

DATA TASK FORCE MEETING: August 8-9th, 2018:

WASHINGTON D.C.

DATA TF Member Attendees:

Matt Fitzgerald
 Laura White
 Kris Schoenow
 Beverly Buchanan
 Trudy Logan
 Georjean Trinkle
 Lise Stuart
 Paula McFarland

Suki Montes
 Daniel Leppo
 Roger McCann
 Aaron Wicks
 Marvin Cox
 Krista Heineman
 Joseph Vaughan
 Tiffany Keimig

Jutta Ulrich
 Veronica Zhang
 Steve Geller
 Jarle Crocker
 Frances Yator
 Barbara Mooney
 Maxine Maloney
 Josiah Masingale

NASCSP, OCS and Facilitator Attendees:

Kate Blunt
 Jenae Bjelland
 Dakota Hayes
 Kyle Gasser
 Katy Kujawski
 Eric Behna
 Jonna Holden
 Roneika Carr
 Maxine Maloney
 Monique Alcantara
 Muska Kamran

Action Items:

- NASCSP will distribute notes from the subcommittee meetings by 8/31.
- NASCSP will send out doodle polls to coordinate the next subcommittee meetings by 8/31.
- NASCSP will put out a doodle poll to the Task Force to identify which conferences would work best for a potential second, in-person meeting.
- Subcommittees will meet in October to finalize deliverables for release by the end of the quarter or early next quarter.
- Subcommittees will plan deliverables for the next year at their next meetings.
- NASCSP will compile a final list of write-in, "Other Indicators."
- The Data Task Force members from TX, AR, NC, TN, and VT will form a sub-subcommittee in September to help craft language around an indicator that can report transitioning out of poverty.
- NASCSP will finalize the revisions to the Instruction Manuals.
- NASCSP will host a webinar on the Module 3 review form.

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DAY 1:

DATA Task Force Operating Procedures

The group reviewed changes made to the Data TF Operating Procedures. There were some questions about the implications of the attendance requirements, and the group agreed that a member would not automatically be removed from the task force if they miss three consecutive meetings, but that they would simply have a conversation with the co-chairs about their attendance.

The group voted to approve the changes.

Report Out Summaries

The group broke out into their subcommittees and spent two hours working on their deliverables. When the entire group reconvened, a representative from each committee reported on the work accomplished, as well as the next steps for their committee. (The full notes for the subcommittee meetings will be sent out separately.)

Guidance and Training

- The Guidance and Training committee reviewed a portion of the lexicon and plans to meet in September to finalize the full lexicon and push it out to the Network.
- The group is hoping to get put together an FAQ on the Annual Report in November, and then they are planning on updating their deliverables in early 2019 once the Network is closer to submitting the Annual Report data and the group can analyze what questions are still being asked and what piece of guidance is needed at that time.

Systems IT

- The Systems IT subcommittee reported out.
 - They were very impressed with the Data Dictionary and believes it is one of the best versions they have seen so far.
 - The group will convene a Vendor Advisory Group to get their thoughts on the Data Dictionary.
 - They reviewed the RFP Toolkit and identified some changes that need to be made. Once the changes are made, the group will review the Toolkit again before finalizing it for release.
 - They have tested the SmartForm for Module 2 and will soon test the SmartForm for Module 4.
 - Note: All the Data TF members present previewed the Module 3 SmartForm during the session.
 - The group was also very excited about vendor mapping.

Communications

- The Communications Subcommittee reported that the Data Task Force Communications Plan they are formulating will have 5 goals:
 - Everyone in the network will be made aware of the Annual Report and the resources available
 - Everyone will embrace the Annual Report
 - All levels of the network will view the Task Force as a representative body
 - All levels of the network will have access to tools to ensure AR completion
 - All levels of the network will provide feedback
- Additionally, the subcommittee will identify its audience and ensure:
 - Messaging for these audiences, and its methods/venues are appropriate for them.
 - To utilize RPIC calls, one pagers, etc. for proper messaging.
- The Communications Subcommittee will plan a subcommittee call to iron out further details.
- The subcommittee will discuss and work on the Data Task Force webpage.
- The subcommittee will work on the interactive Theory of Change and use visuals to ensure adequate presentation of information.
 - The subcommittee provided a demo of the interactive TOC, and the DATA Task Force was excited to get access to the Prezi as soon as possible.

Analysis Subcommittee

- Next Steps for the FAQ
 - Expand the document so different audiences are able to understand it

- Add an introductory paragraph linked to the CSBG Theory of Change
- Provide more concrete examples to make the document relevant for others who may use it.
- Establish question trees with a data focus for all levels; such as those on the frontline, case managers, leaders, board members, the state, and national partners.
- The subcommittee reviewed the dashboards for the website and recommended that the Analysis Subcommittee and the larger DATA TF serve as a focus group to provide feedback for proposed dashboards and any changes moving forward, such as what is relevant, useful, and what can be taken out of context/used inappropriately.
- The subcommittee recommended that the Analysis and Communications Subcommittees coordinate efforts to create talking points about the relevance of CSBG in the current political and economic climate in order to better inform any new members of Congress. These points would be driven by what national partners have determined is necessary and what NCAF has determined would meet their needs.
- The subcommittee reviewed its upcoming deliverables and agreed that these are still relevant and that the timeline that was assigned to them still makes sense. These include:
 - Life Cycle of the data
 - Crosswalks on LIHEAP
 - Standard measurement tools
 - List of standard docs for strategies
- There was a request of the subcommittee to the DATA TF members to go back to their own areas and organizations and ask for any analysis tools that may be shared with the taskforce.

Other Indicators

The Data Task Force discussed the proposed list of “Other Indicators” for Modules 3 and 4 of the Annual Report. The list developed at this meeting will serve to provide common language for agencies across the Network to use when writing in “Other” indicators. This will provide consistency and the ability to better analyze this information.

The domains in which NASCSP collected “Other” indicators were Employment, Education, Infrastructure and Asset Building, Housing, Health and Social/ Behavioral, and Outcomes Across Multiple Domains. The Data TF made recommendations about what “other” indicators to keep and what were thought unnecessary.

Employment

- Keep
 - 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.)
 - Number of communities who increased the minimum wage
 - Number of youth who maintained employment for 90 days (while still remaining student status)
 - Minus the phrase in parentheses
- Take Out
 - Number of individuals who became self-employed

- Duplicative
- Number of individuals who developed skills to obtain employment
 - Duplicative
 - This is an intermediary outcome.

Education

- Keep
 - Number of individuals who moved from high school diploma and/or equivalent to post-secondary education (of any kind)
 - Alter language to state: “who *obtained* and moved from a high school diploma and/or equivalent...”
 - There must be specification that the agency worked to help the individuals first obtain high school diploma/equivalency.
 - Number of communities who made post-secondary education opportunities available
 - Add language: “new or expanded opportunities available”
- Take Out
 - Number of individuals with increased ability to pay for a recognized credential, certificate or degree relating to the achievement of educational or vocational skills
 - Ability cannot be defined
 - This is a service, not an outcome.
 - Number of individuals who enrolled or maintained enrollment in post-secondary education
 - This is simply a matter of attendance and is not a significant outcome.

Infrastructure and Asset Building

- Keep
 - Number of individuals who started their own business
 - Add in language: “for 180 days” because it is more significant if the business continues to operate rather than just starting up.
 - Number of individuals who reduced debt
 - Number of individuals whose reliance on public subsidies was reduced
 - Number of individuals who increased their income from a non-employment source
 - Non-employment source must be defined.
- Take Out
 - Number of individuals who increased income or asset building skills
 - Duplicative and vague
 - Number of individuals with resolved consumer complaints that resulted in restitution
 - Could fall under “Number of individuals whose reliance on public subsidies was reduced”

Housing

- Keep
 - Number of households who avoided a utility shut-off
 - Number of households who obtained utilities
 - Number of households whose energy was restored
 - Number of households whose appliance(s) were replaced
 - All four should be reworded to match LIHEAP’s indicators.

- Take Out
 - Number of households experiencing homelessness who moved to more stable housing (i.e. transitional housing)
 - Duplicative

Health and Social/ Behavioral

- Keep
 - Percent decrease in the opioid death rate
 - Number of individuals whose lives were saved by opioid overdose reversals
 - Number of individuals who discontinued drug/alcohol use
 - Number of individuals who remained drug free for 90 days
 - Number of communities who increased health care options or facilities
 - Add in language: “new or expanded options”
 - Number of individuals who increased social inclusion
 - Must be rephrased to mention specific target populations (i.e. seniors, those with development disabilities)
 - Number of individuals who secured emergency protection from physical and/or emotional abuse
 - Number of individuals with increased safety in their homes
 - Define safety
- Take Out
 - Number of new mothers who improved infant feeding practices
 - Duplicative
 - Number of individuals who increased knowledge about health-related topics
 - This is an intermediary outcome and difficult to measure
- No Clear Decision
 - Number of individuals who reported a better sense of food security
 - The group disagreed on the impact of certain food programs and the viability of tracking food security.

Outcomes across Multiple Domains

- Keep
 - Number of individuals who achieved one or more outcomes as a result of more than one coordinated service
 - Rework language to state “bundled/integrated services” i.e. Number of individuals receiving bundled services achieving one or more outcomes
 - Number of households for whom both adult and child outcomes were observed
 - Rework language to state “whole family”
- NASCSP requested that the Data Task Force members from TX, AR, NC, TN, and VT form a sub-subcommittee to help craft language around an indicator that can report transitioning out of poverty.

CSBG Annual Report Implementation

- **The Task Force discussed the positives about the CSBG Annual Report implementation.**
 - Having Smartforms were helpful to use
 - The help and training that NASCSP provided throughout the process allowed everyone to keep moving forward.
 - Forced local agencies to start thinking about new changes coming down the pipeline and to make sure systems are in place to deal with them effectively
 - The Data Task Force at large was extremely helpful in taking on these new challenges, and this has created a process for moving forward when there are future changes.
 - Forced people to use their data to identify baselines going forward and having them rethink what they've been doing
 - Throughout this entire process, CAAs have been getting together, talking, and establishing common NPIs.
 - All in all, this has forced everyone to come together and talk. It has facilitated coordination and cooperation.
- **The Task Force also discussed the challenges with the CSBG Annual Report Implementation.**
 - Some recipients are still struggling with the old IS report. Switching now to something totally new is challenging. The different ways for recipients to see things on the report (formatting) throws people off.
 - Unduplicated counts
 - Making sure that the information around what needs to be done is adequately disseminated through the network levels
 - The issue of state level staff turnover affects how the new report is taught, and some local agencies are not ready for it and require additional conversations about the new report.
 - For others, there has not been enough training on the new report and they've had to wait a little to move forward.
 - Others have been moving towards new electronic systems and it has been challenging to ensure that all systems and critical infrastructure are in place for a seamless transition.
 - There have been a lot of unique challenges over many different systems.
- **The Task Force discussed what innovations have resulted from this implementation.**
 - In one instance, an electronic spreadsheet was created for Module 3 that is reported on quarterly.
 - New trainings and materials have been created.
 - It has forced everyone to rethink their services and what they've been doing.
 - ROMA Work Group

DAY 2

CSBG Annual Report

Significant Changes

NASCSP received a lot of feedback about the instruction manuals and compiled these responses to inform the updates and revisions made to the Instruction Manuals for Module 2 and 4.

Module 3 was released in April. NASCSP wanted people to get comfortable with this module before requesting feedback. NASCSP asked the DATA TF to review the highlighted changes keeping two questions in mind: 1) Are the changes we made clear? 2)What else needs further clarification? Following is a summary of the comments.

Note: The numbering code for this section is Module_Section_Page#. Please refer to the document on significant changes that is part of the DATA TF In-Person Meeting Packet.

- **2_A_P6**
 - “Note: The difference between Linkages and Civic Engagement...”
 - It was determined that the term “leadership” was unclear and that this should be under 2A.P4 “CSBG Expenditure Domains Definitions.”
- **2_A_P6**
 - “CSBG Eligible Entities who have a federally approved indirect cost rate...”
 - Remove Other
- **4_A_P7**
 - The Task Force concluded to only count participants for the current Annual Report and to consider changing to households with the next OMB Clearance.
- **4_A_P10**
 - “Note: When CSBG Eligible Entities do not collect income...”
 - The Task Force determined this change was good.
- **4_A_P19**
 - The Task Force determined this change was good.
- **4_A_P24**
 - The Task Force determined to combine this with the other change made on page 24. It was thought that it would be better to mention the indicator first and then to provide the definition for financial well-being.
 - It was also determined that the definition should use the term “individual” as opposed to “you.”
- **4_A_P25**
 - “All indicators in this domain count the number of individuals within households...”
 - The Task Force determined to keep the old language instead of getting rid of it.
- **4_A_P27**
 - It was determined by the Task Force that “participants” should be used instead of “households.”
- **4_A_P36**
 - The Task Force determined this was a definition of what “an unduplicated count” is not rather than a definition of what an unduplicated count is.
- **4_C_P45**
 - “Note: Individuals receiving medical services...”
 - The Task Force determined that the added language “IHS ...will not be added to the list” be removed.
- **4_C_P47**
 - “Migrant Seasonal Farm Worker...”
 - The Task Force suggested to simplify the language to clarify that this could apply to either a migrant worker or a seasonal worker.
- **4_C_P47**

- “Unemployed (Short-Term, six months or less...)
 - The Task Force determined this change was good.
- **A_C_P48**
 - “Two Adults, No Children...”
 - The Task Force questioned the need to have “Non-related adults with children.”

NASCSP will make the updates and send the revised document to the DATA TF.

OMB Clearance Process

NASCSP discussed the preparation needed for the next OMB Clearance of the CSBG Annual Report. The DATA TF provided feedback and additional suggestions. The following is a summary of the key points.

- The process for developing the new CSBG Annual Report was extensive and consisted of multiple surveys and webinars to collect feedback from the network.
- There is now a foundation in place as well as consistent and frequent trainings to make sure everyone is on the same page.
- We are not starting from scratch but simply incorporating changes to the Annual Report to ensure we are listening to the needs of the Network and continuously improving.
- NASCSP requested the Data Task Force act as a focus group for developing surveys for the informal feedback process and providing input on other steps NASCSP and the DATA TF can take to ensure we get good input about the proposed changes to the Annual Report.
- NASCSP outlined the projected OMB clearance process going forward, as follows:
 - **March:** 60-day comment period begins
 - **June:** 60-day comment period ends
 - **September:** 30-day comment begins
 - **November:** 30-day comment ends
 - **December:** CSBG Annual Report receives OMB clearance.
- NASCSP will put out webinars to explain what the informal feedback period and the formal OMB clearance process will look like.
- NASCSP and the Data TF have to conduct effective messaging about the purpose of the clearance process, i.e. to provide feedback for improving the Annual Report, not eliminating it.
- NASCSP will send out surveys at the **very latest in January.**

Module 3

NASCSP discussed the Module 3 pilot group and presented the review form that the pilot group developed to analyze the Community Initiative Status Form. In small groups, task force members analyzed an example of a Community Initiative Status Form using the new review form. Feedback about the new form (which questions were useful, what other questions are needed, etc.) follows.

- **Some of the questions in the review form that were identified as the most useful were:**
 - “Does stated goal align with problem identified?”
 - “Expected duration: is duration appropriate for what outcome is expected in indicated initiative?”
 - The form was especially helpful in identifying the essential components of the problem identification and the goal/agenda, which were key components for guiding the rest of the Community Initiative Status Form.

- **Overall, the group was very pleased with the review form and provided feedback that:**
 - The status as a review form is an amazing idea and is certainly much appreciated.
 - It gives more structure to reviewing projects.
 - It highlights duration as important.
 - There was a suggestion to put together milestones for what would be considered reasonable duration. Without such milestones, it may be hard to determine if the duration is reasonable.
 - A common question received in the Network has been: what is “community-level” work? The questions in the review form help guide an organization in identifying whether or not an initiative is actually community-level work.
 - There was a suggestion to include a scoring sheet as well that would help in determining how successful the agency was in filling out the status form.
- The group expressed an interest in having a webinar dedicated specifically to the Module 3 review form.

Data TF Communication

- The DATA TF discussed Talking Points that can be used by Task Force members to sum up what was done at this in-person meeting and create a consistent narrative. Talking Points include:
 - Make sure that everyone knows that there are tools in place and that the DATA TF is here to help
 - What is coming down the pipeline (and the timeline)
 - NASCSP surveys for the informal feedback period
 - Lexicon
 - Data Dictionary
 - Performance Management Website
 - Module 3 Review Form
- The DATA TF identified a need for a process to communicate information to other states that are not on the task force.
 - A suggestion was to release the contact information for each DATA TF member by region so that other entities in the region could reach out to them for additional information.
- Additionally, the Communication Subcommittee will send out a one-pager next month detailing accomplishments and priorities.

Data TF Priorities, Deliverables, and Timeline

To wrap up the Data Task Force in-person meeting, the group discussed priorities, deliverables, and their timeline going forward. NASCSP and the Task Force agreed that the following will be the timeline going forward.

- FFY18-4th Quarter (ends September 30, 2018)
 - Lexicon
 - Vendor Guide/RFP Toolkit
 - Analysis FAQ
 - Theory of Change
 - DATA TF Web Page

- Finalized Communication Plan
- Updated Talking Points
- Updated Instruction Manuals
- Completion of Module 3 Pilot
- FFY19-1st Quarter (Oct-December 2018)
 - Analysis of Module 3 Pilot Findings
 - NASCSP surveys for informal feedback period
 - Annual Report FAQ
 - Data Dictionary
 - Standard Measurement Tools
 - Life Cycle of the Data
- FFY19-2nd Quarter (Jan-March 2019)
 - OMB 60-day comment period begins
 - Public-facing side of the Performance Management Website
 - FAQ on Community-Level Work
 - Analysis Toolkit
- FFY19-3rd and 4th quarter (April-Sep 2019)
 - OMB 30-day comment period
- FFY20-1st quarter (Oct-December 2020)
 - OMB Clearance is received
- NASCSP mentioned that subcommittees must send out doodle polls for their next meetings:
 - Every subcommittee should meet in September
 - Every subcommittee must finalize an agenda before their next meeting
 - Additionally, NASCSP made it a priority that subcommittees discuss updates to deadlines and plan for deliverables beyond September 2019

The group discussed putting together a DATA TF timeline that lays out all the tasks/deliverables/timeframes in one graph.

Wrap-Up

Most important accomplishments of this session

- The in-person meeting, subsequent subcommittee work, and the face-to-face interactions fostered a better dialogue.
- The discussion of the legislative implications for data and data analysis were very much appreciated at the analysis subcommittee meeting and allowed members to gain a new perspective on the importance of the Performance Management Website.
- It was helpful to have the timeline for deliverables articulated and to see the timeline laid out in person rather than just talking about it over the phone.

What worked well

- Breaking up into small groups/ subcommittees to break up the work and reporting back to the group-at-large. This allowed for greater, more in-depth analysis and the ability to come back and brainstorm/ flush it out further.
- The Task Force very much appreciated having access to OCS.

Suggestions for improvements

- Longer days or more days for a meeting to allow for more discussion and brainstorming.
- Get the timelines for deliverables out sooner.
- It would be better to receive the packet two weeks in advance.
- Subcommittees meet more often or longer in the more intimate setting to better tackle the issues or deliverables that individual subcommittees are pursuing.

Possibility of convening twice in a year

- This is logistically challenging and expensive.
- It was suggested to meet at a conference.
 - One suggestion brought up was the CAP MLTC conference in January in New Orleans. The conference would run Wednesday-Friday with a possibility to meet on Monday or Tuesday before the conference.
- NASCSP will put out a doodle poll to the Task Force to identify which conferences would work best for a potential second, in-person meeting.
- In the meantime, NASCSP is working with its web developer for a Data Task Force member portal on the NASCSP website for better access to documents.