NATIONAL ASSOCIATION FOR STATE COMMUNITY SERVICES PROGRAMS

ROMA Next Generation

Presenters

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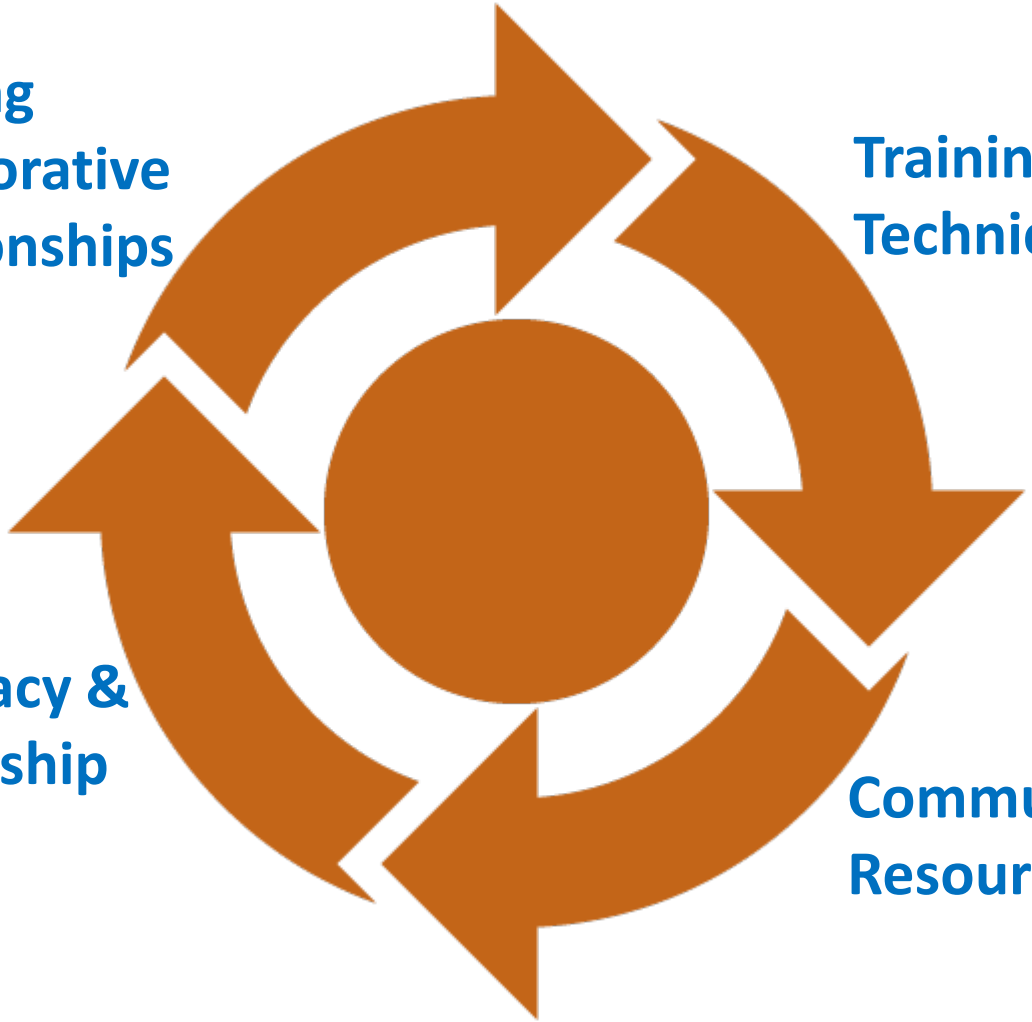
ABOUT NASCSP | WHAT WE DO

NASCSP members are state administrators of the U.S. Department of Health and Human Services Community Services Block Grant (CSBG) and the U.S. Department of Energy's Weatherization Assistance Program (DOE/WAP). NASCSP provides research, analysis, training and technical assistance to State CSBG and WAP offices, Community Action Agencies, and State Associations in order to increase their capacity to prevent and reduce poverty and build economic and energy security.

U.S. DEPARTMENT OF ENERGY

ABOUT NASCSP | CORE STRENGTHS



ABOUT NASCSP | OUR PARTNERS

ABOUT NASCSP | RESEARCH

We provide information.

Each year NASCSP documents the sources of funding, services provided, clients and communities assisted, and the results achieved. This information is shared with the network and other research organizations in the form of national reports, articles, and a promising practices database.

STATUS OF THE CSBG ANNUAL REPORT

Where are we now?

- CSBG Annual report received a ***3-year clearance*** from the Office of Management and Budget (OMB) on January 12, 2017.
- Starts the ***phase-in*** of the CSBG Annual Report and the ***phase-out*** of the CSBG IS Survey.

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

CSBG Annual Report Implementation: Phase 1

Phase 1:

- States complete only Module 1 in the Online Data Collection (OLDC) System for FY16 and FY17.
- States continue to collect and enter CSBG IS data from CSBG Eligible Entities to enter in the CSBG IS Access database for FY16 and FY17.
- The FY16 submission date for Module 1 in OLDC and the CSBG IS Access database was **April 7, 2017**.

Data Submission for FY16
Due April 7, 2017

- **CSBG Annual Report in OLDC:**
  - Module 1: State Administration
    - Sections A-I
- **CSBG IS Survey in the Access Database:**
  - Section B, Eligible Entity List
  - Section D
  - T/TA Survey
  - Sections E-G
  - NPIs

Finally, Clearance! Now, moving forward…

January 12, 2017

- CSBG Annual Report is cleared by OMB

February 2017

- Module 1 is tested in OLDC by State beta testers
- T/TA Webinars
- States prepare to complete Module 1

March 2017

- Module 1 is available in OLDC
- Module 1 Instruction Manual available on NASCSP website
- Convened the DATA Task Force

April 2017

- States complete first submission of Module 1 in OLDC
- States submit CSBG IS Access Database to NASCSP

CSBG Annual Report Implementation: Two Phases

Phase 2:

- States will report on Modules 1 – 4 for the FY18 CSBG Annual Report in OLDC.
- States will collect Modules 2-4 from CSBG Eligible Entities and enter the information into OLDC.
- The expected submission date is **March 31, 2019**.

Data Submission for FY18

- **CSBG Annual Report in OLDC:**
  - Module 1: State Administration
  - Module 2: CSBG Eligible Entity Expenditures, Capacity, and Resources
  - Module 3: Community Level
  - Module 4: Individual and Family Level

CSBG Annual Report Implementation: Data Collection for Modules 2-4

- **Modules 2-4 are based on the State reporting period. Data collection for Modules 2-4 will depend on your State's CSBG reporting period.**
  - July 1, 2017 – June 30, 2018
  - October 1, 2017 – September 30, 2018
  - January 1, 2018 – December 31, 2018

MODULE 1

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 B: Statewide Goals and Accomplishments	Section D. Accomplishments and Coordination of Funds
Section C: CSBG Eligible Entity Update	Section B. General Information on Local CSBG Agencies
Section D: Organizational Standards for Eligible Entities	n/a
Section E: State Use of Funds	Section A. State Use of CSBG Funds Section B. General Information on Local CSBG Agencies
Section F: State Training and Technical Assistance	T/TA Survey Section B. General Information on Local CSBG Agencies
Section G: State Linkages and Communication	n/a
Section H: Monitoring, Corrective Action, and Fiscal Controls	n/a
Section I: Results Oriented Management and Accountability (ROMA)	n/a

Target vs. Actual Performance on the Organizational Standards				
Fiscal Year	**State CSBG Plan Target**	**Number of Entities Assessed**	**Number that Met All (100%) of State Standards**	**Actual Percentage Meeting All (100%) of State Standards**
Auto-populated	[Auto-populated target from question 6.6. of the State CSBG plan].	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
Progress Indicators *Indicate the number of entities that met the following percentages of Organizational Standards.*				
Note – While the State targets the percent of CSBG Eligible Entities to meet 100% of the Organizational Standards, targets are not set in the State Plan for 90%, 80%, 70%, and 60% progress indicators.		**Number of Entities Assessed**	**Number that Met between 90% and 99% of State Standards**	**Actual Percentage**
		[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
		Number of Entities Assessed	**Number that met between 80% and 89% of State Standards**	**Actual Percentage**
		[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
		Number of Entities Assessed	**Number that met between 70% and 79% of State Standards**	**Actual Percentage**
		[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]

Percentage Meeting Organizational Standards by Category			
Category	**Number of Entities Assessed**	**Number that Met All Standards in Category**	**Actual Percentage**
1. Consumer Input and Involvement	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
2. Community Engagement	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
3. Community Assessment	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
4. Organizational Leadership	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
5. Board Governance	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
6. Strategic Planning	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
7. Human Resource Management	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
8. Financial Operations & Oversight	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
9. Data and Analysis	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]

G.1. State Linkages and Coordination at the State Level

- Examples of State linkages and coordination at the State level:
  - The State CSBG office participates in boards, task forces, cross-department meetings to coordinate and promote the work of CSBG.
  - The State CSBG office works closely with LIHEAP and Weatherization to streamline eligibility where possible.
  - The State CSBG office participates in working groups that offer coordination between state and local service providers and CSBG Eligible Entities including homelessness, housing and asset development.

Section I: ROMA System
I.1.a. & I.1.b. ROMA Participation

- Describe how the state:
  - updated data collection systems;
  - implemented new processes to review outcome data;
  - reviewed community needs assessments or community action plans.
- Describe any changes in these processes.

I.3. & I.4. State Review and Feedback on Data

I.3 State Review of CSBG Eligible Entity Data: Describe the ***procedures and activities*** the State used to ***review the ROMA data*** (i.e. all data from elements of the ROMA cycle) from CSBG Eligible Entities for ***completion and accuracy*** (e.g. methodology used for validating the data submitted annually by the local agencies).

I.3. & I.4. State Review and Feedback on Data

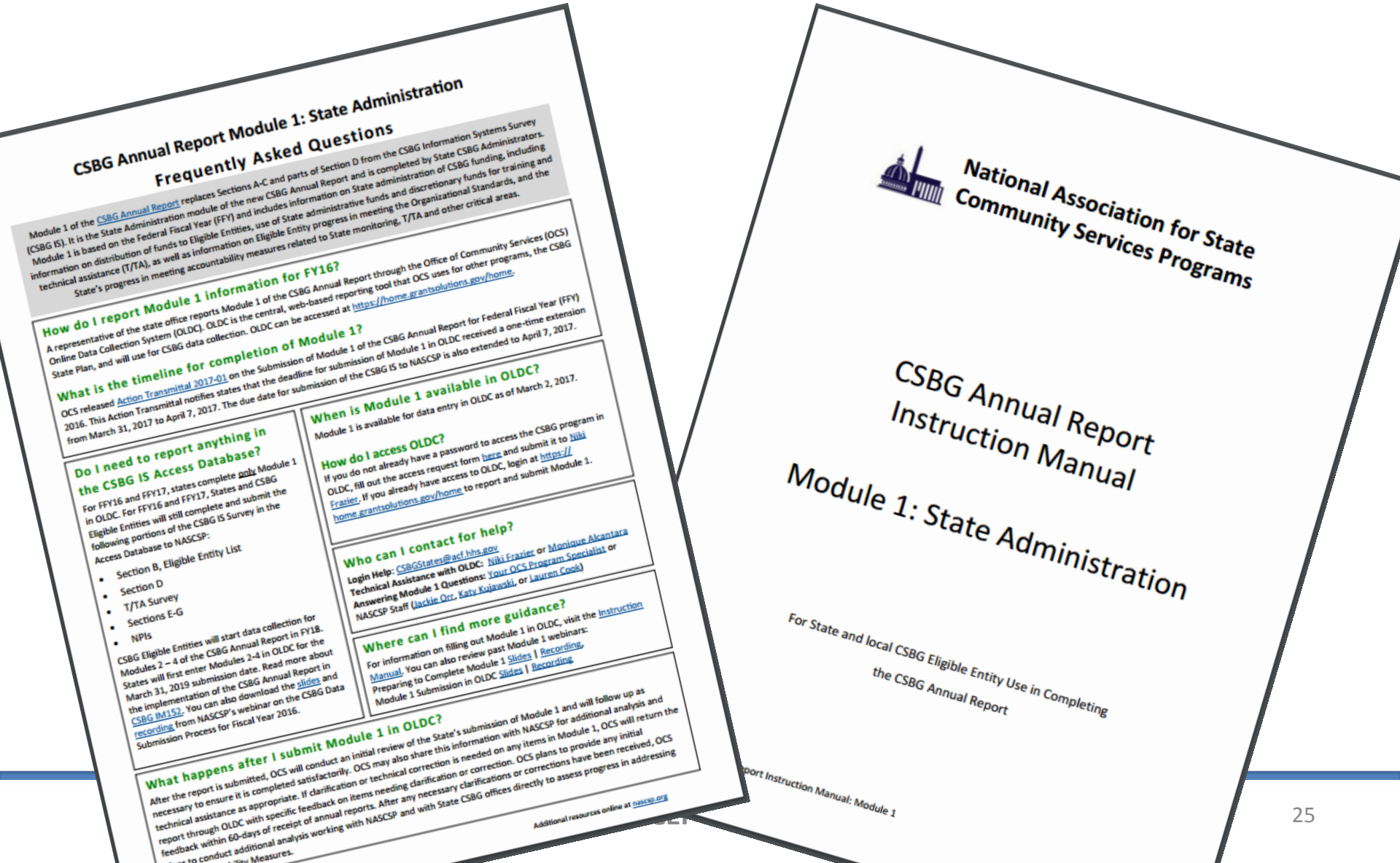
I.4 State Feedback on Data Collection, Analysis, and Reporting: Has the state provided each CSBG Eligible Entity ***written, timely*** (at a minimum within 60 days of the submission) ***feedback*** regarding the entity's ***performance in meeting ROMA goals*** as measured through ***national performance data***? How did the state ***review and provide feedback*** on ROMA data?

State Accountability Measure 5S(ii)

I.5. State and CSBG Eligible Entity Continuous Improvement

- Provide ***2-3 examples*** of changes made by CSBG Eligible Entities to ***improve service delivery*** and ***enhance impact*** for individuals, families, and communities with low-incomes ***based on their in-depth analysis of performance data***.

Module 1 Instruction Manual and FAQs



CSBG Annual Report Module 1: State Administration

Frequently Asked Questions

Module 1 of the CSBG Annual Report replaces Sections A-C and parts of Section D from the CSBG Information Systems Survey (CSBG IS). It is the State Administration module of the new CSBG Annual Report and is completed by State CSBG Administrators. Module 1 is based on the Federal Fiscal Year (FFY) and includes information on State administration of CSBG funding, including information on distribution of funds to Eligible Entities, use of State administrative funds and discretionary funds for training and technical assistance (T/TA), as well as information on Eligible Entity progress in meeting the Organizational Standards, and the State's progress in meeting accountability measures related to State monitoring, T/TA and other critical areas.

How do I report Module 1 information for FY16?

A representative of the state office reports Module 1 of the CSBG Annual Report through the Office of Community Services (OCS) Online Data Collection System (OLDC). OLDC is the central, web-based reporting tool that OCS uses for other programs, the CSBG State Plan, and will use for CSBG data collection. OLDC can be accessed at https://home.grantsolutions.gov/home.

What is the timeline for completion of Module 1?

OCS released Action Transmittal 2017-01 on the Submission of Module 1 of the CSBG Annual Report for Federal Fiscal Year (FFY) 2016. This Action Transmittal notifies states that 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.

Do I need to report anything in the CSBG IS Access Database?

For FFY16 and FFY17, states complete only Module 1 in OLDC. For FFY16 and FFY17, States and CSBG Eligible Entities will still complete and submit the following portions of the CSBG IS Survey in the Access Database to NASCSP:

- Section B, Eligible Entity List
- Section D
- T/TA Survey
- Sections E-G
- NPIs

CSBG Eligible Entities will start data collection for Modules 2 – 4 of the CSBG Annual Report in FY18. States will first enter Modules 2-4 in OLDC for the March 31, 2019 submission date. Read more about the implementation of the CSBG Annual Report in CSBG IM152. You can also download the slides and recording from NASCSP's webinar on the CSBG Data Submission Process for Fiscal Year 2016.

When is Module 1 available in OLDC?

Module 1 is available for data entry in OLDC as of March 2, 2017.

How do I access OLDC?

If you do not already have a password to access the CSBG program in OLDC, fill out the access request form here and submit it to Niki Frazier. If you already have access to OLDC, login at https://home.grantsolutions.gov/home to report and submit Module 1.

Who can I contact for help?

Login Help: CSBGStates@acf.hhs.gov
Technical Assistance with OLDC: Niki Frazier or Monique Alcantara
Answering Module 1 Questions: Your OCS Program Specialist or NASCSP Staff (Jackie Orr, Katy Kujawski, or Lauren Cook)

Where can I find more guidance?

For information on filling out Module 1 in OLDC, visit the Instruction Manual. You can also review past Module 1 webinars:
Preparing to Complete Module 1 Slides | Recording
Module 1 Submission in OLDC Slides | Recording

What happens after I submit Module 1 in OLDC?

After the report is submitted, OCS will conduct an initial review of the State's submission of Module 1 and will follow up as necessary to ensure it is completed satisfactorily. OCS may also share this information with NASCSP for additional analysis and technical assistance as appropriate. If clarification or technical correction is needed on any items in Module 1, OCS will return the report through OLDC with specific feedback on items needing clarification or correction. OCS plans to provide any initial feedback within 60-days of receipt of annual reports. After any necessary clarifications or corrections have been received, OCS plans to conduct additional analysis working with NASCSP and with State CSBG offices directly to assess progress in addressing

Additional resources online at nascsp.org

National Association for State Community Services Programs

CSBG Annual Report Instruction Manual

Module 1: State Administration

For State and local CSBG Eligible Entity Use in Completing the CSBG Annual Report

port Instruction Manual: Module 1

HOW DO WE GET THERE?

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).					

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)
8. The number of employed participants in a career-advancement related program who entered or transitioned 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 wage or salary amount increase.					
b. Of the above, the number of employed participants who increased income from employment through hours worked increase.					
c. Of the above, the number of employed participants who increased benefits related to employment.					

Other Employment 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 _____.					

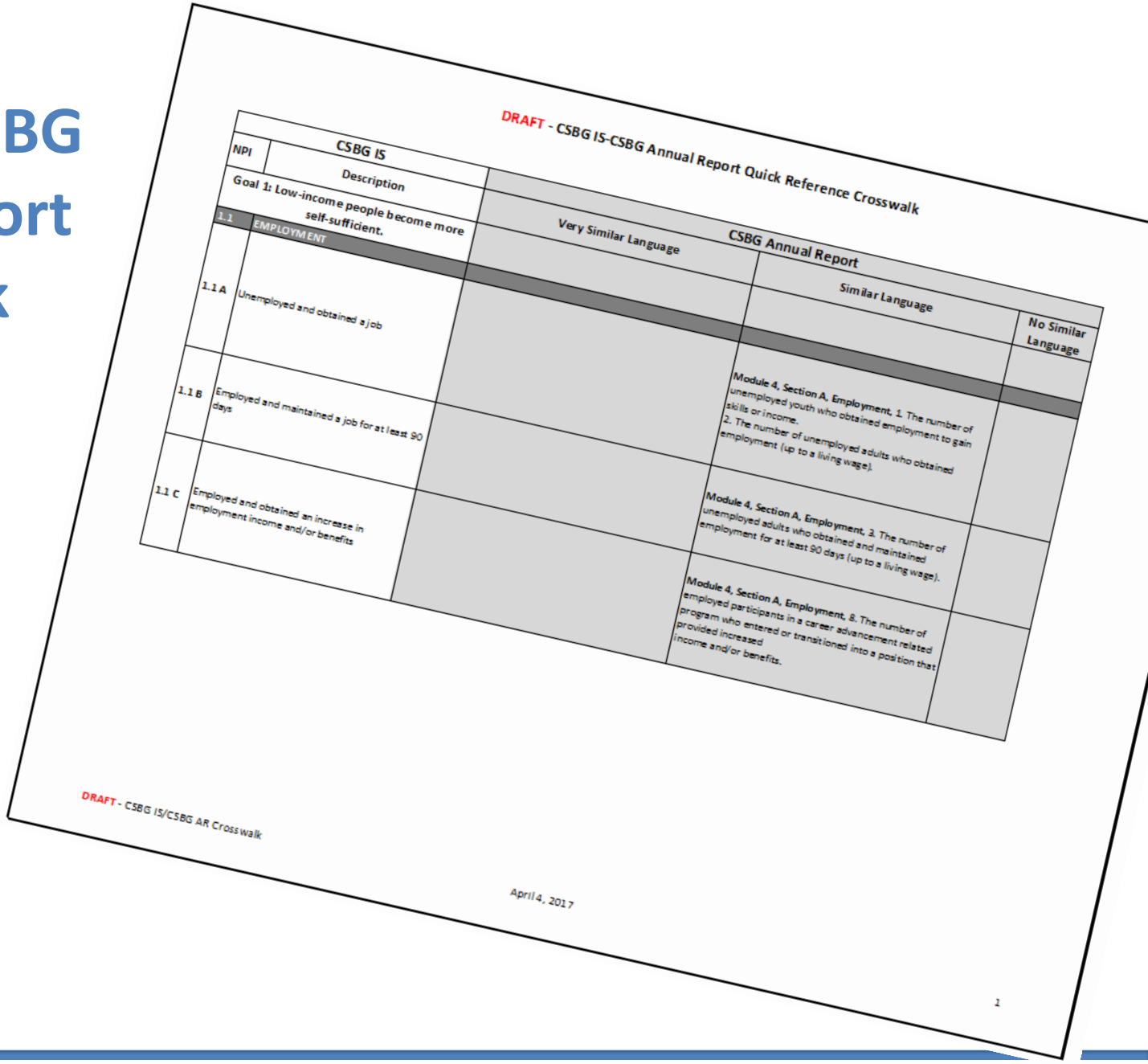
Comments:

Expands on NPI 1.1.A, B, and D

Expands on NPI 1.1.C

Annotated CSBG Annual Report

CSBG IS – CSBG Annual Report Crosswalk



DRAFT - CSBG IS-CSBG Annual Report Quick Reference Crosswalk

CSBG IS		CSBG Annual Report		
NPI	Description	Very Similar Language	Similar Language	No Similar Language
Goal 1: Low-income people become more self-sufficient.				
1.1	EMPLOYMENT			
1.1 A	Unemployed and obtained a job		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).	
1.1 B	Employed and maintained a job for at least 90 days		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).	
1.1 C	Employed and obtained an increase in employment income and/or benefits		Module 4, Section A, Employment, 8. The number of employed participants in a career advancement related program who entered or transitioned into a position that provided increased income and/or benefits.	

DRAFT - CSBG IS/CSBG AR Crosswalk

April 4, 2017

1

New Annual Report Numbering

Module 3
Section B: Community National Performance Indicators (NPIs) - Data Entry Form
CNPI EMP. Counts of Change for Employment Indicators (EMP)
CNPI EMP 1. Number of jobs created to increase opportunities for people with low incomes in the
CNPI EMP 2. Number of job opportunities maintained in the identified community.
CNPI EMP 3. Number of "living wage " jobs created in the identified community*.
CNPI EMP 4. Number of "living wage" jobs maintained in the identified community*.
CNPI EMP 5. Number of jobs created in the identified community with a benefit package.
CNPI EMP OTH Other Counts of Change for Employment Indicators - Please specify below.
CNPI EMP OTH 1. Other
CNPI EMP OTH 2. Other
CNPI EMP OTH 3. Other
RNPI EMP. Rates of Change for Employment Indicators
RNPI EMP 1. Percent decrease of the unemployment rate.
RNPI EMP 2. Percent decrease of the youth unemployment rate.
RNPI EMP 3. Percent decrease of the underemployment rate.
RNPI EMP OTH. Other Rates of Change for Employment Indicators
RNPI EMP OTH 1. Other
RNPI EMP OTH 2. Other
RNPI EMP OTH 3. Other

New Annual Report Numbering

Module 3
Section C: Community Strategies List
STR EMP Employment Strategies
STR EMP 1. Minimum/Living Wage Campaign
STR EMP 2 Job Creation/Employment Generation
STR EMP 3. Job Fairs
STR EMP 4. Earned Income Tax Credit (EITC) Promotion
STR EMP 5. Commercial Space Development
STR EMP 6. Employer Education
STR EMP 7. Employment Policy Changes
STR EMP 8. Employment Legislative Changes
STR EMP 9. Other Employment Strategy: (please specify)
STR ED Education and Cognitive Development Strategies
STR ED 1. Preschool for All Campaign
STR ED 2. Charter School Development
STR ED 3. After School Enrichment Activities Promotion
STR ED 4. Pre K-College/Community College Support
STR ED 5. Children's Trust Fund Creation
STR ED 6. Scholarship Creation

New Annual Report Numbering

Module 4
Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form
NPI EMP Employment
NPI EMP 1. The number of unemployed youth who obtained employment to gain skills or income.
NPI EMP 2. The number of unemployed adults who obtained employment (up to a living wage).
NPI EMP 3. The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).
NPI EMP 4. The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).
NPI EMP 5. The number of unemployed adults who obtained employment (with a living wage or higher).
NPI EMP 6. The number of unemployed adults who obtained and maintained employment for at least 90 days (with a living wage or higher).
NPI EMP 7. The number of unemployed adults who obtained and maintained employment for at least 180 days (with a living wage or higher).

New Annual Report Numbering

Module 4
Section B: Individual and Family Services - Data Entry Form
SRV EMP Employment Services
SRV EMP 1. Skills Training and Opportunities for Experience
SRV EMP 1a. Vocational Training
SRV EMP 1b. On-the-Job and other Work Experience
SRV EMP 1c. Youth Summer Work Placements
SRV EMP 1d Apprenticeship/Internship
SRV EMP 1e. Self-Employment Skills Training
SRV EMP 1f. Job Readiness Training
SRV EMP 2. Career Counseling
SRV EMP 2a. Workshops
SRV EMP 2b. Coaching
SRV EMP 3. Job Search
SRV EMP 3a. Coaching
SRV EMP 3b. Resume Development
SRV EMP 3c. Interview Skills Training
SRV EMP 3d. Job Referrals
SRV EMP 3e. Job Placements
SRV EMP 3f. Pre-employment physicals, background checks, etc.

New Annual Report Numbering

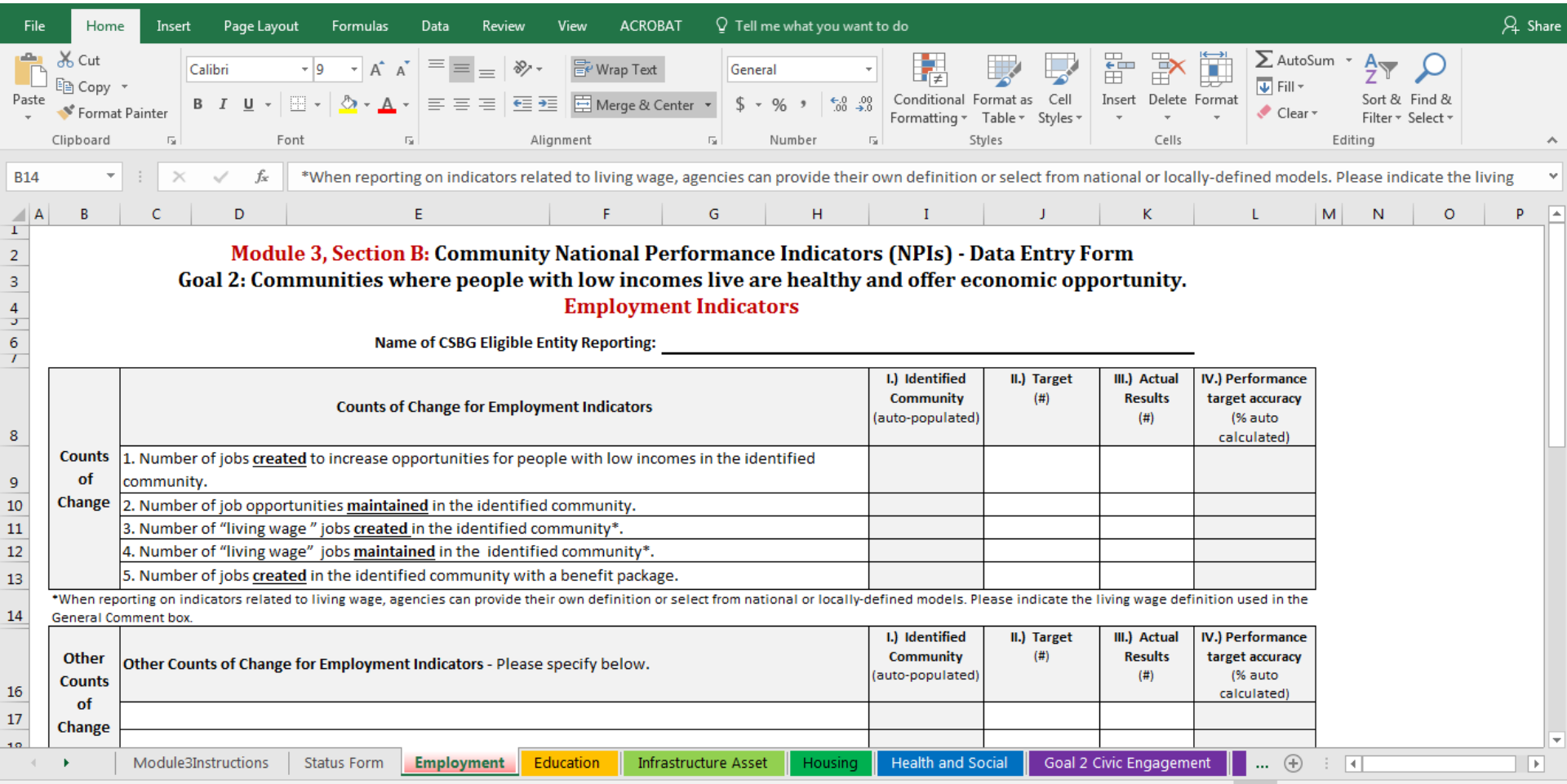
- Is it important to know if an item is Rate of Change or Count of Change? Or simply an NPI?
- Should “C” be used to differentiate Community versus Family Indicators? Or as a Count of Change?
- Should “S” be used instead of “SRV” or “STR”?

DRAFT

CSBG Annual Report/IS Survey and Organizational Standards Crosswalk

CSBG Annual Report	Current CSBG IS	Organizational Standard reference
Module 1: State Administration Section B: Statewide Goals and Accomplishments Section I: Results Oriented Management and Accountability (ROMA) System	Section D	1.2 • The Organization analyzes information collected directly from low-income individuals as part of the Community Assessment. 1.3 • The Organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board. 3.3 • The Organization collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the Community Assessment 9.3 • The organization's governing board and staff leadership have analyzed the agency's outcomes within at least the past 12 months and identified any necessary operational or strategic program adjustments and improvements.
Module 2: Agency Expenditures, Capacity, and Resources Section A: Local Agency CSBG Expenditures	Section E	n/a
Module 2: Agency Expenditures, Capacity, and Resources Section B: Local Agency Capacity Building	NPI Goals Three, Four, and Five	1.1• The Organization demonstrates low-income participation in its activities. 2.1 • The Organization has documented or demonstrated partnerships across the community (for a specific purpose) including other anti-poverty organizations in the area. 2.4 • The Organization documents the number of volunteers and hours mobilized in support of its activities. 6.3 • The approved Strategic Plan contains Family, Agency, and/or Community goals.

Modules 2-4 in Excel



Module 3, Section B: Community National Performance Indicators (NPIs) - Data Entry Form

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.

Employment Indicators

Name of CSBG Eligible Entity Reporting: _____

	Counts of Change for Employment Indicators	I.) Identified Community (auto-populated)	II.) Target (#)	III.) Actual Results (#)	IV.) Performance target accuracy (% auto calculated)
Counts of Change	1. Number of jobs **created** to increase opportunities for people with low incomes in the identified community.				
	2. Number of job opportunities **maintained** in the identified community.				
	3. Number of "living wage " jobs **created** in the identified community*.				
	4. Number of "living wage" jobs **maintained** in the identified community*.				
	5. Number of jobs **created** in the identified community with a benefit package.				

*When reporting on indicators related to living wage, agencies can provide their own definition or select from national or locally-defined models. Please indicate the living wage definition used in the General Comment box.

	Other Counts of Change for Employment Indicators - Please specify below.	I.) Identified Community (auto-populated)	II.) Target (#)	III.) Actual Results (#)	IV.) Performance target accuracy (% auto calculated)
Other Counts of Change					

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- Member Services
- CSBG
  - **CSBG Services and Technical Assistance**
  - **CSBG TTA Center**
  - **Resources and Recordings**
    - Training Request Form
  - **State Plan Information**
  - **Organizational Standards**
  - **ROMA**
    - ROMA Next Generation
      - FRN2 30 Day Comment Period
      - FRN1 60 Day Comment Period
      - Initial Feedback Period
      - Archive
    - National ROMA Peer to Peer Training
  - **CSBG IS Survey**
    - CSBG IS 2016 Submission Form
  - **CSBG Annual Report and Resources**
    - Archive
  - **CSBG Policy and Government Affairs**
- Weatherization
- Healthy Homes
- Carbon Project
- State Contacts

Tools

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 Entitie s - 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.

Module 1 Resources:

CSBG Annual Report - Module 1: State Administration Instruction Manual - This document contains detailed instructions to guide your completion of Module 1.

Module 1 FAQs and Highlights - This 2-page flyer provides quick, important information about completing Module 1.

Module 1 Word Document - Module 1, State Administration of the CSBG Annual Report is now available in a word document.

OLDC Demos:

Take a look at these quick videos demonstrating how to complete each section of Module 1 in OLDC: Section A , Section B , Section C , Section D , Section E , Section F , Section G , Section H , Section I

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.

Training and Technical Assistance

- Additional Tools:
  - Support for states that begin collecting data on July 1, 2017
  - New numbering system for the CSBG Annual Report
  - CSBG Annual Report Crosswalk with LIHEAP, Head Start, WIOA, and Weatherization
  - Webinar Series
  - 2-day CSBG Annual Report Training
  - Data Dictionary
  - Instruction Manual and Lexicon

Questions?

- What have you already done to get ready for implementation of modules 2-4?
- What do you need from NASCSP and other national partners?

AMERICAN CUSTOMER SATISFACTION INDEX (ACSI)

How the ACSI is Utilized

- In fall 2015, OCS used the ACSI methodology to obtain feedback from:
  - State CSBG Lead Agencies on services provided by the CSBG, as outlined in the Federal Accountability Measures.
  - CSBG Eligible Entities about services provided by the state CSBG Lead Agencies, as detailed in the new State Accountability Measures.
- OCS and the State CSBG Directors received their ACSI Survey Reports in February, 2016.

Key State Activities Covered in the Survey

- Development of the State Plan
- Distribution of Funds
- Use of Discretionary Funds
- Training and Technical Assistance
- Monitoring and Corrective Action
- Linkages and Communication

The ACSI: State Accountability Measures

- Seven of the State Accountability Measures specify use of ACSI survey data and other feedback, as appropriate, to adjust the State Plan to improve performance.

- State Accountability Measures 1Sb, 2Sb, 3Sb, 3Sd, 4Sb, 7Sb and 8S are measures of eligible entity satisfaction with the state's performance of critical elements of the State Plan.

The ACSI and the CSBG Annual Report

- As part or the FY 2016 Annual Report, States reported on:
  - The State's most current ACSI Overall Satisfaction Score;
  - How the State considered feedback from eligible entities and other sources;
  - What actions were taken as a result of that feedback; and
  - Its target for Overall Satisfaction of the eligible entities in the State.

The ACSI: CSBG Annual Report

- Because the State CSBG Plan may ***cover two fiscal years***, annual updates related to the eligible entities satisfaction are provided in the Annual Report.
- Information about the satisfaction score and future target are requested in ***both the State Plan and the Annual Report.***

Overall Satisfaction: Setting Targets

- Sharing best practices across states–knowing what works and what does not—in terms of the State Accountability Measures can be key to long-term success.
- NASCSP Best Practices Workgroup
- Working collaboratively with the local agencies to make improvements and communicating what improvements are made will likely also have a positive impact on the ACSI score.

The ACSI: Next Steps

- Going forward, ***OCS will continue to use the ACSI*** as part of its enhanced Performance Management Framework.

- Use of the ACSI allows OCS to collect ***consistent, uniform information from eligible entities*** across the country, and provides the states with actionable insights to improve their customer experience and boost program results.

- This is in keeping with the CSBG networks' enhanced ***emphasis on using data for analysis and decision-making to continually make program improvements.***

The ACSI: Next Steps

- OCS expects to conduct the ACSI Survey of Eligible Entities ***on at least a biennial basis***.
- The next survey is expected to be administered during the ***third quarter*** of FY 2017 (April-June 2017).
- The survey results will be available to the States for ***use in developing the FY 2018 State Plans***.
- OCS anticipates providing the States with timely survey results and ***timely feedback*** on the States use of the survey data.

THEORY OF CHANGE

ROMA Next Generation

- ROMA is a system for **continuous quality improvement** to enable the network to measure, analyze, and communicate performance.
- ROMA NG moves Community Action at all three levels to a **culture of continuous learning** rather than a compliance and reporting culture.
- Ultimately, ROMA NG will help the CSBG Network **generate more robust results** for individuals with low-incomes and the communities served.

What's new in ROMA Next Generation?

- The adoption of a **National Community Action Theory of Change.**
- Renewal of the CSBG network understanding of the necessity of working toward **community change** as well as individual and family outcomes.
- Focus on **improved collection and analysis of data.**
  - Increased use of data at every point of the full ROMA Cycle.
  - Integration of the phases of the ROMA Cycle.

Community Action Theory of Change

The foundation of ROMA NG is the **National Community Action Theory of Change.**

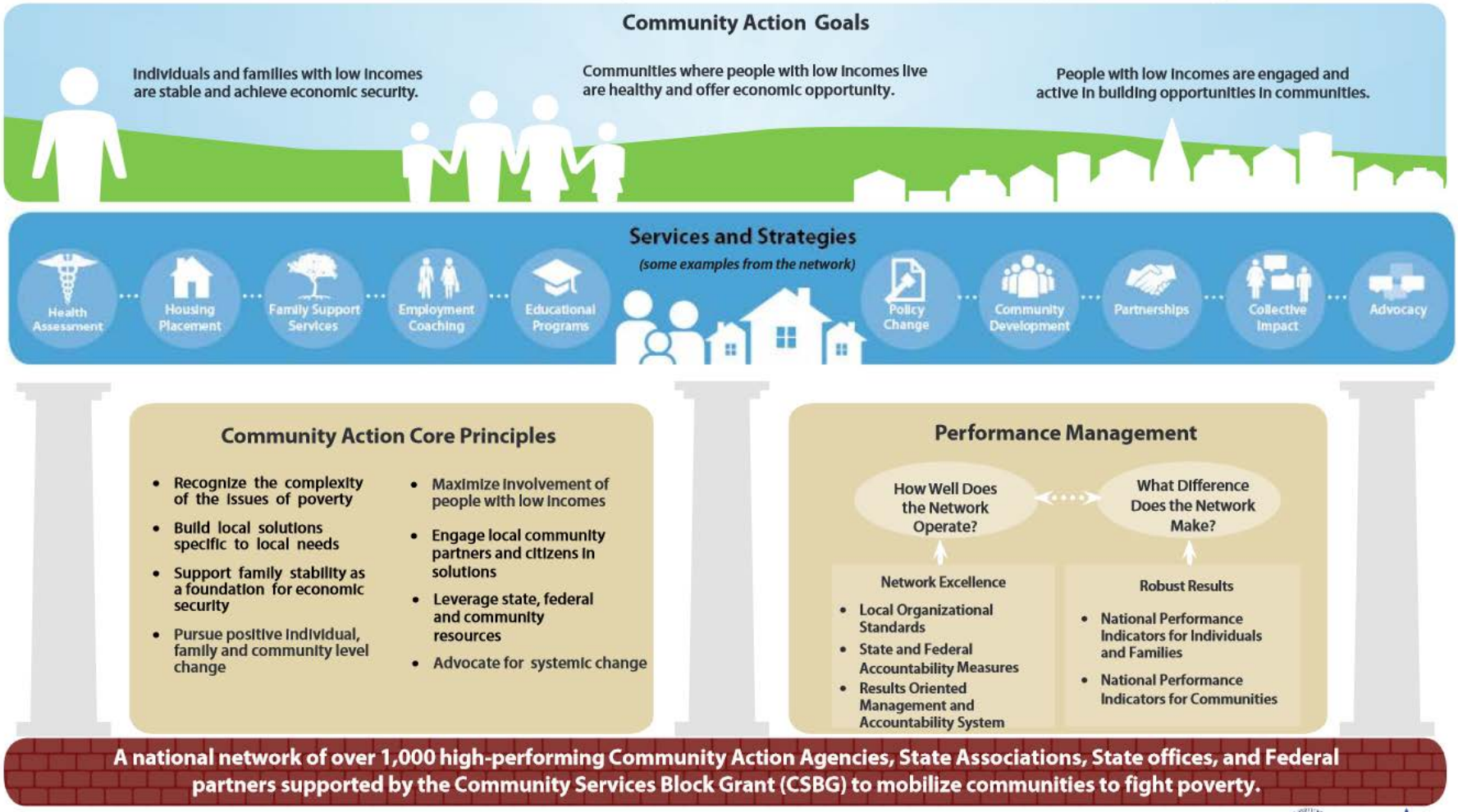
What is the Community Action Theory of Change?

- The National Community Action TOC is the articulation of the underlying beliefs and assumptions that guide a service delivery strategy.
- It identifies the “why” and the “how” of the activities undertaken and it identifies the “what” of change and improvement produced.
- This national statement can be adapted for specific local needs and approaches by local CAAs.

Why We Need It

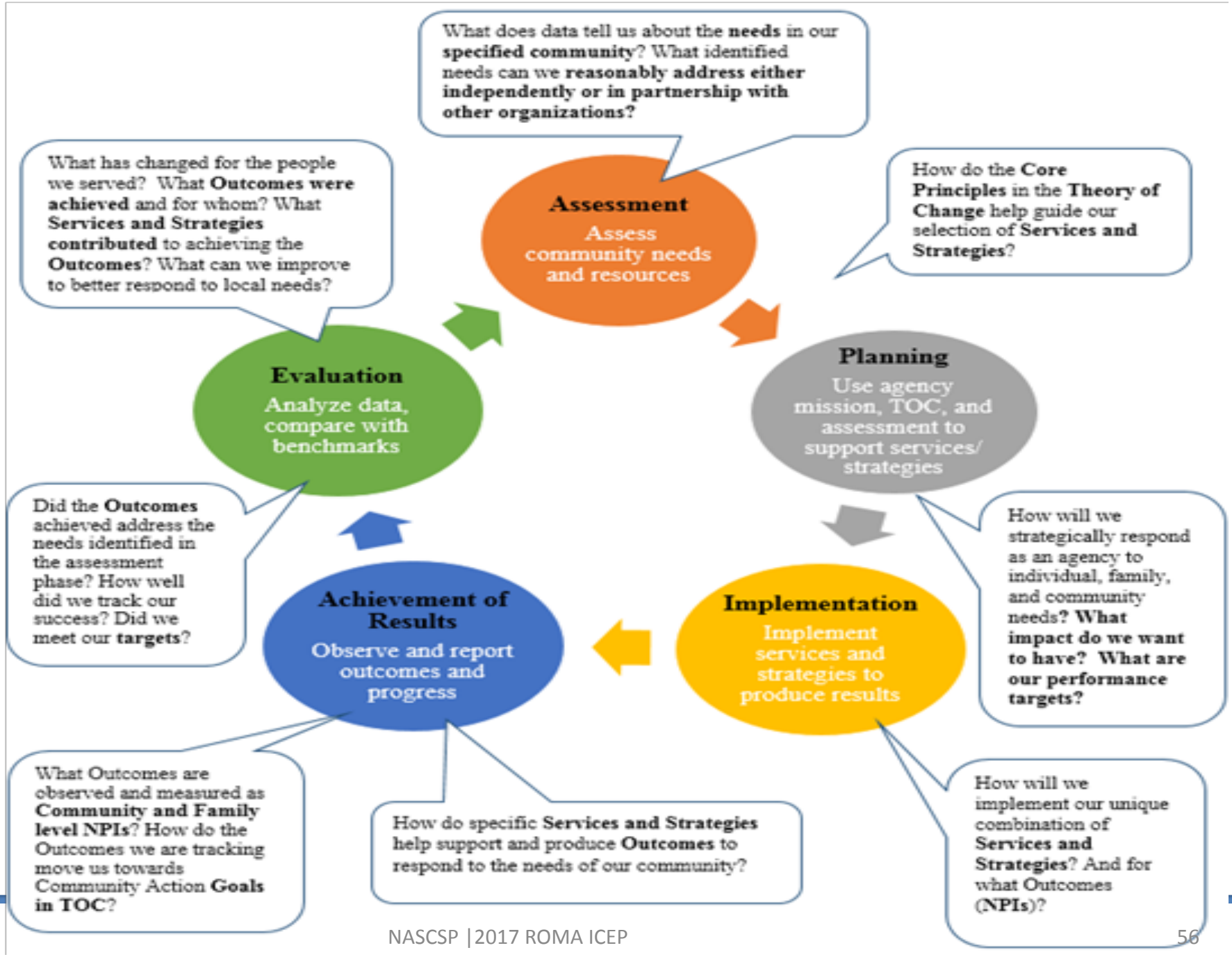
- Make a complicated system easier to understand.
- Unify the network.
- Articulate core principles.
- Identify national goals.

The National Community Action Network Theory of Change



To learn more, check out the Community Action Theory of Change Report. www.nascsp.org

NASCSP


What does data tell us about the needs in our specified community? What identified needs can we reasonably address either independently or in partnership with other organizations?
Assessment
Assess community needs and resources
How do the Core Principles in the Theory of Change help guide our selection of Services and Strategies?
Planning
Use agency mission, TOC, and assessment to support services/ strategies
How will we strategically respond as an agency to individual, family, and community needs? What impact do we want to have? What are our performance targets?
Implementation
Implement services and strategies to produce results
How will we implement our unique combination of Services and Strategies? And for what Outcomes (NPIs)?
How do specific Services and Strategies help support and produce Outcomes to respond to the needs of our community?
Achievement of Results
Observe and report outcomes and progress
What Outcomes are observed and measured as Community and Family level NPIs? How do the Outcomes we are tracking move us towards Community Action Goals in TOC?
Did the Outcomes achieved address the needs identified in the assessment phase? How well did we track our success? Did we meet our targets?
Evaluation
Analyze data, compare with benchmarks
What has changed for the people we served? What Outcomes were achieved and for whom? What Services and Strategies contributed to achieving the Outcomes? What can we improve to better respond to local needs?

Local Community Action Theory of Change

A Local Theory of Change

The national TOC is the framework for the network, but *each agency will identify its own TOC* that will be a guide through analysis of Needs Assessment data, strategic planning, implementation of services, collection of data, and analysis of that data.

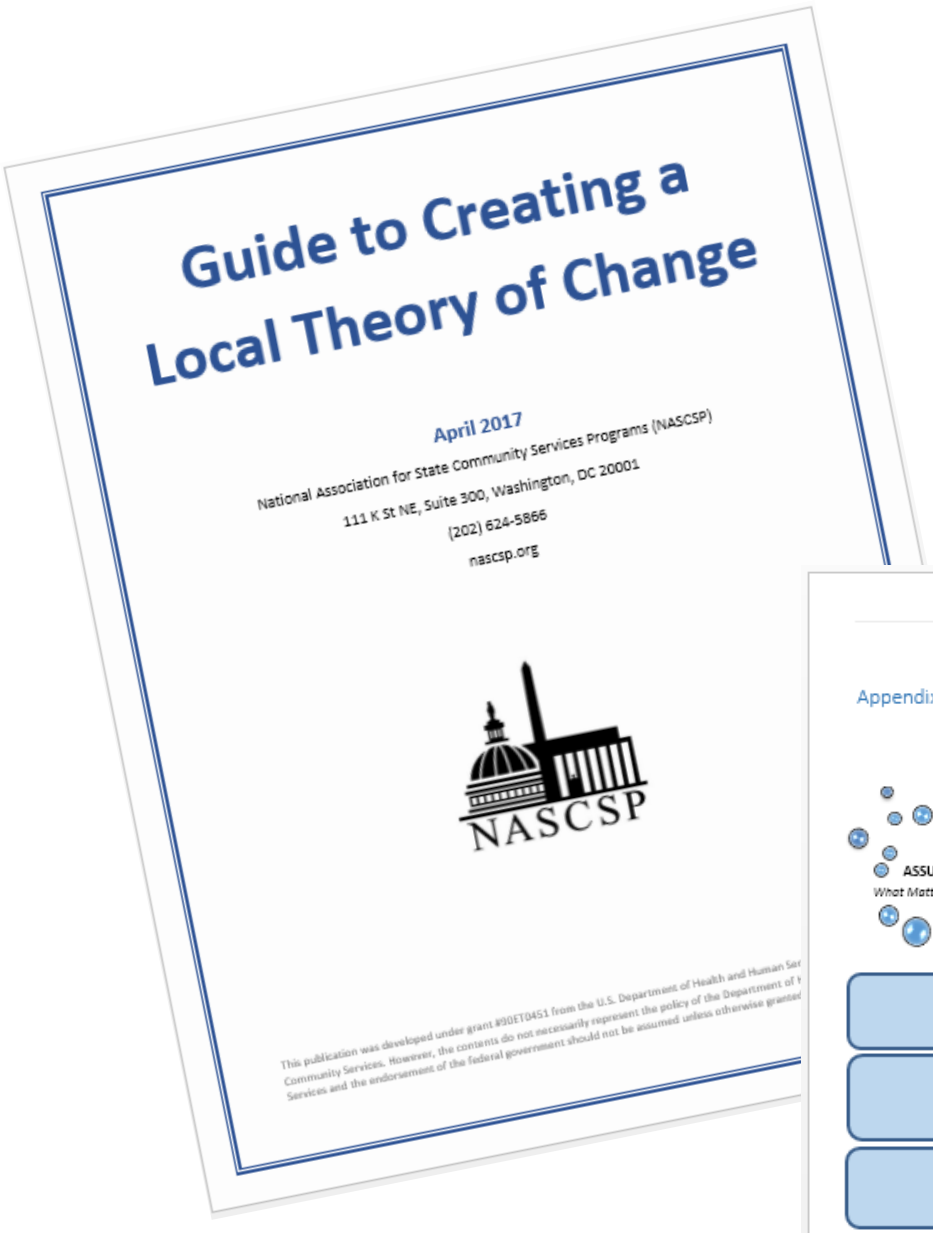
A Local Theory of Change

- The process of creating a local agency Theory of Change (TOC) is a process of thinking about how the agency is supposed to work and what is supposed to change because of their work.

A Local Theory of Change

- The TOC thinking process essentially answers the questions:
  - How will this agency affect the movement of people with low-incomes to stability and economic security?
  - How will it affect the well-being of the community?

New Tool Available at nascsp.org


Guide to Creating a Local Theory of Change

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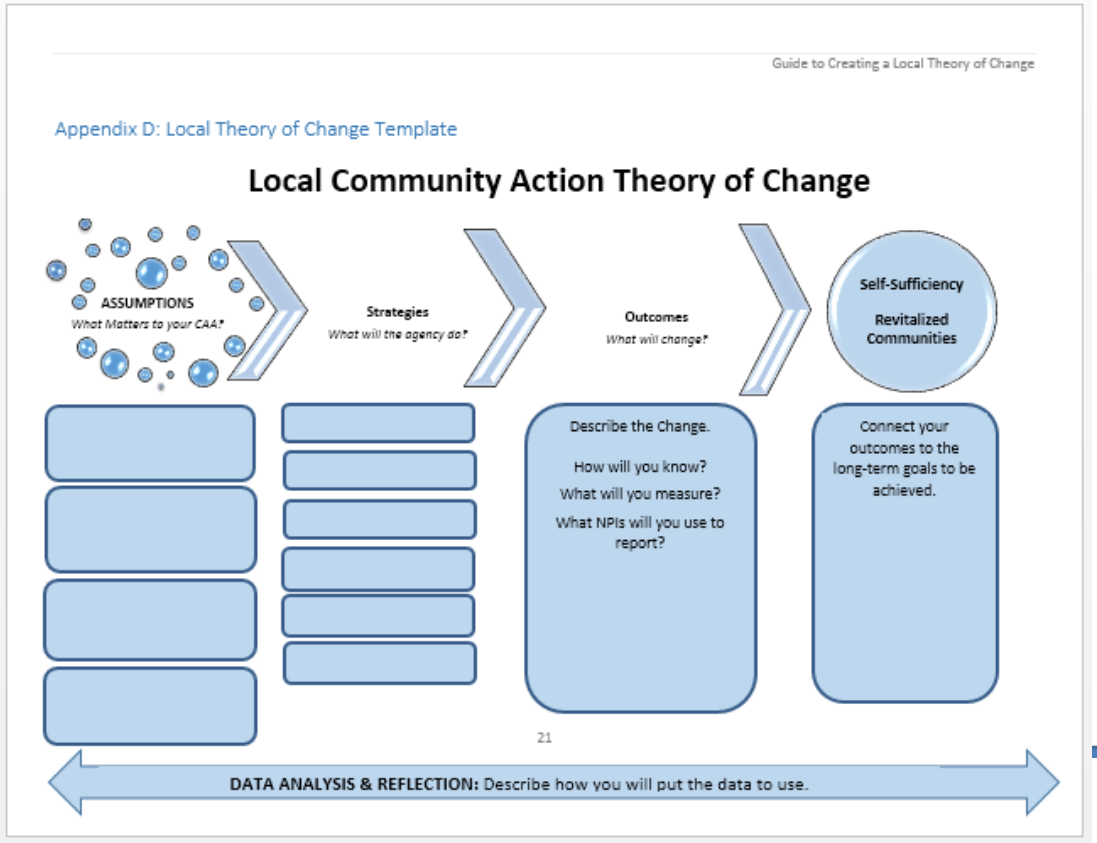

Appendix D: Local Theory of Change Template

Local Community Action Theory of Change

ASSUMPTIONS
What Matters to your CAA?

Strategies
What will the agency do?

Outcomes
What will change?

Self-Sufficiency

Revitalized Communities

Describe the Change.

How will you know?

What will you measure?

What NPIs will you use to report?

Connect your outcomes to the long-term goals to be achieved.

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DATA ANALYSIS & REFLECTION: Describe how you will put the data to use.

Guide to Creating a Local Theory of Change

- The worksheets help an agency work through the process of:
  - identifying assumptions;
  - thinking about the connections between identified needs, population served, outcomes that are realistic and possible for the population and the community; and
  - thinking about how the services and strategies provided achieve the outcomes.

Questions?