



National Association for State Community Services Programs

CSBG Annual Report Instruction Manual

Module 1: State Administration

For State and local CSBG Eligible Entity Use in Completing
the CSBG Annual Report

March 2017

REMINDER! Module 1 will be completed in the On-Line Data Collection (OLDC) system and has received a one-time extension that is due no later than April 7, 2017. Reporting for Module 1 will use Fiscal Year (FFY) 2016 data.

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Overview

In collaboration with the Community Services Block Grant (CSBG) Network, the Office of Community Services (OCS) developed State Accountability Measures to track organizational performance by State CSBG Lead Agencies and OCS. These measures are part of an enhanced framework for accountability and performance management across the CSBG Network. The CSBG State Plan proposes state specific information on the State Accountability Measures and Module 1 of the new CSBG Annual Report provides a progress report on these measures. For more information on the State Accountability Measures see [Information Memorandum \(IM\) 144](#).

Module 1 is the State Administration module of the new CSBG Annual Report and is completed by State CSBG Lead Agencies. This module includes information on State administration of CSBG funding, including information on distribution of funds to Eligible Entities, use of State administrative funds and discretionary funds for training and technical assistance (T&TA) as well as information on Eligible Entity progress in meeting the Organizational Standards and implementing ROMA. Finally, this module provides tracking of the State's progress in meeting accountability measures related to State monitoring, T&TA and other critical areas.

Module 1 of the CSBG Annual Report will be entered into the Office of Community Services (OCS) Online Data Collection System (OLDC). OLDC is the central, web-based reporting tool that OCS has used for other programs and now uses for CSBG data collection. OLDC will allow OCS to auto-populate information from the CSBG State Plans directly to Module 1 of the CSBG Annual Report. There are options to edit auto-populated data from the CSBG State Plan for the reporting year covered by the CSBG Annual Report.

The CSBG Annual Report is organized in four modules.

- Module 1: *State Administration* (completed by State CSBG Administrators) as described above. (States will submit in OLDC by April 7, 2017 for FY16 and March 31, 2018 for FY17.)
- Module 2: *Agency Expenditures, Capacity, and Resources* (completed by Eligible Entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies) includes information on funds spent by 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 Eligible Entities. (States will submit in OLDC by March 31, 2019.)
- Module 3: *Community Level* (completed by Eligible Entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies) includes information on the implementation of

strategies and results achieved for communities of low-income. (States will submit in OLDC by March 31, 2019.)

- Module 4: Individual and Family Level (completed by Eligible Entities; reviewed, evaluated, analyzed by State CSBG Lead Agencies) includes information on services provided to individuals and families, demographic characteristics of people served by Eligible Entities, and the results achieved for individuals and families of low-income. (States will submit in OLDC by March 31, 2019.)

This manual will only provide instructions on submission of Module 1 for FY 2016 and FY 2017. [All Module 1](#) forms should be read thoroughly by the State prior to submission.

Modules 2 – 4 data and information will be collected beginning in FY 2018. Until then, all agency-level (Sections E-G and the National Performance Indicators (NPIs)) forms will continue to be distributed to States by e-mail from the National Association of State Community Services Programs (NASCSPP), and will be submitted through the CSBG Information System (IS) Access database. These documents are also available for downloading from the [NASCSPP website](#). These forms are designed to be distributed by States to local agencies. States will continue the submission of agency level data through the Access database until FY 2018 when States will enter agency level data in OLDC for Modules 2-4.

History

The first comprehensive survey of State uses of Federal CSBG funds was conducted in 1983, by a cooperative venture between NASCSPP 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 surveys of FY 1984, 1985, and 1986 activity were conducted by the Center for Community Futures with guidance from the Data Collection Committee of NASCSPP. Since FY 1987 surveys have been conducted by NASCSPP.

In FY 2001, reporting by States using the IS Survey became a Federal requirement. 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 the survey incorporates the lessons learned from earlier data collection practices and the analysis of this information. Changes are discussed and agreed upon by the Information System Task Force (ISTF), which includes people from across the CSBG Network as well as other stakeholders and partners.

In 2012, OCS awarded a cooperative agreement to NASCSP to assist 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, 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. In addition, OCS worked with NASCSP and a work group of States to obtain specific input on Module 1 of the CSBG Annual Report. 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, OCS considered comments from organizations across the CSBG Network, including national organizations, State CSBG Lead Agencies, State Community Action Associations, and local Eligible Entities and further revised the CSBG Annual Report based on this input. The revised report was released to the Network as an official Federal Register Notice for a final 30-day comment period. Following this review period, the CSBG Annual Report was submitted to OMB for the third and final comment period. OMB granted approval for the CSBG Annual Report on January 12, 2017.

Reporting in OLDC

Reporting Module 1 in OLDC is Phase 1 of the CSBG Annual Report implementation. The implementation process and timeline is outlined by OCS in [IM 152](#). The expected submission date for Phase 1 is April 7, 2017 for FY16 and March 31, 2018 for FY17. All Module 1 information will be entered into OLDC. States will be notified when Module 1 is available for data entry through an email from OCS.

To request access for State staff that will be entering data into OLDC, fill out the access request form [here](#) and submit it to [Niki Frazier](#).

For specific questions and instruction on using OLDC visit [OCS's resource page](#).

TIPS ON USING OLDC:

- Use the *validate* function to check each page for errors and to populate imbedded auto-calculations.
- Click *save* frequently and before moving between pages to ensure data is not lost (validate will also save progress).
- *Errors* or *Warnings* populate if an Item is not answered. Review the associated Item to ensure questions are answered. Then click *validate* to clear the error or warning. The Annual Report can be submitted with warnings, but not with errors.
- Some Items only need to be answered depending on the answer to the previous question(s). In these cases, *Skip Logic* has been applied, and the Items will only appear as necessary.
- Not all States will have all information auto-populated. A State's CSBG Model State Plan periods will depend on the amount of data available to each state for auto-population.
- When entering dates in OLDC use the MM/DD/YYYY format.

Reporting Timeframe

The reporting timeframes for all information in Module 1 is based on the Federal Fiscal Year (FFY), which runs from October 1 of a given calendar year until September 30 of the following calendar year. When completing the CSBG Annual Report, respondents will first indicate the FFY for which the State is submitting data. OLDC system will then auto-populate the administrative module with information from the appropriate year (year 1 or year 2) from the

accepted CSBG State Plan. States will be able to update information in these sections, as necessary.

Section A: CSBG Lead Agency, CSBG Authorized Official, CSBG Point of Contact

This section identifies key contact information for each State office. It will be completed by State staff in OLDC. Most of this section will auto-populate from the CSBG State Plan (CSP) with an option to update where applicable.

- A.1.** Confirm and update important information in relation to the State lead agency designated to administer CSBG in the State, as required by Section 676(a) of the [CSBG Act](#).

OLDC TIP! A.1. – A.1I auto-populates from the CSBG State Plan Items 1.1 – 1.1I.

The State should review all items and may update information to note any changes that have taken place during the reporting year. Any updates or changes will be noted in quality assurance reviews and may require brief explanation prior to OCS's acceptance of the CSBG Annual Report.

A.1a. Lead agency

Auto-populates from CSP Item 1.1a.

The Lead Agency is the agency designated by the State (governor or legislature) to administer CSBG and identified in the Application for Federal Assistance, SF-424M used to apply for CSBG. Review and update if necessary.

OLDC TIP! To update within a text box, type directly into the text box.

A.1b. Cabinet or administrative department of this lead agency

Auto-populates from CSP Item 1.1b.

Identify in which cabinet or administrative department the lead agency is located in the State. Review and update if necessary. If *Other* is chosen, a description will need to be provided.

OLDC TIP! Skip logic has been applied to this -item, so a narrative text box will only appear if *other* is selected.

A.1c. Division, bureau, or office of the CSBG authorized official

Auto-populates from CSP Item 1.1c.

Identify the division, bureau or office associated with the CSBG authorized official. Review and update if necessary.

A.1d. Authorized official of the lead agency

Auto-populates from CSP Item 1.1d.

The authorized official is the person indicated as the authorized representative on the SF-424M. The authorized official could be the director, secretary, commissioner etc. as assigned in the designation letter (attached under CSP Item 1.3). Review and update if necessary.

A.1e. Street address

Auto-populates from CSP Item 1.1e.

Street address of the State lead agency. Review and update if necessary.

A.1f. City

Auto-populates from CSP Item 1.1f.

City of the State lead agency. Review and update if necessary.

A.1g. State

Auto-populates from CSP Item 1.1g.

State of the State lead agency. Review and update if necessary.

A.1h. Zip code

Auto-populates from CSP Item 1.1h.

Zip code of the State lead agency. Review and update if necessary.

A.1i. Telephone number and extension

Auto-populates from CSP Item 1.1i.

Relates to the telephone number and extension (if applicable) of the State lead agency. Review and update if necessary.

A.1j. Fax number

Auto-populates from CSP Item 1.1j.

Relates to the fax number of the State lead agency. Review and update if necessary.

A.1k. Email address

Auto-populates from CSP Item 1.1k.

Relates to the email address of the State lead agency. Review and update if necessary.

A.1l. Lead agency website

Auto-populates from CSP Item 1.1l.

Relates to the website of the State lead agency. Review and update if necessary.

- A.2.** A list of programs that are likely to be administered by the same individual who administers CSBG will be visible. Please check any additional programs administered by the State CSBG Lead Agency during the reporting year (FFY). If *Agriculture, HUD* and/or *other* is chosen, a text box will appear; please specify the exact program.

OLDC TIP! Checkboxes allow all options that apply to be selected.

Section B: Statewide Goals and Accomplishments

Section B collects information on the progress of goals stated in the CSBG State Plan, outcomes and targets from the most recent American Customer Survey Index (ACSI) survey and narratives of State and Eligible Entity management accomplishments as well as innovative programs. Goals and strategies stated in the CSBG State Plan (CSP) may include use of CSBG’s 90 percent funds and discretionary funds, a T&TA plan, a communication plan, use of organizational standards, and partnership strategies as detailed throughout the CSP. This section will be available to State staff for completion in OLDC. Where appropriate this section will auto-populate from the CSBG State Plan with an option to update.

B.1. Progress on State Plan Goals

Auto-populates from CSP Item 3.2 and is read-only.

Describe the progress in meeting the State’s CSBG-specific goals for State administration of CSBG as described in CSP Item 3.2. Select whether *All Goals [were] Accomplished*, *Partially Accomplished*, or *Not Accomplished*.

Choose *All Goals Accomplished* when 100% of goals were met. When some, but not all goals were met, States should choose *Goals Partially Accomplished*. When none of the goals were met, states should choose *Not Accomplished*. For each selection, provide a narrative explanation on progress. If a state would like to update their goals, please do so in the next CSBG State Plan.

Associated State Accountability Measure: 1Sa(i)

State Accountability Measures will be used in assessing overall progress in meeting State goals.

OLDC TIP! Radio buttons only allow one option to be selected.

B.2. CSBG Eligible Entity Overall Satisfaction Targets

Some columns auto-populate from CSP Item 3.5.

B.2. CSBG Eligible Entity Overall Satisfaction Targets:

In the table below, provide the State's most recent target for CSBG Eligible Entity Overall Satisfaction during the performance period (FFY).

Prior Year Target	Most Recent American Customer Survey Index (ACSI) Score	Future Target	Delete
0	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="Delete"/>

Report the most recent target for CSBG Eligible Entity Overall Satisfaction during the performance period (FFY). In the first reporting period (FY 2016), *Prior Target Year* should be left blank. The second column, *Most Recent American Customer Satisfaction Index Survey Result* should include the most recent result (score) of the ACSI survey. In the third column *Future Target*, the State should provide the target as a best estimate for the bi-annual ACSI score. Scores will range from 0-99 in these fields.

Please see OCS' [IM 150](#) for guidance on establishing ACSI targets. This table will not auto-populate in the first year of this report, as it is not required for year one, however will be auto-populated in year two.

Given that the CSBG State Plan may cover two fiscal years, annual updates related to CSBG Eligible Entity satisfaction should be provided in the CSBG Annual Report. The State's target score will indicate improvement or maintenance of the States' Overall Satisfaction score from the most recent ACSI survey of the State's CSBG Eligible Entities.

States that did not receive ACSI scores (i.e. States with only a single CSBG Eligible Entity) should not complete this question, but should provide narrative descriptions of other sources of customer feedback and the State's response to that feedback under Item B.3.

OLDC TIP! This table will need to be added to over time. The *Add Row* functionality exists to accommodate future Annual Report Submissions.

Associated State Accountability Measure: 8S

State Accountability Measures will be used in assessing overall progress in meeting State goals.

B.3. CSBG Eligible Entity Feedback and Involvement

Enter a narrative on CSBG Eligible Entity Feedback. Include information on how the State considered feedback from CSBG Eligible Entities, OCS, public hearings, and other sources, and/or customer satisfaction surveys such as the ACSI. Include any actions that have been taken as a result of the feedback.

Note: While this Item is closely related to CSP Item 3.4a, it will not auto-populate from the CSP. The CSP requests that the States describes the steps that they plan to take in order to receive feedback from Eligible Entities. Within the Annual Report the State should speak to how they implemented the feedback from Eligible Entities.

B.4. State Management Accomplishment

Enter a narrative describing what the State considers to be the top management accomplishment achieved by the State CSBG office during the reporting year (FFY). Provide examples of how administrative or leadership actions led to improvements in efficiency, accountability, or quality of services and strategies. Narratives provide a human face and framework for understanding the facts and figures reported elsewhere.

B.5. CSBG Eligible Entity Management Accomplishments

Enter a narrative describing three notable management accomplishments achieved by CSBG Eligible Entities during the reporting year (FFY). Describe specifically how responsible, informed leadership and effective, efficient processes led to high-quality, accessible, and well-managed services and strategies.

B.6. Innovative Solutions Highlights

Enter a narrative describing at least three examples of ways in which CSBG Eligible Entities addressed a cause or condition of poverty in their community using an innovative or creative approach. Please provide the agency name, local partners involved, outcomes, and specific information on how CSBG funds were used to support implementation.

Section C: CSBG Eligible Entity Update

Section C provides critical updates and information on each Eligible Entity. Most of this section will auto-populate from the CSBG State Plan (CSP) with an option to update where applicable. Each portion of this section will be explained further in detail.

C.1a. CSBG Eligible Entity	C.1b. Public or Non Profit	C.1c. Type of Entity (Choose all that apply)	C.1d. Geographical Area Served by County (Provide all counties)	C.1e. Brief Description of "Other"	C.2a. Yes/No	C.2b. Briefly describe changes
Smith County Community Action Agency	Nonprofit	Community Action Agency (CAA) Limited Purpose Agency Local Government Agency Migrant or Seasonal Farmworker Organization	Smith County		<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Mark for Delete	
Northern Plains Community Action Agency	Nonprofit	Community Action Agency (CAA) Limited Purpose Agency Local Government Agency Migrant or Seasonal Farmworker Organization	Martin, Calhoun, and Porter Counties		<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Mark for Delete	

Add Section C - CSBG Eligible Entities: 1

C.1. CSBG Eligible Entities

Columns 1 – 5 auto-populate from CSP Table 5.1.

The table provided in this section will auto-populate with a list of *CSBG Eligible Entities* in the State as described in CSP Table 5.1 for this reporting year (FFY). Review and note any changes or updates to this information. This table should include every CSBG Eligible Entity to which the State allocated 90 percent of CSBG funds during the reporting period (FFY). The table should not include entities that only receive remainder/discretionary funds from the State and/or tribes/tribal organizations that receive direct funding from OCS under Section 677 of the [CSBG Act](#).

Note: *90 percent funds* are the funds a State provides to CSBG Eligible Entities to carry out the purposes of the [CSBG Act](#), as described under Section 675C of the [CSBG Act](#). A State must provide “no less than 90 percent” of their CSBG allocation, under Section 675B, to the Eligible Entities.

- **Column 1:** *CSBG Eligible Entity* will auto-populate with the name of the CSBG Eligible Entity entered into the CSBG State Plan. Review and update where needed. If the name needs to be updated, simply update directly in the text field. If any changes are made, mark Column 6 (C.2a) as yes and please explain in Column 7 (C.2b).
- **Column 2:** *Public or Private* will auto-populate whether the CSBG Eligible Entity is Public or Private. Eligible Entities are designated as such by Section 673(1)(A) of the [CSBG Act](#). A Private Entity is typically a non-profit organization holding a 501(c)3 and a Public Entity is typically part of a local branch of government and housed within

City or County offices. If any changes are made, mark Column 6 (C.2a) as *yes* and please explain in Column 7 (C.2b).

- Column 3: Type of Entity will auto-populate the type of entity from the CSBG State Plan. If any changes are made, mark Column 6 (C.2a) as *yes* and please explain in Column 7 (C.2b).

OLDC TIP! To make multiple selections. hold down the CTRL key and click multiple options.

DEFINITIONS:

Community Action Agency is any organization officially designated for fiscal year 1981 as a community action agency or a community action program under the provisions of section 210 of the Economic Opportunity Act of 1964 as amended. Private, nonprofit CAAs must have tri-partite boards of directors, consisting of one-third public officials, at least one-third representatives of the poor, and the remainder from the private sector pursuant to Sec. 676B of the [CSBG Act](#).

Limited Purpose Agency refers to a CSBG Eligible Entity that was designated as a limited purpose agency under Title II of the Economic Opportunity Act of 1964 for the fiscal year 1981, that served the general purposes of a community action agency under Title II of the Economic Opportunity Act; did not lose its designation as a limited purpose agency under Title II of the Economic Opportunity Act as a result of failure to comply with that Act; and has not lost its designation as a CSBG Eligible Entity under the [CSBG Act](#).

Local Government Agency is a public CSBG Eligible Entity where CSBG funds are allocated to and spent by a branch of local government. The Local Government Agency must follow all the same rules and requirements of the [CSBG Act](#) including administering CSBG through a tri-partite board.

Migrant or Seasonal Farmworker Organization can be designated a CSBG Eligible Entity under the [CSBG Act](#). Migrant or Seasonal Farmworker Organizations primarily meet the needs of farmworkers with low-incomes.

Tribe or Tribal Organizations are Federal or State recognized Indian Tribal Governments or Organizations within the Tribe that are eligible under the [CSBG Act](#) to be designated as Eligible Entities.

Other: If *Other* is selected in column 3, please provide further detail in the space allotted (describe in column 5) for a narrative response. Rows may be added by choosing "Add Row". Add rows to identify a new entity and to note any name changes.

- Column 4: Geographical Area will auto-populate with the counties that the identified Eligible Entity serves. Review and update this column as necessary. If any changes are made, mark Column 6 (C.2a) as *yes* and please explain in Column 7 (C.2b).
- Column 5: Brief Description of Other only needs to be completed if “Other” was chosen in Column 3. In completing this column, provide as much information as possible on the type of entity receiving CSBG. If any changes are made, mark Column 6 (C.2a) as *yes* and please explain in Column 7 (C.2b).

OLDC TIP! Skip logic has been applied to Column 5, so a text box will only appear if **other** in Column 3 is selected.

- Column 6: C.2a Yes/No reports whether there were changes to any one of the Eligible Entities reported. Select yes or no. If *yes* is selected, provide a description of changes in Column 7 (C.2b).
- Column 7: C.2b Briefly Describe Modifications allows States to describe any changes to the selected Eligible Entity.

OLDC TIP! Skip logic has been applied to Column 7, so a text box will only appear if **yes** in Column 3 is selected.

- Column 8: Mark as Delete should be checked when an Eligible Entity needs to be deleted from the list. A deletion could occur due, but not limited to, de-designation or a merger. If you choose *Mark as Delete* for any entity, please explain in Column 7 (C.2b).

C.3. Total number of CSBG Eligible Entities: ##

This will automatically update based on chart in C.1.

OLDC TIP! Save or Validate must be clicked in order for columns to automatically update.

Section D: Organizational Standards for CSBG Eligible Entities

In an effort to increase accountability throughout the CSBG Network and enhance the results achieved for people and communities with low-incomes, OCS launched several initiatives in 2012. One of these focused on establishing Organizational Standards for Eligible Entities. CSBG Network leaders developed and recommended a set of Organizational Standards to strengthen the capacity of the more than 1,000 Eligible Entities providing services across the country.

The Organizational Standards ensure that all Eligible Entities have appropriate organizational capacity. To fulfill the promise of the standards, States must provide consistent and high-quality oversight and technical assistance related to Organizational Standards. In addition, based on information about organizational capacity, States must work with the Eligible Entities to make informed programmatic decisions about how the agencies can best meet the local needs of families and communities of low-income.

This section collects information on how the State implements the Organizational Standards and reports on performance and progress of CSBG Eligible Entities in implementing them. Where appropriate this section will auto-populate from the CSBG State Plan with an option to update. For guidance on Organizational Standards, please reference [IM 138](#).

D.1. Assessment of Organizational Standards

Auto-populates from CSBG State Plan (CSP) Item 6.1.

In IM 138, States were given discretion on the set of standards to implement. Under CSP Item 6.1, the State indicates whether they're implementing the Organizational Standards or an alternative set of standards.

OLDC TIP! Radio buttons allow for only one option to be selected.

D.1a. Assessment of Organizational Standards

Auto-populates from CSP Item 6.4.

The State lead agency is responsible for annually assessing the status of the Organizational Standards among all of the Eligible Entities and for reporting progress to OCS. The response will be auto-populated from Item 6.4 of the CSBG State Plan with the option for the State to update information based on its actual assessment process. If *other* is chosen, please provide a narrative description.

OLDC TIP! Checkboxes allow all options that apply to be selected.

D.1b. Assessment of Organizational Standards Narrative

Provide a narrative describing the Organizational Standards assessment process as selected in D.1a. Please note that with the exception of regular on-site CSBG monitoring, all assessment options above may include either on-site or desk review (or a combination).

D.2. Organizational Standards Performance

Column 2 auto-populates from CSP Item 6.6.

Note: CSP Item 6.6 was not collected in FY 2016 and therefore will not populate into the Annual Report this year. Column 2 in the table below does not require a response this year.

D.2. Organizational Standards Performance:
 In the table below, please provide the percentage of CSBG Eligible Entities that met all State-adopted organizational standards in the reporting period (FFY). The target set in the CSBG State Plan is provided in the left-hand column. For more information on the CSBG Organizational Standards, see [CSBG Information Memorandum # 138](#).

Target vs. Actual Performance on the Organizational Standards

Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number that Met All (100%) State Standards	Actual Percentage Meeting All (100%) of State Standards	Delete
2016		2	1	50.00%	<input type="checkbox"/>

Add Section D - D2: 1

It is expected that all CSBG Eligible Entities meet 100% of the Organizational Standards. However, it is understood that meeting the Organizational Standards is a process. This table allows the State to report on the number of CSBG Eligible Entities that met all State-adopted Organizational Standards in the reporting period (FFY).

OLDC TIP! This table will need to be added to over time. The *Add Row* functionality exists to accommodate future Annual Report Submissions.

- Column 1: *Fiscal Year*: this column will auto-populate with the fiscal year being reported.
- Column 2: *State CSBG Plan Target*:

Auto-populates from CSP Item 6.6.

If FY16 was the first year that the state used OLDC to submit the CSBG Model State Plan this field will not populate. In these cases, do not enter data into the target field and only fill out the form for any entities assessed during the period.

- **Column 3: Number of Entities Assessed:** This number will auto-populate based on the total number of entities reported in Section C. Please update if there is an instance where not all entities were assessed.
- **Column 4: Number that Met All (100%) of State Standards:** The State will enter the number of entities that were assessed who met 100% of the Organizational Standards.
- **Column 5: Actual Percentage Meeting All (100%) of State Standards:** This column will auto-populate with a percentage based on the calculation of the Number that Met All (100%) of State Standards/the Number of Entities Assessed.

Progress Indicators			
Indicate the number of entities that met the following percentages of Organizational Standards			
	Number of Entities Assessed	Number that Met between 90% and 99% of State Standards	Actual Percentage
	2	<input type="text" value="1"/>	50.00%
	Number of Entities Assessed	Number that Met between 80% and 89% of State Standards	Actual Percentage
	2	<input type="text" value="0"/>	0.00%
	Number of Entities Assessed	Number that Met between 70% and 79% of State Standards	Actual Percentage
	2	<input type="text" value="0"/>	0.00%

Note - While the State targets the percent of CSBG Eligible Entities to meet 100% of the Organizational Standards, targets are not set in the State Plan for 90%, 80%, and 70% progress indicators.

Note: [This information is associated with State Accountability measures 6Sa.](#)

The next portion of the chart indicates the progress made by Eligible Entities that did not meet 100% of the Organizational Standards. While targets are not set in the CSBG Model State Plan for entities meeting less than 100% of the Organizational Standards, describing progress for these Eligible Entities is a useful indicator of when all entities might meet 100% of the Organizational Standards.

The first column, *Number of Entities Assessed*, will carry over from the Column 3 of the first portion of this table. For each milestone (90%, 80%, and 70%), the State should enter the number of entities who met the milestone in the second column. The third column will auto-populate with the percentage of those meeting the milestone.

OLD C TIP! In order for the *Number of Entities Assessed* to populate and for the third column to auto-calculate, the report must be saved or validated after completing the tables.

Note: While the system will verify that the number of entities assessed is not more than the number of entities within the State, there is no verification that the number of entities that met each target is equal to or greater than the total entities within the state.

Associated State Accountability Measure: 6Sa

State Accountability Measures will be used in assessing overall progress in meeting State goals.

D.2a. Organizational Standards Performance

Understanding that barriers may exist in meeting all 58 Organizational Standards, this section provides a place for States to enter a narrative identifying any challenges or factors contributing to the difference between the target and actual results provided in the first portion of Table D.2 (above).

D.2b. Percentage Meeting Organizational Standards by Category

D.2b. Percentage Meeting Organizational Standards by Category. In the table below, provide the number of eligible entities that met each category of the Organizational Standards. The percentage that met all standards in each category will be automatically calculated and totaled in the bottom row.

Percentage Meeting Organizational Standards by Category			
Category	Number of Entities Assessed	Number that Met all Standards in Category	Actual Percentage
1. Consumer Input and Involvement	2	<input type="text" value="2"/>	100.00%
2. Community Engagement	2	<input type="text" value="2"/>	100.00%
3. Community Assessment	2	<input type="text" value="2"/>	100.00%
4. Organizational Leadership	2	<input type="text" value="2"/>	100.00%
5. Board Governance	2	<input type="text" value="2"/>	100.00%
6. Strategic Planning	2	<input type="text" value="1"/>	50.00%
7. Human Resource Management	2	<input type="text" value="1"/>	50.00%
8. Financial Operations & Oversight	2	<input type="text" value="2"/>	100.00%
9. Data & Analysis	2	<input type="text" value="2"/>	100.00%

This section offers the ability for States to report on each category of the Organizational Standards and the number of entities meeting the standards in that category. This may be a useful tool in identifying exemplary practices or targeting T&TA.

In the first column, the *Number of Entities Assessed* for each category listed will auto-populate from the first portion of Table D.2. In the second column, enter the number of Eligible Entities that met each category of the Organizational Standards. The third column will auto-calculate the percentage that met all standards in each category.

OLD C TIP! In order for the *Number of Entities Assessed* to populate and for the third column to auto-calculate, save or validate the report after completing the tables.

D.3. Technical Assistance Plans and Quality Improvement Plans

D.3. Technical Assistance Plans and Quality Improvement Plans:

In the table below, please provide the number of CSBG Eligible Entities with unmet organizational standards with Technical Assistance Plans (TAPs) or Quality Improvement Plans (QIPs) in place.

Technical Assistance Plans and Quality Improvement Plans

Total Number of CSBG Eligible Entities with unmet organizational standards with Technical Assistance Plans (TAPS) in place	<input type="text" value="0"/>
Total number of CSBG Eligible Entities with unmet organizational standards with Quality Improvement Plans (QIPS) in place	<input type="text" value="0"/>

During the assessment process, the State may find Eligible Entities that do not meet any or a number of the standards. In these cases, States have discretion based on their assessment of the nature of the problems and the time frame expected for a solution in how they work with the Eligible Entity. States may offer a Technical Assistance Plan (TAP) to the Eligible Entity or a State may initiate action through a Quality Improvement Plan (QIP) in accordance with Section 678C of the [CSBG Act](#) (42 U.S.C. § 9915). The QIP includes clear timelines and benchmarks for progress.

In the table provided enter the number of CSBG Eligible Entities that have either a TAP or QIP in place due to unmet Organizational Standards. Entities that do not have a formal plan in place, but who may have unmet standards do not need to be reported here. They will be reported below in D.3.a with an explanation.

D.3a. Technical Assistance Plans and Quality Improvement Plans

If the State identified CSBG Eligible Entities with unmet Organizational Standards for which it was determined that TAPs or QIPs would not be appropriate, please provide a narrative explanation below.

EXAMPLE: An instance where a standard was not met, but no plan is needed - if the Eligible Entity did not have a strategic plan in place at the time of the State assessment, but had just completed a strategic planning session and is expected to have the plan in place prior to the next assessment.

Associated State Accountability Measure: 6Sb

State Accountability Measures will be used in assessing overall progress in meeting State goals.

QIPs are described in Section 678C(a)(4) of the [CSBG Act](#). For additional information on corrective action and the circumstances under which a State may establish TAPs and QIPs, see [IM 138](#), specifically pages 5 – 6.

Section E: State Use of Funds

Describing how States used CSBG funds is critical in order to enable understanding of how CSBG is implemented in each State. This section is to be filled out by the State. It reports on how the State used their CSBG allocation for regular, discretionary and administrative funding. This section also reports on distribution formulas, timeframes and staff at the State office. The reporting time frame for all questions in Section E is the FFY. Where appropriate this section will auto-populate from the CSBG State Plan with an option to update.

In developing a response to Section E, the State CSBG program staff may need to consult with various departments.

E.1. State Distribution Formula

This is a *yes* or *no* question asking if the State made any changes in the distribution formula for the CSBG Eligible Entities during the FFY. If changes were made they should be described in E.1a.

There are five sub-state allocation methods generally used. If these do not apply, select *other* and provide an explanation in the text box.

DEFINITIONS:

Historic method means continuing to allocate to each Eligible Entity the share it received under federal funding prior to the creation of CSBG in 1981.

Base + formula method is usually adopted when the formula-alone method would fail to provide the smaller Eligible Entities with enough funding to open their doors for operation. In this case, some minimum funding level, or base, is provided each Eligible Entity off the top of the State allocations to be supplemented with whatever amount its formula share might be of the remainder of the State allocation for local agencies.

Formula alone allocation method, whereby the allocation to any one Eligible Entity is calculated solely by determining the share its service area has relative to the total in the State of some factor(s) (such as population below the poverty income level, TANF households, unemployment rate, square miles, etc.).

Formula with variables method is used by States that utilize a formula for the in-state allocation of most CSBG funds, but also award a fraction of their monies on a subjective basis, such as the quality of proposals received. "Variable" means elements other than formula factors are considered in distributing funds.

Hold-harmless + formula allocation is usually adopted as a transition method in moving from an historic to a formula allocation, but moving in steps in order that Eligible Entities not be reduced or increased precipitously in any one funding period.

E.1a State Distribution Formula

Only respond to E.1a if the answer to E.1 was yes. In the explanation, please include how the State changed their distribution formula and continued to comply with assurances provided in Section 14 of the CSBG State Plan as required under Section C76(b)(8) of the State CSBG Act.

OLDC TIP! Skip logic has been applied to this Item, so it will only appear if **yes** is selected in E.1.

E.2. Planned vs. Actual Allocation

CSBG Eligible Entity	Planned vs Actual CSBG 90 Percent Funds		Actual Allocations (Based on State Formula)	Actual Obligations	Mark for Delete
	Funding Amount (\$)	Funding Amount (%)			
Smith County Community Action Agency	0	90.00%	50,000	50,000	<input type="checkbox"/>
Northern Plains Community Action Agency	0	0.00%	75,000	25,000	<input type="checkbox"/>
Total	0	90.00%	125,000	75,000	

Add Section E2:

Enter the actual allocation of 90 percent of CSBG funds to CSBG Eligible Entities, as described under Section 675C(a) of the [CSBG Act](#). This section only includes 90 percent funds and does not include any discretionary/remainder, state administration or any other funding. While the CSBG State Plan allows for either percentages or dollar amounts, the table in this report must be based on actual dollars allocated to each CSBG Eligible Entity during the FFY. For each CSBG Eligible Entity receiving CSBG funds, provide the Funding Amount allocated to the CSBG Eligible Entity during the FFY.

- **Column 1: CSBG Eligible Entity:**
Auto-populates from item C.1 and is read-only
- **Columns 2 and 3: Planned Funding Amount (\$ or %):**
Auto-populates from CSP Table 7.2. Column 2 (dollar amount) or 3 (percentage) based on what you provided, and is read-only.

Columns 4: Allocations (Based on State Formula):

Enter the dollar amount each CSBG Eligible Entity should receive during the Federal Fiscal Year 2016 based on the State formula. This amount may include carryover from previous Federal Fiscal Years.

- Column 5: Obligations: Please enter the actual dollar amount of funds that were committed to each CSBG Eligible Entity through contracts, grants or sub-awards during the Federal Fiscal Year 2016. This amount may include carry over from previous Federal Fiscal Years.

Totals will be calculated at the bottom of the chart.

OLDC TIP! In order for the *Totals* to auto-calculate, the report must be saved or validated after completing the tables.

EXAMPLE:

The contracting period in a state is July 1, 2015 – June 30, 2016 while reporting period for Module 1 is October 1, 2015 – September 30, 2016. The state *allocated* funds from Federal Fiscal Year 2015 to a CSBG Eligible Entity in July 2015, however since the entity usually spends funds from a previous fiscal year the 2015 funds weren't *obligated* to the entity until Federal Fiscal Year 2016. This same entity was *allocated* Federal Fiscal Year 2016 funds, but they were not committed in contract until after the end of Federal Fiscal Year 2016 and won't be reported on this report.

There are cases where the amount *allocated* and *obligated* will be the same number. Note that *obligated* is not the same as *expended*. States do not report on the amount a CSBG Eligible Entity *expended*. States are only asked to report in this section on the amount they put into contracts with CSBG Eligible Entities. The amount *expended* will be reported by CSBG Eligible Entities in Section E of the existing IS Report until it is phased out and then that number will be reported in Module 2 of the new CSBG Annual Report.

E.3. Actual Distribution Timeframe

The State Accountability Measures identify that States have no more than 30 calendar days to make funds available to CSBG Eligible Entities after OCS distributed the Federal award. States will report *yes* if they met this standard and *no* if they did not.

E.3a. Actual Distribution Timeframe

If the State did not meet the standard, please identify if any new procedures were implemented to ensure funds were made available to CSBG Eligible Entities consistently and without interruption.

OLDC TIP! Skip logic has been applied to this Item so it will only appear if **no** in E.3 is selected.

E.3b. Actual Distribution Timeframe

If the State was not able to make CSBG funds available within 30 calendar days after OCS distributed the Federal award and was not able to ensure that funds were made available consistently and without interruption, please provide an explanation here of the circumstances along with a description of planned corrective actions.

OLDC TIP! Skip logic has been applied to this Item so it will only appear if **no** in both E.3 and E.3a are selected.

Associated State Accountability Measure: 2Sa

State Accountability Measures will be used in assessing overall progress in meeting State goals.

E.4. Administrative Funds [Section 675C(b)(2) of the [CSBG Act](#)]

Column 1 auto-populates from CSP Item 7.6 and is read-only

State Administrative Funds		
CSBG State Plan		Actual Amount Obligated
Target from CSBG State Plan 7.6	If entered in the CSBG State Plan as a percentage, convert and insert your number in dollars based on actual award amount.	
5 %	<input type="text" value="\$0"/>	<input type="text" value="\$15,000"/>

This section reports on the amount of State CSBG funds obligated for administrative activities during the FFY. Administrative funds are equivalent to typical indirect costs or overhead, including monitoring activities. The amount must be based on actual dollars allocated during the FFY. No State may spend more than \$55,000 or 5 percent of their CSBG grant for administrative expenses.

The amount that was provided in CSP Item 7.6, will be visible in the field (Column 1) on the left. If a percentage was provided in CSP Item 7.6, please convert the percentage to dollars in the field immediately to the right (Column 2).

OLDC TIP! Skip logic has been applied to Column 2, so a text box will only appear if you provided a **percentage** in the CSP.

Note that *obligated* funds are those that were committed through contract, grant or sub-award during the reporting period from the total *allocated* amount.

E.5. Administration

Column 1 auto-populates from CSP Item 7.7 and is read-only.

Staff Positions Funded	
CSBG State Plan	Actual Number
4	<input type="text" value="4"/>

Report the number of State staff positions funded in whole or in part with CSBG funds in the reporting period (FFY). This can be reported as a decimal.

E.6. Administration

Columns 1 auto-populates from CSP Item 7.8 and is read-only

State FTEs	
CSBG State Plan	Actual Number
1	<input type="text" value="1"/>

Of the State staff positions funded with CSBG, report State Full Time Equivalents (FTEs) that were funded with CSBG funds in the reporting period (FFY). This can be reported as a decimal.

E.7. Remainder/Discretionary Funds [Section 675C(b) of the [CSBG Act](#)]

Columns 2 and 3 auto-populates from CSP Table 7.9 and is read-only

Planned vs. Actual Use of Remainder/Discretionary Funds				
Remainder/Discretionary Funds Uses (See 675C(b)(1) of the CSBG Act)	Planned	Planned %	Obligated	Brief Description of Services/activities
	Planned \$		Actual \$	
a. Training/technical assistance to eligible entities	\$0.00	25.00%	<input type="text" value="10,000"/>	<input type="text"/>
b. Coordination of State-operated programs and/or local programs	\$0.00	0.00%	<input type="text"/>	<input type="text"/>
c. Statewide coordination and communication among eligible entities	\$0.00	0.00%	<input type="text"/>	<input type="text"/>
d. Analysis of distribution of CSBG funds to determine if targeting greatest need	\$0.00	0.00%	<input type="text"/>	<input type="text"/>
e. Asset-building programs	\$0.00	0.00%	<input type="text"/>	<input type="text"/>
f. Innovative programs/activities by eligible entities or other neighborhood groups	\$0.00	50.00%	<input type="text" value="20,000"/>	<input type="text"/>
g. State charity tax credits	\$0.00	0.00%	<input type="text"/>	<input type="text"/>
h. Other activities, Specify	\$0.00	25.00%	<input type="text" value="12,000"/>	<input type="text"/>
Totals	\$0.00	100.00%	\$42,000	

Remainder/Discretionary funds are the amount remaining after deductions of the entitlement for Eligible Entities (at least 90 percent) and State level administrative expenses (not more than five percent). For additional information, see Section 675C(b) of the [CSBG Act](#). Remainder/Discretionary funding may fund a wide-range of projects from T&TA to technology projects at the State or local level. Information from the CSBG State Plan will auto-populate for what was planned and States will update the actual amount obligated.

While the CSBG State Plan allows for either percentages or dollar amounts, Table E.7 within Module 1 must be based on actual dollars obligated to each budget category during the FFY. States that do not have remainder/discretionary funds will not complete this item.

If a funded activity fits under more than one category in the table, allocate the funds among the categories. For example, if the State provides funds under a contract with the State Community Action Association to provide T&TA to CSBG Eligible Entities and to create a statewide data system, the funds for that contract should be allocated appropriately between Rows 1 – 3. If an allocation is not possible, the State may allocate the funds to the main category with which the activity is associated.

Uses of Remainder/Discretionary Dollars:

- Row 1: *a. Training/technical assistance to CSBG Eligible Entities*: Report any training or technical assistance that remainder or discretionary dollars supported. Examples may include: ROMA training, Statewide conferences, grants or contracts to train or provide technical assistance to local CSBG agencies, whether made to individual consultants, firms, state CAA associations or state training bureaus; data collection projects.
- Row 2: *b. Coordination of State-operated programs and/or local programs*: Grants to support participation in planning and/or coordinating services for low-income groups should be included under b. Also included in this section are statewide Brokerage/Advocacy Projects, statewide study grants or funding for statewide forums, conferences, or coalitions.
- Row 3: *c. Statewide coordination and communication among CSBG Eligible Entities*: Include projects that allowed for increased communication such as coordinated outreach initiatives or the purchase of technology to allow for increased training.

- **Row 4: d. Analysis of distribution of CSBG funds to determine if targeting greatest need:** Include any grants or contracts made to support analysis of funds, Community Needs Assessment or other planning and targeting projects.
- **Row 5: e. Asset-building programs:** Please include any Individual Development Accounts, home buying programs, other savings programs that CSBG remainder/discretionary supported.
- **Row 6: f. Innovative programs/activities by CSBG Eligible Entities or other neighborhood groups:** Include any innovative programs that the State supported through remainder/discretionary funds at the State or local level.
- **Row 7: g. State charity tax credits:** Enter the amount of CSBG remainder/discretionary funds used to support State Charity Tax Credits.
- **Row 8: h. Other activities, specify _____:** If the State spends any additional remainder/discretionary funds that cannot be included in Rows 1 – 7, they should be included here.

Associated State Accountability Measure: 3Sa

State Accountability Measures will be used in assessing overall progress in meeting State goals.

E.8. Remainder/Discretionary Funds

This Item includes checkboxes for States to identify the types of organizations, if any, who received remainder/discretionary (by grant or contract) to carry out some or all of the activities in Table E.7 (above). Provide a narrative if *other* is selected.

OLDC TIP! Checkboxes allow all options that apply to be selected.

E.9. Total Obligations

Category	Actual Obligations
Obligations to Eligible Entities (from State CSBG 90% Formula Funds)	\$75,000
State Administrative Costs	\$15,000
Remainder/Discretionary Funds	\$42,000
Total Obligations in FY	\$132,000
E.9a. Prior Year Carryover Of the total amount reported in the row above, the amount that represents carryover funding from the prior fiscal year.	\$5,000
E.9b. Carryover for this Fiscal Year Of the total CSBG amount to the State for this Fiscal Year, the amount that was unobligated and will carry forward to the next Fiscal Year.	\$7,500

Review and confirm the fiscal year obligations and enter any carryover funding.

Obligations to CSBG Eligible Entities (from State CSBG 90% Formula Funds):

auto-populates from Table E.2 (total actual obligations in contracts and sub-awards)

State Administrative Costs:

auto-populates from Table E.4 (total actual obligations of administrative funds).

Remainder/Discretionary Funds:

auto-populates from Table E.7 (total actual obligations of State remainder/discretionary funds).

Total Obligations in FY: will auto-calculate based on the three rows above.

The dollar amounts in this chart will auto-populate from Section E.2, E.4, and E.7 above.

E.9a. Prior Year Carryover

Of the total amount reported in the row above (*Total Obligations in FY*), the amount that represents carryover funding from the prior fiscal year. For FY 2016, the State will report the carryover funding from FFY 2015.

E.9b. Carryover for this Fiscal Year

Of the total CSBG amount to the State for this FY, the amount that was unobligated and carry forward to the next fiscal year. For FY 2016, the State will report the carryover funding from FFY 2016.

Section F: State Training and Technical Assistance

Training and Technical Assistance (T&TA) is a critical part of creating and maintaining a strong CSBG Network. Training is a continuous process that takes time and resources. CSBG funds may be used to ensure Eligible Entities training needs are met to improve programs, create strong Boards, improve financial management practices, and ensure responsiveness to local needs among a host of other topics.

Section F reports on how the State delivered CSBG-funded T&TA to CSBG Eligible Entities. This section asks the State to describe the type of T&TA provided, topics, actual dates of training and a brief description. Where appropriate this section will auto-populate from the CSBG State Plan with an option to update.

F.1. Training and Technical Assistance

Columns 1, 2, & 5 auto-populates from CSP Table 8.1

Describe how the State delivered CSBG-funded training and technical assistance to CSBG Eligible Entities. CSBG funding used for this activity is referenced under Item E.7 (Planned vs. Actual Use of Remainder/Discretionary Funds).

This table will auto-populate with planned T&TA activities as reported in CSP Table 8.1 and should be reviewed and updated based on the actual activities. Trainings that should be reported are those that happen during FFY 2016. If the training and or technical assistance was planned, but did not occur, check the *Not Conducted* check box at the end of each row and provide an explanation under *Brief Description*. Add a row to report T&TA that occurred, but was not included in the CSBG State Plan.

OLDC TIP! When entering a date, use the date picker or the MM/DD/YYYY format.

Training and Technical Assistance						
Training	Topic	Actual Dates		Brief Description	Conducted	Delete
		Start Date	End Date			
Training	ROMA	4/11/2016	4/15/2016	This was a planned ROMA training. There were 10 people trained.	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>
Training	Organizational Standards - General	7/19/2016	7/19/2016	Training by the state association was provided at the statewide conference.	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>
Training	Community Assessment			This training did not occur during the reporting period and has been rescheduled for 2017.	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Technical Assistance	Other	9/20/2016	9/20/2016	Technical assistance was provided by the state via webinar.	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>

Add Section F.1.: 1

- **Column 1: Training, Technical Assistance, Both:** Select from one of the three dropdown options.

Auto-populates from the CSP.

- Column 2: Topic: Choose from a list of 13 dropdowns to best describe the topic of the training and/or technical assistance.

Auto-populates from the CSP.

- Column 3: Actual Start Date: Select the date which the training and/or technical assistance started.
- Column 4: Actual End Date: Select the date which the training and/or technical assistance ended. If the training and/or technical assistance was one day, select the same date as the start date.
- Column 5: Brief Description: Provide a brief description of the training and/or technical assistance.

Associated State Accountability Measure: 3Sc

State Accountability Measures will be used in assessing overall progress in meeting State goals.

F.2. Training and Technical Assistance

Indicate the types of organizations by which the State provided training and/or technical assistance as described in Item F.1, and briefly describe their involvement. Section 678A of the [CSBG Act](#) allows CSBG funds be granted or contracted to a variety of organizations with demonstrated expertise in providing training directly related to the work of CSBG. If *CSBG Eligible Entities* and/or *Other* are selected, a description must be provided.

OLDC TIP! Checkboxes allow all options that apply to be selected.

Section G: State Linkages and Communication

Section 676(b)(1) requires States to assure that with Eligible Entities, coordination and linkages with other social service programs will occur to ensure the effective delivery of services to individuals with low-incomes. CSBG is unique among Federal programs in part because “linkages” is not only an administrative item, but also a programmatic activity. Similarly, when CSBG provides administrative funding for programs of other community organizations because there is a partnership with the CSBG Eligible Entities own programs, these expenses may well be classified as either linkages projects or as direct program costs.

This section reports on the activities supported with state level administration and/or discretionary/remainder funds up to 10% that is available to states. This section includes linkages and coordination made by the State to reduce gaps in service and increase communication and coordination made with Associations, and any Workforce Innovation and Opportunity Act (WIOA) Employment and Training Combined Plan Activities. Where appropriate this section will auto-populate from the CSBG State Plan with an option to update.

G.1. State Linkages and Coordination at the State Level

Auto-populates from CSP Item 9.1

Review and confirm the identified State offices the State reported planning to have linkages and coordination with in the CSP. Update as appropriate by adding or removing selections.

OLD TIP! Checkboxes allow all options that apply to be selected.

G.1a. State Linkages and Coordination at the State Level

Describe the linkages and coordination at the State level that the State created or maintained to ensure increased access to CSBG services by communities and people with low-incomes that avoid duplication of services (as required by the assurance under Section 676(b)(5)) and identified in the CSP. Provide a narrative describing activities, including an explanation of any changes from the original CSP. Attach any additional information as needed.

Examples of State linkages and coordination at the State level:

- The State CSBG office participates in boards, task forces, cross-department meetings to coordinate and promote the work of CSBG.
- The State CSBG office works closely with LIHEAP and Weatherization to streamline eligibility where possible.
- The State CSBG office participates in working groups that offer coordination between state and local service providers and CSBG Eligible Entities including homelessness, housing and asset development.

Associated State Accountability Measure: 7Sa

State Accountability Measures will be used in assessing overall progress in meeting State goals.

G.2. State Linkages and Coordination at the Local Level

Auto-populates from CSP Item 9.2

Please review and update the narrative describing actual activities, including an explanation of any changes from the original CSBG State Plan. Describe the linkages and coordination at the local level that the State created or maintained with governmental and other social services, especially antipoverty programs, to assure the effective delivery of and coordination of CSBG services to people with low-incomes and communities, and avoid duplication of services (as required by assurances under Sections 676(b)(5) and (b)(6)).

Examples of State linkages and coordination at the local level:

- The State CSBG office is represented on a state interagency workgroup to share information, reduce service duplication, promote programs and ensure that local funds are maximized.
- The State office working with the Supplemental Nutrition Assistance Program manager (SNAP) on a coordinated SNAP outreach plan.

G.3. CSBG Eligible Entity Linkages and Coordination**G.3a State Assurance of CSBG Eligible Entity Linkages and Coordination**

Auto-populates from CSP Item 9.3a

Review and update the narrative describing actual activities, including an explanation of any changes from the original CSBG State Plan. Describe how the State assured that the CSBG Eligible Entities coordinated and established

linkages to ensure the effective delivery of and coordination of CSBG services to people with low-incomes and communities, and avoid duplication of services (as required by the assurance under Section 676(b)(5)). Include how the State might require Eligible Entities to submit as part of their Community Action Plan (CAP) a description of linkages or how the State reviews linkages through monitoring activities.

G.3b State Assurance of CSBG Eligible Entity Linkages to Fill Service Gaps

Auto-populates from CSP Table 9.3b

Review and update the narrative describing actual activities, including an explanation of any changes from the original CSBG State Plan. Describe how the CSBG Eligible Entities developed linkages to fill identified gaps in the services, through the provision of information, referrals, case management, and follow-up consultations, according to the assurance under Section 676(b)(3)(B) of the [CSBG Act](#). Include information on how CSBG Eligible Entities may have identified gaps through Community Needs Assessments or other activities and what strategies the entity may have developed.

G.4. Workforce Innovation and Opportunity Act (WIOA) Employment and Training Combined Plan Activities (if applicable)

This narrative will only be completed by States in which CSBG employment and training activities are included as part of a WIOA Combined State Plan. Under the 2014 Act, states are encouraged to work together to create a combined plan that reshapes the workforce system that serves people with low-incomes. CSBG, among other programs, was identified as a required partner to WIOA. CSBG is incorporated into WIOA in two ways 1) through One-Stop Career Centers that work to align workforce, education and economic development investments to jobs and 2) through CSBG employment and training activities, at the option of the State, through a Combined State Plan.

Because the WIOA Combined State Plan is in a separate system not administered by ACF, information cannot be auto-populated and must be entered manually. The purpose of this section will be to provide an administrative update on State-level WIOA Plan coordination for States with combined plans, rather than a report on employment and training outcomes at the CSBG Eligible Entity level. If the State included CSBG employment and training activities as part of a WIOA Combined State Plan, as allowed under the Workforce Innovation and Opportunity Act, provide a brief narrative

describing the status of WIOA coordination activities, including web links, if available, to any publicly accessible combined plans and reports.

G.5. Coordination among CSBG Eligible Entities and the State Community Action Association

Auto-populates from CSP Item 9.8

The State will review and update the narrative describing actual activities, including an explanation of any changes from the original CSBG State Plan. Describe State activities that took place to support coordination among the CSBG Eligible Entities and the State Community Action Association. Include meetings, organized trainings, conferences, and other types of interactions. Consider any workgroups where the association and Eligible Entities work together.

G.6. Feedback to CSBG Eligible Entities and State Community Action Association

Auto-populates from CSP Item 9.10

The State will review and update the narrative describing actual activities, including an explanation of any changes from the original CSBG State Plan. Describe how the State provided feedback to local entities and the State Community Action Association regarding its performance on State Accountability Measures. Include communication methods such as conference calls, mailings, blogs, or newsletters. Provide information on the process and the outcomes.

Associated State Accountability Measure: 5S(iii)

The measure indicates feedback should be provided within 60 calendar days of the State receiving feedback from OCS.

Section H: Monitoring, Corrective Action and Fiscal Controls

Section 678B(a)(1) of the [CSBG Act](#), requires that the State conduct a full onsite review of each Eligible Entity at least once every three years and an onsite review of each newly designated entity immediately after the completion of the first year in which the entity receives CSBG.

Please report on completed monitoring visits and reports, monitoring policies, Eligible Entities with Quality Improvement Plans (QIPs) and any Single Audit issues. Where appropriate this section will auto-populate from the CSBG State Plan with an option to update.

H.1. Monitoring of CSBG Eligible Entities

Columns 1, 2, 3 & 6 auto-populates from CSP Table 10.1

This table allows States to describe the actual monitoring visits conducted during the reporting year including: full on-site reviews; on-site reviews of newly designated entities; follow-up reviews – including return visits to entities that failed to meet State goals, standards, and requirements; and other reviews as appropriate. If a monitoring visit was planned during the year but not implemented, check the *Not Conducted* check box (located at the end of each row) and provide an explanation under *Brief Description*. Add a row to report monitoring visits that occurred, but was not included in the CSP.

OLDC TIP! When entering a date, use the date picker or the MM/DD/YYYY format.

CSBG Eligible Entity	Review Type	Planned Site Visit Date	Actual Site Visit Date		Brief Description of Purpose <small>Note: If a monitoring visit was a part of the original state monitoring plan, the State may note that this was a routine scheduled monitoring visit. If the visit was not a part of the original monitoring plan, the State will provide a brief explanation for the purpose of the Visit (e.g. a follow-up regarding a special issue). This section should not be used to outline findings, but should simply note the purpose of the monitoring (FFY) (e.g. follow-up regarding corrective actions).</small>	Conducted	Delete
			Start Date	End Date			
Smith County Community Action Agency	Full onsite	FY1 Q2	3/15/2016	3/17/2016	This was a regular triennial monitoring.	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Northern Plains Community Action Agency	Newly Designated		5/10/2016	5/10/2016	This is a new entity. They received a one-day monitoring visit.	<input checked="" type="radio"/> Yes <input type="radio"/> No	

- **Column 1: CSBG Eligible Entity:**

auto-populates with projected monitoring visits identified in the Table 10.1 of the CSP and is read-only.

- Column 2: Review type:

auto-populates with projected monitoring visits identified in the Table 10.1 of the CSBG State Plan.

This is a drop-down box and can be updated when completing Module 1.

- Column 3: Planned Site Visit Date:

auto-populates with projected monitoring visits identified in the Table 10.1 of the CSBG State Plan and is read-only.

- Column 4: Actual Site Visit Start Date: Select the actual start date of the site visit.
- Column 5: Actual Site Visit End Date: Select the actual end date of the site visit. If the monitoring was one day, select the same date as the start date.
- Column 6: Brief Description of Purpose: If a monitoring visit was a part of the original state monitoring plan, note it as a scheduled monitoring visit. If the monitoring visit was part of the plan but did not occur provide a description here. If the visit was not a part of the original monitoring plan, provide a brief explanation for the purpose of the visit (e.g. a follow-up regarding a special issue). This section should not be used to outline findings, but should simply note the purpose of the monitoring (e.g. follow-up regarding corrective actions).

OLDC TIP! *Add row:* States may add rows to provide information on monitoring visits that were not planned, but occurred during the reporting period.

CSBG Act Citation: Section 678B(a) of the [CSBG Act](#)

Associated State Accountability Measure: 4Sa(i)

H.2. Monitoring Policies

Section 10.2 of the CSBG Model State Plan requests a copy of the States monitoring policies. This section of the CSBG Annual Report requests if any modifications were made to the State's monitoring policies and procedures during the reporting period and if they were to provide an updated draft of the policies.

H.3. Initial Monitoring Reports

State Accountability Measure requires States to disseminate monitoring reports within 60 calendar days from a monitoring visit. This section reports on whether or not the

State met the requirement and that the reports were conducted in a manner consistent with State monitoring policies and procedures.

If “no” is selected, provide the actual number of days for initial distribution of all monitoring reports and provide an explanation for the circumstances that resulted in delayed reports.

Associated State Accountability Measure: 4Sa(ii)

CSBG Act Citation: Section 678C of the [CSBG Act](#)

H.4. Quality Improvement Plans (QIPs)

If the State finds deficiencies of Eligible Entities through monitoring and determines that training and technical assistance will not correct the issue, 678C of the [CSBG Act](#) (42 U.S.C. § 9915) allows States to implement a Quality Improvement Plan (QIP) to resolve the identified deficiencies within a schedule agreed upon by the State and Eligible Entity. If “no,” provide an explanation for the circumstances. If there were no QIPs during the reporting period, select “no” and then explain in the text field provided.

Associated State Accountability Measure: 4Sc

H.5. Reporting QIPs

Please identify if the State reported all CSBG Eligible Entities with serious deficiencies from a monitoring review to OCS within 30 calendar days of the State approving a QIP. If *no*, provide an explanation for the circumstances. Additionally, a plan to assure timely notification to OCS must be included in the next CSP.

Associated State Accountability Measure: 4Sa(iii)

Fiscal Controls and Audits

H.6. Single Audit Review

Title 2 of the Code of Federal Regulations, Uniform Administrative Requirements, Cost Principles, and Audit Requirement for Federal Awards (2 CFR § 200.521) requires that entities that are required to undergo a Single Audit must submit a reporting package to the Federal Audit Clearinghouse (FAC) within 30 calendar days after the receipt of the auditors note, or nine months after the end of the audit period. (More information can be found [here](#) on page 178.)

Employer Identification Number (EIN) of Agency	Date Audit was Accepted by Federal Audit ClearingHouse	State Management Decision Required?	State Management Decision Issued within 6 Months	Date Management Decision Issued (if applicable)	Delete
82-1234567	3/15/2016	No	No		

Add Section H.6.: 1 Add Delete Marked Rows

In the table provided, insert the dates of any CSBG Eligible Entity Single Audits in the Federal Audit Clearinghouse that were received and reviewed during the Federal Fiscal Year as required by the CSBG regulations applicable to 45 CFR § 75.521. If the audit contained findings requiring a management decision by the State, provide the date the decision was issued. Rows may be added if necessary.

H.7. Single Audit Management Decisions

A management decision is issued to Eligible Entities by the State when an audit finding exists in the Single Audit that has not been corrected. The management decision should clearly state whether or not the audit finding is sustained, reason for the decision, expected auditee action, and description of an appeal process. (More information can be found [here](#) on page 189.)

Briefly describe any management decisions issued according to State procedures of the CSBG Eligible Entity single audit. Provide the audit finding reference number from the Federal Audit Clearinghouse and describe any required actions and timelines for correction.

Associated State Accountability Measure: 4Sd

Section I: Results Oriented Management and Accountability (ROMA) System

Results Oriented Management and Accountability (ROMA) is a performance-based system designed to preserve the anti-poverty focus of CSBG Eligible Entities and to promote greater effectiveness among State and local agencies receiving CSBG funds. ROMA was created in 1994 by the Monitoring and Assessment Task Force (MATF). Based upon performance management principles contained in the Government Performance and Results Act of 1993, ROMA provides a framework for continuous growth and improvement among more than 1000 local community action agencies and a basis for State leadership and assistance toward those ends. States are granted discretion through the [CSBG Act](#) to utilize ROMA or another comparable performance measurement system.

This section allows States to report on their ROMA implementation, support of Eligible Entities with ROMA activities, State review of data, and report on continuous improvement. Where appropriate this section will auto-populate from the CSBG State Plan with an option to update.

I.1. ROMA Participation

Auto-populates from CSP Item 13.1

In this section the State will identify which performance measurement system the State and CSBG Eligible Entities use. This section will auto-populate from Section 13.1 of the CSBG State Plan. The State will have the option of updating this information.

CSBG Act Citation: Section 678E(a) and the assurance under Section 676(b)(12)

OLDC TIP! Radio buttons will only allow for you to select one option.

I.1a. ROMA Participation Narrative

If ROMA was selected in Item I.1, provide a narrative update on any changes in procedures or to data collection systems that were initiated or completed in the reporting period. Additionally, include information on data collection systems at the State and local level, how the State considers CAP plans, Community Needs Assessments and other elements of the ROMA cycle.

OLDC TIP! Skip logic has been applied to this item, so it will only appear if you select **ROMA** (option 1) in Item I.1.

I.1b. ROMA Participation – Other System Narrative

If ROMA was not selected in Item I.1, describe the system the State used for performance measurement. Provide an update on any changes in procedures or to data collection systems that were initiated or completed in the reporting period. Include information on the elements of the performance management system, such as those that identify community needs, create the CAP plan, implement services, and observe results.

OLDC TIP! Skip logic has been applied to this item, so it will only appear if you select **another performance management system** (option 2) or **alternative system** (option 3) in Item I.1.

I.2. State ROMA Support

Please provide a narrative on how the State supported the CSBG Eligible Entities in using the ROMA system or alternative performance measurement system in promoting continuous improvement. For example, describe any data system improvements; support for community needs assessment, strategic planning, data analysis, how discretionary funding grants were used; support to certified ROMA trainers or support to meet Organizational Standards that requires the services of a ROMA trainer, etc.

I.3. State Review of CSBG Eligible Entity Data

Please describe the procedures and activities the State used to review the ROMA data (i.e. data from all elements of the ROMA cycle) from CSBG Eligible Entities for completion and accuracy (e.g. methodology used for validating the data submitted annually by the local agencies).

I.4 State Feedback on Data Collection, Analysis, and Reporting

State Accountability Measure 5S(ii) requires States to submit written feedback to each CSBG Eligible Entity regarding the entity's performance in meeting ROMA goals, as measured through National Performance Indicator (NPI) data, within 60 calendar days of submitting the State's CSBG Annual Report.

The State is asked to select *yes* or *no* to report if they provided each CSBG Eligible Entity written, timely (at a minimum within 60 days of the submission) feedback regarding the entity's performance in meeting ROMA goals as measured through national performance data. Please answer this question based on the feedback provided to CSBG Eligible Entities following submission of the previous year's CSBG Annual Report (e.g. When completing the FY 2016 CSBG Annual Report, answer this question based on

submitting timely feedback to each CSBG Eligible Entity within 60 calendar days of submitting the State's FY 2015 CSBG Annual Report).

If *no*, describe the plan to assure timely notification of the CSBG Eligible Entities within 60 calendar days of submitting the State's CSBG Annual Report. If *yes* was selected, please describe the process implemented to provide written feedback.

Questions to consider when providing feedback:

- Did the Eligible Entity meet or exceed their goals in their Community Action Plan?
- How accurate is targeting in the NPIs?
- Does outcome data have large fluctuations from year to year?
- Is the expenditure amount in particular service categories reflected by outcomes reported in the NPIs?

Associated State Accountability Measure: 5S(ii)

I.5. State and CSBG Eligible Entity Continuous Improvement

Provide 2-3 examples of changes made by CSBG Eligible Entities to improve service delivery and enhance impact for individuals, families, and communities with low-incomes based on their in-depth analysis of performance data.

Resources & Technical Support

Several reference documents can assist you in collecting and reporting data for the CSBG/IS survey, so that more standardized data can be combined with that of other States. These reference documents will be updated and enhanced to support the 2018 submission of the CSBG Annual Report. These and other resources can be found at www.nascsp.org or via the following links:

- [CSBG IS Survey Information](#)

THEORY OF CHANGE

The [Theory of Change](#) is intended to provide a graphic overview of the core principles, performance management framework, and services and strategies implemented and led by the network to achieve the goals of Community Action across the nation.

A COMMUNITY ACTION GUIDE TO COMPREHENSIVE COMMUNITY NEEDS ASSESSMENTS

The [Guide to Community Needs Assessments](#) is a toolkit to assist CSBG Eligible Entities in completing a comprehensive community needs assessment.

LEXICON

In addition to common terms and definitions, the [Lexicon](#) includes a detailed list of terms used to describe programs for each section of the CSBG IS Survey.

GUIDE TO REPORTING RACE AND ETHNICITY

[This guide](#) defines race and ethnicity as per the U.S Census Bureau definitions.

CSBG/IS QUICK REFERENCE GUIDE

[This supplement](#) outlines key sections of the CSBG/IS Survey Instructions.

NATIONAL PERFORMANCE INDICATORS INSTRUCTIONS

[This guide](#) is intended to help State and local community action agencies better organize and report ROMA outcomes that constitute the 12 national indicators of community action performance.

TARGETING FIELD MANUAL

[This manual](#) enables CSBG Eligible Entities to accurately predict and identify their results through detailed examples, tested strategies, case studies, and best practices.

TRAINER'S GUIDE TO ACCOMPANY THE TARGETING FIELD MANUAL

This guide outlines key teaching points and methodologies useful for trainers using the [Targeting Field Manual](#).

STORYTELLING MANUAL

[This guide](#) uses a five-step strategic approach to assist States and agencies in telling their Community Action stories effectively.

TECHNICAL SUPPORT

Telephone assistance is available to State CSBG administrators and their staff for completing the CSBG Annual Report. Please visit the NASCSP site for staff contact information.

ASSOCIATED LEGISLATION, INFORMATION MEMORANDA'S AND DEAR COLLEAGUE LETTERS

The [CSBG Act](#)

Legislation authorizing CSBG.

IM 37 [Definition and Allowability of Direct and Administrative Cost Block Appropriation and Allocations](#)

Discusses allowable administrative uses of CSBG and the difference between administrative funds and program funds.

IM 49 [Program Challenges, Responsibilities and Strategies, FY 2001-2003](#)

Discusses ROMA implementation.

IM 97 [Guidance on the CSBG Requirement to Monitor Eligible Entities](#)

Discusses the requirement to monitor CSBG Eligible Entities as outlined in the [CSBG Act](#).

IM 138 [State Establishment of Organizational Standards for CSBG Eligible Entities](#)

Discusses the implementation of Organizational Standards for CSBG Eligible Entities.

IM 141 [Application for FY 2016 Funds for States and Territories](#)

Discusses the CSBG application requirements for FY 2016.

IM 144 [State and Federal Accountability Measures and Data Collection Modernization](#)

Discusses performance management for the CSBG network and the State and Federal Accountability measures.

IM 147 [Application for FY 2017 Funds for States and Territories](#)

Discusses the CSBG application requirements for FY 2017.

IM 150 [Use of the American Customer Satisfaction Index \(ACSI\) to Improve Network Effectiveness](#)

Discusses the implementation and use of the ACSI.

IM 151 [Training and Technical Assistance Strategy](#)

Discusses a three-year Training and Technical Assistance strategy to guide both the development and delivery of training and technical assistance for the CSBG network.

IM 152 [CSBG Annual Report](#)

Discusses the implementation and timelines for online submission of the CSBG Annual Report.

[Action Transmittal 2017-01](#)

Discusses the Submission of Module 1 of the CSBG Annual Report for Fiscal Year (FY) 2016.

[CSBG Dear Colleague Letter Information About the Workforce Innovation and Opportunity Act \(WIOA\)](#)

Discusses the new Workforce Investment Act as it relates to CSBG.

Error Message Listing

Error Number	Location of Error	How to correct the error:
19411	Item A.2. Additional Programs Administered - U.S. Dept. of Agriculture Programs	Under Item A.2. you must provide a narrative describing additional U.S. DEPT OF AGRICULTURE PROGRAMS administered by your agency
19410	Item A.2. Additional Programs Administered	Under Item A.2. you must select which additional programs the lead state agency administered during the FFY being reported
19412	Item A.2. Additional Programs Administered - U.S. Dept. of HUD Programs	Under Item A.2. you must provide a narrative describing additional U.S. DEPT OF HUD PROGRAMS administered by your agency
19413	Item A.2. Additional Programs Administered - Other	Under Item A.2. you must provide a narrative describing OTHER additional programs administered by your agency
19414	Item B.1. Progress on State Plan Goals	Under Item B.1. select one option defining the state's current status of state plan goals and provide a narrative explanation
19415	Item B.1. All Goals Accomplished - Explanation	Under Item B.1. All goals Accomplished Description is required
19416	Item B.2. ACSI Survey Result	Under Item B.2. Column 2, state must enter their ACSI Survey Result
19417	Item B.2. ACSI Future Target	Under Item B.2. Column 3, state must enter their future target. See IM 105 for guidance
19418	Item B.3. Eligible Entity Feedback and Involvement	Under Item B.3., you must describe how the State considered feedback from outside sources, including eligible entities, OCS, surveys and public hearings
19419	Item B.4. State Management Accomplishment	Under Item B.4. you must describe the state's top management accomplishment

19420	Item B.5. Eligible Entity Management	Under Item B.5. you must describe the eligible entities notable management accomplishments and how the state helped the entities achieve these accomplishments
19421	Item B.6. Innovative Solutions Highlights	Under Item B.6. you must describe the efforts of eligible entities to address conditions of poverty eligible entities through innovative efforts
19423	Item B.1. Goals Partially Accomplished - Explanation	Under Item B.1. Goals Partially Accomplished Description is required
19424	Item B.1. Not Accomplished - Explanation	Under Item B.1. Goals Not Accomplished Description is required
19425	Item C.3.Changes to Eligible Entities	Under Item C.3., you must select whether there have been any changes of the eligible entities during the reporting period
19426	Item C.3.Changes to Eligible Entities Explanation	Under Item C.3., you must provide an explanation of the changes in your eligible entities
19427	Item D.2. Organizational Standards Performance - Number of Entities Assessed	Under Item D.2., column 3, row 3 you must provide the number of entities that were expected to meet 100% of the standards that were assessed during the reporting period
19428	Item D.2. Organizational Standards Performance - Number of Entities that Met All Standards	Under Item D.2., column 4 you must provide the number of entities that met 100% of state standards
19595	Item D.1b. State Implemented Assessment Process	Under Item D.1b., you must describe the assessment process as implemented by the state
19610	Item D.1a. State Assessment of Eligible Entities Org Standards	Under Item D.1a., you must describe showing how you assessed eligible entities against organizational standards
19611	Item D.1a. State Assessment of Eligible Entities Org Standards - Other Option Selected	Under Item D.1a., you must explain the Other option showing how you assessed eligible entities against organizational standards
19430	Item D.2a. Target vs Actual Results Explanation	Under item D.2a, you must describe challenges that affected difference between target and actual results

19431	Item D.3. TAPs	Under Item D.3., you must provide the number of entities under a TAP including if there are zero entities
19432	Item D.3. QIPs	Under Item D.3., you must provide the number of entities under a QIP including if there are zero entities
19433	Item D.3a. Entities with Unmet Standards	Under Item D.3a. you must select what information was analyzed during the development of the Annual Report
19434	Item D.3a. Entities with Unmet Standards Explanation	Under Item D.3a. you must explain why entities with unmet standards were not placed on a QIP or TAP
19468	Item F.1. Training or Technical Assistance - Date Range	Under Item F.1., Column 3, you must select the date or date range of when you provided each T/TA listed
19469	Item F.1. Training or Technical Assistance - Brief Description	Under Item F.1., Column 4, you must provide a brief description for each T/A listed
19470	Item F.2. Training and Technical Assistance Organization Type	Under Item F.2., you must select the types of organizations through which the State provided training and/or technical assistance
19471	Item F.2. Training and Technical Assistance Organization Type	Under Item F.2., CSBG eligible entities (if checked, provide the expected number of CSBG eligible entities to receive funds)
19472	Item F.2. Training and Technical Assistance Organization Type	Under Item F.2., Other (if checked, please specify)
19473	Item G.1. State-Level Linkages and Coordination	Under Item G.1., you must describe the areas in which the state coordinated linkages and coordination activities
19474	Item G.1. State-Level Linkages and Coordination	Under Item G.1., If Other is selected Describe
19475	Item G.1a. State-Level Linkages and Coordination - Description	Under Item G.1a, you must describe the State CSBG Lead Agency notable linkages and coordination efforts at the state level and explain any changes from the CSBG State Plan
19476	Item G.2. Local-Level Linkages and Coordination	Under Item G.2., you must describe the State CSBG Lead Agency notable linkages and coordination efforts at the local level and explain any changes from the CSBG State Plan

19477	Item G.3a. State Assurance of Eligible Entity Linkages and Coordination	Under Item G.3a., you must describe how the State assured eligible entities coordinated and established linkages and coordination, and explain any changes from the CSBG State Plan
19478	Item G.3b. Eligible Entity Linkages to Fill Service Gaps	Under Item G.3b., you must describe how eligible entities to fill identified gaps in the services provided, and explain any changes from the CSBG State Plan
19479	Item G.4. WIOA Employment and Training Combined Plan Activities	Under Item G.4., if you completed a WIOA Combined State Plan, you must describe the status of your WIOA activities
19480	Item G.5. Coordination among Eligible Entities and State Community Action Association	Under Item G.5., describe the support that the State CSBG Lead Agency gave to eligible entities and the State Community Action Association and explain any changes from the CSBG State Plan
19481	Item G.6. Feedback to Eligible Entities and State Community Action Association	Under Item G.6., you must describe feedback given to eligible entities and State Community Action Association and explain any changes from the CSBG State Plan
19482	Item H.1. Monitoring of Eligible Entities - Review Type	Under Item H.1., Column 2, please designate the monitoring review type for each eligible entity during the reporting period
19517	Item H.1. Monitoring of Eligible Entities - Dates	Under Item H.1., column 3, you must note the actual site visit dates for each eligible entity. Any entities that did not receive a review can be marked as N/A
19518	Item H.1. Monitoring of Eligible Entities - Description	Under Item H.1., Column 4, you must note which site visits were part of the original plan per your CSBG State Plan. For any unplanned visits, provide a description and reason for the site visit
19519	Item H.2. Monitoring Policies	Under Item H.2., you must indicate whether you modified monitoring policies
19520	Item H.2. Monitoring Policies	Under Item H.2., if you selected yes, you must provide a hyperlink of the modified document or attach the full modified document

Error Message Listing

19521	Item H.3. Initial Monitoring Reports	Under Item H.3., you must indicate whether monitoring reports were conducted per state monitoring policies and procedures
19522	Item H.3. Initial Monitoring Reports - Delay Explanation	Under Item H.3., if you selected no, you must provide the actual number of days for distribution and the reason for the delay
19523	Item H.4. Fulfillment of QIPs	Under Item H.4., you must indicate whether entities on QIPs resolved deficiencies
19524	Item H.4. Fulfillment of QIPs - Explanation	Under Item H.4., if you selected no, you must provide an explanation as to why
19525	Item H.5. Reporting QIPs	Under Item H.4., you must indicate whether entities on QIPs resolved deficiencies
19526	Item H.5. Reporting QIPs - Explanation	Under Item H.4., you must indicate whether entities on QIPs resolved deficiencies
19527	Item H.6. Single Audit Review - Employer ID Number	Under Item H.6., Column 1, you must provide the EIN of the agency
19528	Item H.6. Single Audit Review - Date of Audit Acceptance	Under Item H.6., Column 2, you must submit the date the agency's audit was accepted by FAC
19529	Item H.6. Single Audit Review - State Management Decision	Under Item H.6., Column 3, you must indicate whether a state management decision was required
19530	Item H.6. Single Audit Review - Timely Decision	Under Item H.6., Column 4, you must indicate whether the state issued a decision within 6 months
19531	Item H.6. Single Audit Review - Date of Management Decision	Under Item H.6., Column 5, you must indicate the date of the management decision
19532	Item H.7. Single Audit Management Decisions	Under Item H.7, you must describe any management decisions issued according to State procedures of audit, as well as other prompted details
19533	Item I.1a. ROMA Participation - Data Collection Changes	Under Item I.1a, you must provide attachments or a link showing modified procedures or data collection systems

19534	Item I.1b. Performance Management - Data Collection Changes	Under Item I.1b., you must respond with a description of the States performance measurement and any changes in procedures or data collection systems
19535	Item I.2. State ROMA Support	Under Item I.2, you must respond with a description of the State’s efforts to help eligible entities use ROMA or alternative performance measurement systems
19536	Item I.3. State Review of Eligible Entity Data	Under Item I.3., you must respond with a description of the State’s efforts to help eligible entities use ROMA or alternative performance measurement systems
19537	Item I.4. State Feedback on Data Collection, Analysis, and Reporting	Under Item I.4, you must at least one option
19538	Item I.4. State Feedback on Data Collection, Analysis, and Reporting	Under Item I.4, you must describe how the State CSBG Lead Agency provided feedback regarding performance management to eligible entities with 60 days
19436	Item E.1a. State Distribution Formula Changes	Under Item E.1a, you must describe any changes in the distribution formula during the reporting period
19435	Item E.1. State Distribution Formula	Under Item E.1. you must select whether the state change the distribution formula during this reporting period
19438	Item E.2. CSBG 90 Percent Funds Allocations	Under Item E.2. user must enter the actual allocated amount of CSBG 90 Percent funds based on the state formula
19439	Item E.2. CSBG 90 Percent Funds Obligations	Under Item E.2. user must enter the actual obligated amount of CSBG 90 Percent funds
19440	Item E.3. Actual Distribution Timeframe	Under Item E.3., you must indicate whether the State made funds available to eligible entities within 30 days of OCS distributing the Federal award
19441	Item E.3a. Consistent Fund Availability	Under Item E.3a., you must indicate whether the State made funds available to eligible entities in a timely manner
19442	Item E.3. State Funding Timing	Under Item E.3, you must describe whether the State made funds available to eligible entities in a timely manner

19443	Item E.4. State Administrative Funds - Targeted Dollar Amount	Under Item E.4, you must convert the percentage from Column 1 into a dollar amount
19444	Item E.4. State Administrative Funds - Actual Amount Obligated	Under Item E.4, you must provide the actual amount obligated during this reporting period
19445	Item E.5. CSBG State Staff Positions Funded	Under Item E.5., you must state how many state staff positions were funded by CSBG funds
19446	Item E.6. State FTEs	Under Item E.6., you must state how many state FTEs were funded by CSBG this reporting period.
19447	E.7a. Actual Remainder/Discretionary Funds - T/TA	Under Item E.7a, you must enter the actual dollar amount used for T/TA
19448	Item E.7a. Actual Remainder/Discretionary Funds - T/TA Description	Under Item E.7a, you must briefly describe the actual services and activities funded under T/TA
19449	E.7b. Actual Remainder/Discretionary Funds - State-operated and/or Local Programs	Under Item E.7b, you must enter the actual dollar amount used for State-operated and/or Local Programs
19450	Item E.7b. Actual Remainder/Discretionary Funds - State-Operated and/or Local Programs Des	Under Item E.7b, you must briefly describe the actual services and activities funded under - state-operated and/or local programs
19451	Item E.7c. Actual Remainder/Discretionary Funds - Eligible Entities Coordination and Communication	Under Item E.7c., you must enter the actual dollar amount used for statewide coordination and communication
19452	Item E.7c. Actual Remainder/Discretionary Funds - Eligible Entities Coordination and Communication	Under Item E.7c, you must briefly describe the actual services and activities funded under statewide coordination and communication
19453	Item E.7d. Actual Remainder/Discretionary Funds - Distribution of CSBG Funds	Under Item E.7d, you must enter the actual dollar amount used for the analysis of distribution of CSBG funds to determine if targeting the greatest needs
19454	Item E.7d. Actual Remainder/Discretionary Funds - Distribution of CSBG Funds	Under Item E.7d, you must briefly describe the actual services and activities funded under distribution of CSBG funds
19455	Item E.7e. Actual Remainder/Discretionary Funds - Asset-building programs	Under Item E.7e., you must enter the actual dollar amount used for asset-building programs

19456	Item E.7e. Actual Remainder/Discretionary Funds - Asset-building programs	Under Item E.7e, you must briefly describe the actual services and activities funded under asset building programs
19457	Item E.7f. Actual Remainder/Discretionary Funds - Innovative Programs/Activities	Under Item E.7f., you must enter the actual dollar amount used for innovative programs/activities by eligible entities or other neighborhood groups
19458	Item E.7f. Actual Remainder/Discretionary Funds - Innovative Program/Activities Description	Under Item E.7c, you must briefly describe the actual services and activities funded under innovative programs/activities by eligible entities or other neighborhood groups
19459	Item E.7g. Actual Remainder/Discretionary Funds - State Charity Tax Credits	Under Item E.7g, you must enter the actual dollar amount used for state charity tax credits
19460	Item E.7g. Actual Remainder/Discretionary Funds - State Charity Tax Credits Description	Under Item E.7g, you must briefly describe the actual services and activities funded under state charity tax credits
19596	Item I.5. State and Eligible Entity Continuous Improvement	Under Item I.5, you must provide a description evidencing improvements made by eligible entities. The description can be provided through attachment
19615	*Item E.8. Partner Organizations - None Selected	Under Item E.8, you must not indicate what types of organizations were partnered with for activities funded by remainder/discretionary funds as described under Table E.7
19619	Item I.1. ROMA Participation	Under Item I.1., user must confirm which system they used for measuring performance and results
19566	Item D.2. Organizational Standards Performance - Number of Entities Assessed 80%	Under Item D.2., column 3, row 8 you must provide the number of entities that were expected to meet 80-89% of the standards that were assessed during the reporting period
19567	Item D.2. Organizational Standards Performance - Number of Entities Assessed 70%	Under Item D.2., column 3, row 10 you must provide the number of entities that were expected to meet 70-79% of the standards that were assessed during the reporting period

19568	Item D.2. Organizational Standards Performance - Number of Entities that Met 90% of Standards	Under Item D.2., column 4, row 6 you must provide the number of entities that met 90-99% of state standards
19569	Item D.2. Organizational Standards Performance - Number of Entities that Met 80% of Standards	Under Item D.2., column 4, row 8 you must provide the number of entities that met 80-89% of state standards
19570	Item D.2. Organizational Standards Performance - Number of Entities that Met 70% of Standards	Under Item D.2., column 4, row 10 you must provide the number of entities that met 70-79% of state standards
19571	Item D.2b. Consumer Input & Involvement - Entities Assessed	Under Item D.2b., Consumer Input & Involvement you must enter the number of entities assessed during the reporting period
19572	Item D.2b. Community Engagement - Entities Assessed	Under Item D.2b., Community Engagement you must enter the number of entities assessed during the reporting period
19573	Item D.2b. Community Assessment - Entities Assessed	Under Item D.2b., Community Assessment you must enter the number of entities assessed during the reporting period
19574	Item D.2b. Organizational Leadership - Entities Assessed	Under Item D.2b., Organizational Leadership you must enter the number of entities assessed during the reporting period
19575	Item D.2b. Board Governance - Entities Assessed	Under Item D.2b., Board Governance you must enter the number of entities assessed during the reporting period
19576	Item D.2b. Strategic Planning - Entities Assessed	Under Item D.2b., Strategic Planning you must enter the number of entities assessed during the reporting period
19577	Item D.2b. Human Resource Management - Entities Assessed	Under Item D.2b., Human Resource Management you must enter the number of entities assessed during the reporting period
19565	Item D.2. Organizational Standards Performance - Number of Entities Assessed 90%	Under Item D.2., column 3, row 6 you must provide the number of entities that were expected to meet 90-99% of the standards that were assessed during the reporting period
19461	Item E.7h. Actual Remainder/Discretionary Funds - Other activities	Under Item E.7h, you must enter the actual dollar amount used other activities

19462	Item E.7h. Actual Remainder/Discretionary Funds - Other activities description	Under Item E.7c, you must briefly describe the actual services and activities funded under other activities
19463	Item E.8. Partner Organizations	Under Item E.8, you must indicate what types of organizations were partnered with for activities funded by remainder/discretionary funds as described under Table E.7
19464	Item E.8. Partner Organizations	Under Item E.8, CSBG eligible entities if checked, include the expected number of CSBG eligible entities to receive funds
19465	Item E.8. Partner Organizations	Under Item E.8, Other if checked, Other Needs to be specified in the Text box
19466	Item E.9a. Prior Year Carryover	Under Item E.9a, you must provide the amount of carryover funding from the prior fiscal year
19467	E.9b. Current Fiscal Year Carryover	Under Item E.9b, you must provide the amount of carryover funding from the current FFY
19578	Item D.2b. Financial Operations & Oversight - Entities Assessed	Under Item D.2b., Financial Operations & Oversight you must enter the number of entities assessed during the reporting period
19579	Item D.2b. Data & Analysis - Entities Assessed	Under Item D.2b., Data & Analysis you must enter the number of entities assessed during the reporting period
19580	Item D.2b. Consumer Input & Involvement - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Consumer Input & Involvement category during the reporting period
19581	Item D.2b. Community Engagement - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Community Engagement category during the reporting period
19582	Item D.2b. Community Assessment - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Community Assessment category during the reporting period

19583	Item D.2b. Organizational Leadership - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Organizational Leadership category during the reporting period
19584	Item D.2b. Board Governance - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Board Governance category during the reporting period
19585	Item D.2b. Strategic Planning - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Strategic Planning category during the reporting period
19586	Item D.2b. Human Resource Management - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Human Resource Management category during the reporting period
19587	Item D.2b. Financial Operations & Oversight - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Financial Operations & Oversight category during the reporting period
19588	Item D.2b. Data & Analysis - Entities Met	Under Item D.2b., you must enter the number of entities assessed that met all standards in the Data & Analysis category during the reporting period
19592	Item C.2a.Changes to Eligible Entities	Under Item C.2b., provide an explanation for any/all entities that were deleted from Table C.1.
19593	Item C.2b.Changes to Eligible Entities Explanation	Under Item C.2b., you must provide an explanation of the changes in your eligible entities.