DATA TF IN-PERSON MEETING
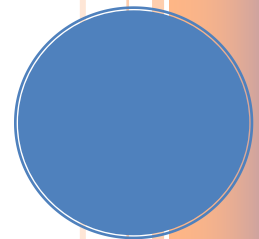
August 8th-9th, 2018

NASCSP | NATIONAL ASSOCIATION FOR STATE COMMUNITY SERVICES PROGRAMS

Contents

AGENDA

NASCSP Office

111 K Street NE, Washington, DC, 20002

Meeting Goals
- Make progress on sub-committee deliverables
- Develop recommendations for "Other" indicators by domain
- Decide on process and timeline for upcoming OMB Clearance
- Determine DATA TF priorities and timeline

Wednesday, August 8

8:00-8:30 a.m. **Continental Breakfast**

8:30-8:40 a.m. **Welcome from DATA TF Chairs**
Kris Schoenow and Lauren Suwansupa

8:40-9:00 a.m. **Warm-Up**
Kate Blunt

9:00-9:15 a.m. **Welcome from OCS**

9:15-9:30 a.m. **Meeting Framework**
Kate Blunt

- Review meeting goals and agenda
- Revisit DATA TF purpose, goals, and operating procedures
- Review subcommittee deliverables and their status

9:30-11:45 a.m. **Subcommittees Convene**

11:45-1:15 p.m.	***Lunch*** *(On Your Own)*
1:15-2:00 p.m.	**Subcommittees Report Out** *Subcommittee Chairs*
2:00-3:30 p.m.	**Small Group Discussion: "Other" Indicators**
3:30-3:45 p.m.	***Break***
3:45-4:30 p.m.	**Briefing/Q&A** *NASCSP*
4:30-4:45 p.m.	**Wrap up/Plan for Tomorrow**
5:00-6:15 p.m.	**Rooftop reception with National Partners**

Thursday, August 9

8:00-8:30 a.m.	**Continental Breakfast**
8:30-8:45 a.m.	**Recap Day One/Review Day Two Agenda**
8:45-10:15 a.m.	**OMB Clearance Process** *NASCSP*

- Small Group Discussion: Initial Feedback Survey

10:15-10:30 a.m.	***Break***
10:30-11:45 p.m.	**Reporting Updates** *NASCSP*

- Module 3 Pilot
- SmartForms
- XML Transfer
- Vendor Advisory Group
- Performance Management Website

11:45-12:45 p.m.	***Lunch*** (Brought in by NASCSP)
12:45-1:45 p.m.	**Discussion: DATA TF Priorities, Deliverables, and Timeline**
1:45-2:00 p.m.	**DATA TF Communication: What are the three key talking points?** *Kate Blunt*

OPERATING PROCEDURES

Purpose

The CSBG DATA Task Force is 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 DATA Task Force serves 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 task force consists of representatives from Community Action Agencies, State CSBG Offices, Community Action Agency State Associations, National Partner organizations, and OCS. Those who value the importance of collecting data and who are committed to using data effectively to show results of the CSBG Network were selected as members.

Mission

The DATA Task Force provides feedback to OCS and NASCSP on the implementation of the CSBG Annual Report, with a focus on how to use CSBG data in all phases of the ROMA cycle. Members of the DATA Task Force collaborate to make recommendations for improvements to the use of data and provide valuable input regarding data collection, data reporting, and affecting change with data.

DATA Task Force Nomination Process
- Nominations are solicited from the CSBG Network and managed by NASCSP. Individuals may self-nominate.
- After the initial application process (2017), nominations occur when there is a vacancy on the Task Force due to term limits or resignations. Prior to seeking nominations from the CSBG network, NASCSP will reach out to individuals from the original 2017 nomination list to fill the vacancy. If there is no one from the original nomination list that is available or interested, NASCSP will then solicit nominations from the CSBG network.
- NASCSP selects members from those who have been nominated. Members are selected based on relevant experience and type of representation in the CSBG Network (local CAA, CSBG State Office, State Association/RPIC, National Partner)

DATA Task Force Membership
- No fewer than one representative from each of the ten OCS Regions:
    - No fewer than five representatives from CSBG State Offices

- o No fewer than five representatives from local CAAs and/or State Associations
- One representative from each of the CSBG Network National Partners (NASCSP, NCAF, CAPLAW, the Partnership, ANCRT)

Membership Roles:

- Communicate the activities and work of the Task Force within the members' state and regional network and, to the extent possible, share feedback received from the network with the task force.
- Provide input into all aspects of CSBG Network data collection and reporting.
- Hold information received as a task force member as confidential, if requested.

Membership Terms:

- Members serve for a three-year term (*The first term is 2017-2020*)
- Members must be able to participate in regular conference calls and webinars (up to a monthly basis) and up to two in-person meetings annually (requiring travel)
    - o Attendance Requirements – It is expected that members make themselves available for DATA Task Force meetings and webinars, including subcommittee meetings for the subcommittees of which they are a part. However, if a member must miss a meeting, the member should inform a NASCSP staff person.
        - ▪ If members miss three consecutive meetings they will receive an email or phone call from the DATA Task Force co-chairs to discuss their ability to continue to participate in the task force.

Voting Process
- When an action requires a vote, the vote will be led by the co-chairs and members will either raise hands, complete a simple 'yea' or 'nay', or submit via email their support or dissention
- Votes are required in selection of co-chairs and may be required for other actions
- All members get one vote
- Proxy voting will not be accepted

Leadership
- One State Co-Chair
- One CAA Co-Chair

Co-Chairs Roles:

- Provide leadership to the DATA Task Force
- Represent the concerns of states or CAAs
- Assist in convening/running meetings
- Help with developing the meeting agenda
- Approve the DATA Task Force's submissions to OCS
- Speak at trainings and conferences with support of NASCSP staff
- Spokespeople for task force

Co-Chair Terms:

- Co-Chairs are nominated and elected by the DATA Task Force members.
- Co-Chairs will serve for the duration of their membership period.

Co-Chair Election Process:

- Any interested member completes a nomination form.
- Nomination forms are returned to NASCSP.
- NASCSP compiles all nominations and develops a ballot.
    o Members use the ballot to vote for two names:
        ▪ One State co-chair and One CAA co-chair
- Ballots are returned to NASCSP.
- NASCSP tallies the votes and announces the results of the voting.
- The task force follows normal voting procedures, as outlined above. State Offices or State Associations may fill the State co-chair role.

Subcommittees
- Subcommitees are expected to meet once every quarter.
- Each subcommittee must have a chair from either a State Office, Local CAA, or State Association representative.
    o Chairs must be nominated and approved by the subcommittee.

Chair Roles:

- Work with NASCSP staff on developing meeting schedules and agendas
- Report out to the larger DATA Task Force on committee work
- Work closely with the DATA Task Force co-chairs on committee deliverables and deadlines
- Review and approve meeting notes

Document Updates:
4/21/2017 - Original document
7/24/2018 - Updates made to membership roles, terms, and subcommittees

DATA Task Force Subcommittee Assignments

Analysis Subcommittee

Member	Region	State	Type of Org	Organization Name
Aaron Wicks	2	NY	Private CAA	Action for a Better Community, Inc
Lise Stuart	10	OR	Public CAA	Lane County- Human Services Division
Jutta Ulrich	9	NY	State Association	Arizona Community Action Association
Tiffany Keimig	7	IA	State Association	Iowa Community Action Association
Matt Fitzgerald	3	VA	CSBG State Office	Virginia Department of Social Services
Kris Schoenow	5	MI	CSBG State Office	State of Michigan Department of Health & Human Services
Frances Yator	N/A	N/A	National Partner	National Community Action Foundation (NCAF)
Katy Kujawski	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSP)
Jenae Bjelland	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSP)
Barbara Mooney	N/A	N/A	National Partner	Association of Nationally Certified ROMA Trainers (ANCRT)

Guidance and Training Subcommittee

Member	Region	State	Type of Org	Organization Name
Steve Geller	1	VT	Private CAA	Southeastern VT Community Action (SEVCA)
Marvin D. Cox	4	TN	Public CAA	Metro Action Commission
Trudy Logan	4	NC	Local CAA	Community Action Opportunities
Lauren Suwansupa	9	CA	Public CAA	Monterey County Community Action Partnership
Georjean Trinkle	2	NJ	State Association	New Jersey Community Action Association
Daniel Leppo	3	PA	State Association	Community Action Association of Pennsylvania
Roger McCann	4	KY	State Association	Community Action Kentucky
Kris Schoenow	5	MI	CSBG State Office	State of Michigan Department of Health & Human Services
Laura White	6	TX	CSBG State Office	Texas Department of Housing and Community Affairs
Beverly Buchanan	6	AR	CSBG State Office	Arkansas Department of Human Services
Sukie Montes	9	CA	CSBG State Office	Department of Community Services & Development
Jarle Crocker	N/A	N/A	National Partner	Community Action Partnership (CAP)
Jackie Orr	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSP)
Katy Kujawski	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSP)
Barbara Mooney	N/A	N/A	National Partner	Association of Nationally Certified ROMA Trainers (ANCRT)

DATA Task Force Subcommittee Assignments

Systems IT Subcommittee				
Member	**Region**	**State**	**Type of Org**	**Organization Name**
Krista Heineman	7	NE	Private CAA	Northeast Nebraska Community Action Partnership
Paula McFarland	1	RI	State Association	Rhode Island Community Action Association
Josiah Masingale	8	CO	State Association	Colorado Community Action Association
Kris Schoenow	5	MI	CSBG State Office	State of Michigan Department of Health & Human Services
Monique Alcantara	N/A	N/A	Federal Partner	Office of Community Services (OCS)
Katy Kujawski	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSP)
Jenae Bjelland	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSP)
Frances Yator	N/A	N/A	National Partner	National Community Action Foundation (NCAF)

Communications and Marketing Subcommittee				
Member	**Region**	**State**	**Type of Org**	**Organization Name**
Joseph Vaughn	5	MN	Private CAA	Scott-Carver-Dakota CAP Agency
Lauren Suwansupa	9	CA	Public CAA	Monterey County Community Action Partnership
Josiah Masingale	8	CO	State Association	Colorado Community Action Association
Sukie Montes	9	CA	CSBG State Office	Department of Community Services & Development
Jenae Bjelland	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSP)
Eric Behna	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSP)
Jarle Crocker, Natalie Kramer	N/A	N/A	National Partner	Community Action Partnership (CAP)
Monique Alcantara	N/A	N/A	Federal Partner	Office of Community Services (OCS)
Jonna Holden	N/A	N/A	Federal Partner	Office of Community Services (OCS)
Christopher Logue,CAPLAW	N/A	N/A	National Partner	Community Action Program Legal Services (CAPLAW)
Barbara Mooney, ANCRT	N/A	N/A	National Partner	Association of Nationally Certified ROMA Trainers (ANCRT)
Frances Yator, NCAF	N/A	N/A	National Partner	National Community Action Foundation (NCAF)

LIST OF SUBCOMMITTEE DELIVERABLES

DATA TF Subcommittee	Deliverables	Suggested Dates
1. Communications and Marketing Subcommittee	TOC FAQ	Completed
	Talking Points for the DATA TF and the general public (Update regularly – quarterly)	Quarterly
	Communication Plan for DATA Task Force – how the group communicates with the network (i.e. RPIC meetings, website, information pushes)	September 14, 2018
	Interactive TOC	August 31, 2018
	Feedback on the DATA TF page on the NASCSP website	August 8, 2018
	DATA TF blog post	September 28, 2018
	Paragraph defining each committee, who they are, type of work they do	August 10, 2018
2. Guidance/Training Subcommittee	Case Studies on Community Level Work	April 2019
	Annual Report slide deck for training (Update regularly - quarterly)	Quarterly
	FAQ on Community Level Work - how to choose, define community	October 31, 2018
	Annual Report FAQ	September 14, 2018
	Lexicon – what does it look like, how is it organized and what type of information is included?	September 3, 2018
	Review the Module 3 Survey by ANCRT	Ongoing
3. Systems IT Subcommittee	Module 4 Individual and Family: how to clarify unduplicated count – have examples, not a national definition. Survey vendors and then provide examples.	January 2019
	RFP Toolkit/Guide	August 31, 2018
	Data Dictionary and Standards, Flow charts/common rules (front end, back end)	September 24, 2018
	Best Practices in database implementation	August 31, 2018
	Best practices in integrating data across programs	April 2019

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LIST OF SUBCOMMITTEE DELIVERABLES (CNTD)

DATA TF Subcommittee	Deliverables	Suggested Dates
4. Analysis Subcommittee	Crosswalks - LIHEAP crosswalk (analysis of the data points)	October 31, 2018
	Standard measurement tools – related to indicators (i.e. financial wellbeing, living wage calculators, living independently, basic education, health and behavioral indicators, etc.)	November 12, 2018
	Talking points on what analysis is/FAQ on analysis	August 10, 2018
	Collect Analysis tools from across the network	Ongoing
	Lifecycle of the data	September 10, 2018
	Analysis Toolkit – how to make meaning of the data. How to use funds and evaluate what they are doing. What impact am I having? Data driven decision making. Use the questions that we have.	Ongoing
	A list of standard documentation for strategies and services	December 21, 2018
Full DATA TF work	Recommendations for the Performance Management Website	Ongoing
	Revisions to the Annual Report published by NASCSP	Ongoing
	Instruction Manual Revisions	August 24, 2018

Calendar of Deliverables

2018

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

JUL

10 | Communications Meeting

12 | Guidance and Training Meeting

20 | Analysis Meeting

27 | In-Person Meeting Prep

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

AUG

8-9 | In-Person Meeting

10 | Analysis FAQ

24 | Updated Instruction Manuals

31 | Interactive Theory of Change; RFP
Toolkit/Guide

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

SEP

3 | Lexicon

10 | Life Cycle of the Data

14 | Communications Plan; Annual
Report FAQ

24 | Data Dictionary

28 | Blog Post

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

OCT

31 | Community Level Work FAQ; LIHEAP
Crosswalk

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

NOV

12 | Standard Measurement Tools

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

DEC

21 | Standard Documentation for Services
and Strategies

Subcommittee progress

Communications

The Communications Committee has met three times as a group in 2018: May 4, June 29, and July 10. At the May 4th meeting, the group reviewed the beginning stages of the Interactive Theory of Change (TOC) and provided feedback. The group also discussed next steps for other priority deliverables, including case studies for Module 3, and an Annual Report FAQ. Those deliverables were then shifted to the Guidance and Training Committee prior to the next meeting as they were deemed more appropriate for that group by NASCSP and the DATA TF co-chairs. The Communications Committee then regrouped on June 29th to discuss the changes. On July 10th, the group began work on their new priority deliverable, a communications plan for the DATA TF, as well as continued their work on the Interactive TOC by providing additional feedback. The Interactive TOC will be in its finishing stages by the in-person meeting, during which time the committee will provide one more round of feedback. The committee will also review an outline for the communications plan and flesh out the details in order to have a finalized plan by September. This plan will include information about blog posts and content for the NASCSP website.

Guidance and Training

The Training Committee met on May 11th, while the Guidance Committee met on May 17th, to discuss merging the two groups. Prior to those meetings, NASCSP and the DATA TF co-chairs reviewed the deliverables for each committee and realized there was significant overlap. Each committee met in May to discuss possible solutions for preventing overlap and duplication of efforts. The Training Committee was in favor of merging the two groups and suggested a staged process whereby the combined committee first works on developing guidance materials and then shifts attention to developing a training plan for use of those materials. The Guidance Committee concurred, and both committees met as one on June 11th. At the June 11th meeting, the group discussed next steps for their priority deliverables: the Annual Report FAQ, the lexicon, and the training calendar. The group met again on July 12th to continue work on the deliverables. It was decided at that time that the training calendar was not necessary and was therefore removed as a deliverable. Given the lack of response with regards to compiling questions about the Annual Report, the group discussed the need for publishing an FAQ on the Annual Report immediately, and they decided to delay the deliverable until they compiled more questions. The group also reviewed an outline of the lexicon and provided feedback. They will be reviewing a more substantive draft of the lexicon at the in-person meeting in order to have it

published by September. In the meantime, they will continue work on collecting questions to include in the Annual Report FAQ.

Systems

The Systems Committee was only able to meet once on May 10th, during which time they reviewed a draft of a data dictionary that NASCSP and its technical contractor had put together that defines each data point that database vendors should build in their systems for reporting on the new Annual Report. The group also discussed ideas for an RFP template to procure database vendors that NASCSP was in the beginning stages of creating. The group provided a lot of great suggestions, and it was decided that a toolkit including a template and examples should be created instead. A draft of this toolkit will be reviewed by the committee at the in-person meeting to provide more detailed feedback as NASCSP finalizes the toolkit for release by the end of the month in August.

Analysis

The Analysis Committee met twice on May 18th and July 20th. At the May 18th meeting, the group reviewed a draft of an FAQ on analysis that NASCSP shared with them. That review led to a discussion on other deliverables that could build off of the FAQ, which would serve as a beginning first step in a larger toolkit to help the Network enhance its efforts towards analyzing the data received from the Annual Report. On July 20th, the group shifted gears to focus on analysis tools for the Performance Management Website that is currently being developed by NASCSP who wanted to ensure that its work is being informed by the expertise and knowledge of this committee. The group will discuss these tools further at the in-person meeting, where they will also review the Analysis FAQ to be published later in August.

LIST OF "OTHER" INDICATORS

Module	EMPLOYMENT
M4	Number of employed individuals who are at risk of losing employment who maintained employment as a result of CAA interventions (work related clothing or supplies, transportation, child care, certifications, etc.).
M4	Number of individuals who became self-employed.
M4	Number of individuals who developed skills to obtain employment.
M4	Number of youth who maintained employment for 90 days (while still maintaining student status).
M3	Number of communities who increased the minimum wage.
	EDUCATION
M4	Number of individuals with increased ability to pay for a recognized credential, certificate or degree relating to the achievement of educational or vocational skills
M4	Number of individuals who enrolled or maintained enrollment in post-secondary education.
M4	Number of individuals who moved from high school diploma and/or equivalent to post-secondary education (of any kind).
M3	Number of communities who made post secondary education opportunities available.
	INFRASTRUCTURE AND ASSET BUILDING
M4	Number of individuals who started their own business.
M4	Number of individuals who increased their income from a non-employment source.
M4	Number of individuals who reduced debt.
M4	Number of individuals who increased income or asset building skills.
M4	Number of individuals with resolved consumer complaints that resulted in restitution.
M4	Number of individuals whose reliance on public subsidies was reduced.
	HOUSING
M4	Number of households who improved physical access in their living space (wheel chair ramps, grab bars etc.).
M4	Number of households who avoided a utility shut-off.
M4	Number of households who obtained utilities.
M4	Number of households whose energy was restored.
M4	Number of households whose appliance(s) were replaced.
M4	Number of households experiencing homelessness who moved to more stable housing (i.e. transitional housing).

LIST OF "OTHER" INDICATORS (CNTD)

	HEALTH AND SOCIAL/BEHAVIORAL
M4	Number of individuals who reported a better sense of food security.
M4	Number of new mothers who improved infant feeding practices.
M4	Number of individuals who increased social inclusion.
M4	Number of individuals whose lives were saved by opioid overdose reversals.
M4	Number of individuals who obtained health insurance/access to health care.
M4	Number of individuals who discontinued drug/alcohol use.
M4	Number of individuals who remained drug free for 90 days.
M4	Number of individuals who increased knowledge about health-related topics.
M4	Number of individuals who secured emergency protection from physical and/or emotional abuse.
M4	Number of individuals with increased safety in their homes.
M3	Percent decrease in the opioid death rate.
M3	Number of communities who increased health care options or facilities.
	CIVIC ENGAGEMENT/COMMUNITY INVOLVEMENT
M4	Number of individuals who obtained US citizenship.
M4	Number of individuals who obtained an I90/Green Card.
	OUTCOMES ACROSS MULTIPLE DOMAINS
M4	Number of individuals who achieved one or more outcomes as a result of more than one coordinated services.
M4	Number of households for whom both adult and child outcomes were observed.

PROPOSED CHANGES TO MODULES 2 AND 4 INSTRUCTION MANUALS

Module	Section	Page	Action	Old	New
2	A	4	Removed Language	**A.1 CSBG Eligible Entity Reporting Period** – The CSBG Reporting Period is selected by the CSBG State Office and indicates the 12-month period in which most of the Federal Fiscal Year (FFY) CSBG funds for the year covering this report were expended. For example, the FY 2018 report would be reporting on outcomes and services obtained with FFY18 funds. This reporting period may or may not be the same as the Federal Fiscal Year (FFY). CSBG Eligible Entities should check with their State Office with any questions on the reporting period.	**A.1 CSBG Eligible Entity Reporting Period** – The CSBG Reporting Period is selected by the CSBG State Office and indicates the 12-month period in which most of the Federal Fiscal Year (FFY) CSBG funds for the year covering this report were expended. For example, the FY 2018 report would be reporting on outcomes and services obtained with FFY18 funds. This reporting period may or may not be the same as the Federal Fiscal Year (FFY). CSBG Eligible Entities should check with their State Office with any questions on the reporting period.
2	A	5	Added Language	N/A	CSBG Eligible Entities should have a documented systematic approach for determining in which domain to report CSBG funds expended. Some examples from the field include reviewing all services rendered during the program year and allocating funding to the domains based on the portion of services to the whole. Another example is using accounting codes and associating the domains with timesheets to determine where the efforts should be reported.
2	A	6	Added Language	N/A	* **Note:** The difference between Linkages and Civic Engagement is that Linkages is the work done to build relationships and partnerships. It's the activities that a CSBG Eligible Entity engages in to connect themselves to other providers and resources in the community. Linkages, while critical to an entity, is a relatively low impact activity. Civic Engagement is the intentional work done to make a difference in the community through political and non-political processes such as advocacy, leadership, or other coordinated efforts.
2	A	6	Added Language	N/A	CSBG Eligible Entities who have a federally approved indirect cost rate should those funds in A.2i Agency Capacity or A.2j Other. Those CSBG Eligible Entities that do not have an indirect cost rate can use their cost allocation plans to determine how the administrative dollars are allocated within the domains.
2	A	7	Added Language	The *Community Needs Assessment* is the report a CSBG Eligible Entity compiles after conducting research to understand their community and plan for programs. This report includes both quantitative and qualitative data, a summary of key findings, and the identification of needs.	The *Community Needs Assessment* is the report a CSBG Eligible Entity compiles after conducting research to understand their community and plan for programs. This report includes both quantitative and qualitative data, a summary of key findings, and the identification of needs. It is required by the Organizational Standards (3.1) that CSBG Eligible Entities complete a community needs assessment and issue a report within the past three years.
2	A	7	Added Language	*Strategic Planning* is the activity a CSBG Eligible Entity engages in to discuss and set the direction of the CSBG Eligible Entity through the implementation of specific programs and initiatives.	*Strategic Planning* is the activity a CSBG Eligible Entity engages in to discuss and set the direction of the CSBG Eligible Entity through the implementation of specific programs and initiatives. A strategic plan is required by the Organizational Standards (6.1) to be approved by the Board every 5 years.

Module	Section	Page	Action	Old	New
2	A	7	Revised Language	**Data Management & Reporting:** Select the check box if funds reported in A.2i. supported activities related to the data management and reporting. This can include any costs incurred to support training, implementation, purchase of technology or software or other direct costs, staff time, and/or other administrative costs.	**Data Management & Reporting:** Select the check box if funds reported in A.2i. supported activities related to data management and reporting. This can include any costs incurred to support collecting or reporting data, funds spent to support the implementation and purchase of technology or software or other direct costs, staff time, and/or other administrative costs as they might relate to data and reporting.
2	A	7	Revised Language	**Training & Technical Assistance:** Select the check box if funds reported in A.2i. supported training and technical assistance. This can include any costs incurred to secure training facilities, travel, consultants or other direct costs, staff time, and/or other administrative costs. *Training activities* are those that provide staff development and program support on programs and initiatives operated by the CSBG Eligible Entity, and education on poverty and other topics relevant to the work of the CSBG Eligible Entity. Training can be supported by CSBG or other funds.	**Training & Technical Assistance:** Select the check box if funds reported in A.2i. supported training and technical assistance. This can include any costs incurred to secure training facilities, travel to trainings, pay consultants or staff time in trainings, or other direct costs, staff time, and/or other administrative costs. *Training activities* are those that provide staff development and program support on programs and initiatives operated by the CSBG Eligible Entity, and education on poverty and other topics relevant to the work of the CSBG Eligible Entity. ~~Training can be supported by CSBG or other funds.~~
2	B	9	Added Language	**B.3a. Total number of volunteer hours donated to the agency:** In B.3a report all volunteer hours donated to the CSBG Eligible Entity during the reporting period. This section collects data on hours and not the number of people. Board members, the Head Start Policy council, and parent advisory board members should be included here.	**B.3a. Total number of volunteer hours donated to the agency:** In B.3a report ¬all volunteer hours donated to the CSBG Eligible Entity during the reporting period. This section collects data on hours and not the number of people. Board members, the Head Start Policy council, and parent advisory board members should be included here, in addition to the hours provided by other agency volunteers.
2	B	9	Added Language	While B.3a. asked for the total number of hours donated by all volunteers, in B.3a.1. report only the hours from the above that were donated by persons with low-incomes. This number for B.3a.1. should never be more than B.3a. To know which volunteers are persons with low-incomes, a CSBG Eligible Entity does not need to complete income verification, but can ask a clarifying question on their volunteer application or complete an anonymous survey of their volunteers.	While B.3a. asked for the total number of hours donated by all volunteers, in B.3a.1. report only the hours from the above that were donated by persons with low-incomes. This number for B.3a.1. should never be more than B.3a. To know which volunteers are persons with low-incomes, a CSBG Eligible Entity does not need to complete income verification, but can ask a clarifying question on their volunteer application or complete an anonymous survey of their volunteers. Note: This is where Board members with low-incomes should be reported.
2	B	10	Removed Language	**B.4d. Number of staff with a child development certification:** Report the number of child development certifications obtained through a national credentialing program. Do not include staff who are in the process of becoming certified. For example, report Child Development Associate certificate obtained by some early childhood education staff.	**B.4d. Number of staff with a child development certification:** Report the number of child development certifications obtained through a ~~national~~ credentialing program. Do not include staff who are in the process of becoming certified. For example, report Child Development Associate certificate obtained by ~~some~~ early childhood education staff.
2	B	11	Added Language	**B.4i. Number of Building Performance Institute (BPI) Certified Professionals:** Report the number of BPI certified professionals certified through the Building Performance Institute. Do not include staff who are in the process of becoming BPI certified.	**B.4i. Number of Building Performance Institute (BPI) Certified Professionals:** Report the number of BPI certified professionals certified through the Building Performance Institute. Include all certifications obtained through BPI that are not already listed above under the Home Energy Professionals (B.4g.1-B.4g.4). Do not include staff who are in the process of becoming BPI certified.

Module	Section	Page	Action	Old	New
2	B	12	Removed Language	Formal arrangements, such as memoranda of understanding/agreement or service contracts, between a CSBG Eligible Entity and one or more public or private service providers to coordinate referral and exchange of program participants;	Formal arrangements, such as memoranda of understanding/agreement or service contracts, ~~between a CSBG Eligible Entity and one or more public or private service providers~~ to coordinate referral and exchange of program participants;
2	B	12	Removed Language	Informal working relationships between a CSBG Eligible Entity with public or private agencies, organizations, or individual service providers that expand service opportunities for individuals/families with low-income, including routine service referrals and follow-up contacts; and	Informal working relationships ~~between a CSBG Eligible Entity with public or private agencies, organizations, or individual service providers~~ that expand service opportunities for individuals/families with low-income, including routine service referrals and follow-up contacts; and
2	B	12	Removed Language	Alliances between a CSBG Eligible Entity and one or more public or private organizations that advocate for expanded services or community opportunities for people with low-income.	Alliances ~~between a CSBG Eligible Entity and one or more public or private organizations~~ that advocate for expanded services or community opportunities for people with low-income.
2	C	16	Removed Language	C.3d.8. All other HUD programs, including homeless programs: All other homeless and housing programs funded by the U.S. Department of Housing and Urban Development. This includes the McKinney Homeless program.	C.3d.8. All other HUD programs, including homeless programs: All other homeless and housing programs funded by the U.S. Department of Housing and Urban Development. ~~This includes the McKinney Homeless program.~~
2	C	19	Revised Language	**C.6d. Value of in-kind services received from businesses:** The State CSBG Lead Agency should provide guidelines for valuing in-kind donations. A consistent, reasonable statewide method is required.	**C.6d. Value of in-kind services received from businesses:** The State CSBG Lead Agency should provide guidelines for valuing in-kind donations. A consistent, reasonable statewide method should be considered.~~is required.~~
2	C	19	Removed Language	**C.6f. Payments by private entities for goods or services for low income clients or communities:** Some CSBG Eligible Entities are paid by private entities, profit or non-profit, to provide services to those corporations. Most such arrangements are contractual. Examples are: outreach for HMO programs, transportation services, public utility contracts for customer services or weatherization, and even rental of space and equipment in the service area. This space is for recording the gross income from such arrangements. Contractual arrangements which are simply direct subcontracts or sub-grants of state, local or federal funds should continue to be reported in the federal, state or local resources, and not reported here. This item records funding of a type not previously enumerated or which was historically assigned to a less appropriate category because the survey offered no item to capture these contractual arrangements involving the private or charitable resources of a non-governmental CSBG Eligible Entity.	**C.6f. Payments by private entities for goods or services for low income clients or communities:** Some CSBG Eligible Entities are paid by private entities, profit or non-profit, to provide services to those corporations. Most such arrangements are contractual. Examples are: outreach for HMO programs, transportation services, public utility contracts for customer services or weatherization, and even rental of space and equipment in the service area. This space is for recording the gross income from such arrangements. Contractual arrangements which are simply direct subcontracts or sub-grants of state, local or federal funds should continue to be reported in the federal, state or local resources, and not reported here. ~~This item records funding of a type not previously enumerated or which was historically assigned to a less appropriate category because the survey offered no item to capture these contractual arrangements involving the private or charitable resources of a non-governmental CSBG Eligible Entity.~~
4	A	7	Removed Language	For FNPIs, only participants are being counted. If an indicator measures households, report all members of the household. If there are four members of one household, report four (4). Further, if multiple programs in the agency are helping the participant achieve the same FNPI, there is only one participant, so the count is one (1).	~~For FNPIs, only participants are being counted. If an indicator measures households, report all members of the household. If there are four members of one household, report four (4). Further, if multiple programs in the agency are helping the participant achieve the same FNPI, there is only one participant, so the count is one (1).~~
4	A	10	Revised Language	Adults are defined as individuals aged 25 and up and can be specific to each program's scope and funding source.	Adults, for the purpose of this report, are defined as individuals aged 25 and up ~~and can be specific to each program's scope and funding source.~~

Module	Section	Page	Action	Old	New
4	A	10	Revised Language	**Note:** A CSBG Eligible Entity will track number of adults who obtained employment, even if the wage is unknown	**Note:** When CSBG Eligible Entities do not collect income for the employment obtained and cannot verify if the participant obtained a job at or below a living wage, the participant should be reported here in "up to a living wage."
4	A	11	Revised Language	**Note:** Outcome data reported in FNPI 1c should also be reported FNPI 1b. If a participant obtained and maintained a job for 90 days as a result of CSBG Eligible Entity assistance, this participant also qualifies for FNPI 1b (obtaining a job). This is true only if the participant obtained employment through the assistance of the CSBG Eligible Entity. If the Entity assists an employed participant who achieves one or more of indicators FNPI 1 c-d, that participant would NOT be reported in FNPI 1b.	**Note:** Outcome data reported in FNPI 1c should also be reported in FNPI 1b. If a participant obtained and maintained a job for 90 days as a result of CSBG Eligible Entity assistance, this participant also qualifies for FNPI 1b (obtaining a job). This is true only if the participant obtained employment through the assistance of the CSBG Eligible Entity. If the Entity serves a participant who had already obtained a job on their own, and is assisting them only with maintaining employment, that participant would not be reported in FNPI 1b-d. ~~assists an employed participant who achieves one or more of indicators FNPI 1 c-d, that participant would NOT be reported in FNPI 1b.~~
4	A	16	Added Language	N/A	**Emergent Literacy Skills** refers to the knowledge and expertise or ability that lays the foundation for reading and writing for infants and toddlers.
4	A	17	Added Language	N/A	**Positive Approaches to Learning** focuses on how children learn. It refers to the skills and behaviors that children use to engage in learning. It incorporates emotional, behavioral, and cognitive self-regulation under a single umbrella to guide teaching practices that support the development of these skills.
4	A	19	Added Language	**Basic education** includes the basic skills adults need, such as reading, writing, math, English language proficiency, and problem solving, to be productive workers and citizens.	**Basic education** includes the basic skills adults need, such as reading, writing, math, English language proficiency, and problem solving, to be productive workers and citizens. This can also include the basic education needed as a prerequisite to obtain additional education. For example, in order to be accepted to college and take college level courses, a participant must first complete and pass a basic math course.
4	A	21	Revised Language	CSBG Eligible Entities are only expected to report on basic needs indicators as applicable to the CSBG Eligible Entity's programs. When reporting on indicators related to basics needs, CSBG Eligible Entities can provide their own definition or select from national, state, or locally defined models. CSBG Eligible Entities must identify in the General Comments Section the basic needs definition used. In general, basic needs are food, shelter, water, and clothing.	CSBG Eligible Entities are only expected to report on basic needs indicators as applicable to the CSBG Eligible Entity's programs. When reporting on indicators related to basics needs, CSBG Eligible Entities can provide their own definition or select from national, state, or locally defined models. CSBG Eligible Entities must identify in the General Comments Section the basic needs definition used. In general, basic needs is the ability to have consistent access to food, safe and stable shelter [including utilities] and ensure the safety of participants and their family.) ~~basic needs are food, shelter, water, and clothing.~~
4	A	24	Added Language	N/A	**Financial well-being** is a state of being wherein you: have control over day-to-day and month-to-month finances; have the capacity to absorb a financial shock; are on track to meet your financial goals; and have the financial freedom to make the choices that allow you to enjoy life .

Module	Section	Page	Action	Old	New
4	A	24	Revised Language	This indicator requires CSBG Eligible Entities to keep an unduplicated count of people who report improved financial well-being based on their responses to the CFPB Financial Well-Being Scale survey. The survey needs to be delivered at intake and at intervals as determined by the program in order to accurately report progress.	This indicator ~~requires CSBG Eligible Entities to keep~~ is an unduplicated count of people who report improved financial well-being. A tool the CSBG Eligible Entities can use to measure financial well-being is the CFPB Financial Well-Being Scale survey. The survey needs to be delivered at intake and at intervals as determined by the program in order to accurately report progress. CSBG Eligible Entities can select to use a different scale to measure financial well-being, but should have an assessment tool and process in place.
4	A	25	Removed Language	NOTE: All indicators in the housing domain pertain to households. However, this is an unduplicated count of individuals. Report the individuals in the households who obtain these outcomes. If a family of four obtained the outcome, then report four (4).	NOTE: All indicators in the housing domain pertain to households. ~~However, this is an unduplicated count of individuals.~~ Report the number of households who obtain these outcomes. If a family obtained the outcome and has four people in their household, then report one (1).
4	A	25	Removed Language	Note: All indicators in this domain count the number of individuals within households, not households. For example, if a household of four obtains housing, then four (4) will be reported.	~~Note: All indicators in this domain count the number of individuals within households, not households. For example, if a household of four obtains housing, then four (4) will be reported.~~
4	A	27	Added Language	N/A	Report the number household who avoided an eviction. An **eviction** is the act of being expelled from a property, typically in a renter/landlord situation. CSBG Eligible Entities may identify what constitutes a potential eviction and determine at the local level the appropriate time to provide an intervention and the appropriate intervention.
4	A	28	Revised Language	Note: This is primarily a weatherization indicator. Weatherization primarily tracks units. When reporting, ensure that an unduplicated number of individuals in the household is represented, not a count of units.	Note: This is primarily a weatherization indicator and more specifically, a place where outcomes obtained by using Health and Safety dollars could be reported.~~Weatherization primarily tracks units. When reporting, ensure that an unduplicated number of individuals in the household is represented, not a count of units.~~
4	A	28	Removed Language	Note: This is primarily a weatherization indicator. When reporting, ensure that an unduplicated number of individuals in a household is represented, not a count of the total measures. Households reported in 4g may also be reported in 4h.	Note: This is primarily a weatherization indicator. ~~When reporting, ensure that an unduplicated number of individuals in a household is represented, not a count of the total measures. Households reported in 4g may also be reported in 4h.~~
4	A	29	Added Language	Note: While this type of program may benefit all household members, this is an individual count. Only report the participants in the program who improved their skills.	Note: While this type of program may benefit all household members, this is an individual count. Only report the participants in the program who improved their skills. Ensure that there is some assessment in place to measure whether or not a participant achieved the outcome.

Module	Section	Page	Action	Old	New
4	A	30	Added Language	N/A	**Note:** CSBG Eligible Entities who plan to report on this indicator should have a definition for what it means to improve health and wellbeing. A measurement tool to determine improvement should be implemented. Tracking an individual's health and wellbeing could include a number of indicators such as reduction of injuries from falls, reduced blood pressure, weight reduction, improved affects from asthma, vision, hearing, mobility improvements, or a variety of other measurable changes. Resource for potential assessment tools: • Quality of Life Index
4	A	30	Added Language	N/A	**Note:** CSBG Eligible Entities reporting in this indicator should have an identified assessment tool in place to measure change over time. Many federal and state programs may have a tool for assessment. Resource for potential assessment tool: • SAMHSA-HRSA Center for Integrated Health Solutions
4	A	31	Added Language	N/A	**Note:** CSBG Eligible Entities who plan to report in this indicator should have an assessment tool in place to measure change over time and to be able to report in this indicator.
4	A	31	Added Language	N/A	**Note:** CSBG Eligible Entities who plan to report in this indicator should have an assessment tool in place to measure change over time.
4	A	32	Added Language	N/A	**Independent Living** is a living situation where the individual has freedom to make their own decisions, control over their financial, legal, or medical situation, and assistance in overcoming physical or mental barriers to independence .

Module	Section	Page	Action	Old	New
4	A	36	Revised Language	o A CAA that operates programs that had primary, secondary and even tertiary outcomes. Some CAAs have the capacity to track all the outcomes that an individual achieves on their path to economic security. • For example, individuals in an intensive economic security program may have goals to get their High School Equivalency, obtain safe and affordable housing, obtain employment and get a child ready for kindergarten. CAAs often help families achieve all these milestones as they climb out of poverty. o A CAA that operates many programs that achieved a variety of outcomes for one individual/family/household. • For example, individuals are often either intentionally (two-generation approach) or unintentionally enrolled in multiple programs such as Head Start, financial coaching, utility assistance, ESL, child care etc. Outcomes are often reached in each program for one individual/household. o A CAA Housing program participant whose single outcome was having obtained safe and affordable housing as a result of the work of the CAA may be reported here.	o A CAA that operates programs where an individual/family/household achieved a variety of outcomes . where an that had primary, secondary and even tertiary outcomes. Some CAAs have the capacity to track all the outcomes that an individual achieves on their path to economic security. • For example, individuals in an intensive economic security program may have goals to get their High School Equivalency, obtain safe and affordable housing, obtain employment and get a child ready for kindergarten. CAAs often help families achieve all these milestones as they climb out of poverty. o A CAA that operates many programs that achieved a variety of outcomes for one individual/family/household. • For example, individuals could be in a two-generation approach program or are often either intentionally (two-generation approach) or unintentionally enrolled in multiple programs such as Head Start, financial coaching, utility assistance, ESL, child care etc. Outcomes are often reached in each program for one individual/household. o A family in a CAA Housing program participant whose single outcome was having obtained safe and affordable housing as a result of the work of the CAA may be reported here. The individual household would also be reported here.
4	A	36	Revised Language	This is different than adding up all the FNPI numbers, as we have established that individuals achieve multiple outcomes.	This is different than adding up all the FNPI numbers which would show the total number of outcomes achieved rather than the number of individuals and families who obtained the outcomes. as we have established that individuals achieve multiple outcomes.
4	B	41	Added Language	N/A	While reporting the count of services here does not align with the general instruction on reporting services in this report, it is acceptable to do so for these specific services.
4	C	42	Removed Language	The All Characteristic Report can accept the reporting of individuals about whom some, but potentially not all, demographic information is collected. A single unique identifier is the only data point that needs to be collected to ensure an unduplicated count in the All Characteristics Report. To be reported in section A or B, a participant must have at least one characteristic (gender, age, race, education level, etc.) collected and reported.	The All Characteristic Report can accept the reporting of individuals about whom some, but potentially not all, demographic information is collected. A single unique identifier is the only data point that needs to be collected to ensure an unduplicated count in the All Characteristics Report. To be reported in section A or B, a participant must have at least one characteristic (gender, age, race, education level, etc.) collected and reported.
4	C	44	Revised Language	A **disabling condition** is a physical or mental impairment that substantially limits one or more major life activities.	A **disabling condition** is an inability to engage in any substantial gainful employment by reason of any medically determinable physical or mental impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months. a physical or mental impairment that substantially limits one or more major life activities.
4	C	45	Added Language	N/A	**Note:** Individuals receiving medical services from Indian Health Services (IHS) should be reported under Unknown/not reported. IHS will be added to the reporting form in future years.

Module	Section	Page	Action	Old	New
				a. Ethnicity **1. Hispanic, Latino or Spanish Origins:** For Census 2010: People who identify with the terms "Hispanic" or "Latino" are those who classify themselves in one of the specific Hispanic or Latino categories listed on the Census 2010 questionnaire -- "Mexican," "Puerto Rican," "South or Central American" or "Cuban" -- as well as those who indicate that they are "other Spanish culture or origin regardless of race." Origin can be viewed as the heritage, nationality group, lineage, or country of birth of the person or the person's parents or ancestors before their arrival in the United States. People who identify their origin as Spanish, Hispanic, or Latino may be of any race. **2. Not Hispanic, Latino or Spanish Origins** **3. Unknown/not reported** **4. Total (auto calculated)**	**a. Ethnicity** **1. Hispanic, Latino or Spanish Origins:** The terms "Hispanic," "Latino," and "Spanish" are used interchangeably. Some individuals identify with all three terms while others may identify with only one of these three specific terms. Hispanics or Latinos who identify with the terms "Hispanic," "Latino," or "Spanish" are those who classify themselves in one or more of the specific Hispanic, Latino, or Spanish categories ("Mexican," "Puerto Rican," or "Cuban") as well as those who indicate that they are "another Hispanic, Latino, or Spanish origin." People who do not identify with any of the specific origins listed on the questionnaire but indicate that they are "another Hispanic, Latino, or Spanish origin" are those who may identify as Argentinian, Colombian, Dominican, Nicaraguan, Salvadoran, Spaniard, or other Spanish cultures or origins. Origin can be viewed as the heritage, nationality group, lineage, or country of birth of the person or the person's parents or ancestors before their arrival in the United States. People who identify their origin as Hispanic, Latino, or Spanish may be of any race. ~~For Census 2010: People who identify with the terms "Hispanic" or "Latino" are those who classify themselves in one of the specific Hispanic or Latino categories listed on the Census 2010 questionnaire -- "Mexican," "Puerto Rican," "South or Central American" or "Cuban" -- as well as those who indicate that they are "other Spanish culture or origin regardless of race." Origin can be viewed as the heritage, nationality group, lineage, or country of birth of the person or the person's parents or ancestors before their arrival in the United States. People who identify their origin as Spanish, Hispanic, or Latino may be of any race.~~ **2. Not Hispanic, Latino or Spanish Origins**
4	C	45	Revised Language		
4	C	46	Revised Language	**a. Veteran:** an individual who served in the active military, naval, or air services and who was discharged or released under conditions other than dishonorable.	**a. Veteran:** Veteran status is used to identify people with active duty military service and service in the military Reserves and the National Guard. Veterans are men and women who have served (even for a short time), but are not currently serving, on active duty in the U.S. Army, Navy, Air Force, Marine Corps, or the Coast Guard, or who served in the U.S. Merchant Marine during World War II. People who served in the National Guard or Reserves are classified as veterans only if they were ever called or ordered to active duty, not counting the 4-6 months for initial training or yearly summer camps. All other civilians are classified as nonveterans. These data are used primarily by the Department of Veterans Affairs (VA) to measure the needs of veterans. ~~an individual who served in the active military, naval, or air services and who was discharged or released under conditions other than dishonorable.~~
4	C	47	Added Language	N/A	**Note:** Individuals who have no military status should be reported in Unknown/not reported.

Module	Section	Page	Action	Old	New
4	C	47	Removed Language	**a. Employed Full-Time:** working at least 30 hours each week. This could include multiple employers. **b. Employed Part-Time:** working less than 30 hours each week. This could include multiple employers.	**a. Employed Full-Time:** working at least 30 hours each week. ~~This could include multiple employers.~~ **b. Employed Part-Time:** working less than 30 hours each week. ~~This could include multiple employers.~~
4	C	47	Revised Language	**c. Migrant Seasonal Farm Worker:** working seasonally on a farm.	**c. Migrant Seasonal Farm Worker:** an individual who is employed, or was employed in the past 12 months, in farmwork of a seasonal or other temporary nature and is either not required to be absent overnight from his/her permanent place of residence or who travels to the jobsite and is not reasonably able to return home the same day. ~~working seasonally on a farm.~~
4	C	47	Revised Language	**d. Unemployed (Short-Term, six months or less):** no substantial work for six months or less and is actively seeking work. Substantial work is regular and at least part-time. **e. Unemployed (Long-Term, more than six months):** no substantial work for more than six months and are actively looking for work. Substantial work is regular and at least part-time.	**d. Unemployed (Short-Term, six months or less):** the individual has not worked ~~no substantial work~~ for six months or less and is actively seeking work. ~~Substantial work is regular and at least part-time.~~ **e. Unemployed (Long-Term, more than six months):** the individual has not worked ~~no substantial work~~ for more than six months and are actively looking for work. ~~Substantial work is regular and at least part-time.~~
4	C	47	Revised Language	**f. Unemployed (Not in Labor Force):** not working for any period of time. This category consists mainly of students, homemakers, seasonal workers interviewed in an off season who were not looking for work, institutionalized persons, and persons doing only incidental unpaid family work (less than 15 hours during the reference week).	**f. Unemployed (Not in Labor Force):** the individual is not working outside the home and is not actively looking for work. ~~not working for any period of time.~~ This category consists mainly of students, homemakers, seasonal workers interviewed in an off season who were not looking for work, institutionalized persons, and persons doing only incidental unpaid family work (less than 15 hours during the reference week).
4	C	48	Revised Language	**b. Two Adults, No Children:** the Head of Household is an adult; another Non Head of Household member is also an adult. May include a childless couple or two non-related adults living together. **c. Single Parent, Female:** the Head of Household is a Female and has no Spouse or Partner but has at least one child. **d. Single Parent, Male:** the Head of Household is a Male and has no Spouse or Partner but has at least one child. **f. Non-related Adults with Children:** two adults who are not married. One or both adults may have children in the household who may or may not be related. **g. Multigenerational Household:** a household where more than two generations of the family live under one roof. This includes grandparents raising grandchildren.	**b. Two Adults, No Children:** the Head of Household is an adult; another Non Head of Household member is also an adult. ~~May include a childless couple or two non-related adults living together.~~ **c. Single Parent, Female:** the Head of Household is a Female and ~~has no Spouse or Partner~~ but has at least one child. **d. Single Parent, Male:** the Head of Household is a Male and ~~has no Spouse or Partner~~ but has at least one child. **f. Non-related Adults with Children:** two adults who are not related by blood or marriage with at least one child in the household ~~married. One or both adults may have children in the household who may or may not be related.~~ **g. Multigenerational Household:** a household three or more ~~more than two~~ generations of the family live under one roof. ~~This includes grandparents raising grandchildren.~~

CSBG ANNUAL REPORT INSTRUCTION MANUAL

Module 2: CSBG Eligible Entity Expenditures, Capacity, and Resources

NASCSP

Version I

Release Date: February 2, 2018

Contents

Overview

As part of the new Performance Management framework, a new Community Services Block Grant (CSBG) Annual Report was developed to better illustrate the impact the CSBG Network has in communities across the country.

Module 2 is the Agency Expenditures, Capacity, and Resources module of the new CSBG Annual Report and is completed by CSBG Eligible Entities and then reviewed, evaluated, and analyzed by State CSBG Lead Agencies. This module includes information on funds spent by CSBG Eligible Entities on the direct delivery of local services and strategies, capacity building, and administrative costs. Module 2 of the CSBG Annual Report will be entered into the Online Data Collection System (OLDC), which is the central-web-based reporting tool that the Office of Community Services (OCS) has used for other programs and now uses for CSBG data collection.

The CSBG Annual Report contains four modules.

- Module 1: *State Administration* (completed by State CSBG Administrators) includes information on state administration of funds to CSBG Eligible Entities, use of state-administered and discretionary funds for training and technical assistance, and information on CSBG Eligible Entity progress in meeting the Organizational Standards and implementing ROMA Next Generation. (States submitted Module 1 in OLDC in March 2017.)

- Module 2: *Agency Expenditures, Capacity, and Resources* (completed by CSBG Eligible Entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies) includes information on funds spent by CSBG Eligible Entities on the direct delivery of local services and strategies and capacity development as well as information on funding devoted to administrative costs by the CSBG Eligible Entities. (States will submit Module 2 in OLDC by March 31, 2019.)

- Module 3: *Community Level* (completed by CSBG Eligible Entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies) includes information on the implementation of strategies and results achieved for communities where people with low-incomes live. (States will submit Module 3 in OLDC by March 31, 2019.)

- Module 4: *Individual and Family Level* (completed by CSBG Eligible Entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies) includes the information described above. (States will submit Module 4 in OLDC by March 31, 2019.)

Each module has an accompanying instruction manual released by the National Association for State Community Services Programs (NASCSP) that serves as a supplement to the federal system. The manual for Module 4 provides instructions and definitions for the data points of the new CSBG Annual Report. NASCSP will post recorded webinars to guide users through the manual, and to collect feedback via this form. NASCSP will also post additional tools and resources as they become available to assist states and local entities in implementing this report.

Together, Modules 2–4 of the CSBG Annual Report are the vehicles that will actualize accountability for CSBG Eligible Entities in the new Performance Management Framework. CSBG Eligible Entities and states

will report using Modules 2-4 beginning in Fiscal Year (FY) 2018. Forms used for reporting in FY 2018 can be accessed on the NASCSP website.

History

The first comprehensive survey of state uses of federal CSBG funds was conducted in 1983, by a cooperative venture between NASCSP and the National Governors' Association with outside assistance from the Center for Community Futures. This led to the development of the National Voluntary Reporting System, or NVRS. The Center for Community Futures, guided by the Data Collection Committee of NASCSP, conducted surveys of FY 1984, 1985, and 1986 activity. NASCSP began conducting these surveys in FY 1987.

In FY 2001, it became a federal requirement for states to use the IS Survey for reporting. These surveys and the reports they generated were periodically amended to focus on information of special interest to state and federal policymakers, such as the relationship of CSBG to other funding sources and the development of innovative programs. Each fiscal year's survey incorporated lessons learned from earlier data collection practices and the analysis of this information. The Information System Task Force (ISTF), which included participants from across the CSBG Network, as well as other stakeholders and partners, discussed and agreed upon changes.

In 2012, the OCS awarded a cooperative agreement to NASCSP to assist the OCS in developing the new CSBG Annual Report. Through frequent and multiple communications with the CSBG Network, including listening sessions, presentations and webinars, the Network informed the development of the CSBG Annual Report.

In 2016, the OCS, in partnership with NASCSP, invited the CSBG Network to provide feedback on content for the CSBG Annual Report forms through a formal Office of Management and Budget (OMB) clearance process. In response, over half of the CSBG Network provided thoughtful comments and letters. OCS and NASCSP analyzed all the responses and used the feedback to prepare the forms that were then submitted for the first Federal Register 60-Day Notice review in June 2016.

In response to the 60-day notice, the OCS considered comments from organizations across the CSBG Network, including national organizations, State CSBG Lead Agencies, State Community Action Associations, and local CSBG Eligible Entities, and further revised the CSBG Annual Report based on this input. The OCS released the report to the Network as an official Federal Register Notice for a final 30-day comment period. Following this comment period, the OCS submitted the CSBG Annual Report to the OMB for the third and final comment period. The OMB granted approval for the CSBG Annual Report on January 12, 2017.

NASCSP soon created instruction manuals for each module. On May 31, 2017, NASCSP sent the manuals to the DATA Task Force (DATA TF) for review. Through an in-person meeting and written comments, the DATA TF provided valuable insight to enhance these documents so that they meet the needs of the Network. Since May, NASCSP has been eliciting feedback and incorporating the feedback into these manuals from the OCS and other experts in the field.

Module 2, Section A: CSBG Expenditures by CSBG Eligible Entity

A.1. CSBG Eligible Entity Reporting Period

A.1 CSBG Eligible Entity Reporting Period
A.1a. July 1 - June 30
A.1b. October 1 - September 30
A.1c. January 1 - December 31

A.1 CSBG Eligible Entity Reporting Period – The CSBG Reporting Period is selected by the CSBG State Office and indicates the 12-month period in which most of the Federal Fiscal Year (FFY) CSBG funds for the year covering this report were expended. For example, the FY 2018 report would be reporting on outcomes and services obtained with FFY18 funds. This reporting period may or may not be the same as the Federal Fiscal Year (FFY). CSBG Eligible Entities should check with their State Office with any questions on the reporting period.

A.2. CSBG Expenditures Domains

A.2. CSBG Expenditures Domains	CSBG Funds
A.2a. Employment	
A.2b. Education and Cognitive Development	
A.2c. Income, Infrastructure, and Asset Building	
A.2d. Housing	
A.2e. Health and Social/Behavioral Development *(includes nutrition)*	
A.2f. Civic Engagement and Community Involvement	
A.2g. Services Supporting Multiple Domains	
A.2h. Linkages *(e.g. partnerships that support multiple domains)*	
A.2i. Agency Capacity Building *(detailed below in Table A.4)*	
A.2j. Other *(e.g. emergency management/disaster relief)*	
A.2k. Total CSBG Expenditures (auto calculated)	**$0**

A.2. CSBG Expenditure Domains – In this item, CSBG Eligible Entities report only on <u>expended</u> federal CSBG funds. Include carryover funds from the previous fiscal year's CSBG funds and any CSBG discretionary funds spent during the state's CSBG Reporting Period as identified under Item A.1. This section should <u>not</u> include any state allocated CSBG funds, only federal CSBG funds. Report all CSBG funds <u>expended</u> regardless of the originating federal fiscal year grant award.

CSBG Domain Classification

Each CSBG Eligible Entity should report all CSBG funds expended by domain. Report the expended funds in the domain that best matches the need identified and the outcome the project is designed to achieve. In the most straightforward situations, a CSBG project will fit in one of the nine domain areas: *Employment; Education and Cognitive Development; Income, Infrastructure, and Asset Building; Housing; Health and Social/Behavioral Development (includes nutrition); Civic Engagement and Community*

Involvement; Services Supporting Multiple Domains; Linkages (e.g. partnerships that support multiple domains); Agency Capacity Building; and "Other" (e.g. emergency management/disaster relief).

Projects funded partially or wholly by CSBG should be reported under A.2. The primary purpose/outcome of a project should determine under which domain in Section A.2 to enter the CSBG funds. For example, a CAA operates a project designed to provide various services to help individuals obtain and maintain employment. Under this project, some participants receive housing support so they are able to maintain employment. The CSBG expenditures on this project should be reported under **A.2a. Employment** because the primary purpose/outcome of this project is employment.

In another example, a CAA might operate a project designed to help families increase their economic security. The outcomes vary based on family needs and may include employment, education or housing. In this example, the CSBG expenditures should be reported under **A.2g. Services Supporting Multiple Domains** because the outcomes in this project cross multiple domains.

The data point **A.2j. Other** captures expenditures on projects funded by CSBG that are not easily classified in the other nine categories. It is understood that not all projects a CSBG Eligible Entity manages fits neatly into the CSBG domains. In this case the State CSBG Lead Agency will review any funds reported in **A.2j. Other** to ensure that the activities cannot be reported in one of the other nine categories, prior to submitting the CSBG Annual Report to OCS.

CSBG Expenditure Domains Definitions

A.2a. Employment: Report all federal CSBG funds expended on employment programs, for both individual/family services and community strategies.

A.2b. Education and Cognitive Development: Report all federal CSBG funds expended on education and cognitive development programs, for both individual/family services and community strategies.

A.2c. Income, Infrastructure, and Asset Building: Report all federal CSBG funds expended on income, infrastructure and asset building programs, for both individual/family services and community strategies.

A.2d. Housing: Report all federal CSBG funds expended on housing programs, for both individual/family services and community strategies.

A.2e. Health and Social/Behavioral Development (includes nutrition): Report all federal CSBG funds expended on health and social/behavioral programs, for both individual/family services and community strategies.

A.2f. Civic Engagement and Community Involvement: Report all federal CSBG funds expended on civic engagement and community involvement programs, for both individual/family services, and community strategies.

A.2g. Services Supporting Multiple Domains: Report all federal CSBG funds expended under services supporting multiple domains, which are programs that span or support outcomes achieved across the multiple domains (A.2a – A.2f), for both individual/family services and community strategies, such as case management, transportation, and childcare.

A.2h. Linkages (e.g. partnerships that support multiple domains): Many of the activities that were associated with Linkages are now captured in **A.2i. Agency Capacity Building**, which narrows the definition of Linkages. Linkages includes the activities that build partnerships related to community initiatives, work on collaborations and Information and Referral (I/R) calls. For example, staff time spent at regular

community resource sharing meetings where the purpose is to inform the community about available programs and resources should be reported here. Report all federal CSBG funds expended on linkages here on both individual/family services and community strategies.

A.2i. Agency Capacity Building (detailed below in A.4.): Report all federal CSBG funds expended on agency capacity building, which is detailed in A.4. on this form. For example, if staff are involved in the Community Needs Assessment, Strategic Plan, or time spent in training, it should be reported here.

Agency capacity building is the training, technical assistance, or other activity that helps a Board member or staff person improve their skills, knowledge and understanding of CSBG or other programs with the explicit purpose of building the capacity of the CSBG Eligible Entity to achieve results. Activities can include staff development, strategic planning sessions, succession planning, ROMA Activities, Organizational Standards technical assistance, fiscal training, risk assessment, or Board retreats.

A.2j. Other (e.g. emergency management/disaster relief): Report all federal CSBG funds expended on activities not easily classified in the other nine categories. The State CSBG Lead Agency will review any funds reported here to ensure that the activity(ies) cannot be reported in one of the other nine categories prior to submitting the CSBG Annual Report to OCS.

A2k. Total CSBG Expenditures: this item will auto-calculate A.2a.-A.2j.

A.3. Administrative Costs

A.3. Of the CSBG funds reported above, report the total amount used for Administration. For more information on what qualifies as Administration, refer to IM37.

A.3. Administrative Costs: Enter the amount of the federal CSBG funds reported in **A.2 CSBG Expenditure Domain**s, which were expended for administrative purposes.

NOTE: *Information Memoranda 37 (IM 37) contains guidance on reporting CSBG administrative costs. IM 37 describes Administrative Costs, in the context of CSBG statutory reporting requirements, as the equivalent to the familiar concepts of "indirect" costs or "overhead." Administrative costs relate to the general management of the grantee organization, such as strategic direction, Board development, Executive Director functions, accounting, budgeting, personnel, procurement, and legal services. Therefore, direct program costs include expenditures on some activities with administrative qualities, including salaries and benefits of program staff and managers, equipment, training, conferences, travel, and contracts that expressly relate to the delivery of an individual program or service funded by a specific grant source.*

It is important to remember that <u>not all indirect expenses are "administrative,"</u> especially if they are paying for the salaries of persons engaged in coordinating programs or any activity or cost that can be directly tied to a program or domain. For example, the Executive Director's time spent organizing a coalition whose goal is to increase the percent of children in the community who are ready to enter Kindergarten. This work can be specifically tied to the Education and Cognitive Development domain and not considered administration. However, the time the Executive Director spent on Board development or strategic direction are administrative. For example, if an Executive Director holds a Board retreat, that time would be reported in Agency Capacity Building and reported in A.3.

A.4 Details on Agency Capacity Building Activities Funded by CSBG

A.4. Details on Agency Capacity Building Activities Funded by CSBG:
1. Please identify which activities were funded by CSBG as reported under **A.2.i Agency Capacity** in Table A.2. Please check all that apply.
☐ Community Needs Assessment   ☐ Data Management & Reporting   ☐ Other*   ☐ Strategic Planning   ☐ Training & Technical Assistance
*Below please specify any Other activities funded by CSBG under **A.2.i Agency Capacity** which do not fit into the provided categories:

A.4. Details on Agency Capacity Building Activities Funded by CSBG – Under Table A.4., please identify which activities were funded wholly or partially by CSBG (as reported under **A.2i. Agency Capacity Building**). Please check all that apply.

Community Needs Assessment: Select the check box if funds reported in A.2i. supported activities related to the creation of a Community Needs Assessment. This can include any costs incurred to conduct focus groups, surveys, work conducted by consultants, or staff time.

The *Community Needs Assessment* is the report a CSBG Eligible Entity compiles after conducting research to understand their community and plan for programs. This report includes both quantitative and qualitative data, a summary of key findings, and the identification of needs.

Strategic Planning: Select the check box if funds reported in A.2i. supported activities related to the development of a Strategic Plan. This can include any staff time or other administrative costs, in addition to any costs incurred to use facilitators or other consultants.

Strategic Planning is the activity a CSBG Eligible Entity engages in to discuss and set the direction of the CSBG Eligible Entity through the implementation of specific programs and initiatives.

Data Management & Reporting: Select the check box if funds reported in A.2i. supported activities related to the data management and reporting. This can include any costs incurred to support training, implementation, purchase of technology or software or other direct costs, staff time, and/or other administrative costs.

Training & Technical Assistance: Select the check box if funds reported in A.2i. supported training and technical assistance. This can include any costs incurred to secure training facilities, travel, consultants or other direct costs, staff time, and/or other administrative costs.

Training activities are those that provide staff development and program support on programs and initiatives operated by the CSBG Eligible Entity, and education on poverty and other topics relevant to the work of the CSBG Eligible Entity. Training can be supported by CSBG or other funds.

Other*: Select the check box if funds reported in A.2i. do not fit in any of the four categories above. If this check box is selected, list the activitiy(ies) in the accompanying text box. The State CSBG Lead Agency will review any items reported here to ensure that the activities cannot be reported in one of the already identified categories for agency capacity building prior to submitting the CSBG Annual Report to OCS.

Module 2, Section B: CSBG Eligible Entity Capacity Building

Agency capacity building is a critical activity. It helps entities become and continue to be high-performing. The time and activities staff engages in to increase capacity is important to report in order to show the investment a CSBG Eligible Entity is making.

B.1 CSBG Eligible Entity Reporting Period

B.1. CSBG Eligible Entity Reporting Period	"X"
B.1a. July 1 - June 30	*auto-populated from Module 2, Section A*
B.1b. October 1 - September 30	
B.1c. January 1 - December 31	

CSBG Eligible Entity Reporting Period will have been previously set in Section A; therefore, no selection needs to be made here.

B.2 Hours of Agency Capacity Building (e.g. training, planning, assessment)

B.2. Hours of Agency Capacity Building (e.g. training, planning, assessment):	Hours
B.2a. Hours of Board Members in capacity building activities	
B.2b. Hours of Agency Staff in capacity building activities	

B.2. Hours of Agency Capacity Building asks the CSBG Eligible Entity to report the number of hours that Board members and staff spent in agency capacity building activities. For example, if two staff members enroll in and complete the National Peer-to-Peer ROMA Training Program, the total hours that the first person spent in training was 15 and the total hours the second person spent was also 15, the CSBG Eligible Entity should enter 30 hours in B.2b.

> **B.2a. Hours of Board Members in capacity building activities:** enter the total number of hours that <u>all</u> Board members spent in capacity building activities. This item aims to capture the hours Board members spent on activities such as planning, assessing community needs and resources, or participating in training. Reporting of all hours Board members spent in board meetings should be entered in B.3.

> **B.2b. Hours of Agency Staff in capacity building activities:** enter the total number of hours that <u>all</u> CSBG Eligible Entity staff members combined spent in capacity building activities.

B.3. Volunteer Hours (e.g. program support, service delivery, and fundraising)

B.3. Volunteer Hours (e.g. program support, service delivery, fundraising):	Hours
B.3a. Total number of volunteer hours donated to the agency	
B.3a.1. Of the above, the total number of volunteer hours donated by individuals with low-incomes	

B.3a. Total number of volunteer hours donated to the agency: In B.3a report <u>all</u> volunteer hours donated to the CSBG Eligible Entity during the reporting period. This section collects data on <u>hours</u> and not the number of people. Board members, the Head Start Policy council, and parent advisory board members should be included here.

Examples of volunteer activities:

- Serving on the CAA governing Board.
- A volunteer representing the CSBG Eligible Entity on a Board for furthering the CSBG Eligible Entity's strategic plan.
- Assisting with program activities and logistics.
- Participating in advocacy to influence the policies and practices of government and/or private entities so that they are responsive to the needs of communities where low-income people live.
- The CAA's 15 Board members each attend 6 Board meetings, each lasting 2 hours. (Report as 180 hours.)
- The CAA's free tax preparation program has 10 volunteers, who work 3 hours a week for 12 weeks. (Report as 360 hours)

B.3a.1. Of the above, the total number of volunteer hours donated by individuals with low-incomes: B.3a.1 is focused on documenting how people with low-income are supported by the local CSBG Eligible Entity to have a stake in their community. This section provides a snapshot of involvement of individuals with low-income in their community by tracking the number of volunteer hours donated by such individuals.

While B.3a. asked for the total number of hours donated by <u>all</u> volunteers, in B.3a.1. report only the hours from the above that were donated by persons with low-incomes. This number for B.3a.1. should never be more than B.3a. To know which volunteers are persons with low-incomes, a CSBG Eligible Entity does not need to complete income verification, but can ask a clarifying question on their volunteer application or complete an anonymous survey of their volunteers.

Examples of Applicable Activities:

- Individuals with low-incomes volunteering in any Community Action initiatives.
- Individuals with low-income serving on CAA Boards.
- Individuals with low-income serving on Head Start Policy Council.
- Community members with low-income assist a CAA with poverty simulations.

B.4. 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

B.4. 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:	Number
B.4a. Number of Nationally Certified ROMA Trainers	
B.4b. Number of Nationally Certified ROMA Implementers	
B.4c. Number of Certified Community Action Professionals (CCAP)	
B.4d. Number of Staff with a child development certification	
B.4e. Number of Staff with a family development certification	
B.4f. Number of Pathways Reviewers	
B.4g. Number of Staff with Home Energy Professional Certifications	
B.4g.1. Number of Energy Auditors	
B.4g.2. Number of Retrofit Installer Technicians	
B.4g.3. Number of Crew Leaders	
B.4g.4. Number of Quality Control Inspectors (QCI)	
B.4h. Number of LEED Risk Certified assessors	
B.4i. Number of Building Performance Institute (BPI) certified professionals	
B.4j. Number of Classroom Assessment Scoring System (CLASS) certified professionals	
B.4k. Number of Certified Housing Quality Standards (HQS) Inspectors	
B.4l. Number of American Institute of Certified Planners (AICP)	
B.4m. Other *(Please specify others below):*	

In B.4. report the total number of staff who hold the specific certifications listed during the reporting period. The same person can be reported under multiple certifications and can be reported multiple years in a row while they work with the CSBG Eligible Entity. If a staff member holds a certification, such as those obtained through WIC, Certified Public Accountant, Social Work licensure, or other licensures that are not listed, please include them in **B.4m. Other.** Do not report college degrees, only report certifications obtained related to the work of the CSBG Eligible Entity.

B.4a. Number of Nationally Certified ROMA Trainers: Report the number of ROMA Trainers certified through the Association of Nationally Certified ROMA Trainers. Do not include staff who are in the process of becoming certified.

B.4b. Number of Nationally Certified ROMA Implementers: Report the number of ROMA Implementers certified through the Association of Nationally Certified ROMA Trainers. Do not include staff who are in the process of becoming certified.

B.4c. Number of Certified Community Action Professionals (CCAP): Report the number of CCAPs certified through the Community Action Partnership. Do not include staff who are in the process of becoming certified.

B.4d. Number of staff with a child development certification: Report the number of child development certifications obtained through a national credentialing program. Do not include staff who are in the process of becoming certified. For example, report Child Development Associate certificate obtained by some early childhood education staff.

B.4e. Number of staff with a family development certification: Report the number of family development specialists certified through a participating university credentialing program. Do not include staff who are in the process of becoming certified.

B.4f. Number of Pathways Reviewers: Report the number of Pathways Reviewers certified through the Community Action Partnership. Do not include staff who are in the process of becoming reviewers.

B.4g. Number of staff with Home Energy Professional Certifications: Enter the number of staff who have any one of the Home Energy Professional Certifications as outlined in the Job Task Analysis and provided through an accredited training center as described in Department of Energy's Weatherization Assistance Program.

B.4g.1. Number of Energy Auditors: Report the number of Energy Auditors certified through an accredited training center. Do not include staff who are in the process of becoming Energy Auditors.

B.4g.2. Number of Retrofit Installer Technicians: Report the number of Retrofit Installer Technicians certified through an accredited training center. Do not include staff who are in the process of becoming Retrofit Installer Technicians.

B.4g.3. Number of Crew Leaders: Report the number of Crew Leaders certified through an accredited training center. Do not include staff who are in the process of becoming Crew Leaders.

B.4g.4. Number of Quality Control Inspectors (QCI): Report the number of *QCIs* certified through an accredited training center. Do not include staff who are in the process of becoming *QCIs.*

B.4h. Number of LEED Risk Certified assessors: Report the number of LEED Risk Certified Assessors certified through the U.S. Green Building Council. Do not include staff who are in the process of becoming LEED Risk Certified Assessors.

B.4i. Number of Building Performance Institute (BPI) Certified Professionals: Report the number of BPI certified professionals certified through the Building Performance Institute. Do not include staff who are in the process of becoming BPI certified.

B.4j. Number of Classroom Assessment Scoring System (CLASS) Certified Professionals: Report the number of CLASS Certified Professionals certified through a Head Start Program or similar credentialing. Do not include staff who are in the process of becoming certified.

B.4k. Number of Certified Housing Quality Standards (HQS) Inspectors: Report the number of HQS Inspectors certified through the National Association of Housing and Redevelopment Officials. Do not include staff who are in the process of becoming certified.

B.4l. Number of American Institute of Certified Planners (AICP): Report the number of American Institute of Certified Planners certified through the American Planning Association**.** Do not include staff who are in the process of becoming certified.

B.4m. Other (Please specify others below): Report the number of staff who hold other certifications. If a number is reported here, specify the types of certifications in the space below. If a staff member holds a certification, such as those obtained through WIC, Certified Public Accountant, Social Work licensure, or other licensures that are not listed, please include them here. Do not report college degrees; only report certifications obtained.

B.5. Number of organizations, both public and private, that the CSBG Eligible Entity actively works with to expand resources and opportunities to achieve family and community outcomes.

B.5. Number of organizations, both public and private, that the CSBG Eligible Entity actively works with to expand resources and opportunities in order to achieve family and community outcomes:	Unduplicated Number of Organizations
B.5a. Non-Profit	
B.5b. Faith Based	
B.5c. Local Government	
B.5d. State Government	
B.5e. Federal Government	
B.5f. For-Profit Business or Corporation	
B.5g. Consortiums/Collaborations	
B.5h. School Districts	
B.5i. Institutions of Post-Secondary Education/Training	
B.5j. Financial/Banking Institutions	
B.5k. Health Service Organizations	
B.5l. Statewide Associations or Collaborations	

As part of the purpose of CSBG, Eligible Entities work with other public and private organizations to expand service opportunities for individuals or families or to achieve community improvement outcomes. B.5. collects the number of organizations a CSBG Eligible Entity actively works with as identified by:

- Financial agreements between a CSBG Eligible Entity and one or more business entities or financial institutions to promote individual or community economic development and/or infrastructure investment;

- Formal arrangements, such as memoranda of understanding/agreement or service contracts, between a CSBG Eligible Entity and one or more public or private service providers to coordinate referral and exchange of program participants;

- Informal working relationships between a CSBG Eligible Entity with public or private agencies, organizations, or individual service providers that expand service opportunities for individuals/families with low-income, including routine service referrals and follow-up contacts; and

- Alliances between a CSBG Eligible Entity and one or more public or private organizations that advocate for expanded services or community opportunities for people with low-income.

Include the number of organizations that make up the types of partnerships mentioned above. Only report the number of organizations the CSBG Eligible Entity is engaged with and not the number of partnerships with each type of CSBG Eligible Entity. For example, a CAA may have a partnership with three different departments within the Department of Education, however the Department of Education is only one organization. As such, the number "one" should be reported to represent the Department of Education. If an organization qualifies within multiple categories, CSBG Eligible Entities should report the organization in only one category, its primary classification. For example, Catholic Charities is a non-profit, faith-based organization. However, their primary mission is faith-based and should be reported under faith-based

organizations. Additionally, each CSBG Eligible Entity has a relationship with both their State CSBG Lead Agency and their association. Ensure that those partnerships are represented in this chart.

Module 2, Section C: Allocated Resources per CSBG Eligible Entity

Section C: Allocated Resources per CSBG Eligible Entity data entry form provides data on resources allocated to, and administered through, the CSBG Eligible Entity. This report provides valuable information on how CSBG leverages funds from multiple federal, state, local, and private sources as required in the CSBG Act. Section C characterizes the work of the network and places it within a realistic context.

All reported dollars should be allocated dollars. **Allocated dollars** are the amount that is available to each CSBG Eligible Entity during a twelve-month period. If a contract covers a three-year period, only report the amount allocated for the most current year of the contract.

C.1. CSBG Eligible Entity Reporting Period

C.1. CSBG Eligible Entity Reporting Period	"X"
C.1a. July 1 - June 30	auto-populated from Module 2, Section A
C.1b. October 1 - September 30	
C.1c. January 1 - December 31	

CSBG Eligible Entity Reporting Period will have been previously set in Section A, therefore no selection needs to be made here.

C.2. Amount of FY 20XX CSBG Allocated to Reporting Entity

Enter the amount of FFY 20XX CSBG dollars allocated to the CSBG Eligible Entity for the reporting period. Include any federal CSBG discretionary dollars awarded by the state to the CSBG Eligible Entity during the reporting period.

C.3. Federal Resources Allocated (Other than CSBG)

Report all federal resources allocated to the CSBG Eligible Entity during the reporting period. Many funds received from the state by a CSBG Eligible Entity are actually federal funds. When responding to this section review all funds a CSBG Eligible Entity receives and report all federal funds here, even if the contract held by the CSBG Eligible Entity is with the state. An example might be funding received from the state to help support senior programs that is actually Older American Act funding. In this situation, the funding should be reported here and not in the state funding section.

C.3a. Weatherization (DOE) (include oil overcharge $$): Funding from the U.S. Department of Energy. Include Petroleum Violation Escrow (PVE) oil overcharge funds used for this program. Any Bonneville Power Administration funding should be reported under other.

C.3b. Health and Human Services (HHS): Report funding from Health and Human Services using the following categories:

>**C.3b.1. LIHEAP - Fuel Assistance (include oil overcharge $$):** Low-Income Home Energy Assistance Program (LIHEAP) funding from the U.S. Department of Health and Human Services. Include PVE oil overcharge funds used for this program.

>**C.3b.2. LIHEAP - Weatherization (include oil overcharge $$):** Low-Income Home Energy Assistance Program (LIHEAP) funding from the U.S. Department of Health and Human Services used to provide weatherization services.

C.3b.3. Head Start: Head Start funding from the U.S. Department of Health and Human Services.

C.3b.4. Early Head Start: Early Head Start funding from the U.S. Department of Health and Human Services.

C.3b.5. Older Americans Act: Older Americans Act funding from the U.S. Department of Health and Human Services.

C.3b.6. Social Services Block Grant (SSBG): Social Services Block Grant funding from the U.S. Department of Health and Human Services.

C.3b.7. Medicare/Medicaid: Medicare and Medicaid funding from the U.S. Department of Health and Human Services.

C.3b.8. Assets for Independence (AFI): Assets for Independence funds provided by the U.S. Department of Health and Human Services.

C.3b.9. Temporary Assistance for Needy Families (TANF): TANF Funds provided by the U.S. Department of Health and Human Services. This should include all programs funded by TANF to provide services to former welfare recipients including programs that assist families in remaining self- sufficient. It is critical to examine the ultimate source of the funds because often TANF funds are funneled through other state and county programs.

C.3b.10. Child Care Development Block Grant (CCDBG): Childcare Development Block Grant funds provided by the U.S. Department of Health and Human Services.

C.3b.11. Community Economic Development (CED): Community Economic Development (CED) is a federal grant program funding Community Development Corporations that address the economic needs of people with low-incomes through the creation of sustainable business development and employment opportunities.

C.3b.12. Other HHS Resources: List all other funding from the U.S. Department of Health and Human Services not listed above in Item 3b.12i-3b.12.iv. List in order of largest to smallest. For each program, please list the name and the funding source. Please DO NOT use acronyms and abbreviations. **Include CFDA number.**

C.3b.12.	Other HHS Resources				
C.3b.12.i.		CFDA #:		C.3b.12.i.	
C.3b.12.ii.		CFDA #:		C.3b.12.ii.	
C.3b.12.iii.		CFDA #:		C.3b.12.iii.	
C.3b.12.iv.		CFDA #:		C.3b.12.iv.	
C.3b.13. Total Other HHS Resources (autocalculated)				C.3b.13.	$ -

C.3b.13. Total Other HHS Resources (auto calculated): the total of all other U.S. Department of Health and Human Resources will auto-calculate.

C.3c. Department of Agriculture (USDA): Report funding from the United States Department of Agriculture using the following categories:

C.3c.1. Special Supplemental Nutrition for Women, Infants, and Children (WIC): Special Supplemental Nutrition Program for Women, Infants and Children funded by the U.S. Department of Agriculture.

C.3c.2. All USDA Non-Food programs (e.g. rural development): All non-food programs funded by the U.S. Department of Agriculture, such as rural development and housing.

C.3c.3. All other USDA Food programs: All other food programs funded by the U.S. Department of Agriculture, including The Emergency Food Assistance Program (TEFAP) or the Commodity Supplemental Food Program (CSFP).

C.3d. Department of Housing and Urban Development (HUD): Report all funds allocated to the CSBG Eligible Entity from United States Department of Housing and Urban Development using the following categories:

C.3d.1. Community Development Block Grant (CDBG) - Federal, State, and Local: Report all Community Development Block Grant funds from the U.S. Department of Housing and Urban Development received directly or indirectly through contracts with the state or local government.

C.3d.2. Section 8: Section 8 provides housing assistance to families with very low incomes.

C.3d.3. Section 202: Section 202 provides capital supportive housing for the elderly.

C.3d.4. Home Tenant-Based Rental Assistance (HOME TBRA): Home Tenant-Based Rental Assistance provides housing assistance to families with low-incomes.

C.3d.5. HOPE for Homeowners Program (H4H): HOPE for Homeowners is a refinancing program.

C.3d.6. Emergency Solutions Grant (ESG): The Emergency Solutions Grant provides assistance to families to regain stability. It also supports homeless shelters and prevention.

C.3d.7. Continuum of Care (CoC): The Continuum of Care is a community-wide program working towards ending homelessness.

C.3d.8. All other HUD programs, including homeless programs: All other homeless and housing programs funded by the U.S. Department of Housing and Urban Development. This includes the McKinney Homeless program.

C.3e. Department of Labor (DOL): Report all funds allocated to the CSBG Eligible Entity from U.S. Department of Labor using the following categories:

C.3e.1. Workforce Innovation and Opportunity Act (WIOA) *previously WIA: The Workforce Innovation and Opportunity Act provides funding for employment and training activities from the U.S. Department of Labor.

C.3e.2. Other DOL Employment and Training programs: Other U.S. Department of Labor funding that supports employment and training programs.

C.3e.3. All other DOL programs: All other U.S. Department of Labor programs.

C.3f. Corporation for National and Community Service (CNCS) programs: Funds from CNCS support programs such as the AmeriCorps*VISTA and AmeriCorps*NCCC programs, the Senior Corps (Foster Grandparent, RSVP, or Senior Companion) programs, Learn and Serve, or America Reads. Report all funding and service volunteer equivalent.

C.3g. Federal Emergency Management Agency (FEMA): Emergency funds from the Federal Emergency Management Administration such as food assistance and disaster relief.

C.3h. Department of Transportation: Transportation funding from the U.S. Department of Transportation (US DOT).

C.3i. Department of Education: Education funding from the U.S. Department of Education (US EDU).

C.3j. Department of Justice: Justice funding from the U.S. Department of Justice (US DOJ).

C.3k. Department of Treasury: Treasury funding from the U.S. Department of the Treasury (US TD).

C.3l. Other Federal Resources: List all other federal funding sources not listed above in Items C.3l.i.-C.3l.iv**.** PLEASE PROVIDE THE <u>FULL NAME</u> OF THE FEDERAL DEPARTMENT. For each program, please list the name and the funding source. Please DO NOT use acronyms or abbreviations. It is important that all programs listed under "*Other*" in Item 3l. are scrutinized at the state level. Often programs entered here belong on the more specific categories listed in the pre-existing Federal categories. For those programs that are listed in these fields, please provide as much detail as possible. Include the **CFDA number.**

C.3l. Other Federal Resources

C.3l.i.		CFDA #:		C.3l.i.
C.3l.ii.		CFDA #:		C.3l.ii.
C.3l.iii.		CFDA #:		C.3l.iii.
C.3l.iv.		CFDA #:		C.3l.iv.

C.3m. Total Other Federal Resources (autocalculated)   C.3m. $ -

C.3m. Total Other Federal Resources (auto-calculated): The total will auto-calculate from the items listed above.

C.3n. Total: Non-CSBG Federal Resources Allocated (auto-calculated): Item C.3n. will auto-calculate all non-CSBG Federal Resources.

C.4. State Resources Allocated

Report funds allocated to CSBG Eligible Entities from state funds appropriated by the state legislature. The figure reported here should include all the funds allocated to local CSBG Eligible Entities during the reporting period. When reporting state allocations ensure the funds are <u>not</u> federal funds that the state is administering. If they are, then report those funds in the appropriate federal category in C.3.

C.4a. State appropriated funds used for the same purpose as Federal CSBG funds: Include funds that were appropriated by the state legislature to be used in line with the federal criteria for CSBG. This is the only place where state-appropriated CSBG dollars are reported in this report.

C.4b. State Housing and Homeless programs (include housing tax credits): State funds appropriated for housing and homeless programs.

C.4c. State Nutrition programs: State funds appropriated for nutrition programs.

C.4d. State Early Childhood Programs (e.g. Head Start, Day Care): State funds appropriated for Early Childhood programs.

C.4e. State Energy programs: State funds appropriated for State Energy programs.

C.4f. State Health programs: State funds appropriated for health programs.

C.4g. State Youth Development programs: State funds appropriated for youth development programs.

C.4h. State Employment and Training programs: State funds appropriated for employment and training programs.

C.4i. State Senior programs: State funds appropriated for senior programs.

C.4j. State Transportation programs: State funds appropriated for transportation programs.

C.4k. State Education programs: State funds appropriated for education programs.

C.4l. State Community, Rural and Economic Development programs: State funds appropriated for community, rural, and economic development programs.

C.4m. State Family Development programs: State funds appropriated for family development programs. Include Navigator programs here.

C.4n. Other State Resources: For Item C.4n., list all other programs that made use of state funding sources. Please list the names of all programs and each program's specific funding source(s) and funding amounts. Please write out all acronyms and abbreviations.

It is important all programs listed under the *"Other"* category are scrutinized. Often programs entered here belong in the more specific categories listed in C.4. For programs listed in C.4n., please provide as much detail as possible. This will aid in disseminating the information in the Annual Report to Congress. Please do not use program acronyms unless the full name of a particular program or funding source is also provided.

C.4n.	Other State Resources		
C.4n.i.		C.4n.i.	
C.4n.ii.		C.4n.ii.	
C.4n.iii.		C.4n.iii.	
C.4n.iv.		C.4n.iv.	
C.4o. Total Other State Resources (autocalculated)		C.4o.	$ -

C.4.o. Total Other State Resources (auto-calculated): This item will auto-calculate based on the information entered into C.4.i-iv.

C.4.p Total: State Resources Allocated (auto-calculated): This item will auto-calculate based on the information entered into C.4.a-n.

C.5. Local Resources Allocated

Report all resources, including in-kind donations from cities, counties, and other local funders (except foundations which are included in C.6.)

C.5a. Amount of unrestricted funds appropriated by local government: Enter the amount of unrestricted funds appropriated by local government.

C.5b. Amount of restricted funds appropriated by local government: Enter the amount of restricted funds appropriated by local government.

C.5c. Value of Contract Services: Enter the value of contract services. Report contracts with cities, counties, or other local providers. Report the total amount of the executed contract allocated per program period.

C.5d. Value of in-kind goods/services received from local government: Enter the value of in-kind goods/services received from local government.

C.5e. Total: Local Resources Allocated (auto-calculated): This item will auto-calculated based on the information entered in C.5.

C.6. Private Sector Resources Allocated

Report all resources allocated to the CSBG Eligible Entity from the private sector. Include all donated funds, foundation funding, and payments from clients.

C.6a. Funds from foundations, corporations, United Way, other nonprofits: Report funds from foundations, corporations, United Way, and other nonprofits.

C.6b. Other donated funds: Report donated funds that do not fit in any other category.

C.6c. Value of other donated items, food, clothing, furniture, etc.: Report the value of all donated items.

C.6d. Value of in-kind services received from businesses: The State CSBG Lead Agency should provide guidelines for valuing in-kind donations. A consistent, reasonable statewide method is required.

C.6e. Payments by clients for services: Amounts entered for this item should include all resources generated by a local CSBG Eligible Entity for direct services to program participants. Examples are income through "sliding scale" fees charged for medical care, mental health services, or housing services where a client is responsible for a portion of their rent.

C.6f. Payments by private entities for goods or services for low income clients or communities: Some CSBG Eligible Entities are paid by private entities, profit or non-profit, to provide services to those corporations. Most such arrangements are contractual. Examples are: outreach for HMO programs, transportation services, public utility contracts for customer services or weatherization, and even rental of space and equipment in the service area. This space is for recording the gross income from such arrangements. Contractual arrangements which are simply direct subcontracts or sub-grants of state, local or federal funds should continue to be reported in the federal, state or local resources, and not reported here. This item records funding of a type not previously enumerated or which was historically assigned to a less appropriate category because the survey offered no item to capture these contractual arrangements involving the private or charitable resources of a non-governmental CSBG Eligible Entity.

C.6e. Total: Private Sector Resources Allocated (auto-calculated): This item will auto-calculate based on the information entered for all Private Sector Resources.

C.7. Total Non-CSBG Resources Allocated: (Federal, State, Local & Private)

This item will auto-calculate the total of all federal, state, local and private resources, excluding CSBG.

C.8. Total Resources in CSBG Eligible Entity (including CSBG)

This item will auto-calculate the total of all federal, state, local and private resources, including CSBG, available to the CSBG Eligible Entity during the reporting period.

CSBG ANNUAL REPORT INSTRUCTION MANUAL

Module 4: Individual and Family Level

Version I

Release Date: February 21, 2018

Contents

Overview

As part of the new Performance Management framework, a new Community Services Block Grant (CSBG) Annual Report was developed to better illustrate the impact the CSBG Network has in communities across the country.

Module 4 is the Individual and Family Level module of the new CSBG Annual Report and includes information on services provided to individuals and families, demographic characteristics of people served by CSBG Eligible Entities, and the results achieved for individuals and families with low-incomes.

CSBG Eligible Entities complete Module 4 in fiscal year 2018. State CSBG Lead Agencies then reviewed, evaluated, and analyzed the module and entered the information into the Online Data Collection System (OLDC), the central web-based reporting tool that the Office of Community Services (OCS) uses for CSBG data collection.

The CSBG Annual Report contains four modules.

- Module 1: *State Administration* (completed by State CSBG Administrators) includes information on state administration of funds to CSBG Eligible Entities, use of state-administered and discretionary funds for training and technical assistance, and information on CSBG Eligible Entity progress in meeting the Organizational Standards and implementing ROMA Next Generation. (States submitted Module 1 in OLDC in March 2017.)

- Module 2: *Agency Expenditures, Capacity, and Resources* (completed by CSBG Eligible Entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies) includes information on funds spent by CSBG Eligible Entities on the direct delivery of local services and strategies and capacity development as well as information on funding devoted to administrative costs by the CSBG Eligible Entities. (States will submit Module 2 in OLDC by March 31, 2019.)

- Module 3: *Community Level* (completed by CSBG Eligible Entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies) includes information on the implementation of strategies and results achieved for communities where people with low-incomes live. (States will submit Module 3 in OLDC by March 31, 2019.)

- Module 4: *Individual and Family Level* (completed by CSBG Eligible Entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies) includes the information described above. (States will submit Module 4 in OLDC by March 31, 2019.)

Each module has an accompanying instruction manual released by the National Association for State Community Services Programs (NASCSP) that serves as a supplement to the federal system. The manual for Module 4 provides instructions and definitions for the data points of the new CSBG Annual Report. NASCSP will post recorded webinars to guide users through the manual, and to collect feedback via this

[form](#). NASCSP will also post additional tools and resources as they become available to assist states and local entities in implementing this report.

Together, Modules 2–4 of the CSBG Annual Report are the vehicles that will actualize accountability for CSBG Eligible Entities in the new Performance Management Framework. CSBG Eligible Entities and states will report using Modules 2-4 beginning in Fiscal Year (FY) 2018. Forms used for reporting in FY 2018 can be accessed on the [NASCSP website](#).

History

The first comprehensive survey of state uses of federal CSBG funds was conducted in 1983, by a cooperative venture between NASCSP and the National Governors' Association with outside assistance from the Center for Community Futures. This led to the development of the National Voluntary Reporting System, or NVRS. The Center for Community Futures, guided by the Data Collection Committee of NASCSP, conducted surveys of FY 1984, 1985, and 1986 activity. NASCSP began conducting these surveys in FY 1987.

In FY 2001, it became a federal requirement for states to use the IS Survey for reporting. These surveys and the reports they generated were periodically amended to focus on information of special interest to state and federal policymakers, such as the relationship of CSBG to other funding sources and the development of innovative programs. Each fiscal year's survey incorporated lessons learned from earlier data collection practices and the analysis of this information. The Information System Task Force (ISTF), which included participants from across the CSBG Network, as well as other stakeholders and partners, discussed and agreed upon changes.

In 2012, the OCS awarded a cooperative agreement to NASCSP to assist the OCS in developing the new CSBG Annual Report. Through frequent and multiple communications with the CSBG Network, including listening sessions, presentations and webinars, the Network informed the development of the CSBG Annual Report.

In 2016, the OCS, in partnership with NASCSP, invited the CSBG Network to provide feedback on content for the CSBG Annual Report forms through a formal Office of Management and Budget (OMB) clearance process. In response, over half of the CSBG Network provided thoughtful comments and letters. OCS and NASCSP analyzed all the responses and used the feedback to prepare the forms that were then submitted for the first Federal Register 60-Day Notice review in June 2016.

In response to the 60-day notice, the OCS considered comments from organizations across the CSBG Network, including national organizations, State CSBG Lead Agencies, State Community Action Associations, and local CSBG Eligible Entities, and further revised the CSBG Annual Report based on this input. The OCS released the report to the Network as an official Federal Register Notice for a final 30-day comment period. Following this comment period, the OCS submitted the CSBG Annual Report to the OMB for the third and final comment period. The OMB granted approval for the CSBG Annual Report on January 12, 2017.

NASCSP soon created instruction manuals for each module. On May 31, 2017, NASCSP sent the manuals to the DATA Task Force (DATA TF) for review. Through an in-person meeting and written comments, the

DATA TF provided valuable insight to enhance these documents so that they meet the needs of the Network. Since May, NASCSP has been eliciting feedback and incorporating the feedback into these manuals from the OCS and other experts in the field.

Module 4, Section A: Individual and Family National Performance Indicators

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

Module 4: Individual and Family Level collects information on Family National Performance Indicators (FNPIs), Services (SRV) provided to individuals and families, and demographic characteristics of people served by CSBG Eligible Entities. All individual and family-level performance indicators and services are categorized within seven of the nine available domains that organize the work of the Community Action Network.

Community Service Block Grant 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 and Services Across Multiple Domains

How to Select Individual and Family Indicators

Module 4 of the CSBG Annual Report is comprised of outcome indicators that fall under National Goal 1: Individuals and families with low incomes are stable and achieve economic security. The outcomes and services in this module represent work that changes conditions at the individual and family level.

Community Needs Assessments (CNA), Community Action Plans, and other agency-specific planning documents guide all work done by CSBG Eligible Entities. During agency-wide and program planning, CSBG Eligible Entities should identify the problems and opportunities they plan to pursue and the outcomes they will use to measure and determine progress. The outcomes that relate to family and individual level change should be reflected in the FNPIs. The selection of FNPIs must be guided by a CSBG Eligible Entity's specific and unique work that responds to local conditions in the CSBG Eligible Entity's service area. CSBG Eligible Entities should only report on the FNPIs that are relevant and appropriate to measure their work.

While reporting is not optional, the indicators and services reported are determined by the Community Needs Assessment and selected by the CSBG Eligible Entity. Additionally, there is a category for "Other Outcome Indicator." CSBG Eligible Entities will only report an "Other Outcome Indicator" if there is no FNPI listed to capture the outcomes the CSBG Eligible Entity is trying to achieve. Sample language is provided in the "Other Outcome Indicator" data entry section and will be modified by the CSBG Eligible Entity, as necessary.

General Activities to Aid Data Collection of Individual and Family Indicators

The FNPIs report outcomes by counting unduplicated individuals/participants. CSBG Eligible Entities should pay close to attention to each indicator and make sure they are reporting accurately.

CSBG Eligible Entities should only report on FNPIs when the change was directly related to or assisted by programs or activities of the CSBG Eligible Entity. An outcome obtained by a referral may only be counted if the CSBG Eligible Entity is engaged with the participant through a program or activity supported by the CSBG Eligible Entity. Do not count FNPIs for changes that were secured by the participant independent of the CSBG Eligible Entity.

For FNPIs, only participants are being counted. **If an indicator measures households, report all members of the household**. If there are four members of one household, report four (4). Further, if multiple programs in the agency are helping the participant achieve the same FNPI, there is only one participant, so the count is one (1).

How to Report Individual and Family Indicators

For all FNPIs, data is entered in columns I-III; columns IV and V will auto-calculate. The percentage achieving the outcome is reflected in column IV. Column V measures the accuracy of the CSBG Eligible Entity's targeting.

Domain	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)

I.   Column I, the **Number of Participants Served**, reports the unduplicated number of participants who were served in programs that were part of the CSBG Eligible Entity's efforts to achieve the particular indicator.

II.   Column II, **Target**, reports the **number** of participants who were **expected to achieve the identified outcome.** In many cases, this target number can be found in the Community Action Plan, grants or contracts of the particular funding source that supports the efforts, or is identified through the CSBG Eligible Entity's ROMA (Results Oriented Management and Accountability) targeting process. This number should be established before the reporting period starts. States should establish procedures for CSBG Eligible Entities to follow to make revisions to targets.

III.   Column III, **Actual Results**, reports the **number** of participants in column III (above) who **actually achieved the identified outcome** within the reporting period. This number must be based on verification that an outcome has been achieved, and must be supported by appropriate documentation.

IV.   Column IV, **Percentage Achieving and Outcome**, indicates the proportion of program participants who achieved an outcome (III) divided by the total number of participants served (I). The provided forms will automatically calculate the actual outcome achieved. (III/I=IV).

V.   Column V, **Performance Target Accuracy**, measures the accuracy of planned anticipated outcomes. The Actual Result (III) is divided by the Target (II). The provided forms will automatically calculate this success rate of performance (III/II=V).

FNPI 1 Employment Indicators

Employment Indicators Overview

The Employment Indicators (Domain 1) collect data on outcomes achieved by low-income participants in CSBG Eligible Entity employment programs who were either:
- Unemployed and seeking earned income, **or**
- Employed and seeking increased earned income and/or employment benefits.

Indicators tracking outcomes over time:
Indicators tracking outcomes for 90 or 180 days: CSBG Eligible Entities are only expected to report on indicators with retention time frames for programs that specifically include follow up. If the CSBG Eligible Entity does not conduct follow-up activities as a part of its programs, outcomes for indicators with retention time frames will not be reported.

Living Wage:

There is no single national "living wage." Each state and/or local agency must define what constitutes a "living wage" in its service area. When reporting on indicators related to living wage, Community Action Agencies (CAAs) can provide their own definition, select from national or locally defined models, or work with their state to identify a shared definition.

For example, New York State completed a report and identified the living wage for various family compositions. The report can be found here. Count and report the number of program participants who are helped to reach or exceed local living wage thresholds. **CAAs must identify the living wage definition used in the General Comments section.**

The Massachusetts Institute of Technology has developed the MIT Living Wage Calculator, a useful tool that estimates the living wage needed to support families using twelve unique family compositions. The MIT calculator's market-based approach draws upon geographically specific expenditure data related to a family's likely minimum food, child care, health insurance, housing, transportation, and other basic necessities (e.g., clothing, personal care items, etc.) costs. The living wage draws on these cost elements and the rough effects of income and payroll taxes to determine the minimum employment earnings necessary to meet a family's basic needs while also maintaining self-sufficiency.

Applicable Activities

Employment Indicators collect data on unduplicated participants who achieved employment outcomes as a result of:
- Direct employment services as specified in the Employment Services List

- Employment support services reflected in the Services Supporting Multiple Domains List, or
- Verification that the participant used the CSBG Eligible Entity's referral, and received a service as a result of that referral from another partnering Entity that helped the participant obtain employment.

CSBG Eligible Entities should report Employment Indicators for all federal, state, local and privately funded activities that focus on employment or self-sufficiency as a primary outcome *or* as a complementary outcome (for example, when employment is one of several goals for a participant).

Note*: A participant can be reported for more than one indicator (FNPI a-i), as applicable, as long as they are **only** reported <u>once per indicator</u>.*

Indicators

FNPI 1a. The number of unemployed youth who obtained employment to gain skills or income.

Youth are defined as individuals aged 14-24. While it is expected that every effort will be made to report on those programs that serve only this specific age group, all programs designed specifically to meet the needs of young people and serve the age range of 14-24 should be included, even if the program includes slightly older or younger program participants (as in the case of programs that serve program participants ages 10-17 or 12-21).

Duration of Employment: <u>FNPI 1a</u> does not set any national requirements for how long a participant must be employed in order for the outcome to be valid. Temporary and seasonal employment (including summer youth employment) may be reported, unless the state sets other specific guidelines

Subsidized Employment: <u>FNPI 1a</u> does not set any national requirements for the source of funding for the wages of youth achieving an employment outcome.

Examples of activities that may generate reportable outcomes for this indicator:

- Unemployed youth who obtained a job as a result of having been engaged in CAA programs that specifically focus on employment and training or placement (such as those funded by CSBG, TANF, WIOA, or other sources).

- Unemployed youth who, as a result of having been engaged in case-management that focuses on stability and economic security, achieved employment as part of their overall progress toward stability and economic security.

FNPI 1b. The number of unemployed adults who obtained employment (up to a living wage[1]).

Adults are defined as individuals aged 25 and up and can be specific to each program's scope and funding source.

Duration of Employment: FNPI 1b does not set any national requirements for how long a participant must be employed in order for the outcome to be valid. Temporary and seasonal employment may be reported, unless the state sets other specific guidelines.

Subsidized Employment: FNPI 1b does not set any national requirements for the source of funding for the wages of participants achieving an employment outcome. Subsidized employment could be included here.

Examples of activities that may generate reportable outcomes for this indicator:

- o Unemployed participants who obtained a job as a result of having been engaged in CAA programs that specifically focus on employment and training or placement (such as those funded by CSBG, TANF, WIOA or other sources).

- o Unemployed participants who engaged in case-management or coaching, which focuses on employment, and they obtain a job as part of their overall progress toward stability and economic security.

- o Unemployed parents of Head Start or other child development program who obtained employment in the context of parent and family development services.

Note: A CSBG Eligible Entity will track number of adults who obtained employment, even if the wage is unknown.

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[1][3][4] When reporting on indicators related to living wage, CSBG Eligible Entities can provide their own definition or select from national or locally-defined models. Entities must identify in the General Comments Section, the living wage definition used.

FNPI 1c. The number of unemployed adults who obtained and retained employment for at least 90 days (up to a living wage[2]).

This indicator measures participants who obtained a job, and demonstrates that the participants retained the job for at least 90 days and earned up to a living wage.

Examples of activities that may generate reportable outcomes for this indicator:

- o Participants engaged in an economic security program with case management or coaching who obtained employment during the course of their participation, and then maintained that employment for at least 90 days. The maintained employment earned the participant up to a living wage.

- o Participants who found employment as a result of CAA employment supports, and retained that employment following an initial 90-day probationary period. The retained employment earned the participant up to a living wage.

Note: *Outcome data reported in FNPI 1c should also be reported FNPI 1b. If a participant obtained and maintained a job for 90 days as a result of CSBG Eligible Entity assistance, this participant also qualifies for FNPI 1b (obtaining a job). This is true only if the participant obtained employment through the assistance of the CSBG Eligible Entity. If the Entity assists an employed participant who achieves one or more of indicators FNPI 1 c-d, that participant would NOT be reported in FNPI 1b.*

FNPI 1d. The number of unemployed adults who obtained and retained employment for at least 180 days (up to a living wage[3]).

This indicator measures participants who obtained a job, and demonstrates that the participants retained the job for at least 180 days and earned up to a living wage.

Examples of activities that may generate reportable outcomes for this indicator:

- o Participants engaged in a case management or coaching program who achieved employment during the service and retained that employment for at least 180 days during the course of their participation.

- o Participants placed in entry-level jobs or who found and retained employment for 180 days as a result of CAA employment supports.

Note: *Outcome data reported in FNPI 1d should also be reported in FNPI 1b and FNPI 1c. If a participant obtained and maintained a job for 180 days as a result of CSBG Eligible Entity assistance, this participant also qualifies for FNPI 1b (obtaining a job) and FNPI 1c (maintain the job for 90 days). This is true only if the participant obtained employment through the assistance of a CSBG Eligible Entity. If the CSBG Eligible*

Entity assists an employed participant who achieves one or more of indicators FNPI 1 c-d, that participant would NOT be reported in FNPI 1b.

FNPI 1e. The number of unemployed adults who obtained employment (with a living wage or higher).

For more information on the definition of a Living Wage, see page 8 of this manual.

Examples of activities that may generate reportable outcomes for this indicator:

- o Unemployed participants who obtained a job paying a living wage or higher as a result of having been engaged in CAA programs specifically focused on employment and training or placement (such as those funded by CSBG, TANF, WIOA or other sources).

- o Unemployed participants who obtained a job paying a living wage or higher as the result of having been engaged in case management or coaching focused on stability/economic security.

- o Unemployed parents of Head Start or other child development program who obtained initial employment in the context of parent and family development services and earned a living wage or higher.

FNPI 1f. The number of unemployed adults who obtained and retained employment for at least 90 days (with a living wage or higher).

This indicator measures participants who obtained a job and demonstrates that the participants were able to retain the job for at least 90 days and earn a living wage or higher.

Examples of activities that may generate reportable outcomes for this indicator:

- o Participants who achieved and retained that employment for at least 90 days as a result of having been engaged in a case management or coaching program. The retained employment earned the participant a living wage or higher.

- o Participants who found and retained employment following an initial 90-day probationary period as a result of a CAA employment supports. The retained employment earned the participant a living wage or higher.

Note: *Outcome data reported in this indicator, FNPI 1f, should also be reported in FNPI 1e. If a participant obtained a job earning a living wage as a result of CAA assistance and retained it for 90 days, this participant also qualifies for FNPI 1e (obtaining a job with a living wage). This is true only if the participant obtained employment through the assistance of a CSBG Eligible Entity. If the CSBG Eligible Entity assists an employed participant who achieves one or more of indicators FNPI 1 e-f, that participant would NOT be reported in FNPI 1e.*

FNPI 1g. The number of unemployed adults who obtained and retained employment for at least 180 days (with a living wage or higher).

This indicator measures participants who obtained a job and demonstrates that the participants were able to retain the job for at least 180 days and earn a living wage or higher.

Examples of activities that may generate reportable outcomes for this indicator:

- o Participants engaged in a case management or coaching program who achieved employment and retained that employment for at least 180 days.

- o Participants placed in entry-level or higher jobs as a result of CAA employment supports, and who maintained employment for 180 days.

Note: *Outcome data reported in this indicator, FNPI 1g, should also be reported in FNPI 1e and FNPI 1f. If a participant obtained a job earning a living wage as a result of CAA assistance and retained it for 90 days, this participant also qualifies for FNPI 1e (obtaining a job with a living wage). This is true only if the participant obtained employment through the assistance of a CSBG Eligible Entity. If the CSBG Eligible Entity assists an employed participant who achieves one or more of indicators FNPI 1 e-f, that participant would NOT be reported in FNPI 1e.*

FNPI 1h. 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.

This performance indicator captures CSBG Eligible Entity efforts to help low-wage workers move toward economic security.

Activities that may generate reportable outcomes for this indicator:

- o Employed participants who engaged in a career advancement program and increased their income or benefits. Career advancement programs could include:
  - Continuing or vocational education
  - Job referral or employment placement assistance
  - Employment counseling/coaching
  - On-the-job training
  - Starting a micro-business
  - Achieving daycare provider licensure

Report the total number of participants in all programs experiencing improved employment income as a result of both direct service (funded by a variety of sources, including CSBG, JSAP, WIOA, TANF, Welfare to Work, state/local/private programs), and as a result of partnerships with other agencies or organizations in the community.

- **FNPI 1h(1). Of the above, the number of employed participants who increased income from employment through wage or salary amount increase.**

Report the number of participants from the programs listed in FNPI 1h who increased their income specifically through a wage or salary increase. The increased income should be directly related to the advancement of skills obtained through the programs in FNPI 1h. Participants who increase their income should be reported in both FNPI 1h(1) and FNPI 1h.

- **FNPI 1h(2). Of the above, the number of employed participants who increased income from employment through an increase in hours worked.**

Report the number of participants from the programs listed in FNPI 1h who increased their income specifically by increasing the number of hours worked. The increased hours should be directly related to the advancement of skills obtained through the programs in FNPI 1h. Participants who increased their income through increased hours should be reported in this indicators FNPI 1h(2) and FNPI 1h. If the participant increased their wage/salary and hours worked, then they should be reported in FNPI 1h, FNPI 1h(1) (wage/salary increase) and FNPI 1h(2) (hours increase).

- **FNPI 1h(3). Of the above, the number of employed participants who increased benefits related to employment.**

Report the number of participants from the programs listed in FNPI 1h who increased their employment-related benefits. The increased benefits should be directly related to the advancement of skills obtained through the programs in FNPI 1h. Participants who increased their benefits should be reported in this indicator FNPI 1h(3) and FNPI 1h. If the participant increased their wage/salary, hours worked, and benefits, then they should be reported in FNPI 1h, FNPI 1h(1) (wage/salary increase), FNPI 1h(2) (hours increase), and FNPI 1h(3) (benefits increase).

FNPI 1i. Other Employment Outcome Indicator

Only report an "Other Outcome Indicator" if none of the current FNPIs capture the outcomes achieved by the program. Sample language is provided below:
  - *FNPI 1i(1) The number of individuals or households who_____.*

FNPI 2 Education and Cognitive Development Indicators

Education and Cognitive Development Overview:

Education and Cognitive Development indicators (Domain 2) collect data on outcomes achieved by children, youth, parents/caregivers, and other adults with low-incomes who participated in CSBG Eligible Entity programs.

Examples of activities that produce reportable outcomes for children (0-5):

- o Head Start and Early Head Start
- o State-funded preschool child development programs
- o CSBG-funded child development/child care programs
- o TANF-funded child care programs
- o Preschool enrichment or developmental programs operated by partnering organizations (including faith-based organizations) within the community to which children of agency program participants are served, and the CAA is coordinating parent and child services.
- o Reading-at-grade-level programs

FNPI 2 collects data on unduplicated individuals based on activities that produce developmental and educational outcomes for children, youth, parents/caregivers, and other adult participants.

Head Start and FNPI 2:

Head Start has established a number of child health, developmental, and school readiness objectives and outcome expectations for participating youth. CSBG Eligible Entities with Head Start programs are asked to report the number of youth that are deemed to have achieved health, developmental, and school readiness objectives as defined by the program. For more information on the Head Start Performance Standards and indicators, please visit: https://eclkc.ohs.acf.hhs.gov/policy.

Examples of activities that produce reportable outcomes for children and youth:

- o Before- and after-school recreational or enrichment programs for school-aged youth
- o Mentoring programs for at-risk youth
- o Youth and family counseling and peer support group activities
- o Substance abuse prevention programs
- o Teen pregnancy and STD prevention programs
- o Educational skill enhancement programs
- o After-school and summer youth employment training and placement programs
- o Food and nutrition assistance and instructional programs
- o Anger management and conflict resolution instruction

> **Examples** of activities that produce reportable outcomes for parents and other adults:
>
> - o   Parenting skill enhancement programs
> - o   Family functioning skill enhancement programs, including focus on communications, conflict resolution, supportive relationship building, responsibility sharing, and promotion of healthy marriages
> - o   Mental health and substance abuse treatment
> - o   Family/domestic violence prevention, intervention, and remediation programs
> - o   English Language Learner (ELL) programs
> - o   Programs to prepare adults for earning high school diploma or equivalent
> - o   Programs supporting attendance at community college, technical schools, trade schools, and traditional four-year colleges

It is understood that the number of children reported as having achieved program goals in Head Start or any other youth development program may have to be comprised of qualitative assessments of each child's physical growth and health indicators, developmental skill measurements, and/or educational readiness scores. It is expected that Head Start programs have determined the best assessment or measurement tools to use to document participant progress and achievement.

Indicators

FNPI 2a. The number of children (0 to 5) who demonstrated improved emergent literacy skills.

Report the total unduplicated count of children who increased their skills through direct service (funded by a variety of sources, including CSBG, Head Start, TANF, Welfare to Work, state/local/private programs).

> **Examples** of activities that may generate reportable outcomes for this indicator:
>
> - o   Children involved in Head Start, Early Head Start or other pre-kindergarten or kindergarten readiness program who learned and developed new vocabulary and literacy skills.
> - o   Children whose parents received support, counseling, education or coaching heard and learned more words and demonstrated a better understanding of language.
> - o   Children who attended a library reading program and demonstrated enhanced literacy skills.

FNPI 2b. The number of children (0 to 5) who demonstrated skills for school readiness.

> **An example** of an activity that may generate reportable outcomes for this indicator:
>
> - o   Children enrolled in Head Start, Early Head Start or other pre-kindergarten or kindergarten readiness program who exhibited signs of being ready to enter school, such as socialization and communication skills.

FNPI 2c. The number of children and youth who demonstrated improved positive approaches toward learning, including improved attention skills.

Examples of activities that may generate reportable outcomes for this indicator:

- o Children enrolled in Head Start, Early Head Start or other pre-kindergarten or kindergarten readiness program who improved their approaches to learning and demonstrated improved attention skills.
- o Youth involved in after-school enrichment programs who demonstrated increase learning skills.
- o Youth involved in mentoring programs who demonstrated an increased ability to attend to schoolwork.
- o Youth participating in one-on-one tutoring programs who demonstrated improved study habits.
- o Outcomes achieved by participating in service learning programs.

Note: *No data is entered in FNPI 2c. This row will auto-populate totals from data entered for FNPI 2c(1)-FNPI 2c(3)*

- **FNPI 2c(1). Early Childhood Education (ages 0-5)**

Enter the total unduplicated number of children ages 0-5 who demonstrated positive approaches to learning and improved their attention skills.

- **FNPI 2c(2). 1st grade-8th grade**

Enter the total unduplicated number of children in grades 1 through 8 who demonstrated positive approaches to learning and improved their attention skills.

- **FNPI 2c(3). 9th grade-12th grade**

Enter the total unduplicated number of children in grades 9-12 who demonstrated positive approaches to learning and improved their attention skills.

FNPI 2d. The number of children and youth who are achieving at basic grade level (academic, social, and other school success skills).

Examples of activities that may generate reportable outcomes for this indicator:

- o Children enrolled in Head Start, Early Head Start or other pre-kindergarten or kindergarten readiness program who demonstrated grade-level achievements.
- o Youth involved in after-school academic programs demonstrated basic grade-level achievements.
- o Youth attending a case management, counseling or other supportive program operated by a CAA who demonstrated basic grade-level achievements.
- o Youth participating in a mentoring program who demonstrated increased social skills.

Note: *No data is entered in FNPI 2d. This row will auto-populate totals from data entered for FNPI 2d(1)-FNPI 2d(3).*

Examples of activities that may generate reportable outcomes for this indicator:

- o Parents/caregivers attending a strengths-based parenting training operated by the CSBG Eligible Entity who display skills improving their home environments.
- o Parents/caregivers in formal case management, counseling or other support programs who attend a parent support group, learning new skills and exhibiting an improved home environment.
- o Parents/caregivers learn nutrition and cooking skills and demonstrate an improved home environment.
- o Parents/caregivers attend an anger management group and demonstrate an improved home environment.
- o Parents/caregivers who participate in a home visiting program have improved their home environment through an increase in reading/learning materials for their children or other improvements.
- o Parents/caregivers who participate in a program to improve their executive functioning and learn new skills that improve the home environment.
- o Parents/caregivers participate in a mentoring, cohort or circle of support that provide increased social capital and knowledge that improves their home environment.

- • **FNPI 2d(1). Early Childhood Education (ages 0-5)**

Enter the total unduplicated number of children ages 0-5 who demonstrated basic grade-level achievement (academic, social, and other school success).

- • **FNPI 2d(2). 1st grade-8th grade**

Enter the total unduplicated number of children in grades 1 - 8 who demonstrated basic grade-level achievement at basic grade level (academic, social, and other school success).

- **FNPI 2d(3). 9th grade-12th grade**

Enter the total unduplicated number of children in grades 9-12 who demonstrated basic grade-level achievement (academic, social, and other school success).

FNPI 2e. The number of parents/caregivers who improved their home environments.

Improving home environments is the progress toward having a safe home free of violence, where children are nurtured, food and books are readily available, and parents and children have resiliency skills for tough times. Depending on the service provided, there will be different methods of assessment and documentation to confirm that the home environment has been approved. CSBG Eligible Entities pursuing this outcome/indicator should develop appropriate methods for documenting that the outcome has been achieved.

Report the unduplicated number achieving this outcome.

FNPI 2f. The number of adults who demonstrated improved basic education.

> **Examples** of activities that may generate reportable outcomes for this indicator:
>
> - Adults attending a reading, writing or other basic skills class who demonstrated improved knowledge.
> - Adults completing adult basic education courses in English language proficiency financed by CSBG or by Refugee Resettlement Program funds who improved their employment opportunities and income.
> - Adults who participated in a literacy program and improved their basic education skills.

Basic education includes the basic skills adults need, such as reading, writing, math, English language proficiency, and problem solving, to be productive workers and citizens.

FNPI 2g. The number of individuals who obtained a high school diploma and/or obtained an equivalency certificate or diploma.

> **Examples** of activities that may generate reportable outcomes for this indicator:
>
> - Participants in CAA case-management or coaching programs who earned a high school diploma or obtained an equivalency certificate through partnerships with local schools or other federal and state programs.
>
> - Participants in a CAA GED test preparation program who obtained their GED.

Note: This outcome can include both youth and adults.

FNPI 2h. The number of individuals who obtained a recognized credential, certificate, or degree relating to the achievement of educational or vocational skills.

Examples of activities that may generate reportable outcomes for this indicator:

- o Parents of children in a Head Start program who earned a recognized credential, certificate, or degree because of CAA support.

- o Participants in CAA-coordinated stability programs who earned a recognized credential, certificate, or degree because of financial planning, student loan and federal grant assistance from the CAA and TANF-supported child care or transportation subsidies.

- o Participants in a case management or coaching program supported by several federal, state, and local programs who earned a certificate as part of their preparation for seeking employment.

Note: This outcome can include both youth and adults.

FNPI 2i. The number of individuals who obtained an Associate's degree.

An example of an activity that may generate reportable outcomes for this indicator:

- o Participants in CAA case management, coaching or other support programs who earned an associate's degree.

FNPI 2j. The number of individuals who obtained a Bachelor's degree.

> **Examples** of activities that may generate reportable outcomes for this indicator:
>
> o Participants who earned a bachelor's degree through a work support program employing students with low-incomes to help them through college.
>
> o Participants who earned a bachelor's degree through a partnership with the CAA and a local community college that provides coaching and an on-campus study center to mothers with low-incomes.

FNPI 2k. Other Education and Cognitive Development Outcome Indicator
Only report an "Other Outcome Indicator" if none of the current FNPIs capture the outcomes achieved by the program. Sample language is provided below:

> o *FNPI 2k(1). The number of individuals or households who_____.*

FNPI 3 Income and Asset Building Indicators

Income and Asset Building Overview:

Income and Asset Building Indicators (Domain 3) collects data on outcomes achieved by unduplicated participants with low-incomes in CSBG Eligible Entity programs by either:

- Increasing their ability to meet basic needs (Meeting basic needs is the ability to have consistent access to food, safe and stable shelter [including utilities] and ensure the safety of participants and their family.)
- Increasing their assets
- Increasing their ability to manage and use resources (Asset Utilization) or
- Improving financial well-being.

Applicable Activities

FNPI 3 collects outcome data on participants who achieved outcomes as a result of either:

- Stand-alone asset enhancement or case management/coaching programs or

- Asset enhancement or case management/coaching services as part of broader intervention.

> Some examples of activities that may be offered as stand-alone programs or integrated in with other programs include:
>
> - o CAA activities that result in an improved sense of financial wellbeing such as classes to improve participant credit scores or how to purchase a home.
> - o Individual Development Accounts (IDAs).
> - o Financial counseling or coaching.

CSBG Eligible Entities are only expected to report on basic needs indicators as applicable to the CSBG Eligible Entity's programs. When reporting on indicators related to basics needs, CSBG Eligible Entities can provide their own definition or select from national, state, or locally defined models. CSBG Eligible Entities must identify in the General Comments Section the basic needs definition used. In general, basic needs are food, shelter, water, and clothing.

Indicators

FNPI 3a. The number of individuals who achieved and maintained capacity to meet basic needs for 90 days.

> **Examples** of activities that may generate reportable outcomes for this indicator:
>
> - o CAA programs that help participants manage household income and resources, including instruction in household budgeting, consumer education, and the use of financial services within the community.
>
> - o Financial coaching activities that provide information, knowledge and support on a range of financial empowerment topics that may include, savings, credit repair, avoiding predatory lending, budgeting, and selecting safe banking products.

Note: This is an <u>individual</u> count and an unduplicated count. Only report the participants who attend classes, case management/coaching sessions, or other training here who met their basic needs for 90 days. This does not include the number of people in the participant's household. If multiple household/family members are participating in the activities (for example, a husband and wife are both participating in coaching sessions), then they are counted as individuals.

FNPI 3b. The number of individuals who achieved and maintained capacity to meet basic needs for 180 days.

Similar to FNPI 3a, this is an unduplicated individual count. Report participants who have met their basic needs for 180 days. Participants reported in FNPI 3b should also be reported above in FNPI 3a. This does

not include the number of people in the participant's household. If multiple household/family members are participating in the activities (for example, a husband and wife are both participating in coaching sessions), then they are counted as individuals.

FNPI 3c. The number of individuals who opened a savings account or IDA.

> **Examples** of activities that may generate reportable outcomes for this indicator:
>
> - o   A CAA participant in a financial coaching program who opened a savings account.
> - o   A CAA participant in an IDA program who opened an IDA.

This is an unduplicated individual count. Report the number of individuals who opened accounts, not the number of accounts or the number of people in the participant's household.

FNPI 3d. The number of individuals who increased their savings.

> **An example** of an activity that may generate reportable outcomes for this indicator:
>
> - o   A CAA participant with a savings account or an IDA who deposited money and increased their balance.

This is an unduplicated individual count.

This does not include the number of people in the participant's household.

Participants reported here may be also be reported in FNPI 3c <u>only if</u> they opened a savings account and increased savings. Participants who had existing accounts and increased their savings as a result of activities they participated in with the CSBG Eligible Entity should be reported here.

FNPI 3e. The number of individuals who used their savings to purchase an asset.

> **An example** of an activity that may generate reportable outcomes for this indicator:
>
> - o   Participants in CAA programs such as IDAs or housing programs who accumulated economic resources that enabled them to invest in major life-improving activities, such as creating a small business, pursuing higher education, or purchasing a home. In some programs designed for certain target populations (teens exiting foster care, rural places) automobiles may be identified as an allowable asset purchase.

This is an unduplicated individual count.

Participants reported here may also be reported in FNPI 3c and FNPI 3d <u>only if</u> they opened a savings account and increased savings. Participants who used savings and purchased an asset independent of working with a CSBG Eligible Entity <u>should not</u> be reported here.

- **FNPI 3e(1) Of the above, the number of individuals who purchased a home.**

    Report the number of people from FNPI 3e who used their savings specifically to purchase a home. This indicator is an unduplicated individual count and does **not** include the number of people in the household—only the person who purchased a home. Participants who used savings to purchase a home independent of working with a CSBG Eligible Entity <u>should not</u> be reported here.

FNPI 3f. The number of individuals who improved their credit scores.

Report the number of participants in CSBG Eligible Entity programs who improved their credit scores as a result of working with the CSBG Eligible Entity.

FNPI 3g. The number of individuals who increased their net worth.

Report the number of participants in CSBG Eligible Entity programs who increased their net worth as a result of working with the Entity.

Net worth is defined as the total value of the participant's assets, minus the participant's total amount of debt.

FNPI 3h. The number of individuals engaged with the Community Action Agency who report improved financial well-being.

This indicator requires CSBG Eligible Entities to keep an unduplicated count of people who report improved financial well-being based on their responses to the CFPB Financial Well-Being Scale survey. The survey needs to be delivered at intake and at intervals as determined by the program in order to accurately report progress.

FNPI 3i. Other Income and Asset Building Outcome Indicator

Only report an "Other Outcome Indicator" if none of the current FNPIs capture the outcomes achieved by the program. Sample language is provided below:

- *FNPI 3i(1) The number of individuals or households who_____.*

FNPI 4 Housing Indicators

Housing Indicators Overview:

Housing indicators (Domain 4) collect data on outcomes achieved by the unduplicated number of households with low-incomes participating in CSBG Eligible Entity programs by:

- Accessing emergency housing
- Obtaining and maintaining stable housing
- Reducing eviction or foreclosure
- Improving a home's safety

NOTE: *All indicators in the housing domain pertain to households. However, this is an unduplicated count of individuals. Report the individuals in the households who obtain these outcomes. If a family of four obtained the outcome, then report four (4).*

Applicable Activities

FNPI 4 collects outcome data of participants who achieved outcomes as a result of either:

- A stand-alone housing program or
- Housing services as part of broader case management/coaching or other CSBG Eligible Entity program.

CSBG Eligible Entities are only asked to report on housing indicators as applicable to the CSBG Eligible Entity's programs. Include CSBG Eligible Entity programs funded by CSBG, HUD, USDA, Weatherization, and other funding sources.

Note: *All indicators in this domain count the number of individuals within households, not households. For example, if a household of four obtains housing, then four (4) will be reported.*

Indicators

FNPI 4a. The number of households experiencing homelessness who obtained safe temporary shelter.

Examples of activities that may generate reportable outcomes for this indicator:

- The CAA operates an emergency shelter and provided temporary shelter to individuals experiencing homelessness.
- The CAA has a voucher program in partnership with their city and provided emergency motel vouchers to individuals experiencing homelessness.
- The CAA assessed needs and eligibility for other partners in the community, provided referrals to the local shelter, and received confirmation that the household member experiencing homelessness stayed in the shelter.

This report uses HUD's definition of homeless:

- People who are living in a place not meant for human habitation, in emergency shelter, in transitional housing, or are exiting an institution where they temporarily resided. The only significant change from existing practice is that people will be considered homeless if they are exiting an institution where they resided for up to 90 days (previously 30 days), and were in a shelter or a place not meant for human habitation immediately prior to entering that institution.
- People who are losing their primary nighttime residence, which may include a motel, hotel, or a doubled-up situation, within 14 days and lack resources or support networks to remain in housing. (HUD had previously allowed people who were being displaced within 7 days to be considered homeless.)
- Families with children or unaccompanied youth who are unstably housed and likely to remain in that state. This new category of homelessness applies to families with children or unaccompanied youth who have not had a lease or ownership interest in a housing unit in the last 60 or more days or more, have moved two or more times within the last 60 days, and who are likely to continue to be unstably housed because of disability or other barriers to employment.
- People who are fleeing or attempting to flee domestic violence, have no other residence, and lack the resources or support networks to obtain other permanent housing.

See HUD's Hearth Act rule for more information.

FNPI 4b. The number of households who obtained safe and affordable housing

Examples of activities that may generate reportable outcomes for this indicator:

- A participating household that received a Section 8 housing voucher and obtained safe and affordable housing as a result of having been engaged in the CAA's case management program and receiving its support.
- A family that secured adequate housing through a housing program operated by the CAA.
- Programs such as Self-Help Housing that helped families build their own homes, case management programs that assisted families in securing housing on the open market, or any housing program that offered subsidized housing.
- The CAA provided referrals to partner housing organizations and received confirmation that the household obtained safe and affordable housing.

Safe and affordable is defined as the CSBG Eligible Entity deems it appropriate, considering community conditions. **Safe** typically means that there are no health or safety risks. **Affordable** typically means that a family spends no more that 30% of its income on housing.

Only include households that the CSBG Eligible Entity directly assisted through its programs or as part of partner referrals. Do not count households that secured housing independently of the CSBG Eligible Entity.

FNPI 4c. The number of households who maintained safe and affordable housing for 90 days.

Report the number of households who remained in a safe and affordable housing situation for 90 days. These households may have been reported in FNPI 4b, or they may be households that entered a CSBG Eligible Entity program while already in safe and affordable housing and had maintained that housing. Do not include households who remained housed, but who were not engaged in case management or other housing services and programs operated by the CSBG Eligible Entity.

FNPI 4d. The number of households who maintained safe and affordable housing for 180 days.

Report the number of households who remained in a safe and affordable housing situation for 180 days. These households may have been reported in FNPI 4b and FNPI 4c or they may be households that entered an CSBG Eligible Entity program while already in safe and affordable housing and had maintained that housing. Do not include households who remained housed, but who were not engaged in case management or other housing services and programs operated by the CSBG Eligible Entity.

FNPI 4e. The number of households who avoided eviction.

Examples of activities that may generate reportable outcomes for this indicator:

- o Participants who received legal assistance and intervention when they were at risk of imminent eviction from their place of residence.
- o A CAA program that worked with landlords and tenants to mediate situations that ultimately keep the tenant housed.
- o Case management that connected the household to funding or a CAA program that provided financial assistance to help households avoid eviction.

FNPI 4f. The number of households who avoided foreclosure.

Examples of activities that may generate reportable outcomes for this indicator:

- o Participants who received legal assistance and intervention when they were at risk of imminent foreclosure from their place of residence.
- o Case management that connected the household to funding or a CAA program that provided financial assistance to help households avoid foreclosure.

FNPI 4g. The number of households who experienced improved health and safety due to improvements within their home (e.g. reduction or elimination of lead, radon, carbon dioxide and/or fire hazards or electrical issues, etc.).

Examples of activities that may generate reportable outcomes for this indicator:

- o Households that received weatherization assistance to remove dangerous or substandard insulation, thus enabling family members to experience improved health.
- o The weatherization program installed measures that improved the health and safety of the family.
- o A program that installed carbon dioxide detectors.

Note: *This is primarily a weatherization indicator. Weatherization primarily tracks units. When reporting, ensure that an unduplicated number of individuals in the household is represented, not a count of units.*

FNPI 4h. The number of households with improved energy efficiency and/or energy burden reduction in their homes.

An example of an activity that may generate reportable outcomes for this indicator:

- o Households that received weatherization assistance to improve the energy efficiency of the home and reduce the household's energy burden.

Note: *This is primarily a weatherization indicator. When reporting, ensure that an unduplicated number of individuals in a household is represented, not a count of the total measures. Households reported in 4g may also be reported in 4h.*

FNPI 4i. Other Housing Outcome Indicator

Only report an "Other Outcome Indicator" if none of the current FNPIs capture the outcomes achieved by the program. Sample language is provided below:

- o *FNPI 4i(1) The number of individuals or households who_____.*

FNPI 5 Health and Social/Behavioral Development Indicators

Health and Social/Behavioral Development Overview:

Health and Social/Behavioral Development indicators (Domain 5) collect data on the unduplicated number of individuals who achieve outcomes as a result of CSBG Eligible Entity activities by:

- Improving a participant's physical, mental, or behavioral health
- Increasing a participating household members' interaction skill

- Demonstrating a participant's ability to live independently
- Decreasing a participating household member's recidivism rate

Applicable Activities

FNPI 5 collects outcome data on participants who achieved outcomes as a result of either:

- Stand-alone household support programs or projects **or**
- Health and social/behavioral services as part of broader programs.

CSBG Eligible Entities are only expected to report on health and social/behavioral development indicators as applicable to the CSBG Eligible Entity's programs.

Note: *Indicators in this section should be supported by documentation that indicates improvements have occurred in individuals. Programs of this nature generally require assessment of the individual's conditions before services begin. Program methodologies vary, and the FNPIs allow for great flexibility; however, CSBG Eligible Entities must be cognizant of using methodologies that are considered best practices for the particular medical, or mental and behavioral health fields and would pass scrutiny among professionals with the appropriate level of field expertise.*

<u>**Indicators**</u>

FNPI 5a. The number of individuals who demonstrated increased nutrition skills (e.g., cooking, shopping, and growing food).

Examples of activities that may generate reportable outcomes for this indicator:

- o A CAA that operates a Cooking Matters program or other classes on how to shop for and prepare food.
- o A CAA that runs a community garden and offers classes on how to grow and prepare food from the garden.
- o A Head Start program that provides a comprehensive nutrition component for parents.

Note: *While this type of program may benefit all household members, this is an individual count. Only report the participants in the program who improved their skills.*

FNPI 5b. The number of individuals who demonstrated improved physical health and well-being.

Examples of activities that may generate reportable outcomes for this indicator:

- o A CAA that offers a physical exercise program to improve the health of seniors and prevent falls.
- o A CAA that offers a weekly exercise group for Head Start parents.
- o A CAA Family Planning program that provides services that improve health and they have a methodology for measuring positive changes in health
- o A CAA program that deploys community health workers into neighborhoods and tracks each individual participant's health changes over time.

FNPI 5c. The number of individuals who demonstrated improved mental and behavioral health and well-being.

An example of an activity that may generate reportable outcomes for this indicator:

- o Individuals who met regularly with a mental health provider and demonstrated improved mental and behavioral well-being through assistance from the CAA.

FNPI 5d. The number of individuals who improved skills related to the adult role of parents/ caregivers.

Examples of activities that may generate reportable outcomes for this indicator:

- o A CAA that operates a Strengthening Families program or other strengths-based skill-building program where participants learn and improve their skills in parenting or caregiving.
- o A weekly caregiver class held at the CAA where participants who attend regularly improve their caregiving skills.
- o A CAA's home visiting program that provides activities for parents and other caregivers that improves their parenting and caregiving skills.

FNPI 5e. The number of parents/caregivers who demonstrated increased sensitivity and responsiveness in their interactions with their children.

Examples of activities that may generate reportable outcomes for this indicator:

- o CAA Head Start parents who attended parenting classes and demonstrated increased sensitivity and responsiveness to their children.
- o A CAA that utilizes a variety of funding sources to offer parenting skills enrichment courses for adult participants in a number of its programs. The courses are designed to help parents improve their ability to:
    - ▪ Communicate with their children.
    - ▪ Establish and maintain appropriate structure, boundaries, and common expectations within the family.
    - ▪ Reduce the incidence of physical or emotional abuse through better anger management and alternative approaches to parent-child conflict resolution.

FNPI 5f. The number of seniors (65+) who maintained an independent living situation.

Examples of activities that may generate reportable outcomes for this indicator:

- o A CAA that operates home health care services that allow seniors to stay in their homes.
- o A CAA that operates a home delivered meals program that helps seniors stay in their homes.
- o A CAA in a rural area that operates a transportation program for seniors that provides rides for medical appointments and grocery shopping. Seniors who need these services are enrolled in a support program that, in addition to providing the rides, provides home visits and follow-up to make sure the seniors are maintaining a healthy living situation.

FNPI 5g. The number of individuals with disabilities who maintained an independent living situation.

An example of an activity that may generate reportable outcomes for this indicator:

- o The number of individuals with disabilities who continue to live independently (not institutionalized) during the reporting period as a result of receiving one or more services.
    - ▪ Services could include home health aides who help the individual complete Activities of Daily Living (ADLs) such as bathing or cleaning. Other services could include transportation to doctors' visits or home-delivered meals.

Note*: If a senior also has a disability, they may be reported in FNPI 5f and this indicator (FNPI 5g).*

FNPI 5h. The number of individuals with chronic illness who maintained an independent living situation.

> **An example** of an activity that may generate reportable outcomes for this indicator:
>
> - ○ The number of individuals with chronic illnesses who continue to live independently (not institutionalized) during the reporting period as a result of receiving one or more services.
>   - ▪ Services could include prescription delivery services or cleaning services.

Note: *If a senior also has a disability and a chronic illness, they may be reported in FNPI 5f, FNPI 5g and this indicator (FNPI 5h).*

A **chronic illness** is a human health condition or disease that is persistent or otherwise long lasting in its effects, often defined as lasting more than three months. Common chronic illnesses include cancer, asthma, diabetes, HIV/AIDS, COPD, depression, and many others.

A **disability** is a physical or mental impairment that substantially limits one or more of an individual's major life activities.

FNPI 5i. The number of individuals with no recidivating event for six months.

A **recidivistic event** occurs when, after an individual is released from custody (jail, prison, or other correctional facility), they violate their probation or parole and are returned to custody.

> **Examples** of activities that may generate reportable outcomes for this indicator:
>
> - ○ A CAA that operates a case management, mentoring or other supportive services program that works with individuals so that they do not return to jail, prison or other correctional facility.
> - ○ A CAA that operates an afterschool program that teaches youth the skills they need to prevent them from returning to juvenile detention or other correctional facility.

- **FNPI 5i(1). Youth (ages 14-17)**

Report the number of youth (ages 14-17) with no recidivistic events within six months of release from custody. The youth reported here in FNPI 5i(1) should also be reported in FNPI 5i.

- **FNPI 5i(2). Adults (ages 18+)**

Report the number of adults (ages 18+) with no recidivistic events within six months of release from custody. The adults reported here in FNPI 5i(2) should also be reported in FNPI 5i.

- **FNPI 5j. Other Health and Social/Behavioral Development Outcome Indicator**

Only report an "Other Outcome Indicator" if none of the current FNPIs capture the outcomes achieved by the program. Sample language is provided below:

- *FNPI 5j(1) The number of individuals or households _____.*

FNPI 6 Civic Engagement and Community Involvement Indicators

Civic Engagement and Community Involvement Overview:

Civic Engagement and Community Involvement indicators (Domain 6) collects data on the unduplicated number of individuals with low-incomes who achieve outcomes as a result of CSBG Eligible Entity activities by:

- Increasing the leadership skills, social networks, and knowledge to improve conditions in the community.

Applicable Activities

FNPI 6 collects outcome data on participants who achieved outcomes as a result of either:

- Stand-alone community improvement programs **or**
- Community improvement initiatives that are part of a broader community initiative.

Note: Only participants should be reported in this section. Board members who are participants of CSBG Eligible Entity programs may be reported here. If the Board member is not a participant, they should be reported only in Module 2.

Indicators

FNPI 6a. 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.

Examples of activities that may generate reportable outcomes for this indicator:

- Individuals who participated in a leadership development program to increase their skills and knowledge.
- Individuals who engaged in a peer-mentoring program.

- **FNPI 6a.1. Of the above, the number of Community Action program participants who improved their leadership skills.**

Examples of activities that may generate reportable outcomes for this indicator:

- The number of individuals who joined and engaged in their neighborhood association, community board, advisory group, or similar organization.
- Individuals who participated in CAA leadership or peer mentoring programs and engaged in civic activities.

Report the number of participants who achieved the outcome listed in FNPI 6a.1 in 6a.

- **FNPI 6a.2. Of the above, the number of Community Action program participants who improved their social networks.**

Examples of activities that may generate reportable outcomes for this indicator:

- Individuals who joined a neighborhood association.
- Individuals who joined the Head Start Policy Council.
- Individuals who joined the parent involvement group at their local school.

Report the number of participants who achieved the outcome listed in FNPI 6a.2 in 6a.

- **FNPI 6a(3). Of the above, the number of Community Action program participants who gained other skills, knowledge and abilities to enhance their ability to engage.**

An example of an activity that may generate reportable outcomes for this indicator:

- Individuals who completed U.S. citizenship classes or engaged in civic events.

Report the number of participants who achieved the outcome listed in FNPI 6a.3 in 6a.

FNPI 6b. Other Civic Engagement and Community Involvement Outcome Indicator

Only report an "Other Outcome Indicator" if none of the current FNPIs capture the outcomes achieved by the program. Sample language is provided below:

- *FNPI 6b(1). The number of individuals or households who_____.*

FNPI 7 Outcomes across Multiple Domains

Outcomes across Multiple Domains Overview:

Outcomes across Multiple Domains indicators collect data on the unduplicated number of individuals who achieve **one or more** of the outcomes reported throughout **any** of the domains as a result of a CSBG Eligible Entity. An individual who obtained employment (FNPI 1b) and a certificate or diploma (FNPI 2g) may be reported in each of those indicators, and reported here once. An individual who obtained only one outcome may also be reported here once.

The data from this indicator will help tell the story of how many lives were improved because of the CSBG eligible Entity Network. Reporting on this indicator requires CSBG Eligible Entities to keep an unduplicated count of individuals who achieved one or more outcomes reported in the FNPIs.

Examples of activities that may generate reportable outcomes for this indicator:

- o A CAA that operates programs that had primary, secondary and even tertiary outcomes. Some CAAs have the capacity to track all the outcomes that an individual achieves on their path to economic security.
    - For example, individuals in an intensive economic security program may have goals to get their High School Equivalency, obtain safe and affordable housing, obtain employment and get a child ready for kindergarten. CAAs often help families achieve all these milestones as they climb out of poverty.
- o A CAA that operates many programs that achieved a variety of outcomes for one individual/family/household.
    - For example, individuals are often either intentionally (two-generation approach) or unintentionally enrolled in multiple programs such as Head Start, financial coaching, utility assistance, ESL, child care etc. Outcomes are often reached in each program for one individual/household.
- o A CAA Housing program participant whose single outcome was having obtained safe and affordable housing as a result of the work of the CAA may be reported here.

This indicator will provide data on how many individuals achieved one or more of the FNPIs. This will allow for better understanding of the number of people with low-incomes who were helped to become stable and achieve economic security. This is different than adding up all the FNPI numbers, as we have established that individuals achieve multiple outcomes.

It is expected that some CSBG Eligible Entities have the technological capacity to provide data for this FNPI, and other CSBG Eligible Entities will need to consider how to move forward for future reporting periods. It is also expected that FNPI 7 will provide CSBG Eligible Entities with valuable data that will help them to manage and improve services. For example, understanding multiple outcomes may provide new insights to the mix of services and activities that work well for certain families under certain conditions.

Indicators

FNPI 7a. The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains.

Report any individual who achieves one or more outcomes across any domain in this report. This is an unduplicated count. The individual should only be counted one time. The result will be an unduplicated (each individual counted once) count of all the individuals across the CSBG Eligible Entity who achieved one or more FNPIs.

FNPI 7b. Other Outcome Indicator

Only report an "Other Outcome Indicator" if the current FNPIs do not capture the outcomes achieved by the program. Sample language is provided below.

- o *FNPI 7b(1). The number of individuals or households _____.*

NOTE: *CSBG Eligible Entities may consider reporting bundled services here. Sample language will be made available on the* NASCSP website*.*

Module 4, Section B: Individual and Family Services (SRV)

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

CSBG Eligible Entities will report **unduplicated counts** of individuals receiving any of the services listed on the Individual and Family Services Form. The only time ever that services are reported as a result of a referral is when an MOU is in place with a partnering agency and the participant is enrolled in a specific CSBG Eligible Entity program.

CSBG Eligible Entities may provide certain services directly or may pay another organization, vendor or entity for a service. For example, an Entity may provide transportation vouchers, pay tuition to a certification program for a participant, or purchase dental services for adults so they can resolve issues and maintain employment. In all three examples, the CSBG Eligible Entity should report these activities as services delivered to participants.

All services are reported as an unduplicated count of people who obtain the service. Each CSBG Eligible Entity and, in many cases, each program must define the point at which an individual is considered a participant. This will help to accurately count the number of participants who obtained a service. In this

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Example of the relationship between FNPIs and services:

CAA of XYZ County operates a full-service case management program where many participants seek services to help them obtain and retain employment. A participant in the case management program is working toward goals related to Employment (FNPI 1). In order to achieve the desired employment outcomes, the participant is enrolled in vocational training (SRV 1a). The same participant also receives resume development (SRV 1j), interview skills training (SRV 1k), and job referrals (SRV 1l), all provided by the case manager at the CAA. The case manager works across multiple domains and assists the participant in obtaining SNAP (SRV 3l), transitional housing (SRV 4n) (provided by the housing department at the CAA) and financial counseling (SRV 4b) (provided by the case manager). During the reporting period, the participant obtained employment up to a living wage (FNPI 1b) and retained employment for 180 days (FNPI 1c and 1d). The participant would be reported once in each of the following places:

Services: Vocational training (SRV 1a); Resume Development (SRV 1j); Interview Skills Training (SRV 1k); Job Referrals (SRV 1l); SNAP Benefits (SRV 3l); Transitional Housing Placements (SRV 4n); Financial Coaching/Counseling (SRV 4b); and Case Management (SRV 7a).

Family National Performance Indicators: Unemployed adult who obtained employment up to a living wage (FNPI 1b); Unemployed adult who maintained employment for 90 days (FNPI 1c); Unemployed adult who maintained employment 180 days (FNPI 1d) and achieved one or more outcomes in various domains (FNPI 7a).

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section, only report participants who have received a service. A general approach that will be used for Module 4, Section B is when an individual enrolls in a program administered by the CSBG Eligible Entity,

they become a participant for the program/service/activity. An individual may receive the same services multiple times, but should only be reported once under the service they received. They may be reported under multiple services, but only once under each service received.

Note: *In the example above, the services listed as having been provided by a partner organization should only be reported in this report if there is an MOU in place.*

SRV 1 Employment Services

All Employment Services (SRV 1a-1q) are intended to help participants obtain outcomes in the Employment Domain of Module 4, Section A. These services include: **Skills Training and Opportunities**; **Job Search**; **Post-Employment Supports**; and **Employment Supplies**. This list of services primarily supports the outcomes in FNPI 1a – 1h. These services may also support outcomes in other FNPIs. It will likely take multiple services across various domains for a participant to obtain one of the Employment outcomes in the FNPIs.

Report the unduplicated number of participants who receive services. **If a participant received the same service more than once during the reporting period, only report that participant one time. The same participant may be reported in multiple services.**

SRV 2 Education and Cognitive Development Services

All Education and Cognitive Development Services (SRV 2a-2cc) are intended to help participants obtain outcomes in the Education and Cognitive Development Domain. These services include: **Child/Young Adult Education Programs**; **School Supplies**; **Extracurricular Programs**; **Adult Education Programs**; **Post-Secondary Education Supports**; **Financial Aid Assistance**; and **Home Visits**. This list of services supports the outcomes in FNPI 2a – 2j. These services may also support outcomes in other domains, such FNPI 3a (the number of individuals who achieved and maintained capacity to meet basic needs for 90 days) within the Income and Asset Building Domain.

Report the unduplicated number of participants who receive services. **If a participant received the same service more than once during the reporting period, only report that participant one time. The same participant may be reported in multiple services.**

SRV 3 Income and Asset Building Services

All Income and Asset Building Services (SRV 3a-3q) are intended to help participants obtain outcomes in the Income and Asset Building Domain. These services include: **Training and Counseling Services**; **Benefit Coordination and Advocacy**; **Asset Building**; and **Loans and Grants**. This list of services primarily supports the outcomes in FNPI 3a – 3h. These services may also support outcomes such FNPI 4f (the number of households who avoided foreclosure) within the Housing Domain.

Report the unduplicated number of participants who receive services. **If participant received the same a service more than once during the reporting period, only report that participant one time. The same participant may be reported in multiple services.**

SRV 4 Housing Services

All Housing Services (SRV 4a-4t) are intended to help participants obtain outcomes in the Housing Domain. These services include: **Housing Payment Assistance**; **Eviction Prevention Services**; **Utility Payment Assistance**; **Housing Placement/Rapid Rehousing**; **Housing Maintenance & Improvement**; and

Weatherization Services. This list of services primarily supports the outcomes in FNPI 4a – 4i. These services may also assist participants in meeting other FNPIs. For example, a participant who receives SRV 4k (utility arrears payments) may meet the outcome in FNPI 3a (the number of individuals who achieved and maintained capacity to meet basic needs for 90 days).

Report the unduplicated number of participants who receive services. **If a participant receives the same service more than once during the reporting period, only report that participant one time. The same participant may be reported in multiple services.**

SRV 5 Health and Social/Behavioral Development

All Health and Social/Behavioral Development Services (SRV 5a-5oo) are intended to help participants obtain outcomes in the Health and Social/Behavioral Development Domain. These services include: **Health Services; Screening and Assessments**; **Reproductive Health Services**; **Wellness**; **Mental/Behavioral Health**; **Support Groups**; **Dental Services, Screenings and Exams**; **Nutrition and Food/Meals**; and **Family Skills Development**. This list of services primarily supports the outcomes in FNPI 5a – 5j. However, these services may also support a participant obtaining outcomes such as FNPI 1c (maintaining employment for 90 days) within other domains such as Employment.

Report the unduplicated number of participants who receive services. **If a participant receives the same service more than once during the reporting period, only report that participant one time. The same participant may be reported in multiple services.**

SRV 6 Civic Engagement and Community Involvement

All Civic Engagement and Community Involvement Services (SRV 6a-6f) are intended to help participants obtain outcomes in the Civic Engagement and Community Involvement Domain. These services include: **Civic Engagement** and **Community Involvement Services** (voter education and access, leadership training, tri-partite Board membership, citizenship classes, getting-ahead classes, and volunteer training). This list of services primarily supports the outcomes in FNPI 6a – 6b.

Report the unduplicated number of participants who receive services. **If a participant receives the same service more than once during the reporting period, only report that participant one time. The same participant may be reported in multiple services.**

SRV 7 Services Supporting Multiple Domains

All Services Supporting Multiple Domains (SRV 7a-7o) are intended to help participants obtain outcomes in the "Services Supporting Multiple Domains" Domain. These services include: **Case Management**; **Eligibility Determinations**; **Referrals**; **Transportation Services**; **Child Care**; **Elder Care**; **Identification Documents**; **Re-Entry Services**; **Immigration Support Services**; **Legal Assistance**; **Emergency Clothing Assistance**; and **Mediation/Customer Advocacy Interventions**. This list of services supports the outcomes in FNPI 7a – 7b.

Report the unduplicated number of participants who receive services. **If a participant receives the same service more than once during the reporting period, only report that participant one time. The same participant may be reported in multiple services.**

Other Services

The services listed here may help participants obtain outcomes across Domains, but are included here because it would be difficult to get an accurate count of the number of participants who receive these services. Rather, it would be easier to count the number of services provided rather than the number of individuals served. These services include: **SRV 1l-Job referrals**; **SRV 1p-Interactions with employers**; **SRV 1q-Employment Supplies**; **SRV 2k-School Supplies**; **SRV 2l-Before- and after-school activities**; **SRV 2aa-College applications/textbooks/computers/etc.**; **SRV 4m-Temporary Housing Placement**; **SRV 5m-Contraceptives**; **SRV 5o-STI/HIV Screenings**; **SRV 5w-Crisis response/call-in responses**; **SRV 5gg-Community gardening activities**; **SRV 5jj-Food distribution**; **SRV 5nn-Kits/boxes**; **SRV 5oo-Hygiene facility utilizations**; **SRV 7c-Referrals**; and **SRV 7n-Emergency clothing assistance**.

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

The All Characteristics Report collects data on all individuals and households, whether or not funded directly by CSBG. This demographic information will strengthen the CSBG Annual Report by demonstrating who is being served by CSBG Eligible Entities. Please note that this report is not intended to be a tool to determine eligibility.

To obtain unduplicated counts, a CSBG Eligible Entity will need to have a system that distinguishes the characteristics for each individual/household. To obtain an unduplicated count, a unique identifier will be needed at the individual level. While some individuals and households may be served by several programs within a reporting year and thus entered into multiple data systems (e.g., LIHEAP, WIC, etc.), they must be reported as unduplicated individuals (in row A) and unduplicated households (in row B) in this report.

We recognize CSBG Eligible Entities have multiple data systems and may not immediately be able to have an unduplicated count across several systems. If the CSBG Eligible Entity is not currently able to have unduplicated counts across programs due to data systems issues, include those programs in rows E and F at the end of this report. Additionally, please indicate the programs in which these individuals and households were enrolled.

Clarification on Duplication in the All Characteristics Report

For the CSBG Annual Report, it is important that CSBG Eligible Entities only report the unduplicated count of participants. Therefore, when CSBG Eligible Entities are unable to verify data as unduplicated, that data should not be reported. If a CSBG Eligible Entity is able to verify that a portion of its data is unduplicated, it is appropriate to report that portion of the data. Make sure to provide a comment to that effect this year and next year to explain the variance that will result from improved reporting. The top priority is to maintain the integrity of the data reported, which is why it is critical that only underplicated data is included in the report. It is recognized, though, that this can be a challenge for CSBG Eligible Entities.

The guideline is to include demographic data on all individuals and households served by the CSBG Eligible Entity, not only those who are CSBG eligible. If the CSBG Eligible Entity completed some form of intake, determined that the individual was NOT eligible for any services from the CSBG Eligible Entity, and the

individual received no services, that individual would NOT be reported. The All Characteristics Report is for demographics collected on individuals/ households receiving services from the CSBG Eligible Entity.

How to report partial information on participants:

The All Characteristic Report can accept the reporting of individuals about whom some, but potentially not all, demographic information is collected. A single unique identifier is the only data point that needs to be collected to ensure an unduplicated count in the All Characteristics Report. To be reported in section A or B, a participant must have at least one characteristic (gender, age, race, education level, etc.) collected and reported.

All Characteristics Report

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

This is an unduplicated count of all individuals in a household served by any of the programs operated by the CSBG Eligible Entity. To obtain unduplicated counts, a CSBG Eligible Entity will need to have a system that distinguishes each individual. It is important to have a unique identifier so individuals served by multiple programs are only counted once for the demographics report, and services provided to the individual can be linked and counted correctly in Module 4, Section B.

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

This is an unduplicated count of all households served by the CSBG Eligible Entity. To obtain unduplicated counts, a CSBG Eligible Entity needs a system that distinguishes to which household unit each individual belongs. Some items collected on the characteristics report are related to household conditions, so it is important to have an accurate, unduplicated count of households served by the CSBG Eligible Entities.

The definition of "household" is one or more people living in the same home. For instance, if an older married couple, their daughter, her husband and two children, and the older couple's nephew all live in the same house or apartment, they would all be considered members of a household.

C. Individual level characteristics

Individual-level characteristics are self-reported.

1. **Gender**
   Gender should be noted as Male, Female, Other, or Unknown/Not Reported. Report Other when an individual identifies as Trans Female (transitioning from male to female), Trans Male (transitioning from female to male), Gender Nonconforming (not exclusively male or female) or another gender

type. This definition is intended to align with HUD.

The options for Gender are as follows:
- **a.** Male
- **b.** Female
- **c.** Other
- **d.** Unknown/not reported
- **e.** TOTAL (auto-calculated)

2. **Age**

   Most CSBG Eligible Entities record the date of birth, and systems calculate ages annually to provide this information.

   The breakdowns for data collection of age are as follows:
   - **a.** 0-5
   - **b.** 6-13
   - **c.** 14-17
   - **d.** 18-24
   - **e.** 25-44
   - **f.** 45-54
   - **g.** 55-59
   - **h.** 60-64
   - **i.** 65-74
   - **j.** 75+
   - **k.** Unknown/not reported
   - **l.** TOTAL (auto calculated)

3. **Education Levels**

   Please note that this Item only applies to youth ages 14-24 and adults over 25 years of age. The education level is the last educational achievement obtained. For example, a 55-year-old individual may report 10th grade as the highest level of educational achievement. They should be reported in Grades 9-12 under their age bracket.

   The breakdowns for data collection of education levels are as follows:

   - **a.** Grades 0-8
   - **b.** Grades 9-12/Non-Graduate
   - **c.** High School Graduate/Equivalency Diploma
   - **d.** 12 grade + Some Post-Secondary
   - **e.** 2- or 4-year College Graduate
   - **f.** Graduate of other post-secondary school
   - **g.** Unknown/not reported
   - **h.** TOTAL (auto calculated)

4. **Disconnected Youth**

   Disconnected youth identifies the unduplicated number of youths who are neither working or in school, and are enrolled in a CSBG Eligible Entity program. Youth is defined as ages 14-24.

   There is one data point to collect this information:

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

5. **Health**

   Disabling Condition: Report the unduplicated number of individuals who have a disabling condition and those who do not.

   A **disabling condition** is a physical or mental impairment that substantially limits one or more major life activities.

   Health Insurance: In 5b, report the unduplicated number of individuals who have some type of health insurance and those who do not. If an individual is reported as having health insurance, they should also be included in 5c(1) – 5c(8). Report health insurance status only for individuals in the household. If an individual/household reports having more than one type of insurance, include them under each type of insurance they have.

   Data points collected in Item 5 are as follows:

   a. Disabling Condition (Yes, No, Unknown)
   b. Health Insurance (Yes, No, Unknown) If an individual reported that they had Health Insurance, identify the source of health insurance below.
   c. Health Insurance Sources:
      1. **Medicaid**: a federally funded and state-administered program that provides health insurance to individuals and families with low-incomes.
      2. **Medicare**: a single-payer, national social insurance program administered by the United States federal government.
      3. **State Children's Health Insurance Program**: a program administered by the United States Department of Health and Human Services that provides matching funds to states for health insurance to families with children who have low-incomes.
      4. **State Health Insurance for Adults**: a state-funded and administered health insurance program.
      5. **Military Health Care**: a program administered by the Department of Defense that provides health insurance to active and retired military and their family
      6. **Direct-Purchase**: health insurance purchased directly from the insurer or through the Health Insurance Exchange under the Affordable Care Act.
      7. **Employment-Based**: insurance provided by an employer.
      8. **Unknown/not reported**: all participants who have no information to report.
      9. **Total** (auto-calculated)

6. **Ethnicity/Race**

Information is collected both on Ethnicity (Hispanic or not Hispanic) and Race of program participants. These are two separate categories that align with data collection by the U.S. Census Bureau. An individual who reports Hispanic, Latino or Spanish Origin for ethnicity in Item 6a will also report a race from the categories in Item 6b. Likewise, an individual who reports Not Hispanic, Latino or Spanish Origin will also report a race in 6b.

While ethnicity and race are self-reported, definitions of each category are identified below. If the ethnicity or race are unknown or not collected, include the unduplicated count of those individuals in the **unknown/not reported** data point.

a. **Ethnicity**
   1. **Hispanic, Latino or Spanish Origins**: For Census 2010: People who identify with the terms "Hispanic" or "Latino" are those who classify themselves in one of the specific Hispanic or Latino categories listed on the Census 2010 questionnaire -- "Mexican," "Puerto Rican," "South or Central American" or "Cuban" -- as well as those who indicate that they are "other Spanish culture or origin regardless of race." Origin can be viewed as the heritage, nationality group, lineage, or country of birth of the person or the person's parents or ancestors before their arrival in the United States. People who identify their origin as Spanish, Hispanic, or Latino may be of any race.
   2. Not Hispanic, Latino or Spanish Origins
   3. Unknown/not reported
   4. **Total** (auto calculated)

b. **Race**
   1. **American Indian or Alaska Native**: refers to a person having origins in any of the original peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment. This category includes people who indicated their race(s) as "American Indian or Alaska Native" or reported their enrolled or principal tribe, such as Navajo, Blackfeet, Inupiat, Yup'ik, or Central American Indian groups or South American Indian groups.
   2. **Asian**: refers to a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. It includes people who indicated their race(s) as "Asian" or reported entries such as "Asian Indian," "Chinese," "Filipino," "Korean," "Japanese," "Vietnamese," and "Other Asian" or provided other detailed Asian responses.
   3. **Black or African American**: refers to a person having origins in any of the Black racial groups of Africa. It includes people who indicated their race(s) as "Black, African Am., or Negro" or reported entries such as African American, Kenyan, Nigerian, or Haitian.

4. **Native Hawaiian and Other Pacific Islander**: refers to a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. It includes people who indicated their race(s) as "Pacific Islander" or reported entries such as "Native Hawaiian," "Guamanian or Chamorro," "Samoan," and "Other Pacific Islander" or provided other detailed Pacific Islander responses.
5. **White**: refers to a person having origins in any of the original peoples of Europe, the Middle East, or North Africa. It includes people who indicated their race(s) as "White" or reported entries such as Irish, German, Italian, Lebanese, Arab, Moroccan, or Caucasian.
6. **Other**: includes all other responses not included in the White, Black or African American, American Indian or Alaska Native, Asian, and Native Hawaiian or Other Pacific Islander race categories described above.
7. **Multi-race** (two or more of the above)
8. **Unknown/not reported**
9. **Total** (auto-calculated)

7. **Military Status**

Report the unduplicated number of veterans and individuals in active military for any branch of the military. This information is not required of participants who are under 18 years old. If systems cannot support skip logic, then it is acceptable to report individuals under 18 or who have no military status here as **unknown/not reported.** This information should be collected only on program participants.

   a. **Veteran:** an individual who served in the active military, naval, or air services and who was discharged or released under conditions other than dishonorable.[4]
   b. **Active Military:** an individual who is in the military full time. They work for the military, may live on a military base, and can be deployed at any time. Persons in the Reserve or National Guard are not full-time active duty military personnel, although they can be deployed at any time, should the need arise.[5]
   c. Unknown/not reported
   d. **Total** (auto-calculated)

8. **Work Status (Individuals 18+)**

Work status is collected on all program participants 18 and older. If systems cannot support skip logic, then it is acceptable to report individuals under 18 here as **unknown/not reported**. Definitions of **work status** are listed below. Individuals may be reported in one or more category. For example, an individual who is retired but also working part-time could be reported in both categories.

   a. **Employed Full-Time**: working at least 30 hours each week. This could include multiple employers.
   b. **Employed Part-Time**: working less than 30 hours each week. This could include multiple employers.
   c. **Migrant Seasonal Farm Worker**: working seasonally on a farm.

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[4] https://va.org/what-is-a-veteran-the-legal-definition/
[5] https://www.va.gov/vetsinworkplace/docs/em_activeReserve.html

d. **Unemployed (Short-Term, six months or less)**: no substantial work for six months or less and is actively seeking work. Substantial work is regular and at least part-time.

e. **Unemployed (Long-Term, more than six months)**: no substantial work for more than six months and are actively looking for work. Substantial work is regular and at least part-time.

f. **Unemployed (Not in Labor Force)**: not working for any period of time. This category consists mainly of students, homemakers, seasonal workers interviewed in an off season who were not looking for work, institutionalized persons, and persons doing only incidental unpaid family work (less than 15 hours during the reference week).

g. **Retired**: individuals who have concluded their working career. Typically someone who currently has income from their former employer, Social Security or both.

h. **Unknown/not reported**

i. **Total** (auto-calculated)

D. Household-Level Characteristics

Household-level characteristics collect an unduplicated count of household characteristics. Household characteristics can be collected for all household members on behalf of the program participant or applicant. Any household situations that do not fit within the listed categories can be reported in **Other**. Any household for whom an item is not collected can be reported in **unknown/not reported.**

NOTE: *Totals may or may not equal items A or B.*

9. **Household Type**

Based on the composition of the participant's household, only **one** of the seven household types should be noted. If the household type of the participant is not reflected in one of these types, please mark "Other." If more than one member of the household receives services, the household should only be counted once. If the data is not collected, report the household in 9i., **Unknown/not reported.** Item 9j should never exceed Item B in this report. Definitions of household type are listed below.

a. **Single Person**: a single individual living alone. This should equal the Household Size of a Single person (10a).

b. **Two Adults, No Children**: the Head of Household is an adult; another Non Head of Household member is also an adult. May include a childless couple or two non-related adults living together.

c. **Single Parent, Female**: the Head of Household is a Female and has no Spouse or Partner but has at least one child.

d. **Single Parent, Male**: the Head of Household is a Male and has no Spouse or Partner but has at least one child.

e. **Two-Parent Household**: the Head of Household has a Spouse or Partner and there is at least one child in the household.

f. **Non-related Adults with Children**: two adults who are not married. One or both adults may have children in the household who may or may not be related.

g. **Multigenerational Household**: a household where more than two generations of the family live under one roof. This includes grandparents raising grandchildren.

h. **Other**: any situation that does not fit in the above categories.

i. **Unknown/not reported**

j. **Total** (auto calculated)

10. **Household Size**

Report the size of the household. The definition of "household" is one or more people living in the same home. Item 10a should be the exact same as Item 9a.

   a. Single Person
   b. Two
   c. Three
   d. Four
   e. Five
   f. Six or more
   g. Unknown/not reported
   h. **Total** (auto-calculated)

11. **Housing**

Report the household's housing situation. Each household should only be reported once. Definitions of housing type are listed below.

   a. **Own**: a household owns its home. This can include a single-family home, mobile home, apartment, condo, or any other dwelling that is considered owned.

   b. **Rent**: a household makes regular payments to a landlord for the use of property or land.

   c. **Other permanent housing**: a household resides in a HUD supported unit or other program that provides permanent housing that the household does not rent or own. This can also include living situations where a participant lives with a family member and does not rent or own the property.

   d. **Homeless**: for the purposes of this report, please refer to HUD's definition of homeless, summarized below:

   - People who are living in a place not meant for human habitation, in emergency shelter, in transitional housing, or are exiting an institution where they temporarily resided. The only significant change from existing practice is that people will be considered homeless if they are exiting an institution where they resided for up to 90 days (previously 30 days), and were in a shelter or a place not meant for human habitation immediately prior to entering that institution.
   - People who are losing their primary nighttime residence, which may include a motel, hotel, or a doubled-up situation, within 14 days and lack resources or support networks to remain in housing. (HUD had previously allowed people who were being displaced within 7 days to be considered homeless.)

- Families with children or unaccompanied youth who are unstably housed and likely to remain in that state. This new category of homelessness applies to families with children or unaccompanied youth who have not had a lease or ownership interest in a housing unit in the last 60 or more days or more, have moved two or more times within the last 60 days, and who are likely to continue to be unstably housed because of disability or other barriers to employment.
- People who are fleeing or attempting to flee domestic violence, have no other residence, and lack the resources or support networks to obtain other permanent housing.

See HUD's Hearth Act rule for more information.

    e. **Other**: any situation that does not fit into the above definitions.
    f. **Unknown/not reported**
    g. **Total** (auto-calculated)

12. **Level of Household Income** - (HHS Guideline percentages)
This Item refers to income levels of households served compared to the current HHS Poverty Income Guidelines, published annually in the Federal Register. Please record the number of households served at each of the nine percentage ranges of the poverty level. It is understood that CSBG Eligible Entities operate programs where income eligibility will exceed CSBG guidelines. Please report all income levels served.

    a. Up to 50%
    b. 51% to 75%
    c. 76% to 100%
    d. 101% to 125%
    e. 126% to 150%
    f. 151% to 175%
    g. 176% to 200%
    h. 201% to 250%
    i. 251% and over
    j. Unknown/not reported
    k. **Total** (auto-calculated)

13. **Sources of Household Income**
Please enter the sources of income received by all individuals in the household. As a household may have several sources of income, please identify the category below that best represents the household. Definitions of the types of household income are listed below.

    a. **Income from Employment Only**: employment is the only source of income in the household. Employment income includes wages, salaries, and self-employment income. If a household is reported here, they will not be reported in 13b.

b. **Income from Employment and Other Income Source**: income from employment and other sources such as those listed in items 14 and 15.

c. **Income from Employment, Other Income Source, and Non-Cash Benefits**: income from employment, from any other sources and from non-cash benefits such as those listed in Item 15.

d. **Income from Employment and Non-Cash Benefits**: income from employment and from non-cash benefits such as those listed in Item 15.

e. **Other Income Source Only**: income not from employment or a non-cash benefit. Examples include retirement income or other income.

f. **Other Income Source and Non-Cash Benefits**: income from another source and non-cash benefits such as those listed in Item 15.

g. **No Income**: the household has no source of income.

h. **Non-Cash Benefits Only**: income only from non-cash benefits such as those listed in Item 15.

i. **Unknown/not reported**

j. **Total** (auto-calculated)

14. Other Income Source

Report the sources of income for all individuals in a household.

a. **TANF**: Temporary Assistance for Needy Families (TANF) program.

b. **Supplemental Security Income (SSI)**: federal assistance under the Social Security program designed to help aged, blind, and disabled people who have little or no income. SSI is awarded to individuals who have no work or too few work credits to qualify for SSDI.

c. **Social Security Disability Income (SSDI)**: federal assistance under the Social Security program designed to help aged, blind, and disabled people who have little or no income. Individuals in this program have enough work credits to qualify for assistance.

d. **VA Service-Connected Disability Compensation**: a benefit paid to veterans with disabilities that are the result of a disease or injury incurred or aggravated during active military service.

e. **VA Non-Service-Connected Disability Pension**: a needs-based benefit paid to wartime veterans who meet certain age or non-service-connected disability requirements.

f. **Private Disability Insurance**: a disability payment paid out of a private insurance claim.

g. **Workers' Compensation**: supplemental income paid to a worker who had been hurt on the job.

h. **Retirement Income from Social Security**: Social Security that is being received by a former worker who earned enough work credits to receive a monthly payment.

i. **Pension**: any type of income earned from private pensions, e.g., company retirement, IRA income or 401(k).

j. **Child Support**: income paid/received by one parent of a child or children to another to assist in supporting the basic needs of the child(ren).

k. **Alimony or other Spousal Support**: income paid/received by one spouse typically as an agreement in a divorce to assist in supporting the other individual's basic needs.

l. **Unemployment Insurance**: income received from an unemployment insurance fund by a worker whose job was terminated for any reason other than wrong doing.

m. **EITC**: a refundable federal tax credit to help workers with low-incomes to meet their basic needs.

n. **Other**: any other income source that does not fit within the above categories.

o. **Unknown/not reported**

15. **Non-Cash Benefits**

Report the unduplicated types of non-cash benefits received by all members of a household. A household should be unduplicated in each row, but can be reported multiple times in the total. For example, multiple members of a household may have SNAP, but the household should only be reported once in the SNAP row. Similarly, a household that receives SNAP, LIHEAP, and Public Housing should be represented only once in each category.

Definitions of these non-cash benefits are listed below.

a. **SNAP**: the Supplemental Nutrition Assistance Program provides nutrition assistance to families. Some states have their own name for this federal program, formerly known as food stamps.

b. **WIC**: the Special Supplemental Nutrition Program for Women Infants and Children provides nutrition assistance to expectant and new mothers.

c. **LIHEAP**: the Low Income Home Energy Assistance Program provides energy assistance to households.

d. **Housing Choice Voucher**: a HUD-subsidized housing voucher program that gives households a choice in where they live.

e. **Public Housing**: HUD-subsidized housing. Public housing is site-based in locations predetermined by the local Housing Authority.

f. **Permanent Supportive Housing**: a HUD program that uses a model that combines low-barrier affordable housing, health care, and supportive services to help individuals and families lead more stable lives. This type of housing is typically used to house formerly homeless individuals and families.

g. **HUD-VASH**: a partnership between HUD and the VA that combines the Housing Choice Voucher and VA funding to provide housing assistance to homeless veterans.

h. **Child Care Voucher**: state or federally subsidized child care that allows families access to quality child care.

i. **Affordable Care Act Subsidy**: the subsidy a family receives through the federal Affordable Care Act to assist with paying health insurance premiums.

j. **Other**: any non-cash benefit that is not listed above.

k. **Unknown/not reported**

E. Number of Individuals Who May or May Not be 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., and some or all of Item B., but due to system interoperability issues an unduplicated count could not be obtained for particular programs.

For example, an individual is served by an employment program, housing assistance and LIHEAP. The CSBG Eligible Entity has a common database that includes data for the employment and housing programs, so an unduplicated count is obtained from data entered for the employment and housing programs and will be reported in Item A. and items under C. LIHEAP data is maintained in a separate data system. The CSBG Eligible Entity is not yet able to include LIHEAP data in the common database, so it may unduplicate the count of individuals/households served across all three programs. LIHEAP data will be reported in Item E. The CSBG Eligible Entity is not able to determine how many of the LIHEAP individuals/households may also have been served in the employment and housing program and included in the common database.

F. Number of Households Who May or May Not be 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., but due to system interoperability issues an unduplicated count could not be obtained for particular programs.

As an example, a household is served by a CSBG-funded program, LIHEAP, and Head Start. CSBG and LIHEAP share a common database with other CSBG Eligible Entity programs, but the Head Start program is not yet using the system. Head Start program information is maintained in a separate data system; therefore, the CSBG Eligible Entity does not have an unduplicated count of Head Start households. The CSBG Eligible Entity will report unduplicated data for the CSBG and LIHEAP programs in items A., B., and C. Head Start data will be reported in items E. and F. The CSBG Eligible Entity is unable to determine how many Head Start households might be included in the All Characteristics Report, or more importantly, what other services the household might be receiving and the outcomes achieved.