

# CSBG ANNUAL REPORT/ROMA NG TALKING POINTS

October 10, 2017

## Overview

NASCSP drafted the talking points below for use by the members of the CSBG DATA Task Force (DATA TF). Task Force members can use these talking points when announcing updates on Regional Performance Innovation Consortia (RPIC) calls, statewide or regional meetings, or when communicating with your CAA, State Association, State Office, or membership. The items in the blue box provide background and context for each topic. The bulleted items will be updated and reviewed by the DATA TF periodically.

## DATA Task Force

*The CSBG DATA TF was convened by the National Association for State Community Services Programs (NASCSP) to assist the Office of Community Services (OCS) and NASCSP in understanding and addressing the CSBG Network's data needs and the use of data for analysis and continual improvement of results. The CSBG DATA Task Force will serve as a consultative body focused on the transition from the CSBG IS Survey to the CSBG Annual Report, as well as ongoing assistance in the implementation of the CSBG Annual Report. The DATA TF is comprised of 26 members from local CAAs, State Associations, State Offices, OCS, and National Partners (ANCRT, NASCSP, CAP, CAPLAW, and NCAF). There is representation from every HHS Region, Public and Private CAAs, and rural and urban areas. The task force is led by a State and a CAA co-chair.*

### DATA TF Accomplishments to Date

- The DATA TF has met four times since February including a two-day in-person meeting in June. During those meetings, the task force:
  - determined priorities and established five subcommittees,
  - provided extensive feedback to NASCSP on the Instruction Manual for Modules 2 and 4 of the new CSBG Annual Report, and posed the “big issues” of concern in Module 3,
  - identified key communication issues.
- Priorities established:
  - Module 3 Community: how to choose, define community
  - Module 4 Individual and Family: how to clarify unduplicated count
  - Flow charts/common rules (front end, back end)
  - Standard measurement tools
  - A list of standard documentation for strategies and services
  - RFP Template (2<sup>nd</sup> level priority- other 5 need to be done first)
- Sub-committees set up:
  1. **Guidance Documents:** Assist in finalizing the instruction manuals; provide examples of programs in each category; assist in beta testing; and address the following:
    - Module 3 Community: how to choose, define community

- Module 4 Individual and Family: how to clarify unduplicated count
  - Flow charts/common rules (front end, back end)
  - A list of standard documentation for strategies and services
2. **Analysis:** Provide insight on how to analyze CSBG data at each level; assist in development of state and national reports and data dashboards; create materials for analysis, analysis training module.
  3. **Systems/IT:** Identify systems capacity; develop tools to assist agencies and states at varying levels of capacity; develop a procurement template.
  4. **Training:** Identify and prioritize training needs for the CSBG Annual Report and ROMA NG; assist in development of tools and training, such as standard measurement tools, to address these needs.
  5. **Communications and Marketing:** Review and prepare communications materials; assist in development of a communications strategy.

## ROMA Next Generation

*ROMA Next Generation (NG) is a way of talking about the role of the ROMA principles and practices in the new Performance Management Framework. The CSBG Annual Report is a component of the ROMA NG framework.*

- ROMA NG is bigger than the new CSBG Annual Report
- Key Additions to ROMA:
  - National Theory of Change (TOC):
    - 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.
  - Local TOCs
    - The national TOC is the framework for the network, but *each agency may identify its own TOC* that reflects 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 difference they make.
  - New CSBG Annual Report:
    - Part of the new Performance Management Framework that allows all of its elements to be **reported**.
  - Increased Focus on Community-level Work
    - Module 3 in the new CSBG Annual Report demonstrates a renewal of the CSBG network’s understanding of the necessity of working toward community change and not only 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.
- Increased Focus on Analysis and Use of 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 ROMA 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 and enhanced results.
- Emphasis on the Integration of All Phases of the ROMA Cycle
  - The phases of the ROMA Cycle must be considered together, with the understanding that the agency may move from Implementation back to Assessment or from Reporting back to Planning.

## CSBG Annual Report

*The federal Office of Management and Budget approved the new CSBG Annual Report in January 2017. The report is being implemented through a phased-in approach. For FY16 and FY17, the States will only report on Module 1 using the On-Line Data Collection (OLDC) system. Data collection for the full CSBG Annual Report (Modules 1-4) will begin in FY18 and will be submitted in OLDC for the first time on March 31, 2019.*

- **WHAT:** Purpose of the CSBG Annual Report
  - Fulfills CSBG Act reporting requirements and will replace the CSBG IS Survey.
  - State Plans are required to indicate how the State **plans** to operate CSBG and use CSBG funding.
  - Annual Reports are required to indicate how the state **actually** operated and used CSBG funding.
  - Provides information on State progress with Organizational Standards and State Accountability Measures.
  - Provides information for OCS, States and local CAAs to use for analysis and evaluation in order to better manage and continue to improve outcomes for families and communities of low income.
- **WHEN:** The CSBG Annual Report is here and it is not delayed.
  - For FY17, CAAs report in the CSBG IS for the last time. States complete only Module 1 of the new Annual Report in OLDC.
  - For FY18, CAAs and States report using the new Annual Report. The full CSBG Annual Report is due in OLDC for the first time on March 31, 2019.
  - When do I start collecting data?

- It depends on your State's CSBG Reporting Period and will be one of the following: July 1, 2017-June 30, 2018; October 1, 2017-September 30, 2018; or January 1, 2018-December 30, 2018
  
- **WHY:** Why are we making the change to the CSBG Annual Report?
  - To obtain data necessary to better tell the story of the continuum of outcomes needed for people of low-income to achieve economic security.
  - Separates *outputs* (services) from *outcomes* (NPIs); standardizes terms and indicators
  - Connects the dots: people > services > outcomes
  - Provides data that is easy to understand and allows some meaningful summary at the national level.
  - Provides 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 an outcome?
  - Collects information on the agency's community level initiatives.
    - Showcases the **connection** between initiatives and outcomes.
    - Demonstrates how initiatives are **reported on over time**.
  - Provides information to better educate decision makers who set policy and funding.
  
- **HOW:** Planning and Implementing the CSBG Annual Report
  - Understand the crosswalk of the CSBG IS and CSBG Annual Report
  - Establish the "low hanging fruit"
  - Identify agency staff to lead the transition
  - Establish internal timelines and work plans
  - Make changes and adjustments to state reporting systems so they are ready to collect new data elements for FY18
  - Review contracts and RFPs; modify, as necessary
  - Work together as a State (State Office, State Association, local CAAs)
  - Identify TTA needs...what can NASCSP and the DATA TF do for you?
  - Provide tools for private and public CAAs