment Assistance	
Utility Payments (LIHEAP-includes Emergency Utility Payments)	Combines CSBG IS, NPI 1.2.J and K, 6.2.B and 6.4.G and I
Utility Deposits	
Utility Arrears Payments	
Level Billing Assistance	NEW
Housing Placement/Rapid Re-housing	
Temporary Housing Placement (includes Emergency Shelters)	
Transitional Housing Placements	NEW
Permanent Housing Placements	
Rental Counseling	

**Module 4, Section B: Individual and Family Services -
Data Entry Form**

**Goal 1: Individuals and Families with low incomes are stable and
achieve economic security.**

Health and Social/Behavioral Development

Name of CSBG Eligible Entity Reporting: _____

Health and Social/Behavioral Development Services	Unduplicated Number of Individuals Served
Health Services, Screening and Assessments	
Immunizations	
Physicals	
Developmental Delay Screening	
Vision Screening	
Prescription Payments	
Doctor Visit Payments	
Maternal/Child Health	
Nursing Care Sessions	
In-Home Affordable Seniors/Disabled Care Sessions (Nursing, Chores, Personal Care Services)	
Health Insurance Options Counseling	
Reproductive Health Services	
Coaching Sessions	
Family Planning Classes	
Contraceptives	
STI/HIV Prevention Counseling Sessions	
STI/HIV Screenings	

Combines and
Expands NPI
1.2.G, 6.2.F, 6.3.A
and 6.4.D

NEW

Module 4, Individual and Family Level

Module 4, Section B: Individual and Family Services - Data Entry Form

Goal 1: Individuals and Families with low-incomes are stable and achieve economic security.

Services Supporting Multiple Domains

Name of CSBG Eligible Entity Reporting: _____

Services Supporting Multiple Domains	Unduplicated Number of Individuals Served
Case Management	
Case Management	
Eligibility Determinations	
Eligibility Determinations	
Referrals	
Referrals	
Transportation Services	
Transportation Services (e.g. bus passes, bus transport, support for auto purchase or repair; including emergency services)	
Childcare	
Child Care subsidies	NEW
Child Care payments	
Eldercare	
Day Centers	
Identification Documents	
Birth Certificate	
Social Security Card	
Driver's License	
Re-Entry Services	
Criminal Record Expungements	
Immigration Support Services	
Immigration Support Services (relocation, food, clothing)	

Module 4, Section B: Individual and Family Services - Data Entry Form

Goal 1: Individuals and Families with low-incomes are stable and achieve economic security.

Civic Engagement and Community Involvement

Name of CSBG Eligible Entity Reporting: _____

Civic Engagement and Community Involvement Services	Unduplicated Number of Individuals Served
Voter Education and Access	
Leadership Training	
Tri-partite Board Membership	NEW
Citizenship Classes	
Getting Ahead Classes	
Volunteer Training	

EXAMPLES

MODULE 4: INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

Example:

A CAA operates a Family Development program. They help 50 people obtain and maintain employment for 6 months, 25 of the 50 also obtained a certificate or diploma. All 50 people received multiple services to obtain these outcomes.

Where would you report these outcomes and services in Module 4?

MODULE 4: INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

- Employment NPIs
 - The number of unemployed adults who obtained employment (up to a living wage).
 - The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).
 - The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).
- Education NPIs
 - The number of individuals who obtained a recognized credential, certificate, or degree relating to the achievement of educational or vocational skills.
- Employment and Education Services
 - Possibly Coaching, Resume Development, Interview Skills Training, Applied Technology Classes, High School Equivalency Classes.

MODULE 4: INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

Example:

A CAA operates an in-home health program that assists seniors in maintaining an independent living situation.

Where would you report this program in Module 4?

MODULE 4: INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

- Health and Social/Behavioral Development NPIs
 - **The number of seniors (65+) who maintained an independent living situation.**
- Health and Social/Behavioral Development Services
 - **In-Home Affordable Seniors/Disabled Care Sessions (Nursing, Chores, Personal Care Services)**

MODULE 4: INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

Example:

A participant of multiple CAA programs (i.e. Housing Program, Employment Program, Nutrition Program) obtains multiple outcomes during the program year.

How can a CAA report this success in Module 4?

MODULE 4: INDIVIDUAL AND FAMILY LEVEL | NATIONAL PERFORMANCE INDICATORS

- If a CAA's systems can support the reporting, people obtaining multiple outcomes during the program year can be reported in **Outcomes Across Multiple Domains**.

Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form

Goal 1: Individuals and Families with low incomes are stable and achieve economic security.

Outcomes Across Multiple Domains

Name of CSBG Eligible Entity Reporting: _____

Outcomes Across Multiple Domains	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/ I = IV] (%) auto calculated)	V.) Performance Target Accuracy (III/II = V] (%) auto calculated)
1. The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains.					

**ALL CHARACTERISTICS
REPORT**

DEMOGRAPHICS AND CHARACTERISTICS

- Goal is to be able to tell how many individual people are served
 - Unduplicated counts are expected
- All Characteristics Report
 - Added new categories

Module 4, Section C: All Characteristics Report - Data Entry Form

Goal 1: Individuals and Families with low-incomes are stable and achieve economic security.

Name of CSBG Eligible Entity Reporting:

A. Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained:

B. Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained:

C. INDIVIDUAL LEVEL CHARACTERISTICS

1. Gender	Number of Individuals
a. Male	<input type="text"/>
b. Female	<input type="text"/>
c. Other	<input type="text"/>
d. Unknown/not reported	<input type="text"/>
TOTAL (auto calculated)	<input type="text" value="0"/>

2. Age	Number of Individuals
a. 0-5	<input type="text"/>
b. 6-13	<input type="text"/>
c. 14-17	<input type="text"/>
d. 18-24	<input type="text"/>
e. 25-44	<input type="text"/>
f. 45-54	<input type="text"/>
g. 55-59	<input type="text"/>
h. 60-64	<input type="text"/>
i. 65-74	<input type="text"/>
j. 75+	<input type="text"/>
k. Unknown/not reported	<input type="text"/>
TOTAL (auto calculated)	<input type="text" value="0"/>

6. Ethnicity/Race	Number of Individuals
I. Ethnicity	
a. Hispanic, Latino or Spanish Origins	<input type="text"/>
b. Not Hispanic, Latino or Spanish Origins	<input type="text"/>
c. Unknown/not reported	<input type="text"/>
TOTAL (auto calculated)	<input type="text" value="0"/>

II. Race	
a. American Indian or Alaska Native	<input type="text"/>
b. Asian	<input type="text"/>
c. Black or African American	<input type="text"/>
d. Native Hawaiian and Other Pacific Islander	<input type="text"/>
e. White	<input type="text"/>
f. Other	<input type="text"/>
g. Multi-race (two or more of the above)	<input type="text"/>
h. Unknown/not reported	<input type="text"/>
TOTAL (auto calculated)	<input type="text" value="0"/>

7. Military Status	Number of Individuals
a. Veteran	<input type="text"/>

j. 75+

k. Unknown/not reported

TOTAL (auto calculated)

3. Education Levels Number of Individuals

	[ages 14-24]	[ages 25+]
a. Grades 0-8	<input type="text"/>	<input type="text"/>
b. Grades 9-12/Non-Graduate	<input type="text"/>	<input type="text"/>
c. High School Graduate/ Equivalency Diploma	<input type="text"/>	<input type="text"/>
d. 12 grade + Some Post-Secondary	<input type="text"/>	<input type="text"/>
e. 2 or 4 years College Graduate	<input type="text"/>	<input type="text"/>
f. Graduate of other post-secondary school	<input type="text"/>	<input type="text"/>
g. Unknown/not reported	<input type="text"/>	<input type="text"/>
TOTAL (auto calculated)	0	0

4. Disconnected Youth Number of Individuals

a. Youth ages 14-24 who are neither working or in school

5. Health Number of Individuals

	Yes	No	Unknown
a. Disabling Condition	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Health Insurance*	<input type="text"/>	<input type="text"/>	<input type="text"/>

*If an individual reported that they had Health Insurance please identify the source of health insurance below.

Health Insurance Sources

i. Medicaid	<input type="text"/>
ii. Medicare	<input type="text"/>
iii. State Children's Health Insurance Program	<input type="text"/>
iv. State Health Insurance for Adults	<input type="text"/>
v. Military Health Care	<input type="text"/>
vi. Direct-Purchase	<input type="text"/>
vii. Employment Based	<input type="text"/>
viii. Unknown/not reported	<input type="text"/>
TOTAL (auto calculated)	0

7. Military Status Number of Individuals

a. Veteran	<input type="text"/>
b. Active Military	<input type="text"/>
c. Unknown/not reported	<input type="text"/>
TOTAL (auto calculated)	0

8. Work Status (Individuals 18+) Number of Individuals

a. Employed Full-Time	<input type="text"/>
b. Employed Part-Time	<input type="text"/>
c. Migrant Seasonal Farm Worker	<input type="text"/>
d. Unemployed (Short-Term, 6 months or less)	<input type="text"/>
e. Unemployed (Long-Term, more than 6 months)	<input type="text"/>
f. Unemployed (Not in Labor Force)	<input type="text"/>
g. Retired	<input type="text"/>
h. Unknown/not reported	<input type="text"/>
TOTAL (auto calculated)	0

Module 4, Section C: All Characteristics Report - Data Entry Form**Goal 1: Individuals and Families with low-incomes are stable and achieve economic security.**Name of CSBG Eligible Entity Reporting: **D. HOUSEHOLD LEVEL CHARACTERISTICS**

9. Household Type	Number of Households
a. Single Person	
b. Two Adults NO Children	
c. Single Parent Female	
d. Single Parent Male	
e. Two Parent Household	
f. Non-related Adults with Children	
g. Multigenerational Household	
h. Other	
i. Unknown/not reported	
TOTAL (auto calculated)	0

10. Household Size	Number of Households
a. Single Person	
b. Two	
c. Three	
d. Four	
e. Five	
f. Six or more	
g. Unknown/not reported	
TOTAL (auto calculated)	0

13. Sources of Household Income	Number of Households
a. Income from Employment Only	
b. Income from Employment and Other Income Source	
c. Income from Employment, Other Income Source, and Non-Cash Benefits	
d. Income from Employment and Non-Cash Benefits	
e. Other Income Source Only	
f. Other Income Source and Non-Cash Benefits	
g. No Income	
h. Non-Cash Benefits Only	
i. Unknown/not reported	
TOTAL (auto calculated)	0

Below, please report the types of Other income and/or non-cash benefits received by the households who reported sources other than employment

14. Other Income Source	Number of Households
a. TANF	
b. Supplemental Security Income (SSI)	
c. Social Security Disability Income (SSDI)	
d. VA Service-Connected Disability Compensation	
e. VA Non-Service Connected Disability Pension	
f. Private Disability Insurance	
g. Worker's Compensation	

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All Characteristics, E

E. Number of Individuals Not Included in the Totals Above - (due to data collection system integration barriers)

- Please list the unduplicated number of individuals served in each program. These individuals may have been included in Item A or Item C, but due to system interoperability issues an unduplicated count could not be obtained for particular programs.

All Characteristics, F

F. Number of Households Not Included in the Totals Above - (due to data collection system integration barriers)

- Please list the unduplicated number of households served in each program. These households may have been included in Item B or Item D, but due to system interoperability issues an unduplicated count could not be obtained for particular programs.

All Characteristics, E & F

EXAMPLE

- An individual is served by an employment program, housing assistance and LIHEAP. An unduplicated count is obtained from data entered for the employment and housing programs, but not from LIHEAP data. Data from the employment and housing programs can be entered in Item A and Item C and the LIHEAP data is entered in Item E.

SETTING TARGETS

Why Use Targets?

- A target demonstrates the agency's expectation about your capacity to deliver results.
- The process for establishing targets also tests your ability to be realistic about what you expect to achieve.
- Realistic targets are based on benchmarks, sub goals, and interim indicators.

Directions from Legislation

- The GPRA legislation (Government Performance and Results Act of 1993/ Modernization Act of 2010) refers to “**performance plans**” and “**performance goals**,” which both relate to the concept of planning for specific results.
- This references two kinds of targets: the number of people who are expected to be served and the number of people (of those served) who are expected to achieve an outcome.
- These targets are identified in planning so they can be assessed in the evaluation phase.

Targeting: Thinking Through The ROMA Cycle

- **Agencies identify local needs** through the Community Needs Assessment process
- **The agency plans** (both agency wide strategic planning and the Community Action Plan) will include what the agency wants to achieve?
- **These expectations will be related to the national goals.**
 - In the Community Action/CSBG Network we have Three National Goals that shape all of our discussions about the results we achieve.

Targeting: Thinking Through The ROMA Cycle

- How will we try to reach the outcomes that we believe will support one or more of the national goals?
- The identification of **services and** strategies is included in the planning, and then these are implemented.
 - The new CSBG Annual Report has separate services (Module 4, Section B) and strategies (Module 3, Section C reports).

Targeting: Thinking Through The ROMA Cycle

- How much change do we expect to see?
- How large of an effect will these outcomes have on our community?
- What resources do we have to provide the services and strategies that will produce the outcomes?
- This is when we identify the indicators of the outcomes expected.
 - In this way we quantify the outcome that an indicator will show us.

What is targeted?

- How many will be served? This is the first target number.
- Of those served, how many will achieve the outcome (will experience the change that is expected from the service)? This is the second target number.
- The relationship between these numbers produces a percent that shows the success of those receiving service.
- This is the foundation of data that will be used to identify what works and for whom.

Targets Identify the Scope of the Expected Results

Example of Results (Outcomes):

- Program participants pass the GED test
- Parents demonstrate increased knowledge of good parenting skills

Example of Targets (indicators):

- 30 of 50 participants (60%) achieve a score of 85% or above on the GED exam within the program year
- 25 out of 50 parents (50%) achieve a passing score on a post test of knowledge related to parenting following the training program.

Connecting to the NPIs

- In the Annual Report, agencies will enter
 - The numbers served
 - The targeted number who are expected to achieve
 - The actual number who achieved
- Two percents will be automatically calculated
 - the performance of the customers
 - and the ability of the agency to target.

Targets Should Be Very Specific

- You must define very precisely what it means to 'achieve the outcome.'
- You do not necessarily have to have just one target.
- It is very helpful to have several interim indicators to show progress in the middle of the program.

Organization/Program: Adult Education			Level: _X_ family __ agency __ community		
Need	Service or Activity <i>Include who will be served, how many people/units of service and time frame.</i>	Outcome	Indicator <i>Of those who will be served, how many will achieve the outcome in the time frame.</i>	Evidence The tool that will be used to measure and document success.	Data collection processes and personnel
Individuals in the community have no HS diploma or GED.	<u>100 students will enroll</u> in a year long GED test preparation course.	Students obtain a GED.	<u>60 of 100 or 60% will improve</u> basic skills <u>40 of 100 or 40% will obtain</u> a GED.	Attendance log. GED test scores.	Program attendance is logged during every class. GED test scores are logged by staff.
Mission Statement: <i>Note: the "Actual Results" column is missing from this graphic. Once service is delivered, actual results must be compared with projected results.</i>					
CSBG Annual Report, Understanding Module 4, Individual and Family Level					65

USING THE DATA FOR ANALYSIS

Using Targets in Analysis

- Targets put the results that indicators measure into the perspective of your resources and capabilities.
- Targets tie national, state, or agency indicators to the scale and timing of the specific program you run in a specified time period.

Management Based on Data

You can't "manage" performance if you can't define and measure it.

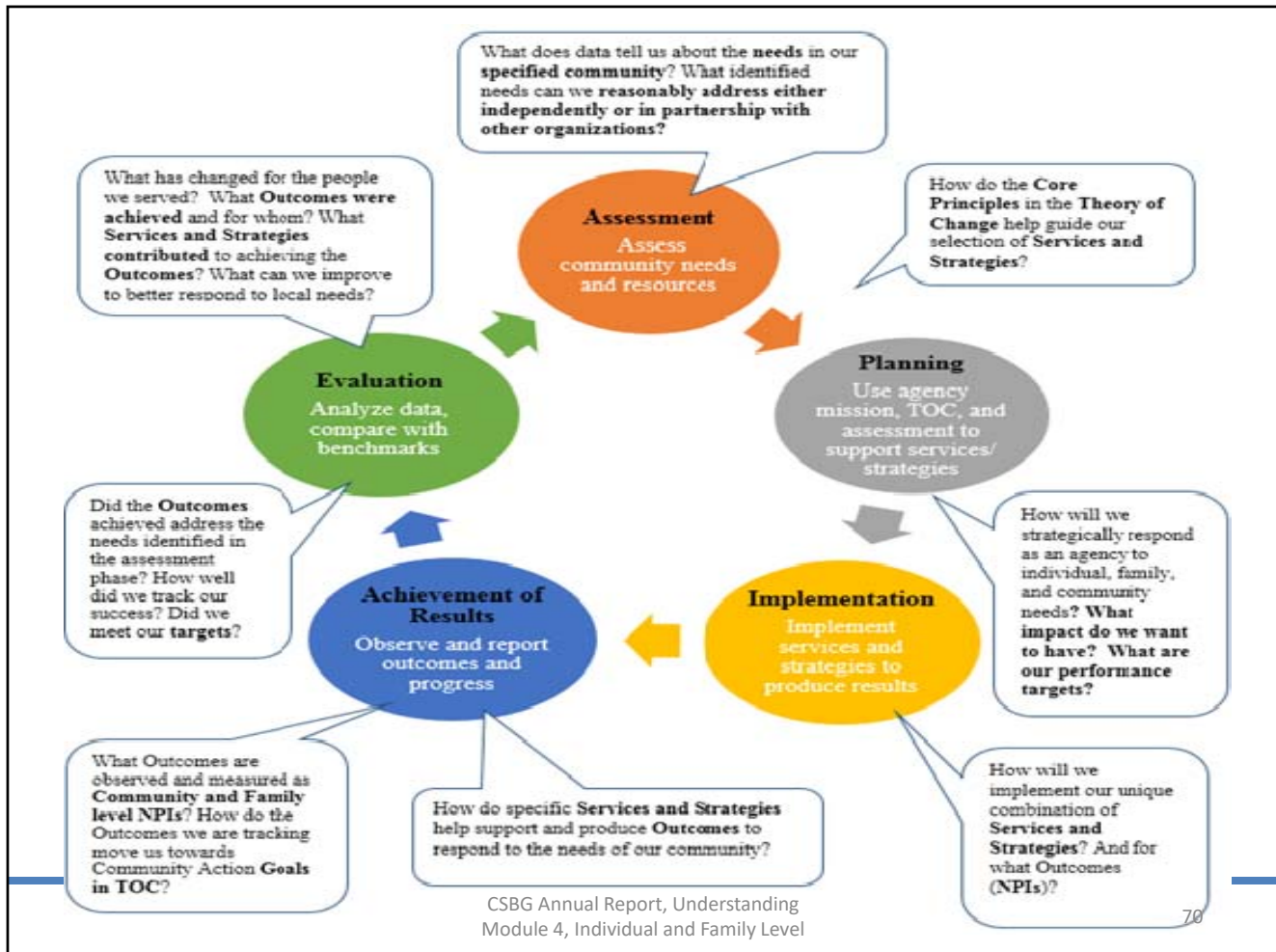
Data is found throughout the ROMA Cycle.

It is important to collect data in a way that assures it is accurate, complete and timely.

It is then necessary to organize the data into useful reports for management

Management Based on Data

- The agency will have enable agencies to more effectively connect people and distressed communities with the services needed to achieve specific outcomes.
- Identify actions to take to improve or strengthen outcomes



RESOURCES AND TOOLS

CSBG Annual Report Numbering

CNPI 1	Counts of Change for Employment Indicators (CNPI 1)
CNPI 1a	Number of jobs created to increase opportunities for people with low incomes in the identified
CNPI 1b	Number of job opportunities maintained in the identified community.
CNPI 1c	Number of "living wage" jobs created in the identified community*.
CNPI 1d	Number of "living wage" jobs maintained in the identified community*.
CNPI 1e	Number of jobs created in the identified community with a benefit package.
CNPI 1	Other Counts of Change for Employment Indicators - Please specify below (CNPI 1)
CNPI 1z	Other
CNPI 1z.1	Other
CNPI 1z.2	Other
CNPI 1	Rates of Change for Employment Indicators (CNPI 1)
CNPI 1f	Percent decrease of the unemployment rate.
CNPI 1g	Percent decrease of the youth unemployment rate.
CNPI 1h	Percent decrease of the underemployment rate.
CNPI 1	Other Rates of Change for Employment Indicators (CNPI 1)
CNPI 1z.3	Other
CNPI 1z.4	Other
CNPI 1z.5	Other

Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.

Employment Indicators

Name of CSBG Eligible Entity Reporting:

Employment	I.) Number of Participants Served in program(s) (N)	II.) Target (N)	III.) Actual Results (N)	IV.) Percentage Achieving Outcome (N/I x 100) (% auto calculated)	V.) Performance Target Accuracy (N/I x 100) (% auto calculated)
1. The number of unemployed youth who obtained employment to gain skills or income.					
2. The number of unemployed adults who obtained employment <u>with a living wage</u> .					
3. The number of unemployed adults who obtained and maintained employment for at least 90 days <u>(see to a living wage)</u> .					
4. The number of unemployed adults who obtained and maintained employment for at least 180 days <u>(see to a living wage)</u> .					
5. The number of unemployed adults who obtained employment <u>with a living wage or benefit</u> .					
6. The number of unemployed adults who obtained and maintained employment for at least 90 days <u>with a living wage or benefit</u> .					
7. The number of unemployed adults who obtained and maintained employment for at least 180 days <u>with a living wage or benefit</u> .					
8. The number of employed participants in a career-advancement related program who <u>entered or transitioned</u> into a position that provided increased income and/or benefits.					
a. Of the above, the number of employed participants who increased income from employment through <u>wage or salary amount increase</u> .					
b. Of the above, the number of employed participants who increased income from employment through <u>hours worked increase</u> .					
c. Of the above, the number of employed participants who <u>increased benefits</u> related to employment.					
Other Employment Outcome Indicator					
9. The number of individuals or households					

Comments:

Annotated CSBG Annual Report

ily Level

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Crosswalks

High-Level Crosswalk
CSBG Annual Report – CSBG IS Survey
FRN#2 30-Day Comment Period

DRAFT

CSBG Annual Report/IS Survey and Organizational Chart

Annual Report	Current CSBG IS	Organizational Chart
1: State Administration B: Statewide Goals and accomplishments I: Results Oriented Management and Accountability (ROMA) System	Section D	1.2 • direc Con 1.3 col sa 3. q f
2: Agency Expenditures, Capacity, and Resources A: Local Agency CSBG Expenditures	Section E	
2: Agency Expenditures, Capacity, and Resources B: Local Agency Capacity Building	NPI Goals Three, Four, and Five	

CSBG Annual Report

Module 1 - State Administration	CSBG IS Survey
Section A: CSBG Lead Agency, CSBG Authorized Official, CSBG Point of Contact	Section C. General Information on State CSBG office
	Section D. Accomplishments and Coordination of Funds
	Section B. General Information on Local CSBG Agencies
	n/a
	Section of CSBG Funds

DRAFT - CSBG IS-CSBG Annual Report Quick Reference Crosswalk

CSBG IS	Very Similar Language	Similar Language	No Similar Language
NPI			
Description			
Goal 1: Low-income people become more self-sufficient.			
1.1 Employment Exp.			
1.1.A Unemployed and obtained a job			
1.1.B Employed and maintained a job for at least 90 days			
1.1.C Employed and maintained an increase in employment (income and/or benefits)			
		Module 4, Section A, Employment, 1. The number of unemployed youth who obtained employment to gain skills or income. 2. The number of unemployed adults who obtained employment (up to a living wage).	
		Module 4, Section A, Employment, 3. The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).	
		Module 4, Section A, Employment, 6. The number of program participants in a career advancement related program who entered an transitional job position that provided increased income and/or benefits.	

DRAFT - CSBG IS-CSBG Annual Report

About NASCSP

The State of Poverty Blog

Member Services

CSBG

CSBG Services and Technical Assistance

Training Request Form

CSBG TTA Center

CSBG Data Collection and Reporting

CSBG Annual Report

Module 1

Module 2 through 4

DATA Task Force

CSBG IS Survey

CSBG IS 2016 Submission Form

CSBG National Report and State Fact Sheets

Archive

ROMA

ROMA Next Generation

Theory of Change

Request for Proposal

Archive

National ROMA Peer to Peer Training

Performance Management

Monitoring

Organizational Standards

State Plan Information

CSBG Communications and Government Affairs

Submit a Success Story

Weatherization



CSBG Annual Report

CSBG > CSBG Data Collection and Reporting > CSBG Annual Report

CSBG Annual Report Cleared by Office of Management and Budget (OMB)

The Office of Community Services (OCS) received OMB approval for a new CSBG Annual Report on January 12, 2017. Additional information about the implementation of the [CSBG Annual Report](#) is detailed in [IM 152 CSBG Annual Report](#), released by OCS on January 20, 2017. The new CSBG Annual Report will eventually replace the CSBG IS Survey. The new report will be implemented through a phased-in approach over two years.

OCS has also released [Action Transmittal 2017-01 on the Submission of Module 1 of the CSBG Annual Report for Fiscal Year \(FY\) 2016](#). This Action Transmittal notifies States that Module 1 is expected to be available in OLDC on **February 28, 2017** and the deadline for submission of Module 1 in OLDC received a one-time extension from March 31, 2017 to **April 7, 2017**. The due date for submission of the CSBG IS to NASCSP is also extended to **April 7, 2017**.

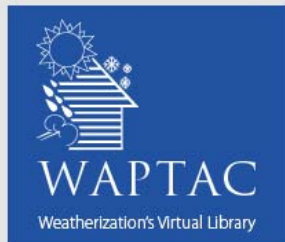
CSBG Annual Report Implementation: Two Phases

Phase 1

- FY16 & FY17
- Module 1 is completed in OLDC
- Local Agency data is completed in the CSBG IS Survey

Phase 2

- FY 18
- Module 1-4 are completed in OLDC
- No data is reported in the CSBG IS Survey



NASCSP

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DC 20002
Phone: 202.624.5866

[FINAL CSBG Annual Report](#) - This pdf is the OMB cleared CSBG Annual Report and is unchanged from the version included in the second Federal Register Notice (FRN#2), 30-day comment period in November 2016.

[Module 2: Expenditure, Capacity, Resources Excel Forms](#) , [Module 3: Community Level Excel Forms](#) , [Module 4: Individual and Family Level Excel Forms](#) - Download the excel forms for each module of the CSBG Annual report.

[CSBG Reporting Timelines for States and local CSBG Eligible Entities](#) - This chart shows the timeline for reporting on the CSBG Annual Report. Click here to see your State's CSBG Reporting Period.

[State Reporting Periods for FY18](#) - Modules 2-4 are based on the State's CSBG Reporting Period and reporting starts in FY18. Check out this chart to see your State's Reporting Period.

Presentations:

[ROMA NG/CSBG Annual Report Update Powerpoint](#)- This powerpoint was presented at the ROMA ICEP in Dallas, TX on April 18, 2017. This presentation provides an overview of the current status of the CSBG Annual Report, process for implementation, and current tools and resources.

[Using the Community Status Page Powerpoint](#)- This powerpoint was presented at the ROMA ICEP in Dallas, TX on April 19, 2017. The presentation provides an overview of where we are headed with community level work, a case study from Louisville Community Metro Services, and an example of how to complete the Community Status page.

Crosswalks:

[High Level CSBG Annual Report/CSBG IS Survey Crosswalk](#)- Use this quick reference tool to identify how the CSBG Annual Report and CSBG IS Survey overlap!

[Annotated CSBG Annual Report](#)-This detailed document provides line by line notations on which CSBG IS NPIs and Sections are included, expanded upon, or used to inform the CSBG Annual Report.

[CSBG IS/CSBG Annual Report Crosswalk](#)- Starting to map out how you will transition from the CSBG IS to the CSBG Annual Report? This detailed crosswalk starts with the NPIs in the CSBG IS Survey and identifies similar indicators in the CSBG Annual Report.

[CSBG Annual Report/CSBG IS Survey/Organizational Standards Crosswalk](#)- This tool crosswalks elements of the CSBG Annual Report, CSBG IS Survey and the Organizational Standards.

[Organizational Standards/ROMA Principles Crosswalk](#)- This tool lists the Organizations Standards that correspond to each phase of the ROMA cycle.

ABOUT NASCSP

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CSBG

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Module 1

Module 2 through 4

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Weatherization



CSBG > ROMA > ROMA Next Generation

What is ROMA Next Generation?

- ROMA Next Generation (NG) is a system for continuous quality improvement to enable the network to measure, analyze and communicate performance.
- ROMA NG will help Community Action at local, state and national levels shift to a culture of continuous learning rather than a compliance and reporting culture.
- Ultimately, ROMA NG will help the CSBG Network generate robust results for individuals with low-incomes and the communities served.

Now...	Under ROMA Next Generation...
Varying data quality and analysis →	Infrastructure for multi-level analysis
No picture of services and strategies →	Multi-level information of services & strategies
No data on accountability measures →	Results on State and Federal accountability
No data on Organizational Standards →	Results on Organizational Standards
Thin data on community level efforts →	Added Community Indicators
No ability to show community level work over multiple years →	Space to report community level work over time
Not OMB Cleared →	3-year OMB Clearance

Theory of Change

Additional Tools and Resources Coming in July

CSBG Annual Report Crosswalk with LIHEAP, Head Start, WIOA, and Weatherization.

CSBG Annual Report, Webinar Series, focus on Modules 3 & 4.

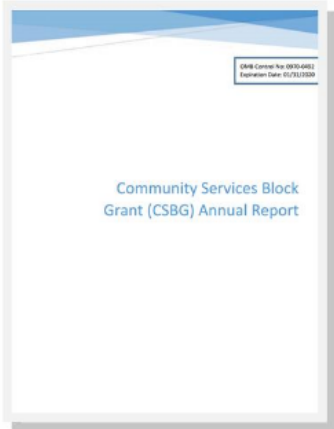
Instruction Manuals and Lexicon

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WELCOME to the CSBG TRAINING and TECHNICAL ASSISTANCE RESOURCE CENTER

This website is a resource for the Community Action Network to access an array of information and assistance designed to support efforts in serving low income families and addressing the causes of poverty in local communities. Through this site you may download toolkits, listen to webinars, register for training, engage in online dialogue with colleagues, submit requests for training or technical assistance, read the latest evaluation reports about evidence-based program models, and search a consultant bank for experienced professionals serving the Community Action Network.





FINAL CSBG Annual Report

N A S C S F

[Click HERE to read the CSBG Annual Report](#)

CSBG Annual Report, Understanding
Module 4, Individual and Family Level

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Questions?

Contact us!

Katy Kujawski: kkujawski@nascsp.org

Lauren Cook: lcCook@nascsp.org

Jackie Orr: jorr@nascsp.org

Upcoming CSBG Annual Report Webinars

Understanding Module 4, Individual and Family Level

July 6 - CSBG Annual Report, Module 4 - 1:00PM ET - [Click here to register](#)

July 7 - CSBG Annual Report, Module 4 - 10:00AM PT - [Click here to register](#)

July 14 - CSBG Annual Report, Module 4 - 11:00AM CT - [Click here to register](#)

Understanding Module 3, Community Level

July 17 - CSBG Annual Report, Module 3 - 11:00AM ET - [Click here to register](#)

July 21 - CSBG Annual Report , Module 3 - 10:00AM PT - [Click here to register](#)

July 25 - CSBG Annual Report, Module 3 - 11:00AM CT - [Click here to register](#)