

# CSBG CNA, CAP, AR

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## Making Meaning from Alphabet Soup

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# Workshop Topics

- Performance Management
- What to look for in Community Needs Assessment
- Connecting the CNA to the Community Action Plan
- Using Needs and Plans to improve review of the Annual Report



# PERFORMANCE MANAGEMENT

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How well does the network operate?

What difference does the network make?



**Performance**

**Evaluation**

**Accountability**

**Accessibility**

**Knowledge**

# The National Community Action Network Theory of Change

## Community Action Goals

**Goal 1:** Individuals and families with low incomes are stable and achieve economic security.

**Goal 2:** Communities where people with low incomes live are healthy and offer economic opportunity.

**Goal 3:** People with low incomes are engaged and active in building opportunities in communities.



## Services and Strategies

Employment



Education & Cognitive Development



Income, Infrastructure & Asset Building



Housing

Health/Social Behavioral Development



Civic Engagement & Community Involvement



## Core Principles

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

## Performance Management

How well does the network operate?

What difference does the network make?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System

- Individual and Family National Performance Indicators
- Community National Performance Indicators

*A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.*



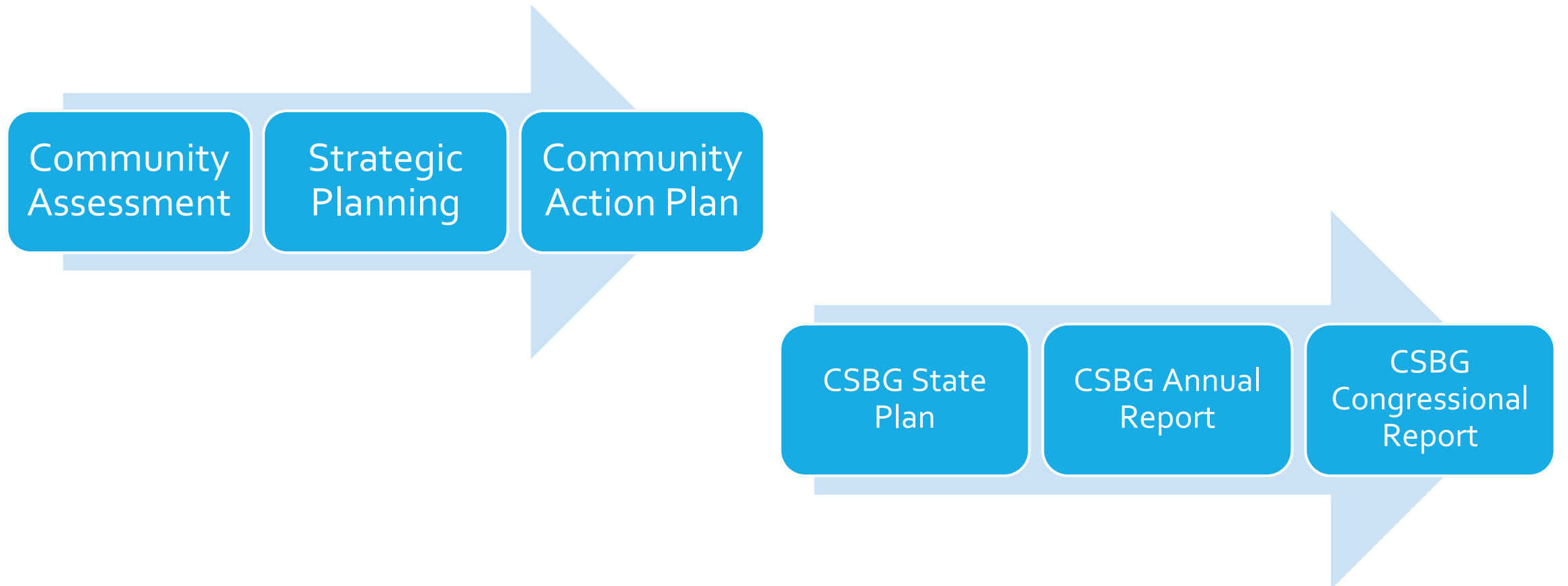
# From State Accountability Measures

Each State shall annually prepare and submit to the Secretary a report on the measured performance of the State and the eligible entities in the State.

# Where does the report come from?

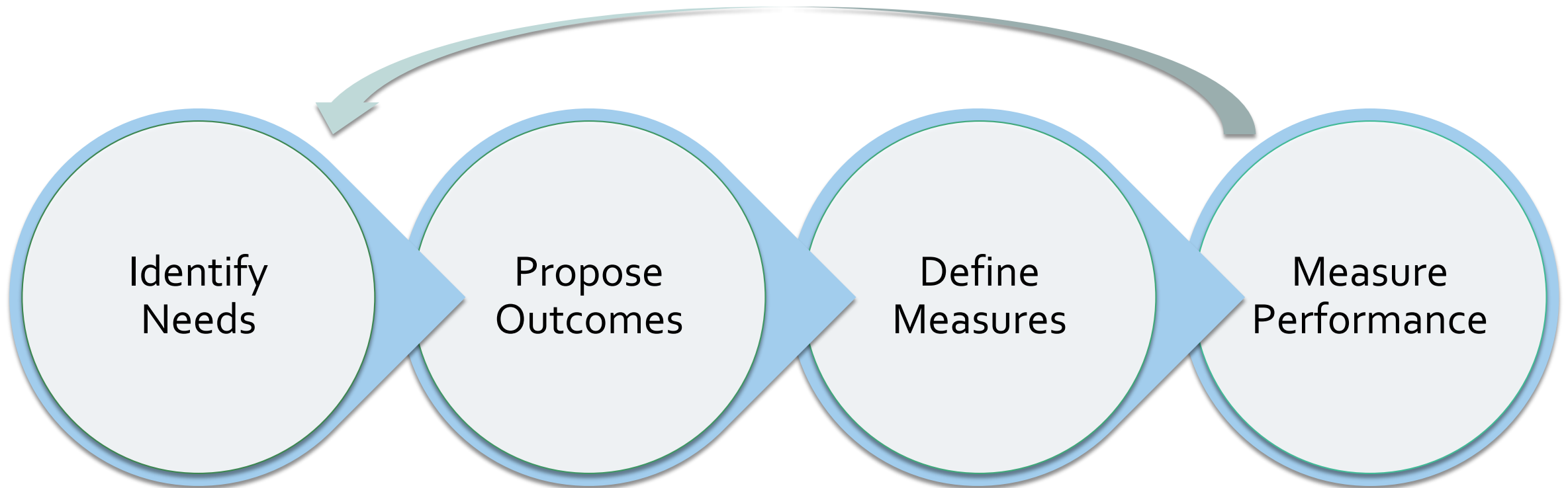
- If the state is to prepare a report on measured performance of eligible entities, you may think that this could be solely based on the data submitted on the Annual Report at the end of the year.
- But data is just one point on a continuum of performance – and performance all along the way should be measured and analyzed.

To understand the report data, you must first understand the Community Needs Assessment and the Community Action Plan that fuels the State Plan and reports.





Measuring performance is contextualized by what is needed, by what is planned, and by what actually happened.



- What do individuals and families need to enable them to move out of poverty?
- What do communities need to support them?

- Based on needs assessment, data, and experience
- What will success look like? What will change?

- Use specific measures
- Use NPIs
- Develop time-specific benchmarks

- Collect and analyze data
- Compare to expectations
- Change if necessary

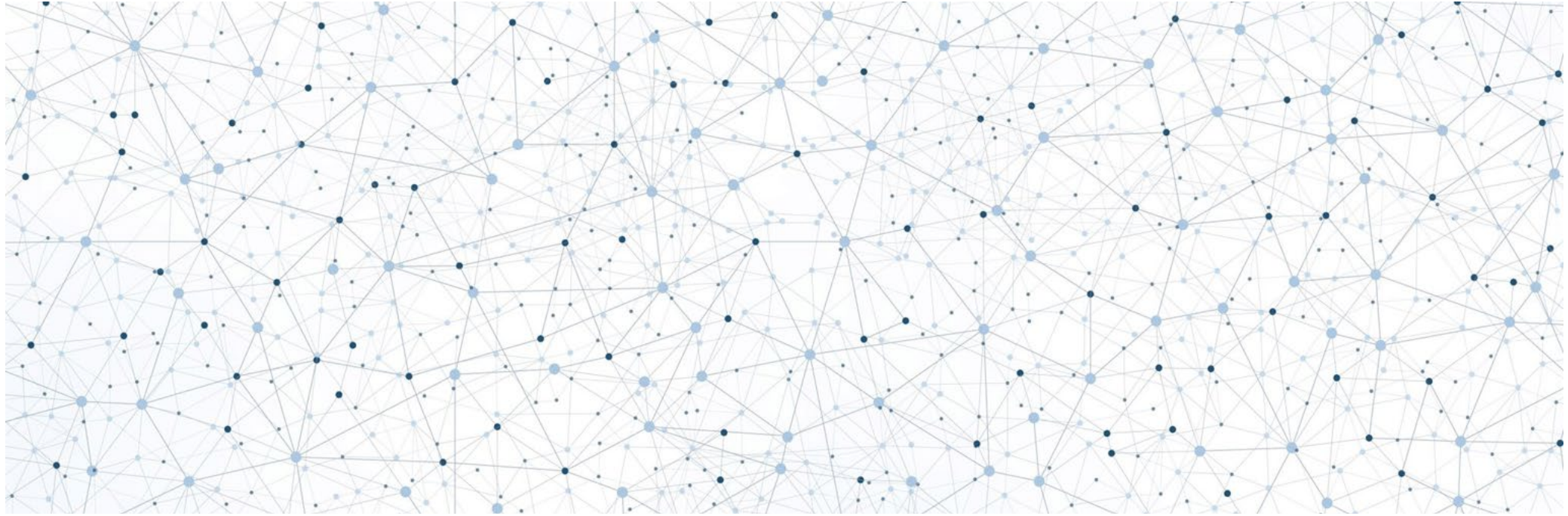
## The Results Oriented Management and Accountability Cycle

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ONE WAY TO THINK  
OF THE PROCESS IS  
TO REFER TO THE  
"ROMA"  
MANAGEMENT AND  
ACCOUNTABILITY  
CYCLE.

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# ASSESSMENT

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What do you know about the community??

# Let's start with the Community Needs Assessment

- The community assessment is a systematic process for creating a profile of the needs and resources of a given community or target population.
- What is it supposed to do?
  - Identify the causes of poverty in the community
  - Identify the conditions that are barriers to families and individuals achieving self-sufficiency,
  - Identify resources that could be brought together to attack the causes and effects of poverty and community breakdown



# Key CNA Activities

- **Assess the needs and assets** within the whole community.
  - Collect data from a wide variety of sources
- **Analyze the data**
  - Identify overall service needs of populations, gaps in services, and barriers to services.
    - Identify levels of need: family, community, and agency
    - Recommend priorities to be addressed by the agency
- **Determine if agency programs match community needs**





# WHAT WILL YOU LOOK FOR AS YOU REVIEW THE CNA SUBMITTED BY THE LOCAL ELIGIBLE ENTITIES?

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Ideas from the CSBG  
Organizational Standards



**Standard 1.2** • The Organization analyzes information collected directly from **low-income individuals** as part of the Community Assessment.



**Standard 1.3** • The Organization has a systematic approach for collecting, analyzing, and reporting **customer satisfaction** data to the governing board.



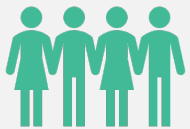
**Standard 2.2** • The Organization utilizes information gathered **from key sectors** of the community in assessing **needs and resources**, during the community assessment process or other times. This would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.



**Standard 3.2** • As part of the Community Assessment, the Organization collects and includes current **data specific to poverty and its prevalence related to gender, age, and race, ethnicity** for their service area(s).



**Standard 3.3** • The Organization collects and analyzes both **qualitative and quantitative data** on its geographic service area(s) in the Community Assessment.



**Standard 3.4** • The community assessment includes key findings on **the causes and conditions** of poverty and the needs of the communities assessed

# How does the agency define community?



How is it identified?  
(by city, county, or neighborhood)



Is the community the same as the agency's service area? Is that clearly stated?



Is the profile of the general community compared to those in need?



Is the population in need clearly identified?



# Population in Need

What are the characteristics of the population with low income in the community?



# POPULATION IN NEED

- Total number of people in community
- Demographic breakdown of **all people** in the community

Of the total number of people, how many **have low income**?  
How do the demographics of the people with low income compare with the general population?

Can you identify the profile of the people who have expressed a specific kind of needs?

For example: of the people who identified *a need for affordable housing*, what are *their* demographics?

# TYPES OF DATA TO INCLUDE

Quantitative, Qualitative,  
Customer Satisfaction,  
Agency Report Data, Resources

# Quantitative Data

How many are impacted by an issue?  
Who are they?

How much of something exists?  
Provides the scope or amount of the issue.

Data that is presented as "numbers."

# Quantitative Examples

Example: Brown county has 2,148 people with less than a 9<sup>th</sup> grade education.

Source: "Educational Attainment and At-Risk Youth" Source American Fact Finder, U.S. Census

Example: 75% of the survey respondents who said that they were unable to afford their heating bills in the winter months were age 65 or over.

Source: Customer Survey issued by agency

# Qualitative Data

Used to understand the depth and breadth of an issue.

Provides opinions and observations.

Data that is presented as "letters" or "words".



# Qualitative Examples

***"I have two kids and we are trying to get disability for my husband. I work, but I'm always behind on lot rent, my car needs new tires. I need to go to the dentist, but I don't have insurance and I always need help paying my bills."***

Source: Head Start parent interview

With the high cost of living, many people (full time employees) have to work two or three jobs to be able to pay their bills.

Source: response to open ended survey question about Cost of Living.

# CUSTOMER INPUT AND CUSTOMER SATISFACTION

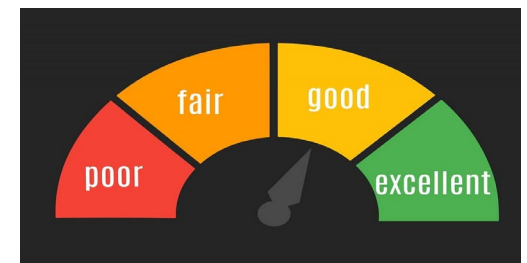


## Customer Input:

- Information about what the customer needs and values.
- Can be used to identify needs on both the **individual and the community level**.

## Customer Satisfaction:

- Information about how satisfied customers are with the services they received and the interaction they had with your agency.
- Can be used to identify agency-level needs.



# Agency Data from Prior Year

What services did we deliver?

What impact did they make?

Has the profile remained stable over the past several years?

Is there more or less of something?

## Data

Number served per program

Number on waiting lists or unserved

Gaps in services

Current or future program funding

Eligibility requirements or barriers

Cost per unit of service

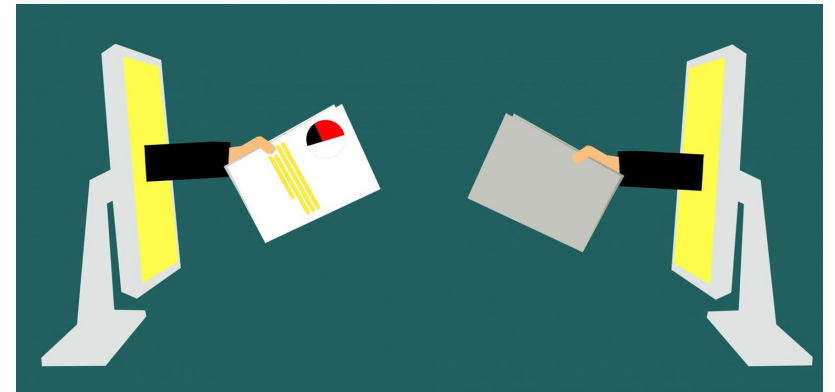
Cost per unit of outcome

## Analysis

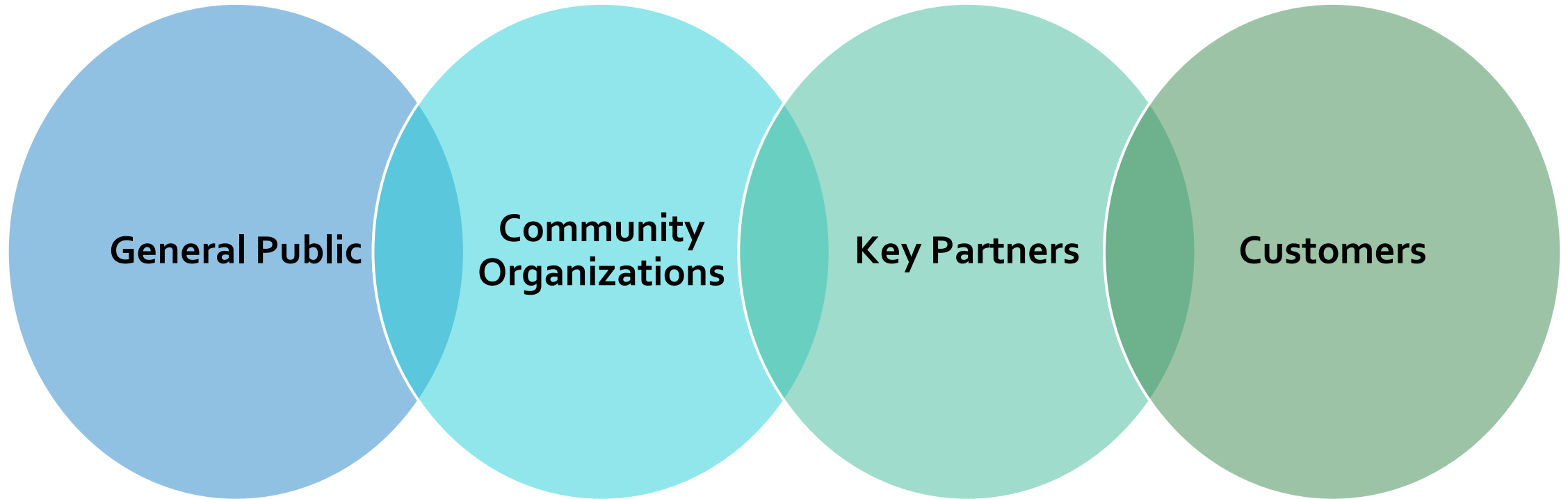
- Did we provide the services we projected? (The number and types of services?)
- Did people request services that we could not address? What were they? For what population?
- Do we have an unduplicated count of our customers? Which customers received multiple services?
- Can you connect services and outcomes for each customer?
- What information can you get from the financial data?
- Does the data identify any systems or policy issues?

# Using data to identify (verify) a need

- An agency may be providing a service that did not appear as a need because it is being filled by that service.
- Demonstration of waiting lists could support a bigger need than the agency was able to meet
- Geographic data could show a larger need for a specific service from one neighborhood, and not from another.
- Verify that service sites align with the need for services demonstrated by customers



# Engaging Stakeholders Through Data Collection





# What is a resource?

- Any thing that can help customers meet needs
- Examples:
  - Tangible assistance from a faith based organization
  - Availability of a summer youth program
  - Substance abuse treatment facility in the neighborhood
  - Emergency room services within 15 minutes of the neighborhood
  - Library open at times that are easy to access
  - Parks are safe for children to play

# Questions to ask about Resources

- What resources are available?
- What needs to be developed?
- What resources are threatened?

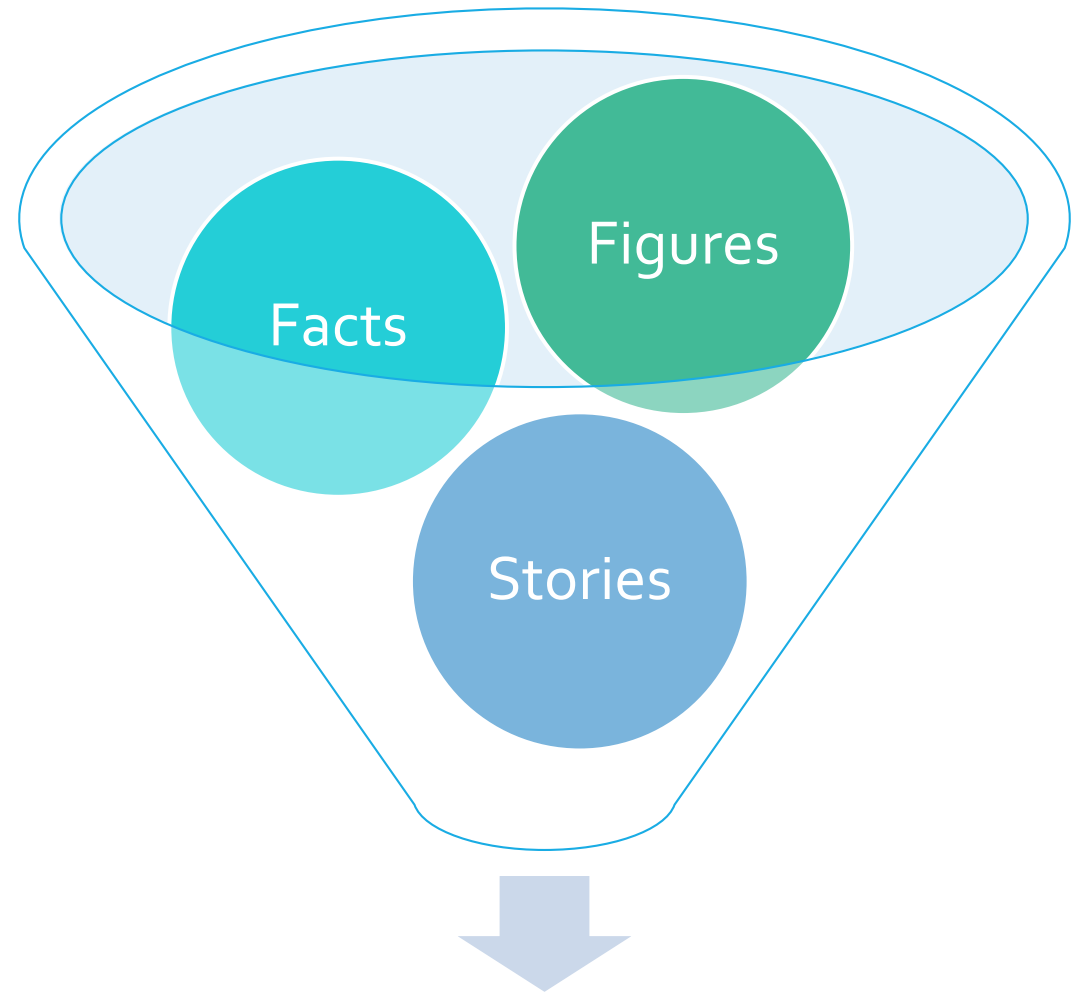


# IS THE DATA ANALYZED?

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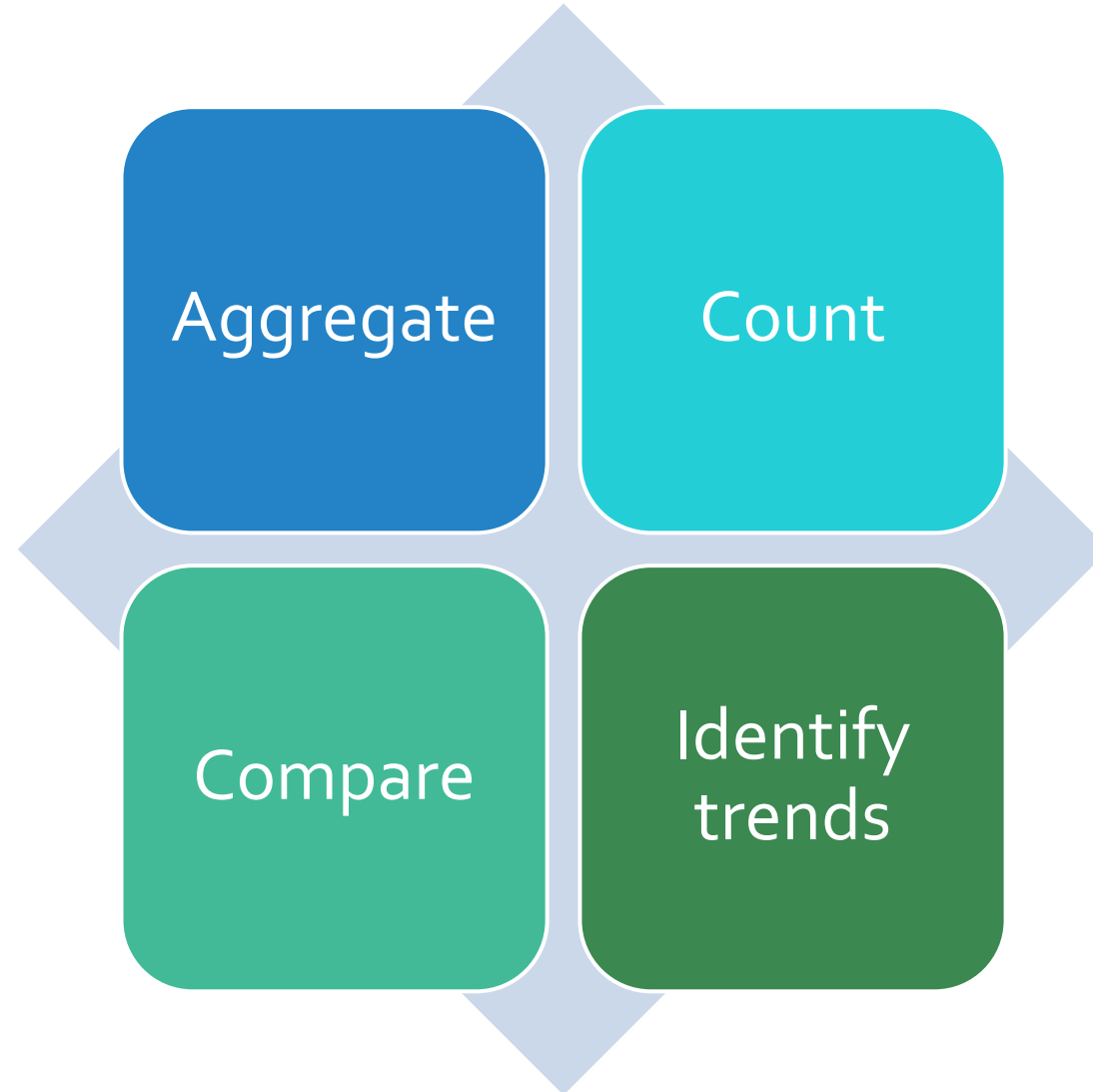
Is there a section of the CNA  
where raw data is turned  
into information?

Raw data is not  
information!  
It must be  
analyzed before it  
becomes useful!



Useful Information is the product  
of analysis

# Simple Analysis Techniques



# Prioritize the Need

- Based on quantity or level of need and its impact
- What are the available resources, including partners?
- What is the cost and estimated impact?
- Is it aligned with the National Goals?
- Is it aligned with the agency's mission?



# Strengthened or Abandoned?

- Some things must be strengthened.
- If essential performance areas are weak, they must be strengthened.

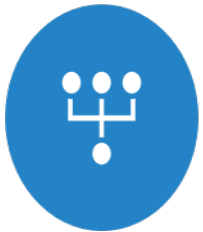


Some things must be abandoned.  
Doing what we have always done is not always the  
right choice.





# Connecting Needs, Resources, and Partners



What is the agency already doing?



What resources are available to continue or expand?



What parts of the need can the agency address alone?



What are community partners already doing?



How can partnerships be built and maintained?



What may take advocacy efforts to address?



# ESTABLISHING CLEAR NEED STATEMENTS

Family

Community

Agency

# What are needs?

- *verb*

1. to require (something) because it is essential or very important.

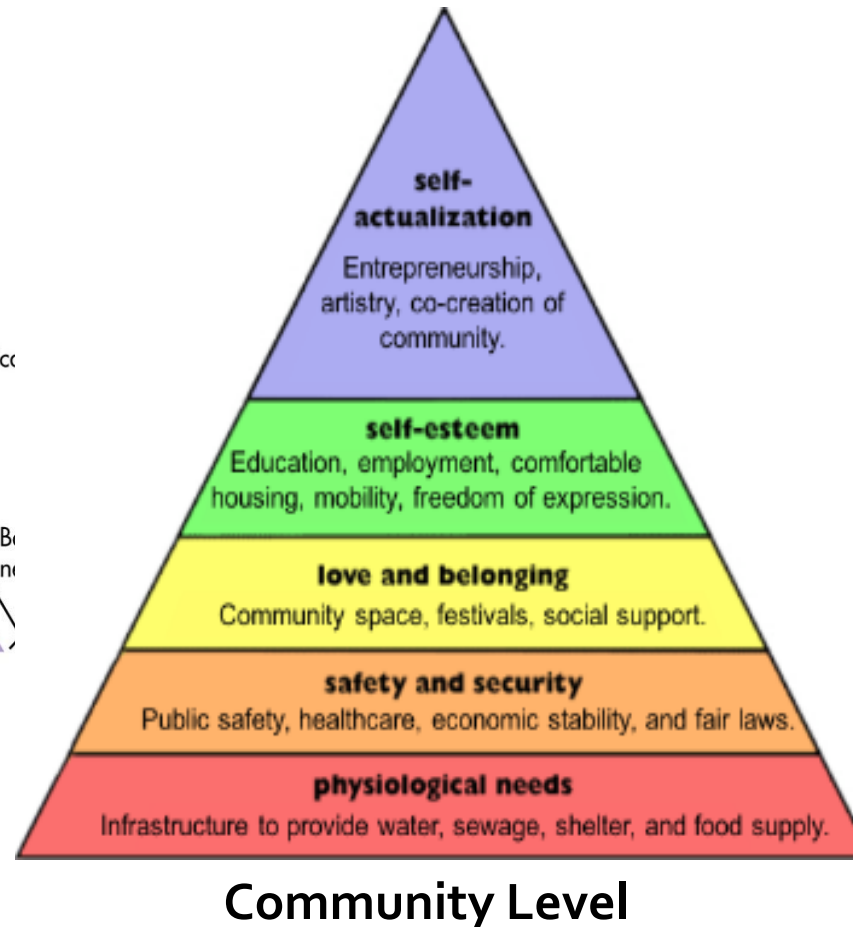
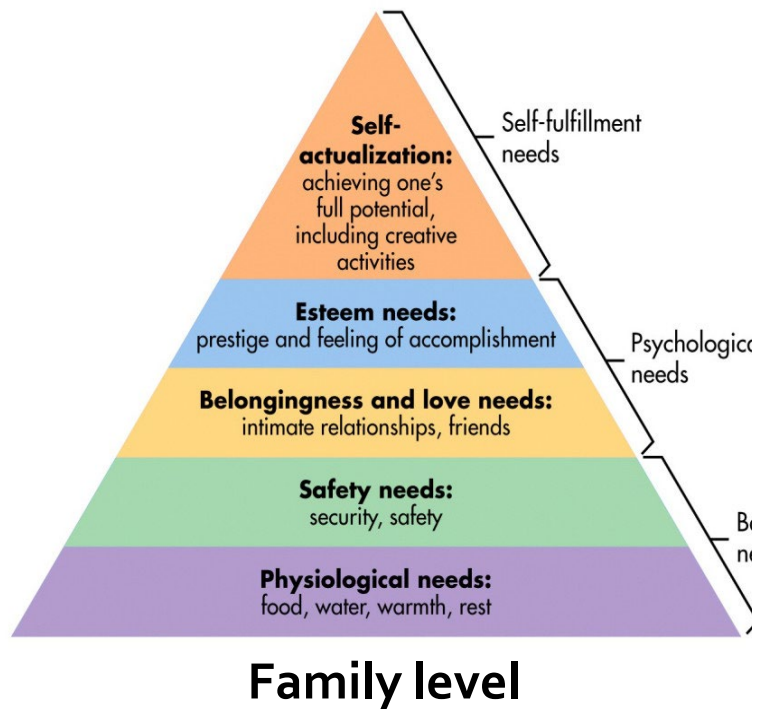
"I need help now"

- *noun*

1. circumstances in which something is necessary, or that require some course of action to provide for the necessity

"the basic human **need** for food"

# What do we mean by “identifying needs by level”?



Some family needs are rooted in deeper community situations. In that case, they can't be addressed with simple family services. We want data to help clarify when needs are bigger than individual.



## Education

Area of Concern:  
high school  
graduation

# LEVELS OF NEED

- Individuals do not have high school diplomas. **(Family)**
- Our community has a low high school graduation rate. **(Community)**
- Our agency has a need for additional resources to establish or expand GED preparation programs for adult customers who have not graduated high school. **(Agency)**



# It's all three? **Create three statements!**

- The area of concern may be seen on all three levels, but a **separate statement must be made for each level.**
- In the Education example on the previous slide, we see **THREE** statement that indicate the three levels of need.

# Clarify the Need! **Don't** identify a service that could address the need



Type of Service

Families need Weatherization service.

**Actual Need: Families have high utility bills.**

Type of Service

Families need rental assistance payment.

**Actual Need: Families are at risk of eviction.**

Type of Service

Individuals need job skills training.

**Actual Need: Individuals lack job skills.**



# Clarify the need! **Don't** identify a strategy that could address the need. (Community and Agency Level)



- Our community needs to develop summer programs for youth.
- **Actual Need: Our community does not provide access to summer programs for youth.**

Type of Strategy

- Our community needs to build affordable housing.
- **Actual Need: Our community has limited affordable housing.**

Type of Strategy

- The agency needs to provide job skills training.
- **Actual Need: The agency does not have staff trained to provide job skills training.**

Type of Strategy

Below are examples of how the identification of needs by level would be integrated into the assessment report:

### **Example 1: Identified Domain: Employment**

Family level: Individuals do not have jobs that are paying at least minimum wage

Community Level: There is a lack jobs that are paying at least minimum wage in our community.

Agency Level: Our CEE does not have the resources to provide appropriate job training to help low-income individuals secure available jobs.

### **Example 2: Identified Domain: Health**

Family level: Individuals abuse substances.

Community Level: There is a lack of drug treatment service providers in the community.

Agency Level: Our CEE does not have experienced staff to work with the individual who abuse substances.



# CNA Template



California Department  
of Community Services  
and Development  
Community Services  
Division

## Community Needs Assessment Narrative

CSBG Act Sections 676(b)(3)(C), 676(b)(9)

Organizational Standards 1.1, 1.2, 2.2, 3.2, 3.3, 3.4

State Plan

1. How did the agency share the CAP, including the CNA, with the community, stakeholders, partner organizations? (Check all that apply.)

- The agency's website
- Posted on the agency's Facebook page
- Electronic reports were sent
- Printed copies were distributed
- Social media channels
- Other

2. Describe how your agency collected and included current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for your service area. (Organizational Standard 3.2, State Plan)

3. Describe the geographic location(s) that your agency is funded to serve. If applicable, include a description of the various pockets, high-need areas, or neighborhoods of poverty that are being served by your agency.

4. Indicate from which sources your agency collected and analyzed quantitative data for the CNA. (Check all that apply.) (Organizational Standard 3.3)

### Federal Government/National Data Sets

- Census Bureau
- Bureau of Labor Statistics
- Department of Housing & Urban Development
- Department of Health & Human

### Local Data Sets

- Local crime statistics
- High school graduation rate
- School district school readiness
- Local employers
- Local labor market

# State Guidance for Review of CNAs



Department of Community Services and Development  
Community Services Division  
2024-2025 Community Needs Assessment (CNA) and Community  
Action Plan (CAP) Review Tool



Department of Community Services and Development  
Community Services Division

2024/2025 Community Needs Assessment (CNA) and Community Action Plan (CAP) Review Tool

**CAP Review Information**

Agency Name Choose an item.  
 Agency Type Choose an item.  
 CSD Representative Choose an item.  
 CAP Review Completed Click or tap to enter a date.  
 CSD Manager Choose an item.  
 CSD Manager Review Completed Click or tap to enter a date.

**Review Summary**

Section	Criteria Met
Cover Page and Certification	Choose an item.
Public Hearing Report	Choose an item.
Community Needs Assessment Narrative	Choose an item.
Community Needs Assessment Results	Choose an item.
Vision and Mission Statement	Choose an item.
Tripartite Board of Directors	Choose an item.
Service Delivery System	Choose an item.
Linkages and Funding Coordination	Choose an item.

**PART I: Community Needs Assessment**

**Community Needs Assessment Narrative**

Review Criteria	Criteria Met	Page	Comments
1. The agency has described how it collected and included current data specific to poverty and its prevalence related to gender, age, and race/ethnicity in its service area.	Choose an item.		
2. The agency has described the geographic location(s) that it is funded to serve. The description includes, if applicable, the various pockets, high-need areas, or neighborhoods of poverty that it is serving.	Choose an item.		
3. The agency has indicated from which sources it collected and analyzed quantitative data for the CNA.	Choose an item.		
4. If "Other" was selected in any of the data sets in Question 3, the agency has listed the additional sources.	Choose an item.		
5. The agency has indicated the approaches it took to gather qualitative data for the CNA.	Choose an item.		
6. If "Other" was selected in Question 5, the agency has listed the additional approaches it took to gather qualitative data.	Choose an item.		



# PLANNING

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What will you do? What will change? How will you know?

# Developing Results Oriented Plans

There are different types of plans in a Community Action Agency.



The Agency Wide Strategic Plan has a broad focus – in general to support the agency's mission.



Strategic thinking at the agency level is big, deep, and future-focused.

This bookshelf is like the CAA's Agency-Wide Strategic Plan.



Plans included can focus on specific funding or program areas that all, taken together, will support the agency to achieve its mission.

# Organizational Standards – Strategic Plan

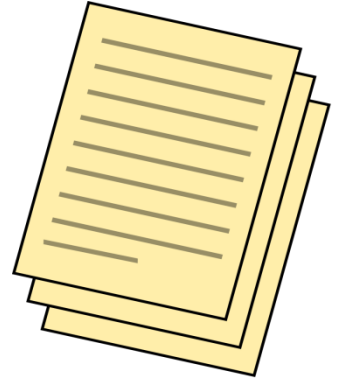
- **Standard 4.1** • The governing board has reviewed the Organization's mission statement within the past 5 years and assured that:
  - 1. The mission addresses poverty; and
  - 2. The Organization's programs and services are in **alignment with the mission**.
- **Standard 4.2** • The Organization's Community Action Plan is **outcome-based, anti-poverty focused, and ties directly to the Community Assessment**.
- **Standard 4.3** • The Organization's Community Action Plan and Strategic Plan document the continuous use of the full **ROMA cycle or comparable system** (assessment, planning, implementation, achievement of results, and evaluation).

# Organizational Standards include characteristics of a Strategic Plan

- **Standard 6.1** • The Organization has an agency-wide Strategic Plan in place that has been approved by the governing board within the past 5 years.
- **Standard 6.2** • The approved Strategic Plan addresses **reduction of poverty, revitalization of low-income communities, or empowerment of people with low incomes to become more self-sufficient.**
- **Standard 6.3** • The approved Strategic Plan contains **Family, Agency, or Community** goals.
- **Standard 6.4** • **Customer satisfaction data and customer input**, collected as part of the Community Assessment, is included in the strategic planning process.

# A Unique Plan for CSBG

Community Action Plans are unique to our network.



From legislation: In addition to the use of CSBG funds, the CAP includes activities of the agency that are funded by other sources to meet the needs of individual, families, and communities with low income.

**Standard 4.2** • The Organization's Community Action Plan is **outcome-based, anti-poverty focused,** and **ties directly to the Community Assessment.**

**Standard 4.3** • The Organization's Community Action Plan and Strategic Plan document the continuous use of the full ROMA cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation).



# Why do agencies need a Community Action Plan?

**To comply with the Community Services Block Grant (CSBG) Act, Public Law 105-285, Section 678B (11) eligible entities must complete a Community Action Plan (CAP), as a condition to receive funding through a Community Services Block Grant.**

- CSBG funds are to be utilized to support activities that remove obstacles and solve problems that block the achievement of self-sufficiency.

# What does the CAP do?

- Ensures your agency's ANTI-POVERTY mission is articulated
- Describes how the CAA will meet the needs identified in the CNA
- Provides direction and clear services and strategies for agency programs
- Describes steps to work towards results and outcomes for individuals, families and communities



# CAP = CSBG work plan

- **CAP is usually the CSBG work plan which is part of the contract process for the State in determining how CSBG funds are used.**
- It is a road map for initiating organizational changes, laying out a comprehensive and effective continuum of programs and services, determining how those are tracked and measured, and detailing the funding for each program or service.

# How do they fit together?

<b>Community Action Plan</b>	<b>Community Needs Assessment</b>	<b>Strategic Plan</b>
Annual	Every 3 years	Every 5 years (or less)
Identifies the plan to implement programs and approaches to meet strategic goals and address community needs	Identifies community needs and resources to allow for planning towards best meeting needs	Sets agency priorities and outcomes, including how agency will address identified needs at family, community, and agency levels

# About the CSBG Community Action Plan Example from Colorado

- Federal Objectives Guide
- The Community Action plan includes a **comprehensive community needs assessment which identifies needs and resources** within the community. The assessment is used to develop the three-year Community Action Plan to the State of Colorado's Department of Local Affairs (DOLA) **describing what activities are being proposed to meet identified needs through the use of Community Service Block Grant (CSBG) funds.**
- Activities will be carried out in a Results-Oriented Management and Accountability (ROMA) format. This format allows Adams County to identify **specific needs, service provisions, expected outcomes, measurement tools, and final outcomes.**
- Activities must meet federal objectives in the area(s) of: employment, education, income management, housing, emergency services, self-sufficiency, linkages, health, and nutrition.

# From NASCS Guide to CAP



The Community Action Plan is the key stone of this whole process.



This is the document that should guide your programmatic decisions and your goals.



This document will be used by the CSBG State staff in monitoring and as part of the application.



You will use your needs assessment, prioritization, and analysis documents to create this Plan.

# Key Elements from AZ Guidance

## I. Agency Overview

## II. Assessment of Community and Clients (*aka the Community Needs Assessment*)

## III. Strategic Plan

## IV. Implementation of Community Action Plan – areas of focus

1. To support activities that are designed to assist low-income families and individuals, including homeless families and individuals, migrant or seasonal farm workers, and elderly low-income individuals and families;
2. To attain an adequate education, with particular attention toward improving literacy skills of the low-income families in communities involved, which may include carrying out family literacy initiatives;
3. To obtain emergency assistance through loans, grants, or other means to meet immediate and urgent family and individual needs;
4. To achieve greater participation in the affairs of the communities involved. This may include the development of public and private grassroots partnerships
5. To meet the needs of low-income youth through initiatives like the creation and expansion of innovative community-based youth development programs that have demonstrated success in preventing or reducing youth crime and promotion of the primary role of the family; support these innovative community and neighborhood-based initiatives (related to the purposes of CSBG), which may include fatherhood initiatives and other initiatives with the goal of strengthening families and encouraging effective parenting;
6. To the maximum extent possible, coordinate, and establish linkages and partnerships between governmental and other social service programs and their providers — including but not limited to religious organizations, charitable groups, and community organizations — to assure the effective delivery of such services to low-income individuals and to avoid duplication of such services. The CAA will coordinate the provision of employment and training activities in the communities with entities providing activities through local workforce investment programs. Finally, the CAA will, to the maximum extent possible, establish these aforementioned linkages in order to address gaps in service deliveries, making use of information, referrals, case management, and follow up consultation in order to do so;
7. To remove obstacles and solve problems that block the achievement of self-sufficiency. This may be achieved by making effective use of program coordination related to the purposes of CSBG,

## V. National Performance Indicator (NPI) Targets

# Virginia Electronic System for Multiple Purposes



Standards

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Community Action Plan

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Demographics

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Financials

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Admin

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Help

### Needs Addressed

Locality	Status	
Bath-Alleghany-Covington	Current Status set to Approved on 06/01/2018	<a href="#">Update</a>
Craig County	Current Status set to Approved on 06/01/2018	<a href="#">Update</a>
Roanoke City	Current Status set to Approved on 06/01/2018	<a href="#">Update</a>
Roanoke County-Salem-Botetourt County	Current Status set to Approved on 06/01/2018	<a href="#">Update</a>
Rockbridge County-Buena Vista-Lexington	Current Status set to Approved on 06/01/2018	<a href="#">Update</a>

**Bath-Alleghany-Covington**

Need Number	Need Description
1.1	<p><b>Jobs/Job Training:</b> Covington has the highest unemployment rate in the service area at 8% (representing just 200 people or so). The largest sectors of Covington's economy are retail trade and food service/accommodation, paying average weekly wages of \$418 and \$254 respectively. The MIT Living Wage Calculator estimates that a living wage in TAP's service area is approximately \$400 for a single adult and \$860 for an adult and child.</p>
1.2	<p><b>2) Early Childhood Education:</b> Covington consistently has by far the highest rates of children assessed at below kindergarten readiness on the PALS-K in TAP's service area - above 30% ever year from 2011 to 2015. In Roanoke city, which is also consistently on the high end, scores hover around 20%, by comparison. One local school administrator surveyed by TAP cited the need for "more Head Start spots in Covington." Covington also has one of the lowest and least consistent high school graduation rates, including the lowest</p>
1.3	<p><b>Housing:</b> Members of the Alleghany Commission, which oversees TAP's work in the region, selected housing as the most pressing need in the area, with specific answers including temporary and re-entry housing, as well as senior housing. Housing was also the second most critical need, after jobs, identified by Alleghany/Covington DSS workers. School administrators in Alleghany/Covington identified low-income housing as the most pressing need after jobs. And a Bath County DSS worker noted "Much of the housing in</p>
1.4	<p><b>Transportation:</b> As with many of the more remote localities, transportation was high on the list of needs identified by survey respondents from the Department of Social Services in these areas. A family service specialist at Bath County Department of Social Services noted "Transportation is a major issue, especially for those in more remote areas of the community. There is no public transportation and many community members do not drive and must depend on family members or friends to provide transportation when they are</p>

These needs are linked to the following initiatives

Program Name	Need Number	Initiative Link
Certified Nursing Assistant (CNA)	1.1	<a href="#">FNPI1 Employment - FNPI 1b</a>
Positive Parents	1.1	<a href="#">FNPI1 Employment - FNPI 1b</a>
Positive Parents	1.1	<a href="#">FNPI1 Employment - FNPI 1c</a>
Head Start	1.2	<a href="#">FNPI2 Education and Cognitive Development - FNPI 2a</a>
Head Start	1.2	<a href="#">FNPI2 Education and Cognitive Development - FNPI 2b</a>





## Part II: Community Action Plan

CSBG Act Section 676(b)(11)

California Government Code Sections 12745(e), 12747(a)

California Code of Regulations, Title 22, Division 11, Chapter 1, Sections 100651 and 100655

### Vision and Mission Statement

1. Provide your agency's Vision Statement.

2. Provide your agency's Mission Statement.

### Service Delivery System

CSBG Act Section 676(b)(3)(A)  
State Plan

1. Describe your agency's service delivery system. Include a description of your client intake process or system and specify whether services are delivered via direct services or subcontractors, or a combination of both. (CSBG Act Section 676(b)(3)(A), State Plan)

2. List your agency's proposed programs/services/activities that will be funded by CSBG. Include a brief explanation as to why these were chosen and how they relate to the CNA. (CSBG Act Section 676(b)(3)(A), State Plan)



California Department of  
Community Services and  
Development  
Community Services Division

# Elements of a plan

- ✓ Agency Information, certifications
- ✓ Clearly identified need statements – (What is the situation?)
- ✓ Description of community or target population – (Who is impacted by the need?)
- ✓ Expected measurable, observable results – (What is expected to change?)
- ✓ Agency actions – services and strategies – (What will the agency do?)
- ✓ Partnerships and linkages – (How services will be coordinated?)
- ✓ Measurement tools and processes – (How will you know?)
- ✓ Budget
- ✓ Board involvement and approval



Identified Problem, Need or Situation	Service or Activity	Outcome <i>General statement of results expected</i>	Projected Indicator <i># to achieve/# to be served; %; time frame</i>	Actual Indicator <i># achieved/# served; %; time frame</i>	Measurement Tool	Data Procedures	Frequency <i>Data Collection and Reporting</i>
					Output Tool:  Outcome Tool:	Who does it?  What is the process?  Where is data stored?	
<b>Mission:</b>							

# ONE WAY TO VISUALIZE THE ELEMENTS OF A PLAN – USE A LOGIC MODEL

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FAMILY LEVEL OUTCOME



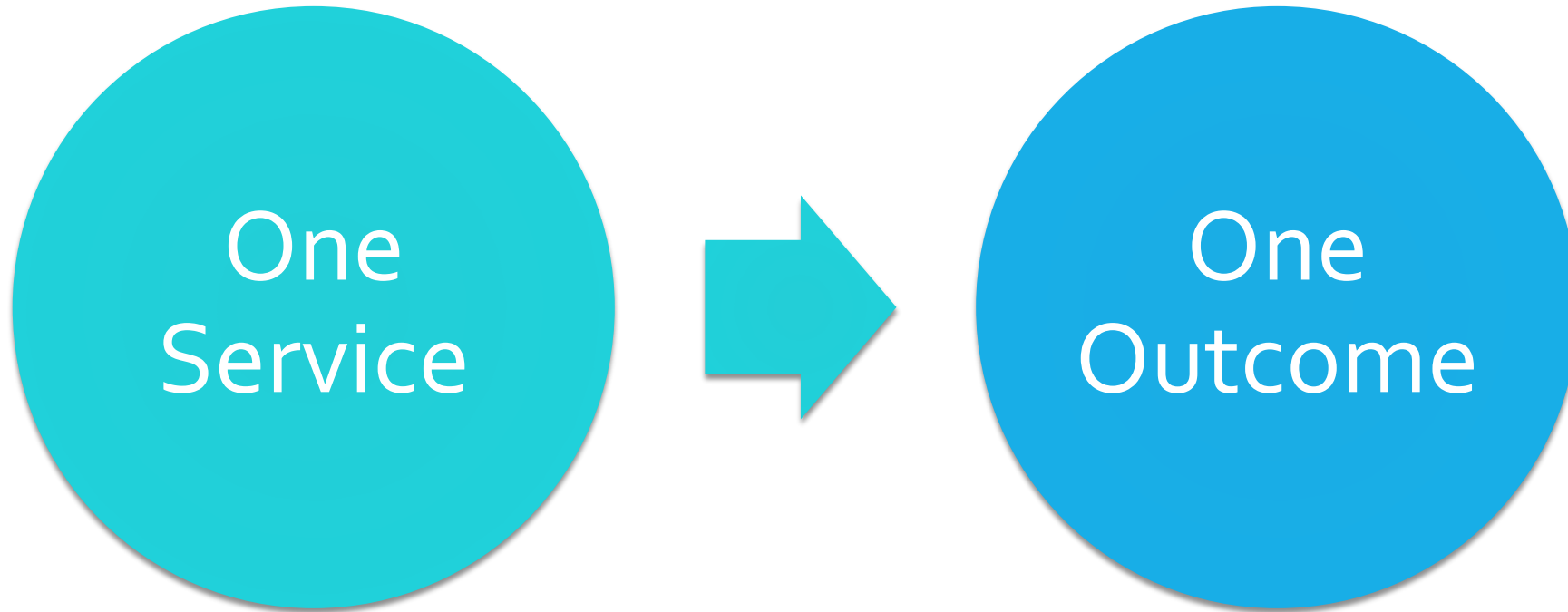
# LOOK FOR THE CONNECTIONS BETWEEN SERVICES AND OUTCOMES.

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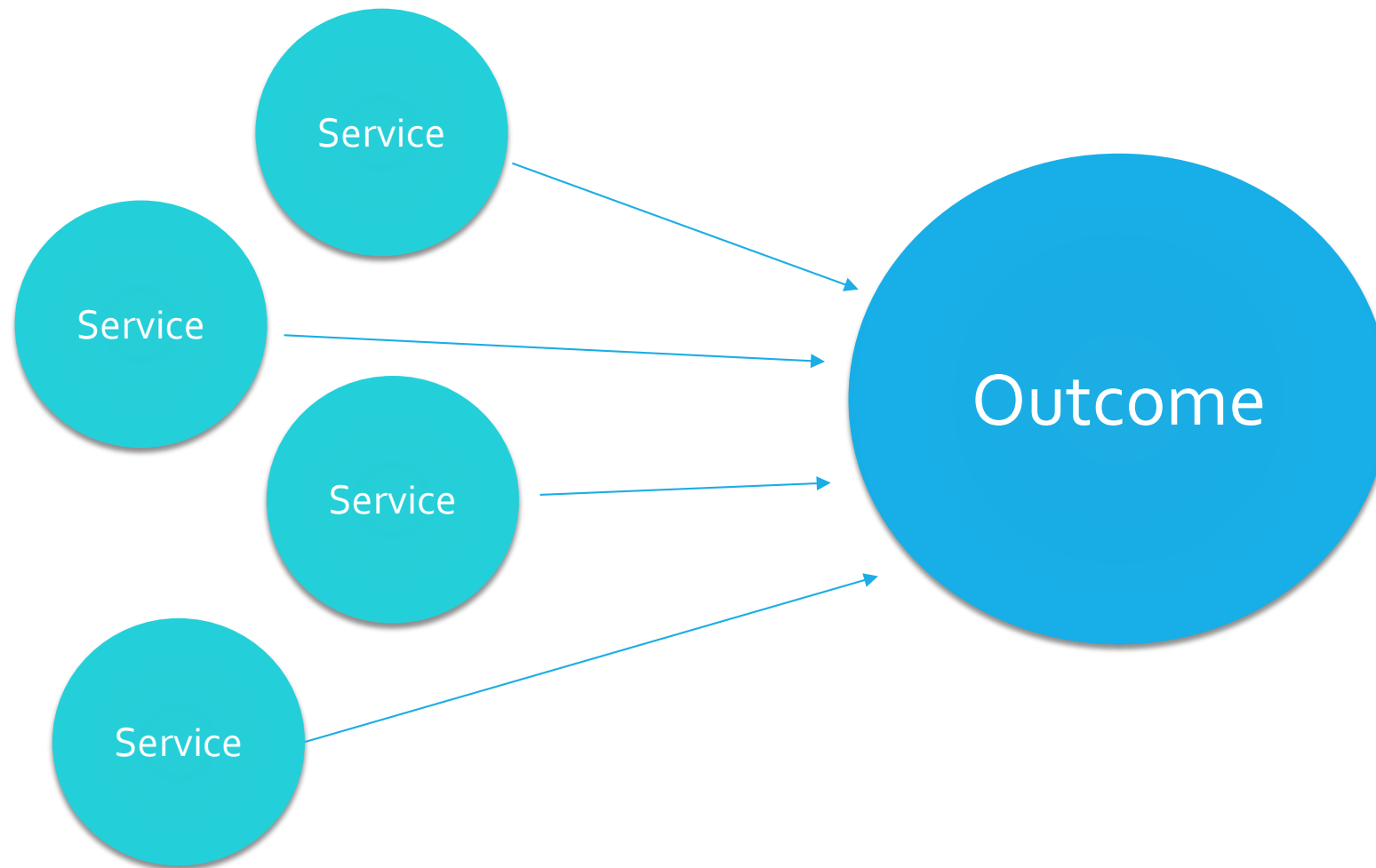
The plan should clearly identify what outcomes are expected to be achieved by the delivery of the service identified to be supported by CSBG funding.

There are many different ways that services and outcomes can be connected.

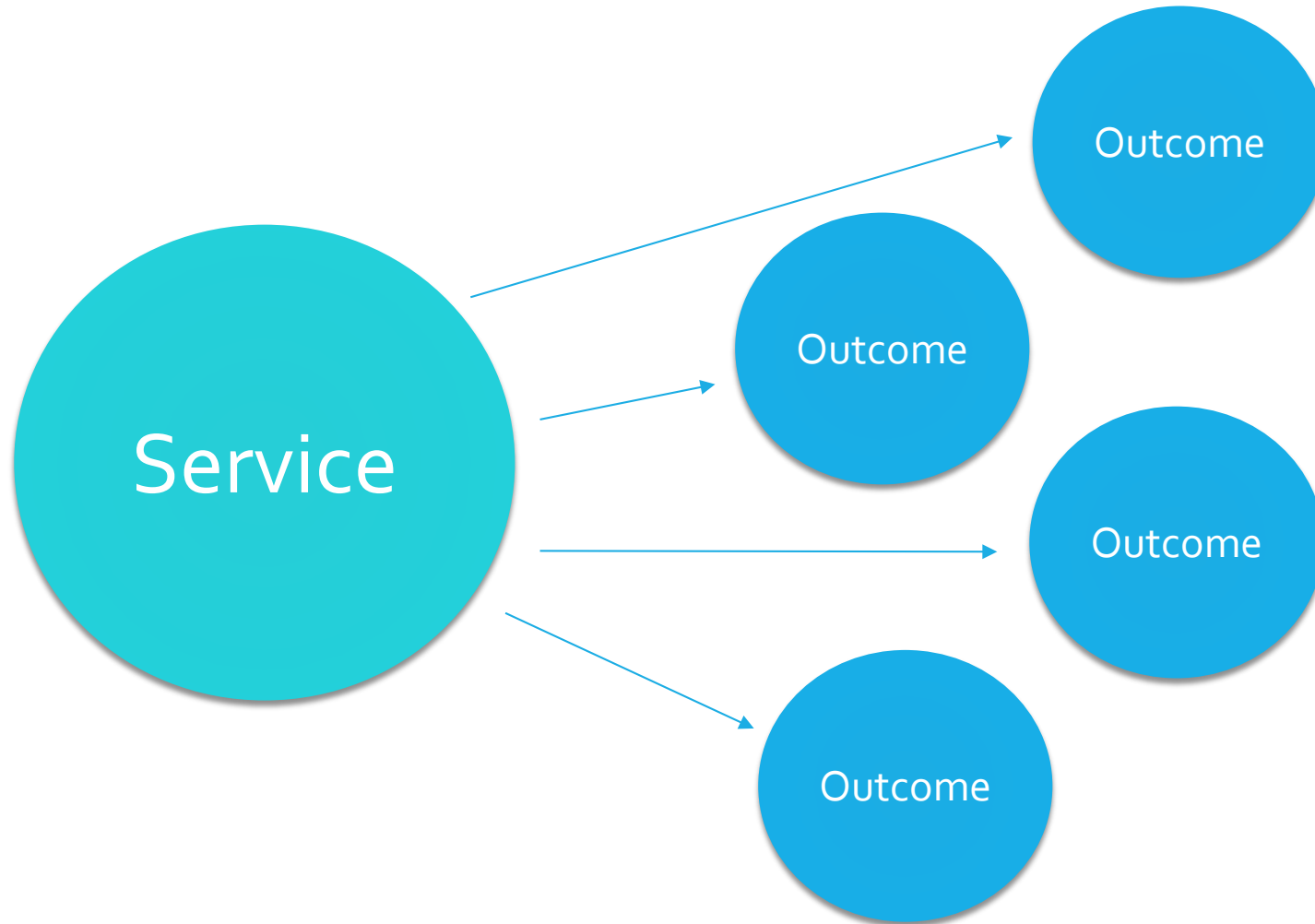
# One Service-One Outcome



# Multiple Services-One Outcome

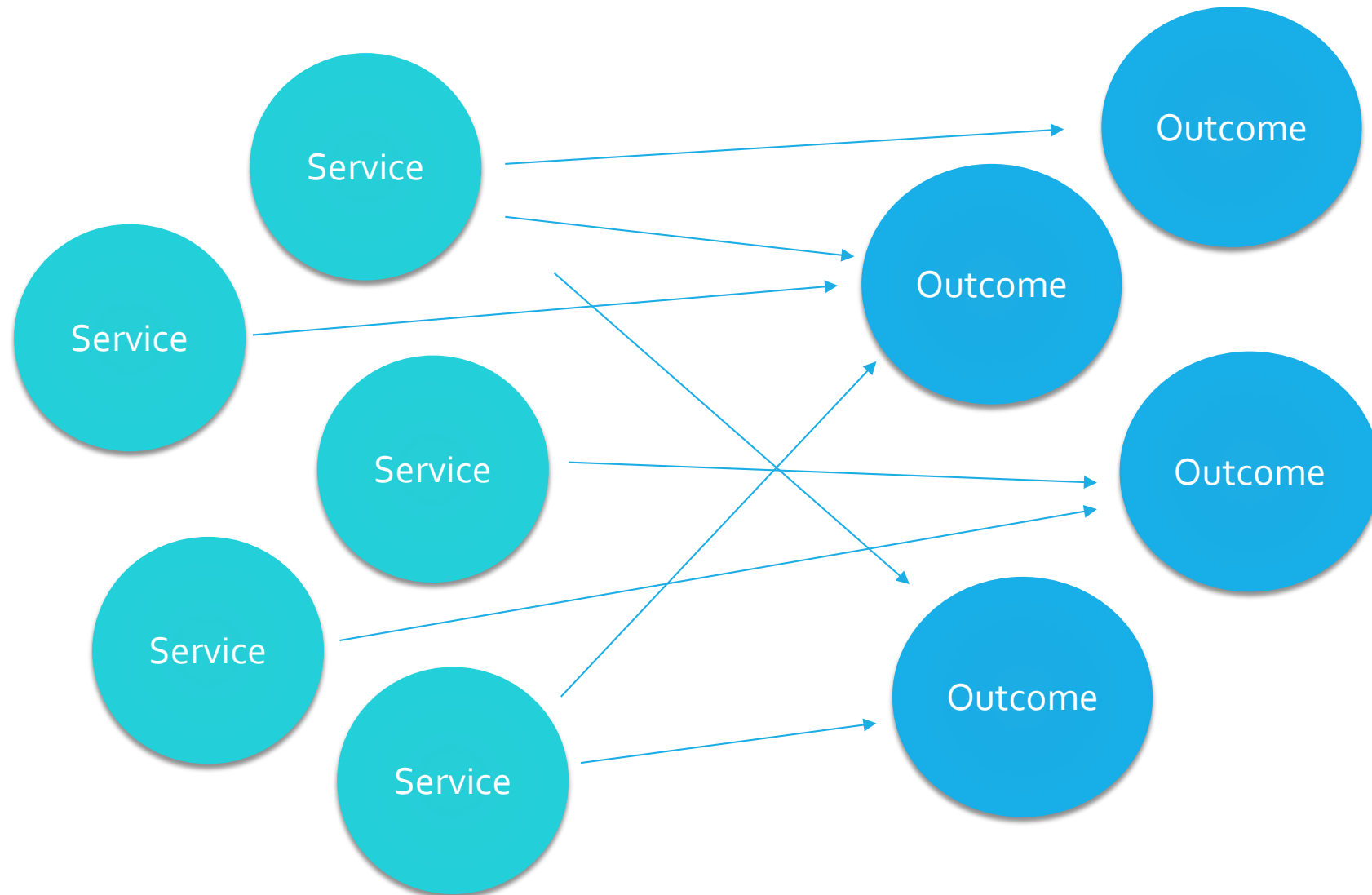


# One Service-Multiple Outcomes





# Multiple Services-Multiple Outcomes



# Look for the connections between outcomes and needs.

- Is it clear how the achievement of identified outcomes will address the needs were found in the assessment process?
- Are the outcomes related to the highest priority of need?
- Are the outcomes at the level of the need? (That is, if the need was identified as community level, are the outcomes also community level? If not, how does the agency connect the family level outcome to the need?)

# Example of clear connections between the needs assessment and strategic plan

Need	Outcome	Strategy
<b>Employment:</b> <b>computer and technology skill development classes are not accessible (community level need)</b>	<b>Computer and technology skill development classes are accessible</b>	Community college has funds and facilities, but classes are not convenient and do not start at a basic level. We formed a work group with CC and other agencies to explore alternatives. <b>We plan to fund 3 – 5 new classes and work with the other partners to do recruitment.</b>
<b>Transportation:</b> <b>There is no transportation service connecting the city center to jobs in outlying areas. (community level need)</b>	<b>There are transportation services connecting the city center to jobs in outlying areas.</b>	While the city has a public transportation service, there is nothing available to support getting to job opportunities in outlying areas of the county. We have no resources to address this issue but <b>we plan to be part of advocacy efforts</b> to petition the City Council to add more bus lines.

# Example of un-clear connections between the needs assessment and strategic plan

Need	Outcome	Strategy or Service
<p><b>Child/youth:</b>  <b>Families with low-income are unable to pay the standard child-care costs (family level need).</b></p>	<p><b>Families with low-income are able to pay the standard child-care costs (family level need).</b></p>	<p>We operate childcare programs in 3 school districts in our service area. <b>We plan to add 10 additional slots</b> to each program. <i>(this is community level and NOT a match for the need –narrative could show how this is connected)</i></p> <p><b>We will provide subsidies to 30 families</b> so they can use the services of our programs.</p>
<p><b>Education &amp; training:</b>  <b>Individuals do not own computers or have internet service in their homes. (family level need)</b></p>	<p><b>Education &amp; training:</b>  <b>Individuals have computers or have internet service in their homes. (family level need)</b></p>	<p>We will <b>submit grants</b> to foundations to secure resources to purchase computers for our agency computer center. at agency. <i>(this is agency level and NOT a match for the need – narrative could show how this is connected)</i></p> <p><b>We will provide vouchers for computers</b> to 20 families and subsidies to 40 families for internet service.</p>



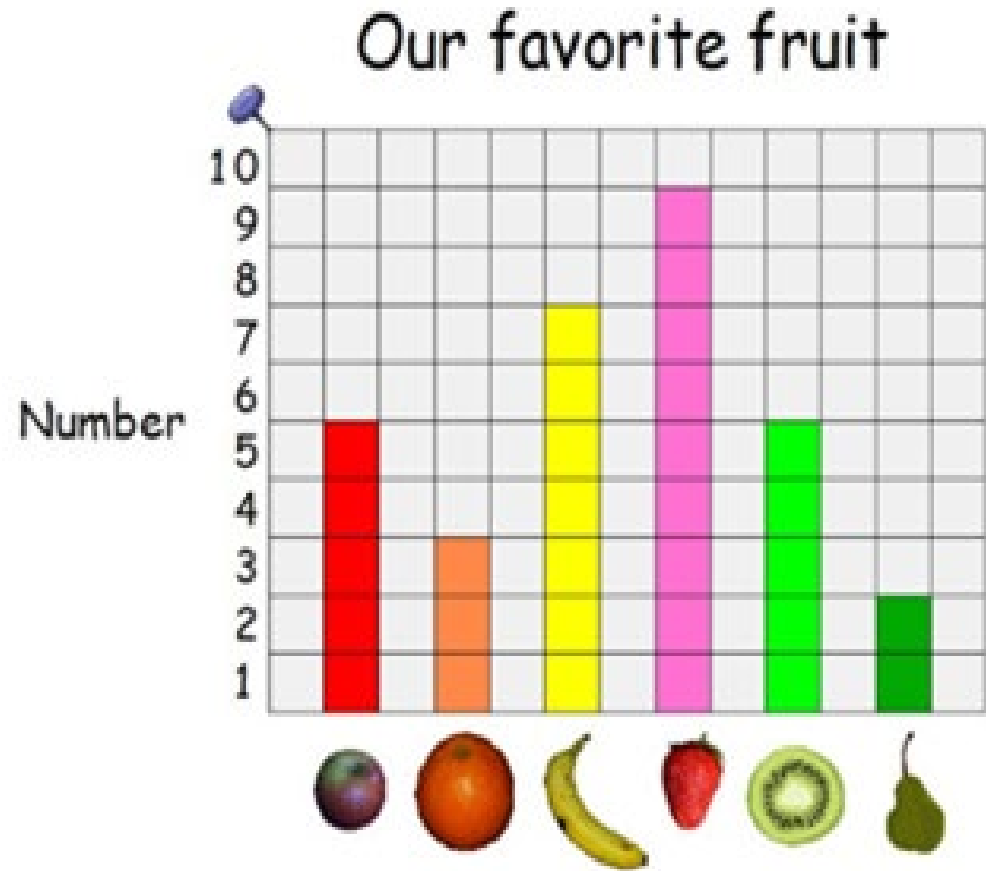
# ANALYSIS OF ANNUAL REPORT DATA

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Fortified with the needs and plans, you can review the Annual Report with greater understanding.

# Why Analyze Data?

- Remove outliers or obvious errors
- Question missing data
- Make comparisons
- Define and clarify the context
- Create a Visualization of the data



# Some Simple Analysis Techniques



Assuring the data is complete, accurate, reliable and timely



Asking the right questions.



Discussing the data with others who may have insights



Bringing together “facts” and observations (experiences, stories) to see the whole picture

# Simple Analysis Techniques



AGGREGATE



COUNT



COMPARE



IDENTIFY  
TRENDS



# Data to compare *(from Carter Questions)*

## Before the agency starts a program

- How many people are expected to be served?
- What services will they receive? (single service or multiple services?)
- What is expect to change?
- How many will achieve the expected goal?

## At end of program

- How many were actually served?
- How many achieved the expected goal?
- What did it cost?

**Module 4, Section A: Individual and Family National Performance Indicators (FNPIs) - Data Entry Form**  
**Goa 1: Individuals and Families with low incomes are stable and achieve economic security.**

**Employment Indicators**

Employment (FNPI 1)	I.) Number of Participants Served in program(s) (#) <b>ACTUAL # served</b>	II.) Target (#) <b>Expected to achieve</b>	III.) Actual Results (#) <b>ACTUAL # achieved</b>	IV.) Average Outcome [III/ I = IV ] (% auto calculated)	V.) Performance Target Achievement (III/II = V) calculated
FNPI 1a The number of unemployed <b>youth</b> who obtained employment to gain skills or income.				#DIV/0!	#DIV/0!
FNPI 1b The number of unemployed <b>adults</b> who obtained employment ( <u>up to a living wage</u> ).				#DIV/0!	#DIV/0!
FNPI 1c The number of unemployed <b>adults</b> who obtained and maintained employment for at least 90 days ( <u>up to a living wage</u> ).				#DIV/0!	#DIV/0!
FNPI 1d The number of unemployed <b>adults</b> who obtained and maintained employment for at least 180 days ( <u>up to a living wage</u> ).				#DIV/0!	#DIV/0!

Customer Success rate

Agency Targeting Success



# Org Standards re: Analysis

- **Standard 9.1** – The organization has a system or systems in place to track and report client demographics and services customers receive.
- **Standard 9.2** – The organization has a system or systems in place to track family, agency, or community outcomes.

**To help make data analysis a positive part of your routine job duties:**

**Know WHY you are interested in the data and what you can learn from it!**

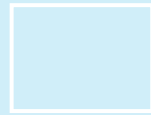
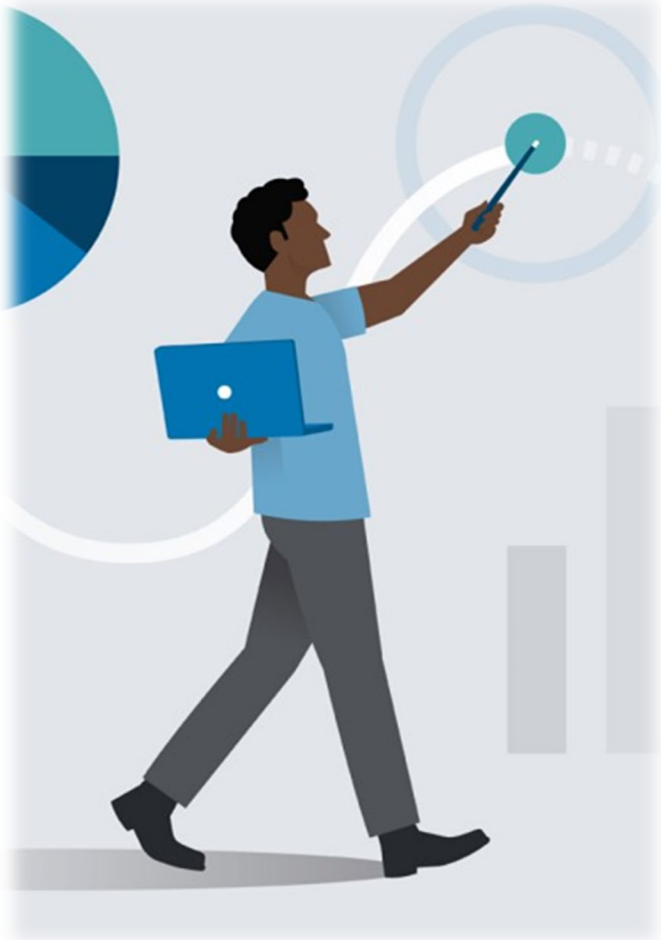
**Know what you plan to USE the data for!**



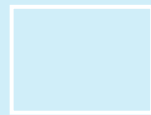
# Analysis can help you know if....

- Something could be working better
  - At the CAA level? At the state level?
- You might want discuss changes with the CAA regarding something that is not producing outcomes
- Agency resources and capacity are able to meet identified needs
- There are trends in demographic changes
- There are needs for TTA

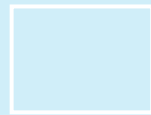
# Use Data Analysis Findings



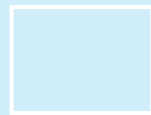
To communicate impact and tell the CSBG story



To identify where improvements could be made



To understand the data collection and reporting process



For advocacy

## The Results Oriented Management and Accountability Cycle

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## Re-Assessment and Planning Updates

- Based on analysis and recommendations, the agency determines additional data to be collected in the next Assessment cycle that would be useful for agency decision-making.
- The agency updates plans based on new data
- And the cycle continues!



# Next Steps?

How can you improve your review of the CNA and CAP processes?

What do you need to make this a part of your job duties?  
(staff skill development, other resources, etc.)

Explore the way you analyze data to make meaning for decision making.

Consider how you can use the CSBG report for outreach, marketing and relationship building.





Please scan  
here to  
complete the  
evaluation for  
this webinar!

