Panelists

- **Karen Dunn, WA**, CSBG Program Manager, Department of Commerce
- **Crystal Johnson, NV**, CSBG Program Manager, Department of Health and Human Services
- **Jackie Orr**, CSBG State Assistance Director, NASCSP
Process

• A few years ago, NASCSP was requested by its members to provide guidance and identify common State CSBG policy and procedure practices and to recommend what should be included in a Policy and Procedure Manual used to administer CSBG.

• NASCSP conducted a survey with CSBG State Offices and developed an Issue Brief that contained recommended contents for a CSBG Policy and Procedures Manual.

• More recently, the membership requested an update to that document.

• A small group of State Office representatives from AR, MN, NE, NV, VA, WA, and WI met to review the original document developed by NASCSP and make revisions.

Why have a CSBG Policies and Procedures Manual?

• To clarify the federal and state requirements for CSBG.

• For efficient use and management of grant funds.

• To provide consistency and direction for new program managers.

• Applicable to all CSBG recipient agencies.

• Establish expectations of eligible entities.

• Provide supplement grant/contract language.

• Provide forms for use by eligible entities i.e., Disposition of Equipment, Quality Improvement Plans, Notice of Equipment Purchase, etc.
Manual Contents

General
✓ Mission and Purpose of State Office
✓ Definition of Eligible Entities
✓ Formula and CEE Allocations
✓ Designation and Re-designation of Eligible Entities
✓ Funding Termination and Reductions
✓ Contract/Grant Modification Procedures
✓ Results Oriented Management and Accountability (ROMA)

Monitoring
✓ Monitoring Philosophy and Principles
✓ Monitoring Practices
✓ Corrective Action
✓ Training and Technical Assistance (T/TA)
Eligible Entity

- Private CAA Board Composition
- Public CAA Board Composition
- Community Action Plan
- Customer Privacy
- Personnel Policy
- Client Income Eligibility
- Client Income Eligibility Verification

Eligible Entity

- Conflict of Interest
- Political Activity / Hatch Act Restrictions
- Workforce Innovation and Opportunity Act (WIOA)
- Child Support Services and Referrals
- Referrals to Drug Treatment Services
- Reporting
- CSBG Organizational Standards
- Community Needs Assessment
- Tribal/Tribal Entities

Fiscal

- Administrative and Indirect Costs
- Invoicing and Requests for Payment Instructions
- Equipment Disposition and Equipment Purchases
- Audit Requirement
- Fidelity Bonds and Insurance Treatment Services