The Goal

Implement ROMA at new level that will move CSBG forward and strengthen Community Action over the next 5-10 years.

While ROMA has served Community Action well for over twenty years, ROMA in the “Next Generation” must push the field at all levels to increase impact.
ROMA Next Generation

Where We Want To Be

- OCS, States and CAAs use performance data to achieve greater stability and economic security for families and communities.

- Each level of the CSBG Network
  - executes the full ROMA cycle.
  - uses data on people, services, and outcomes for decision making

ROMA Next Generation

- Focuses on integrating information on the people served, services and strategies provided, and the outcomes achieved by eligible entities.
- Is a system for continuous quality improvement focused on creating learning organizations at all levels of the CSBG network.
- Requires attention to the capacity of state and local data systems and support.

Key Additions to ROMA

- National Theory of Change (TOC)
- Local TOCs
- CSBG Annual Report
- Increased focus on community level work
- Increased focus on analysis and use of data
- Emphasis on the integration of all phases of the ROMA cycle
• National Theory of Change (TOC)
  • Local TOCs
  • New CSBG Annual Report
  • Increased focus on community level work
  • Increased focus on analysis and use of data
  • Emphasis on the integration of all phases of the ROMA Cycle

ROMA NEXT GENERATION

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.

In 2011 Community Action leaders committed to making reforms to CSBG that would improve results for individuals with low-incomes and communities.
• Articulates core principles for CAA Network.
• Identifies CAA Network national goals.
• Demonstrates CAA Network’s unique approach.
• Makes a complicated system easier to understand.
• By reflecting critical elements of the current CSBG Act.
• Incorporating CAA history, vision and values.
• Considering fresh and innovative thinking about the future of our work.
• Since 2012 NASCSP has solicited feedback from the Network at meetings and via comment periods to develop the final TOC.
• First listening session held January, 2013.
**National Goals**

- Individuals and families with low incomes are stable and achieve economic security.
- Communities where people with low incomes live are healthy and offer economic opportunity.
- People with low incomes are engaged and active in building opportunities in their communities.
• National Theory of Change (TOC)
• Local TOCs
• New CSBG Annual Report
• Increased focus on community level work
• Increased focus on analysis and use of data
• Emphasis on the integration of all phases of the ROMA Cycle

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 reflection of the results of the CAAs needs assessment, strategic planning and Community Action Plan.
• Local TOCs help agencies articulate their assumptions and the connections between what they do and what is accomplished.

Local Theory of Change

• Does the CAA have its own TOC that expresses:
  – What the agency believes about its role as an anti-poverty agent?
  – How the agency is supposed to work?
  – What is supposed to change because of their work?
• Does the CAA’s plan include basic answers to the questions “How will this agency affect the movement of people with low-incomes to stability and economic security?” and also, “How will it affect the well-being of the community?”
- National Theory of Change (TOC)
- Local TOCs
- New CSBG Annual Report
- Increased focus on community level work
- Increased focus on analysis and use of data
- Emphasis on the integration of all phases of the ROMA Cycle

New CSBG Annual Report

Actualizes the Performance Management Framework as the vehicle that moves the framework forward
New CSBG Annual Report

- Provides a tool for monitoring the entire performance management framework.
- Collects information on actual performance that compares with planned performance.
- Initiates questions to guide data analysis practices and discussions about strategies for improving performance.
- Provides information for OCS, States and local CAAs to use to manage and improve results.

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

CSBG Annual Report and CSBG Organizational Standards (Module 1)

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>State Plan Target</th>
<th>Number of Entities Assessed</th>
<th>Number that Met All (100%) of State Standards</th>
<th>Actual Percentage Meeting All (100%) of State Standards</th>
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<tbody>
<tr>
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<td>Auto-populated</td>
<td>Direct a number between 0 – 100</td>
<td>Direct a number between 0 – 100</td>
<td>Auto-calculation</td>
</tr>
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AR Module 1 -- SECTION I
Results Oriented Management and Accountability (ROMA) System

- 1.1. ROMA Participation: In which performance measurement system did the State and CSBG Eligible Entities participate, as required by Section 678E(a) of the CSBG Act and the assurance under Section 676(b)(12) of the CSBG Act?
  - State will review and confirm The Results Oriented Management and Accountability (ROMA) System.
- 1.1a. If ROMA was selected in item 1.1, provide an update on any changes in procedures or to data collection systems that were initiated or completed in the reporting period.
I.2. State ROMA Support

I.2. State ROMA Support: How did the State support the CSBG Eligible Entities in using the ROMA system or alternative performance measurement system in promoting continuous improvement? For example, describe any data systems improvements, support for community needs assessment, support for strategic planning, data analysis etc.

I.3. 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.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?
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.

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Module 2

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<table>
<thead>
<tr>
<th>A.A. Needs for Agency Capacity Building Activities Funded by CSBG:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Please identify which activities were funded by CSBG under Agency Capacity in Table A.2. Please check all that apply.</td>
</tr>
<tr>
<td>□ Community Needs Assessment □ Staff Management &amp; Training □ Other</td>
</tr>
<tr>
<td>□ Strategic Planning □ Training &amp; Technical Assistance</td>
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</table>

Below please specify other activities Funded by CSBG under Agency Capacity:

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<table>
<thead>
<tr>
<th>B.A. The number of staff who hold certifications that increase agency capacity to achieve family and community outcomes, as measured by one or more of the following:</th>
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<tbody>
<tr>
<td>1. A.1. Number of Nationally Certified Professional (NCP)</td>
</tr>
<tr>
<td>2. A.2. Number of Nationally Certified Alcohol Professionals (NCPAP)</td>
</tr>
<tr>
<td>3. A.3. Number of Certified Community Action Professionals (CCAP)</td>
</tr>
<tr>
<td>4. A.4. Number of Staff with a Child Development Certification</td>
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<tr>
<td>5. A.5. Number of Staff with a Family Development Certification</td>
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<tr>
<td>6. A.6. Number of Certified Assessors</td>
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<tr>
<td>7. A.7. Number of Staff with a Certified Professional Certification</td>
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<tr>
<td>8. A.8. Number of Staff with a Certified Professional Certification</td>
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<tr>
<td>9. A.9. Number of Certified Event Coordinators (CEC)</td>
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<td>10. A.10. Number of Certified Event Coordinators (CEC)</td>
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<td>11. A.11. Number of Certified Event Coordinators (CEC)</td>
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<tr>
<td>19. A.19. Number of Certified Event Coordinators (CEC)</td>
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<tr>
<td>20. A.20. Other (please specify others below):</td>
</tr>
</tbody>
</table>

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NASCSP | Performance Management Framework
• National Theory of Change (TOC)
• Local TOCs
• New CSBG Annual Report
• **Increased focus on community level work**
• Increased focus on analysis and use of data
• Emphasis on the integration of all phases of the ROMA Cycle

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**Community Level Work**

- **Economic Opportunity Act and CSBG Act**
  include the importance of addressing poverty on both the individual/family and community levels.

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**Community Level Work**

- Module 3 in the CSBG Annual Report demonstrates a renewal of the CSBG network's understanding of the necessity of working toward community change as well as individual and family outcomes.
- Creates the reporting space for CAAs to tackle complex community level issues.
- Collects information on the agency's community level initiatives.
- Showcases the connection between initiatives and outcomes.
- Demonstrates how initiatives would be reported on over time.
Collecting, Analyzing and Using Data

- The ROMA Next Generation framework builds on ROMA principles and practices to support agencies and states as they gather and use data at all points of the cycle.
- Data collected and analyzed from assessment through evaluation allow us to identify our successes and our challenges and make use of the information for continuous improvement.
Is the data received from the local agencies accurate? Reliable? (Unduplicated counts of individuals served?)

Did the CAAs conduct the needed analyses to understand what is working and what changes to make to increase their impact?

How many people were served across the State? What were the characteristics of the people served? How does this compare with what we know about the individuals and communities of low-income in this state? What trends are evident?

What types of services were provided? How many of these types of services were provided across the state? How many agencies are engaged in partnerships or community level initiatives?

What Individual/Family Outcomes (NPIs) were met by each of the local agencies across the state? What outcomes were not met? Taken together, what outcomes (NPIs) were achieved across the state? What community changes were achieved?

What service delivery models appear most effective? What local agency best practices should be replicated in other parts of the state?

What local agencies should receive enhanced training and technical assistance? What actions might the State take to enhance performance and increase impact across the state?

Telling the Story of CA in the State: In this State, Community Action achieved these Results (Outcomes) for this many individuals/families/communities (Output) with low-income by delivering these services and implementing these Strategies (Outputs), at this Cost.”
• National Theory of Change (TOC)
• Local TOC
• New CBG Annual Report
• Increased focus on community level work
• Increased focus on analysis and use of data

**Emphasis on the integration of all phases of the ROMA Cycle**

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**Not Just Clockwise Movement**

The phases of the ROMA cycle must be considered together, with the understanding that the agency might move from Implementation back to Assessment, or from Reporting back to Planning.
ROMA NEXT GENERATION AND THE ORGANIZATIONAL STANDARDS

Assessment:
- Assess community needs and resources, ensure the list of Organizational Standards are considered.
- 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?

Planning:
- Use agency mission, TOC, and assessment to support services/initiatives, use the organizational standards as a guide.
- How do the Core Principles in the Theory of Change help guide our agency strategic plan and community action plan?
- 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? What services and initiatives do we select?
ROMA, ROMA NG and Organizational Standards

**Implementation**
- How will we implement our unique combination of Services and Initiatives? And for what Outcomes (NPIs)?
- Do we have a process for observing progress and using data to make changes as needed? Do we need to make changes to our services and initiatives?

**Organizational Standards**
- Are programs and services communicated to the public? Do financial reports showing program progress? Are they clear and easy for the board to review?

How will we implement our unique combination of Services and Initiatives (strategies) to produce results?

**Achievement of Results**
- What Outcomes are observed and measured as Community and Family level NPIs? How do the Outcomes we are tracking move us towards our agency goals in our local TOC?
- How do specific Services and Initiatives (Strategies) help support and produce Outcomes to respond to the needs of our community?

**Evaluation**
- Did the Outcomes achieved address the needs identified in the assessment phase? How well did we track our success? Did we meet our targets?
- What has changed for the people we served? What has changed for our community? What Outcomes were achieved and for whom? What Services and Initiatives contributed to achieving the Outcomes? What can we improve to better respond to local needs?

**Organizational Standards**
- Did the agency present to the board, at least within the past 12 months, an analysis of the agency's outcomes?