

# DATA TF IN-PERSON MEETING

*July 31 – August 1, 2019*



NASCSP

NATIONAL ASSOCIATION FOR STATE COMMUNITY SERVICES PROGRAMS

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# AGENDA

## NASCSP Office

**111 K Street NE, Washington, DC, 20002**

### Meeting Goals

1. Collect input on the CSBG Annual Report lessons learned from the FY2018 report submission (April 2019).
2. Understand the OMB Clearance Process.
3. Report out on sub-committee deliverables.
4. Determine DATA TF priorities and timeline.
5. Develop recommendations for the next membership term 2020-2023.
6. Develop talking points for TF members to use.

### Wednesday, July 31

8:00-8:30 a.m.

#### **Continental Breakfast**

8:30-8:40 a.m.

#### **Welcome from DATA TF Chairs**

*Kris Schoenow and Lauren Suwansupa*

8:40-8:50 a.m.

#### **Welcome from OCS**

*Janelle George*

8:50-9:00 a.m.

#### **Warm-Up**

*Carey Gibson*

9:00-9:05 a.m.

#### **Meeting Framework**

*Carey Gibson*

- Review meeting goals and agenda

9:05-10:05 a.m.

#### **Small Group Discussion: Continued CSBG Annual Report Implementation (Meeting goal 1)**

**Goal** of the conversation is to obtain feedback to plan for the future.

10:05-10:20 a.m. **Break**

10:20-10:50 a.m. **Module 3: OCS Brief Update and General Conversation**

10:50-11:50 a.m. **Module 4** (Meeting goal 1)  
NASCS

**Goal** is to learn about the importance of the Performance Management Framework and gain an understanding of TTA needs around unduplicated counts and targeting.

11:50-12:50 p.m. **Lunch (Brought in by NASCS)**

12:50-1:20 p.m. **OMB Clearance Process** (Meeting goal 2)  
OCS/NASCS

**Goal** of the conversation is to gain an understanding the two upcoming OMB Clearance processes

1:20 -2:35 p.m. **Small Group Discussion: TTA Tool Review** (Meeting goal 4)  
Carey Gibson

**Goal** is to understand the strengths and weaknesses of the Annual Report TTA tools. Small groups will receive all current Annual Report TTA tools and have a discussion around the questions below.

2:35-2:50 p.m. **Break**

2:50-4:20 p.m. **Subcommittees Convene** (Meeting goal 3)

**Goal** is to allow the TF to convene as subcommittees and work on their current deliverables, discuss future deliverables, and suggest any needed TTA.

4:20-4:35 p.m. **Subcommittees Report Out** (Meeting goal 3)  
Subcommittee Chairs

4:35-4:40 p.m. **Wrap up/Plan for Tomorrow**  
Carey Gibson

**Goal** is to close out any conversations and orient the TF to Day 2 of the meeting.

5:00-6:15 p.m.      **Networking 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**  
*Carey Gibson*

8:45-10:00 a.m.      **Analytics Maturity Model**  
*Kris Schoenow*

**Goal** is to learn about a data analytics process.

10:00-10:15 a.m.      **Break**

10:15-11:15 a.m.      **Discussion: DATA TF Priorities, Deliverables, and Timeline**  
*Carey Gibson* *(Meeting goal 4)*

**Goal** is plan for future priorities and deliverables and map out a timeline. Carey will facilitate a planning session so the TF can walk away with some direction.

11:15-11:45 a.m.      **Discussion: Next Membership Term 2020-2023** *(Meeting goal 5)*  
*Kris and Lauren*

**Goal** is to discuss the successes of the current TF and provide suggestions for any future TF's.

11:45-12:30 p.m.      **Discussion: Forming a Consensus on Materials** *(Meeting goal 1-5)*  
*Carey*

**Goal** is to form a consensus among the TF around suggested TTA, Operating Procedures, and any other debated topics that occurred over the course of the meeting.

12:30-1:00 p.m.      **Lunch** (Brought in by NASCSP)

1:00-2:00 p.m.

**DATA TF Communication: What are the three key talking points?**

Carey Gibson

*(Meeting goal 6)*

**Goal** is to facilitate a discussion on the talking points that TF members will share with their co-workers and partner networks about this meeting.

## CONTINUED CSBG ANNUAL REPORT IMPLEMENTATION

*Wednesday, July 31<sup>st</sup>*

*9:05-10:05*

### Roundtable Discussion Questions:

- What are some best practices you've used for collecting and reporting data?
- What kind of TTA did you use/provide and what worked well? Examples: In-person or webinar training provided by a national partner or other consultant? Training provided by a State Association? Printed TTA Materials?
- What solutions did you develop for challenges you faced with FY18 reporting? Examples: new systems, policy changes, timeline changes, etc.?
- What improvements in processes or TTA have you identified for FY19 reporting? What can the national partners do? What can States, associations, and local agencies do?
- Have you used any of the FY18 data yet? For analysis? For organizational reports? What have you learned?

## **Module 4**

*Wednesday, July 31<sup>st</sup>  
10:50-11:50*

### Discussion Questions:

- How does your state ask for targets to be set? Do you target both the number to be served and the number to achieve outcomes?
- What is challenging for targeting? (At family level? At community level?)
- What are TTA needs for targeting?
- What TTA is needed on obtaining an unduplicated count?
- What are the newest technological advances, for example in data warehouses, to help with unduplicated counts?



## **OMB Clearance Process**

*Wednesday, July 31<sup>st</sup>  
12:50-1:20*

### Discussion Questions:

The discussion will cover the potential reporting period change with the second upcoming OMB clearance.

- What would a reporting period change look like at your agency or state? Consider policies and practices, staff, time, and process.

## TTA Tool Review

Wednesday, July 31<sup>st</sup>  
1:20-2:35

### **List of Tools**

- [Instruction Manuals](#)
- [Annual Report Q&A](#)
- [List of "Other Indicators"](#)
- [Lexicon](#)
- [Module 3 Review Document](#)
- [LIHEAP/HS/WIOA/WAP Crosswalk](#)
- [Annual Report/IS Crosswalk](#)

### **Roundtable Discussion Questions:**

- Which tools did you utilize?
- What did you like about the tool?
- What would you improve about the tool?
- What is missing from this group?

## **Next Membership Term: 2020-2023**

*Thursday, August 1st  
11:15-11:45*

### Roundtable Discussion Questions:

- What are the recommendations for a future task force?
- What worked and what didn't with this TF?
- What else would you do?

## DATA Task Force Subcommittee Members

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
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 (NASCSPP)
Jenae Bjelland	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSPP)
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
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)
Pamela Harrison	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSPP)
Katy Kujawski	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSPP)
Barbara Mooney	N/A	N/A	National Partner	Association of Nationally Certified ROMA Trainers (ANCRT)

## DATA Task Force Subcommittee Members

Systems IT Subcommittee				
Member	Region	State	Type of Org	Organization Name
Krista Heineman	7	NE	Private CAA	Northeast Nebraska Community Action Partnership
Ann Sirois	1	MA	Private CAA	Community Teamwork
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
Megan Meadows	5	OH	CSBG State Office	The Ohio Development Services Agency, Office of Community Assistance
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 (NASCSPP)
Jenae Bjelland	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSPP)
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
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 (NASCSPP)
Eric Behna	N/A	N/A	National Partner	National Association of State Community Services Programs (NASCSPP)
Jarle Crocker	N/A	N/A	National Partner	Community Action Partnership (CAP)
Monique Alcantara	N/A	N/A	Federal Partner	Office of Community Services (OCS)
Veronica Zhang,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)

## SUBCOMMITTEE PROGRESS

### ***Communications***

The Communications Committee released its interactive TOC at the NASCSP Conference on September 19<sup>th</sup>. The committee then met on October 12<sup>th</sup> and April 11<sup>th</sup> to review the DATA Task Force's communications efforts and recommend additional channels and methods of communication. Additionally, the committee provided feedback on messaging and discussed talking points and other potential communications resources for DATA TF members.

### ***Guidance and Training***

The Guidance and Training Committee met five times since the last in-person meeting: October 9<sup>th</sup>, November 29<sup>th</sup>, January 28<sup>th</sup>, April 11<sup>th</sup>, and June 13<sup>th</sup>. In October, the group met to provide feedback on the draft of the lexicon, as well as to brainstorm topics for an Annual Report FAQ. While NASCSP worked on incorporating their feedback into the lexicon, the committee shifted gears in November to focus on the Annual Report FAQ and finalize the questions to be addressed. The lexicon was then released on January 10<sup>th</sup>. Additionally in January, the group reviewed a draft of an FAQ on targeting in Module 3. This draft was finalized in April and will be submitted to OCS for approval. In June, the group provided feedback on a draft of the Annual Report FAQ, which will be finalized at the in-person meeting. The group also began work towards an FAQ on community level work, which will be reviewed at the in-person meeting. Once finalized by the committee, both FAQ's will also be sent over to OCS for approval.

### ***Systems***

Since the in-person meeting, the Systems Committee tested and provided feedback on all the SmartForms that were released to the network in February to ensure that they were as user-friendly as possible and error-free. They met on October 29<sup>th</sup> and April 15<sup>th</sup> to continue work on the RFP toolkit and data dictionary. The data dictionary will provide the specifications necessary for building out the Annual Report in database systems and will be released pending updates in OLDC. A draft of the RFP toolkit has been developed and will be reviewed at the in-person meeting in order to finalize and release soon after. This toolkit will provide useful information and guidance to those in the Network that may be interested in procuring a new database system. Additionally, the committee discussed better systems to share tools that the DATA TF produces so that they are utilized as much as possible.

### ***Analysis***

The Analysis Committee met three times on October 19<sup>th</sup>, December 11<sup>th</sup>, and February 28<sup>th</sup>. In October, the group finalized the FAQ on collecting, storing, analyzing, and using data,

which was released to the Network on October 26<sup>th</sup>. The group then began planning work on their deliverable to compile a list of standard measurement tools being used by the Network to assess whether an NPI outcome was achieved. During the meetings, the group reviewed potential survey questions and finalized a process to send out the survey, deciding that the RPIC's would be the best means through which to distribute the survey. Each RPIC was assigned two domains to respond to in order to make the survey as non-burdensome as possible. The survey was finalized in June and sent out to the RPIC's in July with a deadline of July 19<sup>th</sup>. The committee will review the results of this survey at the in-person meeting and brainstorm the tools to develop as a result of the information collected through the survey.

## OPERATING PROCEDURES

### *Purpose*

The CSBG DATA Task Force is convened by the National Association for State Community Services Programs (NASCSPP) to assist the Office of Community Services (OCS) and NASCSPP 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 NASCSPP 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 NASCSPP. 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. Nominations from the CSBG network should be solicited at the discretion of the co-chairs. Once a list of interested people from the network is established, it should be used to identify new members to replace those who have resigned. Applications to sit on the Task Force should be accepted on a rolling basis following the establishment of the list of interested people obtained from soliciting the network from this list. Prior to seeking nominations from the CSBG network, NASCSPP 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, the co-chairs can instruct NASCSPP ~~will then~~to solicit nominations from the CSBG network.
- NASCSPP and the Task Force co-chairs select~~s~~ 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, and region).

### *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
  - 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*).
- Terms expire at the end of February of the third year. By October 31<sup>st</sup> of the year prior to term expiration (i.e. October 31, 2019 for terms expiring in 2020), Task Force members must inform the co-chairs if they plan to continue as a Task Force member and commit for another three years or if they would like to resign.
- Co-chairs and NASCSP will begin the solicitation process no later than November 15<sup>th</sup> of the year prior to term expiration.
- 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).
  - 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.
    - If members are non-responsive, they shall be removed from DATA TF membership for cause.

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#### ***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~~ the three-year membership term.
- ~~New co-chairs will be selected at the start of every new membership term. Previous co-chairs may be nominated again. -membership period. In the event that both co-chairs are ending their term, it is expected they are available to help transition to the new leadership by participating on call, meetings, etc. for the first three months.~~

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#### 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.
  - 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***

- Subcommittees are expected to meet once every quarter.
- Each subcommittee must have a chair from either a State Office, Local CAA, or State Association representative.
  - 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

[7/17/19 – Updates made to nomination process, membership terms, and co-chair terms](#)

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# Analytics Maturity Model

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