



25 | 26

# Community Action Plan & Reporting Manual



## 2025-2026 Community Action Plan Developing & Reporting Manual

This guide is designed to help Virginia's Community Action Agencies design and implement their community action plans. Inside this manual, you will find helpful tools, resources, and tips to aid in the development of a comprehensive and effective plan of action for your programs.

The Office of Economic Opportunity staff are available to provide individual technical assistance regarding CAP Plan Development and Reporting. To schedule assistance please email [csbg@dss.virginia.gov](mailto:csbg@dss.virginia.gov).

This guide is divided into two sections: CAP Plan Development and CAP Plan Reporting:

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## Important Dates & Deadlines

<b>CAP Plan Opens Annually</b>	<b>March 1</b>
<b>CAP Plan Due Annually</b>	<b>May 1</b>

<b>Reporting Deadlines</b>	
Quarter 1	November 15
Quarter 2	February 15
Quarter 3	May 15
Quarter 4	August 15
Q1, Q2, and Q3 – Progress report, ROMA Implementer progress report and Match Progress reports due	
Q4 – several components due (4 <sup>th</sup> Quarter Progress, FNPI Page, Expenditures, CSBG Resources, Capacity Building, and Family and Individual Demographics)	

## CSBG Reporter CAP Plan User Guide

Log in to [va.csbgreporter.com](http://va.csbgreporter.com)

### Login Screen

Usernames and passwords can be generated by a current user at your agency or by contacting [csbg@dss.virginia.gov](mailto:csbg@dss.virginia.gov)

### Home Screen

Once you log in this is the default home screen

**Note:** the system will default to the program year you were in when you last logged out. Prior to moving forward ensure you are in the correct program year.

## Adding New Users

To add new users to your account you will click on Director Information under Admin.

The screenshot shows the CSBG Reporter Admin interface. On the left is a navigation menu with options: Standards, Community Action Plan, Financials, Admin, Director Information, and Messages. The 'Admin' section is expanded, showing 'Director Information' and 'Messages'. The main content area displays a table of existing users with columns for Name, Email, and an 'Update' button. A callout box points to the 'Add a New Director Record' button, stating: "You can also add a new person by clicking on Add a new Director. The same form will populate for you to add information for a new user." Another callout box points to the 'Update' buttons, stating: "You can update current users by clicking update next to the user." Below the table, there is a form to add a new director record, with sections for Title and Name, Address, Login Information, and Notifications. A callout box points to the 'Login Information' section, stating: "You can edit the user information as well as edit usernames and passwords." The form includes fields for title, firstName, lastName, address, address2, city, zip, phone, phoneExt, fax, cell, email, login, and password. The 'Login Information' section has fields for login and password. The 'Notifications' section has a checkbox for 'This person will receive notifications for any notification type checked below'. At the bottom are 'Save' and 'Cancel' buttons.

You can also add a new person by clicking on Add a new Director. The same form will populate for you to add information for a new user.

You can update current users by clicking update next to the user.

You can edit the user information as well as edit usernames and passwords.

## Community Action Plan

There are 6 sections under the Community Action Plan tab. Each of these four sections is completed annually and due May 1<sup>st</sup>.

## Needs Section

When you click on needs you have the ability to see any and update current localities and needs that were put in the system and the ability to add new localities and needs.

©2020 CSBG Reporter Inc.

When clicking on update, the information that was carried over from the prior year will populate. You will then be able to update the narratives and submit or save the information as needed.

If the need was tied to a program that will be listed here. Please note if you the need was tied to a program you will be unable to delete that need.

You are also able to add a locality and needs by clicking on the blue button that says “Add Locality/Needs”

The screenshot shows the CSBG Reporter web application interface. The main content area is titled "Needs Addressed". It features a table with two columns: "Locality" and "Status". Below this table is a blue button labeled "Add Locality/Needs". Underneath the button is a form with a "Locality" input field and a "Need Number" input field. To the right of the "Need Number" field is a "Need Description" input field. Below these fields is a table with four rows, each containing a "Need Number" (3.1, 3.2, 3.3, 3.4) and a "Need Description" input field. A yellow callout box with a black border contains the text: "If you need to add a locality and needs you can do so on this page. You will enter the top 4 needs for that locality and hit save or submit." Below the table is a section for "My Comments" and "Staff Comments", each with a text area and a "Show History" link. At the bottom of the page are four buttons: "Save", "Submit", "Cancel", and "Delete".

Each locality should be listed along with the top four needs in each locality.



## Gaps and Linkages

All the gaps and linkages that were in the prior year's community action plan were transferred over. You can update or delete what is there or add new gaps and linkages.

va.csbgreporter.com/Pages/NPI/Gaps%20and%20Linkages/

**CSBG Reporter**

Welcome testing record! [Logout](#)  
My Agency  
State & Program Year: Virginia | 2019-2020

Page Tools Create PDF

**Gaps and Linkages**

Locality	Gaps In Service	Status
testing	testing narrative	Current Status set to Saved on 11/08/2019 <a href="#">Update</a>

[Add New](#)

When you click on update the form will load for you to edit.

Page Tools Create PDF

**Gaps and Linkages**

Locality	Gaps In Service	Status
testing	testing narrative	Current Status set to Saved on 11/08/2019 <a href="#">Update</a>

[Add New](#)

**Gaps And Linkages**

County: testing

Gaps In Service: testing narrative

Gap To Be Addressed: ☒ testing narrative

Community Strategy: testing narrative

Agency Strategy: testing narrative

My Comments [Show History](#)

StaffComments

[Save](#) [Submit](#) [Cancel](#) [Delete](#)

This is the Gaps and Linkages form you have the opportunity to edit the form, you can also delete the form from this page. If you click add new, the same form populates for you to enter new information.



### Strategic Goals

All of the strategic goals that were listed in your prior plan were pulled over, from this page you have the opportunity to edit or delete current goals or add new goals.

Standards  
Community Action Plan  
Financials  
Admin  
Help  
Reporting

Strategic Goals

Strategic Goal	Status
New Strategic Goal test	Current Status set to Saved on 03/15/2019 <a href="#">Update</a>
test2	Current Status set to Saved on 03/15/2019 <a href="#">Update</a>

[Add New](#)

Strategic Goals

New Strategic Goal test

Strategic Goal:

Activities test

Annual Activities Toward Goal:

This strategic goal is linked to the following initiatives

Program Name	Strategic Goal	Initiative Link
New Program3	New Strategic Goal test	<a href="#">FNPI2 Education and Cognitive Development - FNPI 2a</a>
New Program3	New Strategic Goal test	<a href="#">FNPI2 Education and Cognitive Development - FNPI 2c</a>
Program 1	New Strategic Goal test	<a href="#">FNPI1 Employment - FNPI 1g</a>
Program test	New Strategic Goal test	<a href="#">FNPI Other - other FNPI</a>

My Comments [Show History](#)

StaffComments

[Save](#)
[Submit](#)
[Cancel](#)

This is the strategic goals section. When you click update next to a goal, you can edit or delete the goal. Please note that if the goal is tied to a program, you will not be able to delete it unless you remove it from the program. You can also add a new strategic goal by clicking add new.

## Programs

All programs that were in the system in the prior year were pulled over to the current year. From this page you will be able to add new programs, edit programs, or remove programs.

Click here to  
add a new  
program.

Click here to  
edit a current  
program  
name.

Click here to  
remove a  
program.

Pages/NPI/Programs/

[Add New Program](#)
[Select a Program Name to modify](#)
[Edit Program Name](#)
[Select a program to remove](#)
[Remove Program](#)

[Page Tools](#)
[Create PDF](#)

Standards

Community Action Plan

Needs

Gaps and Linkages

Strategic Goals

Programs

Financials

Admin

Help

Reporting

AAAA ▼

Do you use TANF funds in this program? ☐ Yes ☒ No

Initiative

Add New

☐ FNPI ☐ CNPI
 

Add New

Status

Save data for AAAA

Save

Describe the program.

Give details on any ways it relates to other programs offered at the agency, and any ties to community initiatives or other community partner programs/services

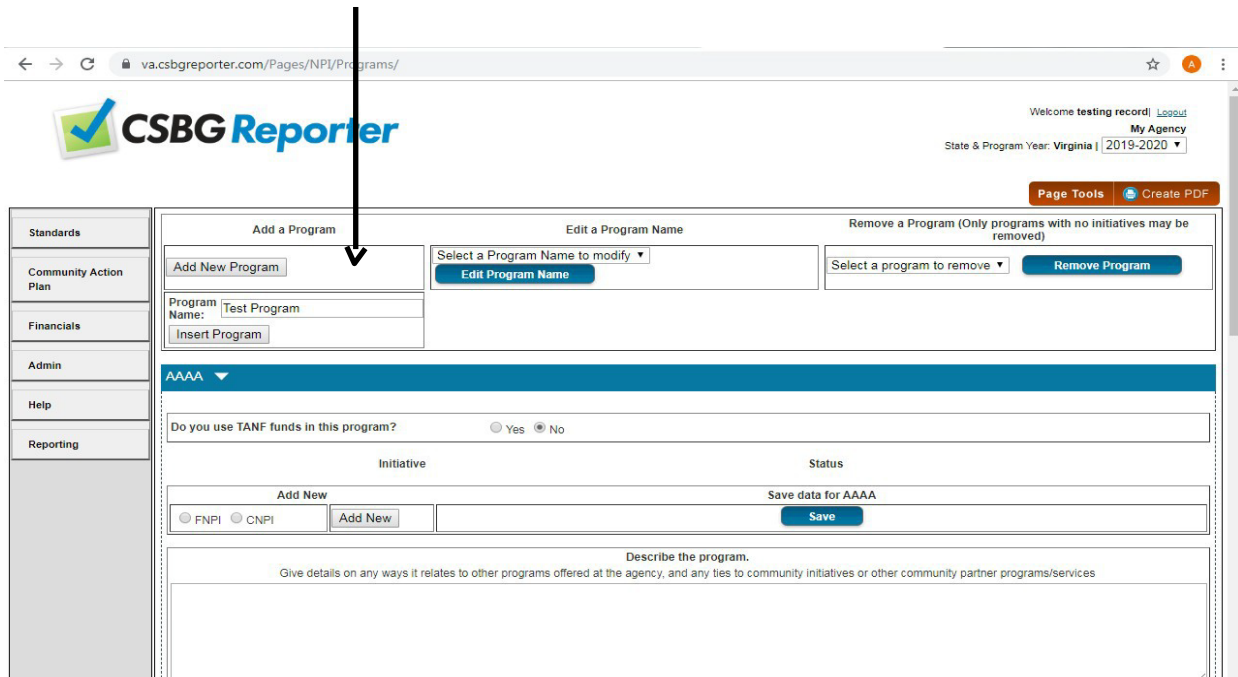
New Program3 ▼

Do you use TANF funds in this program? ☒ Yes ☐ No

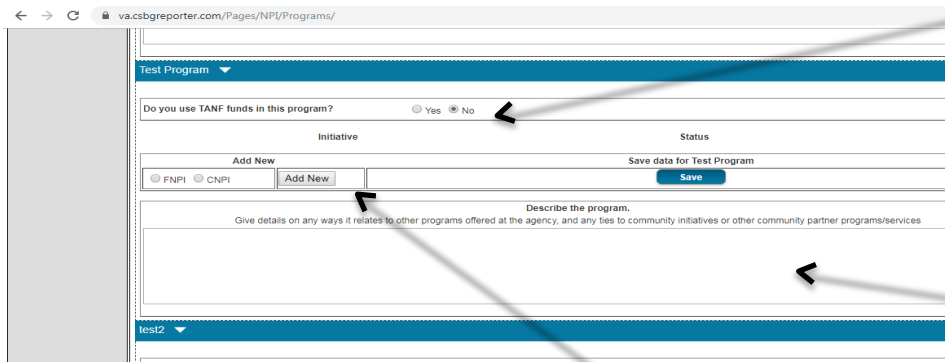
Initiative	Status	
<a href="#">FNPI2 Education and Cognitive Development - FNPI 2a</a>	Current Status set to Saved on 03/15/2019	<a href="#">Remove</a>
<a href="#">FNPI2 Education and Cognitive Development - FNPI 2c</a>	Current Status set to Saved on 03/15/2019	<a href="#">Remove</a>
<a href="#">test</a>	Current Status set to Saved on 03/15/2019	<a href="#">Remove</a>
<a href="#">Unnamed CNPI</a>	Current Status set to Saved on 03/15/2019	<a href="#">Remove</a>
<a href="#">test again</a>	Current Status set to Saved on 03/15/2019	<a href="#">Remove</a>
<a href="#">New Initiative</a>	Current Status set to Saved on 04/15/2019	<a href="#">Remove</a>

#### To add a new program:

When clicking add new program, a box will open which will allow you to enter the new program name. After entering the program name, click insert program.



The screenshot shows the CSBG Reporter interface. On the left is a sidebar with navigation links: Standards, Community Action Plan, Financials, Admin, Help, and Reporting. The main content area has three tabs: 'Add a Program', 'Edit a Program Name', and 'Remove a Program'. The 'Add a Program' tab is active, showing a form with a 'Program Name' input field containing 'Test Program' and an 'Insert Program' button. A black arrow points from the 'Add New Program' button to the 'Program Name' input field.



This screenshot shows the 'Test Program' form. It includes a 'Do you use TANF funds in this program?' section with 'Yes' and 'No' radio buttons. Below this is an 'Initiative' section with 'Add New' and 'Save' buttons. A text area labeled 'Describe the program.' is also visible. Arrows point to the 'Add New' button, the 'Do you use TANF funds in this program?' radio buttons, and the 'Describe the program.' text area.

Once you have added a program, it will appear within the list of programs in alphabetical order. When a program is created you will need to identify whether the program uses TANF funds by clicking the yes or no box. You will also need to describe the program in the text box. You will also add your FNPI's and CNPI's from this page. You will click on either FNPI or CNPI and click "add new".

To Add FNPI, when you click FNPI and “add new” the FNPI sheet will populate.

The screenshot shows the 'Add New' FNPI form in the va.csbgreporter.com application. The form includes several sections with dropdown menus and text boxes, each with a corresponding callout box explaining its function.

**Indicator Section:** Includes a dropdown for 'Indicator' (labeled 'Choose an Indicator'), a dropdown for 'Outcome', a text box for 'Other Outcome', and a text box for 'Outcome Target'. A callout box states: "You will choose an indicator (FNPI), once an NPI is chosen the list of possible outcomes populates. You will select the outcomes and enter the target number."

**Add Service Section:** Includes a dropdown for 'Add Service' (labeled 'Choose an Service') and a text box for 'Target'. A callout box states: "You will also be able to choose services and add targets for those services. You can add multiple services under an outcome."

**Add Need Addressed Section:** Includes a dropdown for 'Add Need Addressed' (labeled 'Choose a Need') and a text box for 'Description'. A callout box states: "All the needs that were entered on the prior screen will populate when you click on the choose a need drop down. You will select any needs that are associated with this program."

**Add Strategic Goal Addressed Section:** Includes a dropdown for 'Add Strategic Goal Addressed' (labeled 'Choose a Strategic Goal') and a text box for 'Annual Activities Toward Goal'. A callout box states: "All the strategic goals that were entered on the prior screen will populate when you click on the choose a strategic goal drop down. You will select any goals that are associated with this program."

**Additional Narrative Section:** Includes a text box for 'Additional Narrative' and a 'My Comments' section with a 'Show History' link. A callout box states: "You also can add an additional narrative if needed."

**Save/Cancel Section:** Includes 'Save' and 'Cancel' buttons. A callout box states: "Don't forget to hit save after entering the information."

#### FNPI 7a

All Community Action Plans should have a program titled Unduplicated Count of Individuals Achieving One or More Outcomes. You will add this program, select FNPI 7a and fill out the program information just as you do for the other programs. This is where you will report on the total number of clients who reported achieving one or more outcomes across your entire agency.

Unduplicated Count of Individuals Achieving One or More Domains ▼

Do you use TANF funds in this program? ☐ Yes ☒ No

Initiative: [FNPI7 Outcomes Across One or More Domains - FNPI 7a](#) Status: Current Status set to Approved on 07/17/2020

Add New Save data for Unduplicated Count of Individuals Achieving One or More Domains Submit all initiatives for Unduplicated Count of Individuals Achieving One or More Domains

☐ FNPI ☐ CNPI

Describe the program.  
Give details on any ways it relates to other programs offered at the agency, and any ties to community initiatives or other community partner programs/services

To Add CNPI, when you click CNPI and “add new” the CNPI sheet will populate. The Community Initiative status sheet will populate on this page. Once complete, click save at the bottom of the form.

← → va.csbgreporter.com/Pages/NPI/Programs/ Strategies Only Create PDF

\* Initiative Name:

Initiative Year:

Problem Identification:

Goal:

CSBG Community Domain:

Ultimate Expected Outcome:

Add Need Addressed Description Locality

Choose a Need

Identified Community:

Expected Duration:

Partnership Type:

Partners:

Strategic Domain:

Strategies:

Progress on Outcomes/Indicators:

Impact Of Outcomes:

Indicators To Report:

Target:

Final Status:

Lessons Learned:

My Comments [Show History](#) Staff Comments

va.csbgreporter.com/Pages/NPI/Programs/

Test Program ▼

Do you use TANF funds in this program? ☐ Yes ☒ No

Initiative Status

Add New Save data for Test Program

☐ FNPI ☐ CNPI

Describe the program.  
Give details on any ways it relates to other programs offered at the agency, and any ties to community initiatives or other community partner programs/services

test2 ▼

Do you use TANF funds in this program? ☐ Yes ☒ No

Initiative Status

[Community test](#) Current Status set to Saved on 03/15/2019

Add New Save data for test2 Submit all initiatives for test2

☐ FNPI ☐ CNPI

Describe the program.  
Give details on any ways it relates to other programs offered at the agency, and any ties to community initiatives or other community partner programs/services

## 2025-26 Community Action Plan & Reporting Manual

### Section 1: CAP PLAN DEVELOPMENT

## Financials

Under the budget page there are 4 budget tabs. These are completed annually and due May 1<sup>st</sup> with the Community Action Plan.

The first is the Federal Budget. You will breakdown your Federal CSBG allocation into the categories on the Federal Budget Tab.

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Federal Budget										
BreakdownCategory	Salaries & Wages	Fringe Benefits	Professional Services	Travel	Space Costs & Rent	Consumable Supplies	Equipment Lease/Purchase	Indirect Costs	Other Costs	Totals
Employment	\$100,001.00	\$1.00	\$1.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100,003.00
Education and Cognitive Development	\$2.00	\$2.00	\$2.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6.00
Income, Infrastructure, and Asset Building	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Housing	\$3.00	\$3.00	\$3.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9.00
Health and Social/Behavioral Development	\$4.00	\$4.00	\$4.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$12.00
Civic Engagement and Community Involvement	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Services Supporting Multiple Domains	\$45,675.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$45,675.00
Linkages	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Agency Capacity Building	\$1,560.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,560.00
Other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>	<b>\$147,245.00</b>	<b>\$10.00</b>	<b>\$10.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$147,265.00</b>

[Save](#)

The second tab is the TANF budget. You will breakdown your TANF allocation into the categories on the TANF Budget Tab.

[Page Tools](#) [Create PDF](#)

TANF Budget										
BreakdownCategory	Salaries & Wages	Fringe Benefits	Professional Services	Travel	Space Costs & Rent	Consumable Supplies	Equipment Lease/Purchase	Indirect Costs	Other Costs	Total
Employment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Education and Cognitive Development	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Income, Infrastructure, and Asset Building	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Housing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Health and Social/Behavioral Development	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Civic Engagement and Community Involvement	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Services Supporting Multiple Domains	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Linkages	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Agency Capacity Building	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

[Save](#)

The third tab is the Agency Budget. The agency budget pull the information from the Federal Budget tab and the TANF budget tab. On this tab you will enter the non-CSBG match and the other resources. The non-CSBG match needs to total 20% of the CSBG and TANF allocation.

[Page Tools](#) [Create PDF](#)

Current Year Budget					
CategoryName	Federal CSBG	Non-CSBG Match	Other Resources	TANF	Totals
Salaries & Wages	\$147,245.00	\$0.00	\$0.00	\$0.00	\$147,245.00
Fringe Benefits	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00
Professional Services	\$10.00	\$0.00	\$0.00	\$0.00	\$10.00
Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Space Costs & Rent	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Consumable Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Equipment Lease/Purchase	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>	<b>\$147,265.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$147,265.00</b>

**Non-CSBG Match** = Non-CSBG Match < 20% of Federal CSBG + TANF amount

My Comments [Show History](#) StaffComments

[Save](#) [Submit for review](#)



The fourth tab is the match page. On this page the match totals per category will populate from the agency budget tab. You will need to enter the description of proposed match, if you are using in-kind you will enter a description of how you determined the in-kind match rate.

This new page will populate a new quarterly report for match documentation.

Page Tools Create

Federal Budget TANF Budget Agency Budget **Match** Additional File Uploads

#### Match

CategoryName	Non-CSBG Match	DescriptionOfProposedMatch	HowWasMatchRateDetermined
Salaries & Wages	\$0.00		
Fringe Benefits	\$0.00		
Professional Services	\$0.00		
Travel	\$0.00		
Space Costs & Rent	\$0.00		

## 2025-26 Community Action Plan & Reporting Manual

### Section 1: CAP PLAN DEVELOPMENT

The fifth tab is the Additional files upload page. These are all documents that you will upload as part of the Community Action Plan.

When you click on Choose file for each file the file search box will populate, and you will be able to upload the file from your computer.

va.csbgreporter.com/Pages/Budget/

Welcome testing record! [Logout](#)  
My Agency  
State & Program Year: Virginia | 2019-2020

Page Tools [Create PDF](#)

**Additional File Uploads**

File Name	Upload your file	Download existing version to view or apply changes and re-upload	Page Citation
Personnel Policies	<a href="#">Choose File</a> No file chosen	<a href="#">soTimesheetSubcategoryReport.txt</a>	asdf
Fiscal Management Policies	<a href="#">Choose File</a> No file chosen	<a href="#">testUpload1.txt</a>	
Agency Bylaws	<a href="#">Choose File</a> No file chosen	<a href="#">testUpload1.txt</a>	
Copy of Latest IRS Form 990	<a href="#">Choose File</a> No file chosen		
List of Grantee Board of Directors (A-03)	<a href="#">Choose File</a> No file chosen		
ROMA Implementer Workplan	<a href="#">Choose File</a> No file chosen		

File Name	Upload your file	Download existing version to view or apply changes and re-upload	Upload Date
Additional Fiscal Information (formerly A-07 and A-09, now one spreadsheet)	<a href="#">Choose File</a> No file chosen		
Agency Proof of Bonding	<a href="#">Choose File</a> No file chosen		
CSBG Property Inventory	<a href="#">Choose File</a> No file chosen		
Copy of Comprehensive or Agency-Wide Budget	<a href="#">Choose File</a> No file chosen		

My Comments

State's Last Comments [Show History](#)

[Save](#)

Once you upload the files, don't forget to hit the save button.

File name:

All Files (\*.\*)

[Open](#) [Cancel](#)

va.csbgreporter.com/Pages/Budget/

Welcome testing record! [Logout](#)  
My Agency  
State & Program Year: Virginia | 2019-2020

Page Tools [Create PDF](#)

**Additional File Uploads**

File Name	Upload your file	Download existing version to view or apply changes and re-upload	Upload Date
Additional Fiscal Information (formerly A-07 and A-09, now one spreadsheet)	<a href="#">Choose File</a> No file chosen		
Agency Proof of Bonding	<a href="#">Choose File</a> No file chosen		
CSBG Property Inventory	<a href="#">Choose File</a> No file chosen		
Copy of Comprehensive or Agency-Wide Budget	<a href="#">Choose File</a> No file chosen		

My Comments

State's Last Comments [Show History](#)

[Save](#)

### Board Information Section

There are 3 tabs in the board information section. These need to be reviewed when you submit the Community Action Plan and edited throughout the year when there are changes.

#### Board Roster

Enter the total number of members per your bylaws. This will then calculate the total seats per sector

Standards★  
Community Action Plan  
Financials  
Board Information  
Board Roster  
Meeting Schedule  
Board Minutes  
Admin  
Help  
Reporting  
Supplemental

Board Roster

List of Grantee Board of Directors ▼

Total number of board members, as stated in current bylaws 15

Provide the name, email address, current term of office, each committee assignment, and Board Officer role (if applicable) for each member of the board of directors by sector in the chart below.

Elected Public Officials

Total # of Seats 5

Total # of Vacancies 4

Name	Email Address	Current Term	Committee Assignment	Board Officer Role	Designee	Elected Official or Government Entity Represented
3rd line	3rd line	3rd line	3rd line		<input type="radio"/> Yes <input type="radio"/> No	
					<input type="radio"/> Yes <input type="radio"/> No	

Democratically-Selected Representatives of the Low-Income Community

Total # of Seats 5

Total # of Vacancies 4

Name	Email Address	Current Term	Committee Assignment	Board Officer Role
danvarley@oncorpsreports.c	danvarley@oncorpsreports.c	danvarley@oncorpsreports.c	danvarley@oncorpsreports.c	danvarley@oncorpsreports.c

Private Sector Representatives

Total # of Seats 5

Total # of Vacancies 4

Name	Email Address	Current Term	Committee Assignment	Board Officer Role
danvarley@oncorpsreports.c	danvarley@oncorpsreports.c	danvarley@oncorpsreports.c	danvarley@oncorpsreports.c	danvarley@oncorpsreports.c

Add all member information in each section, click add after entering information and a new line will populate. # of Vacancies will change based on how many members you have listed.

#### Meeting Schedule

Enter all scheduled meetings for the upcoming program year. Click add and new line will populate.

Standards★  
Community Action Plan  
Financials  
Board Information  
Board Roster  
Meeting Schedule  
Board Minutes  
Admin  
Help

Board Meeting Schedule

Meeting Setup ▼

Please enter dates for all scheduled board meetings for the program year from July, 2020 - June, 2021. If r

Meeting Date

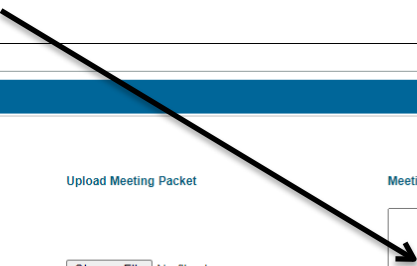
Friday April 10 2020  
Friday April 17 2020  
Thursday April 02 2020  
Thursday May 21 2020  
Friday April 03 2020  
Friday April 24 2020  
Wednesday April 29 2020

Add

Comments and History ▼

### Board Minutes

The dates you entered in the meeting schedule page will populate on the minutes page. Upload minutes and board packet for each meeting as it becomes available. If you did not hold a scheduled meeting, please type in the notes box.



	Meeting Date	Upload Minutes	Upload Meeting Packet	Meeting Notes
	Thursday April 02 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
	Friday April 03 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
	Friday April 10 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
	Friday April 17 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
	Friday April 24 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	

### ROMA Implementer

The last section of the Community Action Plan is the ROMA Implementer Workplan.

In this section your ROMA implementer will fill out the planned activities for each quarter. There is also a section where the implementer can upload documents you would like to share with our office. **This is where you will upload the measurement tools for the year.**

[Page Tools](#) [Create](#)

s

Community Action Plan

Related Linkages

Implementer

Economic Goals

Needs

Strategic Initiative

Notes

Information

Attachments

History

Initial

ROMA Implementer 2024

**Roma Implementer Planned Activities** ▼

**Item 1: Identification of ROMA Professional**

- Who's submitting the plan?
- Who's responsible for each activity of the plan?

(NOTE: If an agency has multiple implementers, list each person and coordinating activity)

**Item 2: Yearly Goals and Objectives**

- What are your overall goals and objectives for improved use of ROMA principles and practices for the year as a ROMA certified Implementer/Trainer?
- How do these goals align with the organization's or community's strategic priorities?

**Item 3: ROMA-Specific Activities:**

- Write in detailed which ROMA- specific activities will you be engaged in during the year? (e.g., agency community needs assessment, strategic plan, board collaboration, program planning or evaluation, facilitating ROMA training sessions, etc.).
- As an implementer/ trainer, who are you sharing ROMA principles with within your organization (i.e., staff, upper management, and board of directors) and how is that accomplished?

## CAP Plan Tips & Information



### **Check the Date Before You Start!**

Don't forget to toggle to new year – the system will take you to what year you were in when you last logged out. You will need to be mindful of what year you are in when you log in.



### **Needs and Strategic Goals Pages**

You can make edits or additions as needed. You will not be able to delete a need or strategic goal if it is tied to a program. You will need to delete it from the program if you need to delete the need or strategic goal.



### **Gaps and Linkages**

This page you can edit, add, or delete as needed. Gaps are not tied to any other area in the plan.



### **Programs Tab**

Everything is pulled over from the prior year; you can edit the title of a program if needed at the top of the page. If you want to delete a program, you must remove any outcomes. Nothing else has changed on the main page. You must still provide a description of the program and check whether the program uses TANF Funds.

When you click into the outcome indicator, you will notice one change. You will see the services have pulled over, but there is no target for the service. You will no longer need to target for services. We still want you to identify which services are provided for each program because this helps us better understand the program. Targets, however, are not needed because, for the reports we submit to OCS, only service totals in general are required.

They do not want to see services broken down by program. Therefore, when you report moving forward (next year) you will report services as a total from the agency. If you provide mentoring in Head Start and Healthy Families, the service total will be the combined total. For your own agency board reports you may still want to break down service totals by program but that is no longer needed for us.

Don't forget to hit submit once all initiatives are entered per program. You can also hit submit all at the bottom of the page.

Outcomes across Multiple Domains - FNPI 7a – All Community Action Plans should have a program titled Unduplicated Count of Individuals Achieving One or More Outcomes. You will add this program, select FNPI 7a and fill out the program information just as you do for the other programs. This is where you will report on the total number of clients who reported achieving one or more outcomes across your entire agency.

## CAP Plan Tips & Information Continued



### **ROMA Workplan**

When you open your page, you will be able to enter your workplan (ROMA Activities per quarter) and hit submit. This has a history built in, so you can see when it has been submitted and approved. **In this section you will also upload your measurement tools, we are looking for 3 measurement tools.**



### **Financial Section**

You will enter your federal and TANF budgets – The CSBG Office will send new year fiscal totals, typically in March each year. In the third tab you will enter your match and other resources. The 4<sup>th</sup> tab is the new match tab where you will describe match for the upcoming year. The 5<sup>th</sup> tab is the additional file uploads page. This page contains the items we want you to upload annually. The CSBG Office will email the additional fiscal information spreadsheet to Finance Directors.



### **Board Information Tab**

**Board Roster** – the board roster pulled over from the prior year. Please make changes as needed. You will start by entering the total number of members per your bylaws. Then you will enter the total number of seats per sector. You do not enter a number into the total number of vacancies section. That will populate on its own. You will enter each member's information in this sheet, click add to get a new line to populate. Delete as needed. This is due annually, but we do expect you to update this sheet throughout the year. When members are added or leave throughout the year update this sheet. There is history built in so we can see when the sheet was updated and if we notice it is not updated in several months, we will ask some questions.



#### Reporting – Progress

Each quarter you will have the ability to enter the data for that quarter. Once you enter the information for that quarter hit submit and it will lock it for staff to review. You will fill out this form for all 4 quarters.

Quarterly Progress reports are found on this progress page.

This is an example of a quarter that was approved:

This is an example of a quarter that was submitted:

This is an example of a quarter that is open for you to enter data:

Community Action Plan	Initiative Name	Quarter 1	Quarter 2	Quarter 3	YTD Actual	Target	Percent Difference	My Comments	State	Staff Comments
Financials	FNPI1 Employment - FNPI 1b	17	9	0	26	154	16.88%	<a href="#">View/Edit</a>		
Board Information	FNPI1 Employment - FNPI 1c	0	0	0	0	168	0.00%	<a href="#">View/Edit</a>		
Admin	<b>Save</b>									
Help	<b>Aspire-Learning Rocks!</b>									
Reporting	FNPI2 Education and Cognitive Development	72	27	0	99	0		<a href="#">View/Edit</a>		
Progress	FNPI2 Education and Cognitive Development - FNPI 2c	0	0	0	0	36	0.00%	<a href="#">View/Edit</a>		
ROMA Implementer Progress	FNPI 2c.1 Early Childhood Education (ages 0-5)	0	0	0	0					
4th Quarter Report	FNPI 2c.2 1st grade-8th grade	0	0	0	0					
	FNPI 2c.3 9th grade-12th grade	0	0	0	0					
Supplemental	<b>Save</b>									
	<b>Ayuda Legal Services</b>									
	Initiative Name	Quarter 1	Quarter 2	Quarter 3	YTD Actual	Target	Percent Difference	My Comments	State	Staff Comments
		7	6	0	13	40	32.50%	<a href="#">View/Edit</a>		
	<b>Save</b>									
	<b>Client Service -B2I</b>									
	Initiative Name	Quarter 1	Quarter 2	Quarter 3	YTD Actual	Target	Percent Difference	My Comments	State	Staff Comments
	<b>Save</b>									
	<b>Dental clinic</b>									
	Initiative Name	Quarter 1	Quarter 2	Quarter 3	YTD Actual	Target	Percent Difference	My Comments	State	Staff Comments
	FNPI5 Health and Social/Behavioral - FNPI 5a.1	28	32	0	60	100	60.00%	<a href="#">View/Edit</a>		
	<b>Save</b>									
	<b>Eathers in Touch</b>									

## Quarterly Match Report

This report will pull the non-CSBG match descriptions over from the match section of the CAP Plan. You will enter quarterly the total amount of match received that quarter and a description of the match that quarter.

standards  
Community Action Plan  
Financials  
Budget★  
Budget Modifications  
Expenses★  
Quarterly Fiscal Report★  
Board Information  
Admin  
Help  
Reporting  
Supplemental

Match for 1st Quarter ▼  
  

Current Year Budget

CategoryName	Non-CSBG Match	Description of Proposed Match Sources. Please describe the type of match (cash or in-kind, donations, etc.)	If match is in-kind, how was the rate determined? What Documentation will be provided at end of year to support match.
Salaries & Wages	\$175,000.00		
Fringe Benefits	\$64,009.00		
Professional Services	\$7,383.00		
Travel	\$8,145.00		
Space Costs & Rent	\$122,100.00		

Current Expenses

Non-CSBG Match

## Quarterly Report- ROMA Implementer Progress

The quarterly ROMA implementer progress report allows ROMA Implementers to share their accomplishments from each quarter.

ROMA Implementer

ROMA Implementation Plan ▼

Period	Actual Activities for ROMA Implementer (Reported each quarter)
1st Quarter	Test this
2nd Quarter	

upload Documentation ▼

File	Notes	Period Uploaded

#### 4th Quarter Report- Family NPI

The Family NPI form is due with the 4th quarter report. On this page the Target column pulls from the Community Action Plan, the Actual Results pulls from the Progress page, it will automatically total the numbers.

The only information that needs to be entered on this page is the 1st column, *the number of participants served*.

va.csbgreporter.com/pages/reporting/module4/

Page Tools Create PDF

Unlocked by Agency 1 Staff on 09/03/2019 at 12:13 PM

#### FNPI1 Employment

	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [(III/I) = IV] %	V.) Performance Target Accuracy [(III/II) = V] %
FNPI 1g The number of unemployed adults who obtained and maintained employment for at least 180 days	<input type="text"/>	0.00	0.00	0%	0%
FNPI 1h The number of employed participants in a career-advancement related program who entered or transitioned into a position that provided increased income and/or benefits.	<input type="text"/>	0.00	0.00	0%	0%

Save

#### FNPI2 Education and Cognitive Development

	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [(III/I) = IV] %	V.) Performance Target Accuracy [(III/II) = V] %
FNPI 2a The number of children (0 to 5) who demonstrated improved emergent literacy skills.	<input type="text" value="2.00"/>	35.00	35.00	1750%	100%
FNPI 2c The number of children and youth who demonstrated improved positive approaches toward learning, including improved attention skills. (auto total)	<input type="text" value="55.00"/>	44.00	44.00	90%	100%

At the bottom of the FNPI Page service counts will also automatically total over from the Progress page.

va.csbgreporter.com/pages/reporting/module4/

#### Services

##### Employment Services (SRV 1)

Skills Training and Opportunities for Experience (SRV 1a-j)	Unduplicated Number of Individuals Served
SRV 1a Vocational Training	45.00
SRV 1b On-the-Job and other Work Experience	0.00
SRV 1c Youth Summer Work Placements	10.00
SRV 1d Apprenticeship/Internship	85.00
SRV 1f Job Readiness Training	33.00
Career Counseling (SRV 1g-h)	Unduplicated Number of Individuals Served
SRV 1g Workshops	60.00
Job Search (SRV 1i-n)	Unduplicated Number of Individuals Served
Post Employment Supports (SRV 1o-p)	Unduplicated Number of Individuals Served

**4th Quarter Report – Community NPI** – The information on this sheet will automatically pull from the Community Action Plan and Progress page. There is nothing that needs to be entered on this page.

va.csbgreporter.com/pages/reporting/module3/

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4th Quarter Report

Family NPI

Community NPI

Demographics

Financials

#### CNP1 Employment

	II.) Target (#)	III.) Actual Results (#)	IV.) Performance target accuracy
CNP1 1b Number of job opportunities maintained in the identified community.	0.00	0.00	0%

#### CNP12 Education & Cognitive Development

	II.) Target (#)	III.) Actual Results (#)	IV.) Performance target accuracy
CNP1 2c Number of new Early Childhood Screenings offered to children (ages 0-5) of families with low-incomes in the identified community.	155.00	358.00	230.97%

#### CNP13 Income & Asset Building

#### CNP14 Housing

#### CNP15 Health & Social/Behavioral

### 4th Quarter Report – Demographics Individual and Families

There are several dropdown tabs within the demographic's pages – both the Individual and Families pages operate the same. *Please Note: There is logic built into these pages, which will not allow submission unless all areas are filled out and totally correctly. If there is an error, you will see a red error message populate where a correction is needed.*

va.csbgreporter.com/pages/reporting/demographics/?category=1

Community Action Plan

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4th Quarter Report

Family NPI

Community NPI

Demographics

Individuals

Families

Financials

#### Number of unduplicated individuals receiving services this reporting period

Number of Individuals	
Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained	150
Total	150

#### Number of Individuals Not Included in the Totals Above

Number of Individuals	Action
test 0	Remove
Total 0	

#### Gender

Gender	Number of Individuals
Male	110
Female	0
Other	0
Unknown/not reported	40
Total	150

Open and collapse each section by clicking on blue box

Enter your information in each of the sections.

At the end of both demographics forms you have the option to save or submit. **Save** will allow you to come back and make changes. **Submit** will lock it for CSBG Staff to review.

va.csbgreporter.com/pages/reporting/demographics/?category=1

Military Status ▶  
Work Status ▼

Work Status	Number of Individuals
Employed Full-Time	0
Employed Part-Time	0
Migrant Seasonal Farm Worker	0
Unemployed (Short-Term, 6 months or less)	0
Unemployed (Long-Term, more than 6 months)	0
Unemployed (Not in Labor Force)	0
Retired	0
Unknown/not reported	150
<b>Total</b>	<b>150</b>

My Comments

StaffComments

Save

Submit for review

Cancel

### 4th Quarter Report – Financials Expenditures

va.csbgreporter.com/pages/reporting/module2/expenses/

Standards  
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Community NPI  
Demographics  
Financials  
Expenditures  
Capacity Building  
CSBG Resources

#### CSBG Expenditures Domains

Budget for 2018-2019 was unlocked on 09/03/2019

BreakdownCategory	Federal CSBG
Employment	\$15,000.00
Education and Cognitive Development	
Income, Infrastructure, and Asset Building	
Housing	
Health and Social/Behavioral Development	
Civic Engagement and Community Involvement	
Services Supporting Multiple Domains	
Linkages	
Agency Capacity Building	\$25,000.00
Other	
<b>Totals</b>	<b>\$40,000.00</b>

Of the CSBG funds reported above, report the total amount used for Administration:

#### Details on Agency Capacity Building Activities Funded by CSBG

Please identify which activities were funded by CSBG under Agency Capacity Section B. Please check all that apply.

- ☒ Community Needs Assessment
- ☒ Data Management
- ☐ Strategic Planning
- ☐ Training and Technical Assistance
- ☒ Other

Please specify Other Activities funded by CSBG under Agency Capacity:

test

My Comments [Show History](#)

Staff Comments

[Save](#) [Submit for review](#)

If any funding is listed in agency capacity building you will need to fill out the agency capacity building checklist.

The total in this box should match the total amount of CSBG Expended in the program year.

If you click on other you will not be able to submit until you specify the other activities in the narrative box.

#### 4th Quarter Report – Capacity Building

This page is very similar to the Demographics pages. You will enter the information in each of the categories. You can also open and collapse any section of this by clicking on the blue tabs. You will also be able to save or submit at the bottom of the page.

[va.csbgreporter.com/pages/reporting/module2/capacitybuilding/](#)

Welcome testing record! [Logout](#)  
My Agency  
State & Program Year: Virginia | 2018-2019 ▼

Page Tools [Create PDF](#)

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4th Quarter Report

Family NPI

Community NPI

Demographics

Financials

Expenditures

Capacity Building

CSBG Resources

Hours of Agency Capacity Building (e.g training, planning, assessment): ▼

Hours of Board Members in capacity building activities	3
Hours of Agency Staff in capacity building activities	2
Total	5

Volunteer Hours of Agency Capacity Building (e.g. program support, service delivery, fundraising) ▼

Total number of volunteer hours donated to the agency	4
Total	4

Of the above, the total number of volunteer hours donated by individuals with low-incomes

Total number of volunteer hours donated by individuals with low-incomes	0
Total	0

The number of staff who hold certifications that increase agency capacity to achieve family and community outcomes, as measured by one or more of the following ▼

Number of Nationally Certified ROMA Trainers	5
Number of Nationally Certified ROMA Implementers	0
Number of Certified Community Action Professionals (CCAP)	4
Number of Staff with a child development certification	0
Number of Staff with a family development certification	0
Number of Pathways Reviewers	4
Number of LEED Risk Certified assessors	0
Number of Building Performance Institute (BPI) certified professionals	0



#### 4th Quarter Report – CSBG Resources

You will enter the information in each of the categories. You can also open and collapse any section of this by clicking on the blue tabs. You will also be able to save or submit at the bottom of the page.

[Community Action Plan](#)
[Financials](#)
[Admin](#)
[Help](#)
[Reporting](#)
[Progress](#)
[4th Quarter Report](#)
[Family NPI](#)
[Community NPI](#)
[Demographics](#)
[Financials](#)
[Expenditures](#)
[Capacity Building](#)
[CSBG Resources](#)

va.csbgreporter.com/pages/reporting/module2/csbgresources/

### Fiscal 2018 allotment

Amount of FY 2018 CSBG allocated to reporting entity	150000
Total	150000

### Federal Resources Allocated (Other than CSBG)

**Weatherization (DOE)**

Weatherization (DOE) (include oil overcharge \$\$)	150000
Total	150000

**Health and Human Services (HHS)**

LIHEAP - Fuel Assistance (include oil overcharge \$\$)	0
LIHEAP - Weatherization (include oil overcharge \$\$)	0
Head Start	0
Early Head Start	0
Older Americans Act	0
Social Services Block Grant (SSBG)	0
Medicare/Medicaid	0
Assets for Independence (AFI)	0
Temporary Assistance for Needy Families (TANF)	0
Child Care Development Block Grant (CCDBG)	0
Community Economic Development (CED)	0
Total	0

**Other HHS Resource Description**

Description	CFDA #	Action
acf	45214	12500
		<a href="#">Add</a>
Description		Action
hhs	291893	0
health care	45264	0
test	43212	1222
test2	12345	123
testing	4526	0
testing	12345	0

### Board Minutes

The dates you entered in the meeting schedule page will populate on the minutes page. Upload minutes and board packet for each meeting as it becomes available. If you did not hold a scheduled meeting please type in the notes box.

Standards ▼	Board Minutes			
Community Action Plan	Meeting Information ▼			
Financials	Meeting Date	Upload Minutes	Upload Meeting Packet	Meeting Notes
Board Information	Thursday April 02 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
Board Roster	Friday April 03 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
Meeting Schedule	Friday April 10 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
Board Minutes	Friday April 17 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
Admin	Friday April 24 2020	<a href="#">Choose File</a> No file chosen	<a href="#">Choose File</a> No file chosen	
Help				
Reporting				
Supplemental				

## CSBG Reporting Tips

The CSBG Report is a comprehensive report—it should contain all programs\* and services your agency provides. The Community Action Plan informs the report. In your community action plan you enter programs with outcomes and services, which are then transferred to the progress report page.

\*Public CAAs should report everything under their board's direction. The sub-grantees would be under the board's direction. However, not necessarily the entire subcontractor's agency, only the work they are doing with CSBG or TANF funds.

## Outcomes or FNPI's

CSBG Eligible Entities should only report on FNPIs when the change a customer made or the outcome they achieved was directly related to or assisted by programs or activities of the CSBG Eligible Entity. **An outcome obtained by a referral may only be counted if the CSBG Eligible Entity is engaged with the participant through a program or activity supported by the CSBG Eligible Entity** (i.e., when the participant is enrolled in an intensive case management program). Do not count FNPIs for changes that were secured by the participant independent of the CSBG Eligible Entity.

All outcomes reported should have a **clear measurement tool** associated with the outcome. All outcome indicators in the housing domain pertain to **households**. However, this is an unduplicated count of individuals. Report the **individuals in the households** who obtain these outcomes. If a family of four obtained the outcome, then report four (4). All other outcomes indicators pertain to the individual so only report on the individual who achieved that outcome.

## FNPI 7a

The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains. Report any individual who achieves one or more outcomes across any domain in this report. This is an unduplicated count—the individual should only be counted one time. The result will be an unduplicated (each individual counted once) count of all the individuals across the CSBG Eligible Entity who achieved one or more FNPIs. This number should not be greater than the total number of outcomes in a given quarter. Learn more about FNPI 7a on pages 37-38: [https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual\\_V2\\_12\\_7\\_18\\_F.pdf](https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual_V2_12_7_18_F.pdf)

## Reporting Outcomes

Each quarter you will report on the number of individuals who achieved outcomes that quarter and the number of individuals who received a service that quarter. This is an unduplicated count of individuals. If a person achieved multiple outcomes or services, they would be counted under each service or outcome. However, if a person received the same service or achieved the same outcome in subsequent quarters they would not be counted in those other quarters.

Reporting Outcomes Example		
<b>FNPI 2a.</b> The number of children (0 to 5) who demonstrated improved emergent literacy skills.		
<b>Measurement tool:</b> The agency conducted an assessment in October and in April to determine improved literacy skills for a class of 30 students.		
Report	# Reported	Explanation
Quarter 1	0	There was no assessment in Q1.
Quarter 2	25	Students who passed the assessment in October would be counted – for this example let's say 25 students passed.
Quarter 3	0	There was no assessment in Q3.
Quarter 4	4	Students who passed the assessment in April and <b>did not</b> pass the assessment in October would be counted. For this example, 28 students passed, but only 4 of those were students not counted in Q2. You would report 4 students.
Annual Report	29	The total would add Q2+Q4, or 25+4 = 29. Thus, this count is <b>unduplicated</b> .

In the Quarter 4 FNPI page, the numbers from all four quarters will be added together. So, for FNPI 2a you would see a total of 29 (25 in Q2 and 4 in Q4). In that year a total of 29 children demonstrated improved literacy skills.

## Services

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

If a participant received the same service more than once during the reporting period, only report that participant one time. The same participant may be reported in more than one service. Learn more about service on pages 39-42: [https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual\\_V2\\_12\\_7\\_18\\_F.pdf](https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual_V2_12_7_18_F.pdf)

## Reporting Services Provided

In the same program as above, the services that were selected as leading to the outcome were:

- SRV 2g Literacy/English Language Education
- SRV 2c Other Early-Childhood (0-5 yr. old) Education
- SRV 2a Early Head Start

If you had 30 children in the class starting in August, you would report 30 in Q1 for each of these services. If no new children entered the class for the remainder of the year, Q2, Q3 and Q4 would be 0. If new children entered the class in one of the other quarters, you would enter that number in the applicable quarter. If a student left the class at any point during the year, there is no need to report that.

Reporting Outcomes Example		
SRV 2g. Literacy/English Language Education		
Report	# Reported	Explanation
Quarter 1	30	30 students began class in August.
Quarter 2	0	There are still 30 students, but no new students joined the class this quarter.
Quarter 3	1	A student left, and a new one joined. There are still 30 students total, but there is <b>1 new</b> student. The loss of a student is not reported.
Quarter 4	0	No new students.
Annual Report	31	This is the total, unduplicated number of students provided service in this year.

This same count would apply to all of the three services, since each service is provided via this class.

## Service Under Multiple Outcomes

If you had the same service under multiple programs or outcomes, you will report the total number of individuals receiving that service on the progress report.

For example, if SRV 3b. Financial Coaching/Counseling was listed under 3 different housing programs, and the list of participants for each program was **different** you would total those participants and report the total number under SRV 3b. See FNPI Reporting Page for Quarter 4, pgs 8-9 [https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual\\_V2\\_12\\_7\\_18\\_F.pdf](https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual_V2_12_7_18_F.pdf) for more information.

## Key Data in Your Report

Number of Participants Served in program(s) (#) – this is the total people served in that program at any point throughout the year (this is entered in Q4 on the FNPI page). This number will be equal to or greater than the actual results.

- **Target (#)** – this number is auto generated from your Community Action Plan.
- **Actual Results (#)** – this number is auto generated from the four quarters of your progress report.
- **Percentage Achieving Outcome** [III/ I = IV] (% auto calculated)
- **Performance Target Accuracy** (III/II = V] (% auto calculated)

## Reporting Demographics (All Characteristics Report)

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

To obtain unduplicated counts, a CSBG Eligible Entity will need to have a system that distinguishes the characteristics for each individual or household. To obtain an unduplicated count, a unique identifier will be needed at the individual level. While some individuals and households may be served by several programs within a reporting year and thus entered into multiple data systems (e.g., LIHEAP, WIC, etc.), they must be reported as unduplicated individuals and unduplicated households in this report. Learn more on pages [42-54](#).

# CSBG Measurement Tool Toolkit

## What is a measurement tool?

Evidence or a way to document that a service or strategy was provided, and an outcome was achieved. (NOTE: Measurement tools must be applied with consistent processes and procedures to verify outcomes and outputs.)

## Why You Should Measure Outcomes and Outputs

Measuring impact is essential because it helps you illustrate the actual difference your nonprofit makes by fulfilling its mission. The National Council of Nonprofits encourages you to identify what “success” looks like, develop a plan to get there, collect data to measure outcomes, and communicate your findings.

You should know why you’re measuring the impact of your programs. Think about what your findings will help you accomplish. First, are you measuring for management or for accountability?

**Measuring for management:** Often referred to as “monitoring,” this approach focuses on processes, efficiency, and execution (i.e. the number of participants). The data is usually collected and analyzed more frequently, on a monthly basis.

**Measuring for accountability:** Otherwise known as reporting and “evaluation,” this approach focuses on the long-term effects and information needed to support future planning. The data typically pertains to outcome and impact statistics and may be collected and analyzed less frequently, on a semi-annual or annual basis.

## Why Measurement Matters

*Why should you measure outcomes?* Here are two of the most important reasons:

1. **Funders expect measurable outcomes.** Many grantmaking organizations require nonprofits to design and measure outcomes as part of the grant process. Funders are looking for accountability in where their financial support goes. They want to make sure your program delivers on what it says it’s going to do.
2. **Measuring outcomes helps your organization stay on track and focus on what really matters—bringing about positive change.** By measuring outcomes, you can more clearly see if the work you are doing is accomplishing the goals you intend it to accomplish. If you find out it’s not, you can make changes to your program. This helps make your programs as effective as possible.



Design a measurement system or way to track your indicators. Figure out how you will collect the data described in your indicators. This might mean coming up with a measurement system yourself such as creating a survey that you give at the start and conclusion of the program. Finding a way to track your indicators might also mean taking advantage of data that is already being gathered.

*Why should you measure outputs?*

**Measuring outputs is important because you have to know what it was that you did that produced successful changes.**

Design a measurement system or way to track your services and strategies. Figure out how you will collect the data described in SRV and STR in the Annual Report. This might mean coming up with a measurement system yourself such as keeping sign in sheets, log of tangible assistance provided, or copies of vouchers/payments provided. Finding a way to track your output might also mean taking advantage of data that is already being gathered.

**Consistency is key** – ensure the same measurement tool is used within the program and staff are trained in using the tool.

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### Common Myths to Get Out of the Way Before You Start Planning

#### **Myth: Evaluation is a complex science. I don't have time to learn it!**

*No! Formal evaluation can be complex, but you can do some things that are easy and quick to learn that can tell you important things about what you are doing and what it means. Evaluation is just another way of saying "answering questions." And you will use your measurement tools and processes to gather data to find the answers.*

#### **Myth: It's an event to get over with and then move on!**

*No! Measurement and analysis of the data you get from the tools and process is an ongoing process. It takes months to develop, test and polish — however, many of the activities required to put measurement systems in place are activities that you're either already doing or could be doing as a part of your daily work.*

#### **Myth: Measurement is a whole new set of activities – we don't have the resources.**

*No! Most of the activities in a measurement process are normal management activities that need to be carried out anyway to evolve your organization to the next level.*

#### **Myth: There's a "right" way to do outcomes evaluation. What if I don't get it right?**

*No! Each outcomes evaluation process can be somewhat different, depending on the needs and nature of the organization and its programs. Consequently, each organization is the "expert" at collecting and analyzing their own data. Your evaluation can start with simple measurement activities, but then learn as you go along in your outcomes planning and implementation.*

**Myth: Funders will accept or reject my outcomes plan.**

*No! Enlightened funders will (at least, should?) work with you, for example, to polish your outcomes, indicators, and outcomes targets. Especially if yours is a new program, then you very likely will need some help — and time — to develop and polish your outcomes plan.*

**Myth: I always know what my clients need – I don't need outcomes evaluation to tell me if I'm really meeting the needs of my clients or not.**

*You don't always know what you don't know about the needs of your clients – a comprehensive assessment helps ensure that you always know the needs of your clients. This is where measurement processes begin. The Assessment sets up the planning process to establish structures so that you and your organization are very likely always focused on the current needs of your clients. The assessment and planning processes are strengthened by identifying appropriate measurement tools and processes before services are started. Also, you won't always be around – measuring outcomes will help ensure that your organization is always focused on the most appropriate, current needs of clients even after you've left your organization.*

**Myth: We don't have time to follow up after a service is delivered, so we just assume that an outcome occurred. So, I don't need any measurement tools or processes.**

*While receipt of a service could lead to an identified change, this is not always the case. Without follow up to measure if a change occurred, you can only report on the service provided.*

## Resources

- <https://blog.candid.org/post/impact-measurement-how-to-measure-your-nonprofits-impact/>
- [https://nascsp.org/wp-content/uploads/2021/01/Measurement-Tools-One-Pager\\_Final\\_10.20.20\\_draft-for-post.pdf](https://nascsp.org/wp-content/uploads/2021/01/Measurement-Tools-One-Pager_Final_10.20.20_draft-for-post.pdf)
- [https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual\\_V2\\_12\\_7\\_18\\_F.pdf](https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual_V2_12_7_18_F.pdf)

## Index of CSBG outcome indicators and example measurement tools

### FNPI 1a.

**The number of unemployed youths who obtained employment to gain skills or income.**

- Youth are defined as individuals aged 14-24.
- **Examples: Obtain a pay stub, obtain offer letter of employment.**
- *Note: FNPI 1a does not set any national requirements for how long a participant must be employed for the outcome to be valid. Temporary and seasonal employment (including summer youth employment) may be reported.*

### FNPI 1b.

**The number of unemployed adults who obtained employment (up to a living wage).**

- Adults, for the purpose of this report, are defined as individuals aged 25 and up.
- **Examples: Obtain a pay stub, obtain offer letter of employment.**
- *Note: When CSBG Eligible Entities do not collect income for the employment obtained and cannot verify if the participant obtained a job at or below a living wage, the participant should be reported here in "up to a living wage."*

### FNPI 1c.

**The number of unemployed adults who obtained and retained employment for at least 90 days (up to a living wage).**

- This indicator measures participants who obtained a job and demonstrates that the participants retained the job for at least 90 days and earned up to a living wage. **Examples: obtain pay stubs, letter from employer with start date/current date** *Note: Outcome data reported in FNPI 1c should also be reported in FNPI 1b. If a participant obtained and maintained a job for 90 days as a result of CSBG Eligible Entity assistance, this participant also qualifies for FNPI 1b (obtaining a job). This is true only if the participant obtained employment through the assistance of the CSBG Eligible Entity. If the Entity serves a participant who had already obtained a job on their own, and is assisting them only with maintaining employment, that participant would not be reported in FNPI 1b-d.*

### FNPI 1d.

**The number of unemployed adults who obtained and retained employment for at least 180 days (up to a living wage).**

- This indicator measures participants who obtained a job and demonstrates that the participants retained the job for at least 180 days and earned up to a living wage. **Examples: obtain pay stubs, letter from employer with start date/current date.** *Note: Outcome data reported in FNPI 1c should also be reported in FNPI 1b. If a participant obtained and maintained a job for 90 days as a result of CSBG Eligible Entity assistance, this participant also qualifies for FNPI 1b (obtaining a job). This is true only if the participant obtained employment through the assistance of the CSBG Eligible Entity. If the Entity serves a participant who had already obtained a job on their own, and is assisting them only with maintaining employment, that participant would not be reported in FNPI 1b-d.*

**FNPI 1e.**

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

- Examples: obtain pay stubs, offer letter from employer  
*Note: There is no single national “living wage.” Each state and/or local agency must define what constitutes a “living wage” in its service area. When reporting on indicators related to living wage, Community Action Agencies (CAAs) can provide their own definition, select from national or locally defined models, or work with their state to identify a shared definition. Count and report the number of program participants who are helped to reach or exceed local living wage thresholds. CAAs must identify the living wage definition used in the General Comments section. The Massachusetts Institute of Technology has developed the MIT Living Wage Calculator, a useful tool that estimates the living wage needed to support families using twelve unique family compositions.*

**FNPI 1f.**

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

- Examples: obtain pay stubs, letter from employer with start date and current date. *Note: Outcome data reported in this indicator, FNPI 1f, should also be reported in FNPI 1e. If a participant obtained a job earning a living wage as a result of CAA assistance and retained it for 90 days, this participant also qualifies for FNPI 1e (obtaining a job with a living wage). This is true only if the participant obtained employment through the assistance of a CSBG Eligible Entity. If the Entity serves a participant who had already obtained a job on their own, and is assisting them only with maintaining employment, that participant would not be reported in FNPI 1e-g.*

**FNPI 1g.**

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

- Examples: obtain pay stubs, letter from employer with start date and current date. *Note: Outcome data reported in this indicator, FNPI 1f, should also be reported in FNPI 1e. If a participant obtained a job earning a living wage as a result of CAA assistance and retained it for 90 days, this participant also qualifies for FNPI 1e (obtaining a job with a living wage). This is true only if the participant obtained employment through the assistance of a CSBG Eligible Entity. If the Entity serves a participant who had already obtained a job on their own, and is assisting them only with maintaining employment, that participant would not be reported in FNPI 1e-g.*

**FNPI 1h.**

**The number of employed participants in a career-advancement related program who entered or transitioned into a position that provided increased income and/or benefits.**

- Examples: obtain pay increase letter, pay stubs, increased benefits letters  
Note: if you report FNPI 1h, please break it down in the following sub-outcomes: FNPI 1h(1). Of the above, the number of employed participants who increased income from employment through wage or salary amount increase. Report the number of participants from the programs listed in FNPI 1h who increased their income specifically through a wage or salary increase. The increased income should be directly related to the advancement of skills obtained through the programs in FNPI 1h. Participants who increase their income should be reported in both FNPI 1h(1) and FNPI 1h.
- FNPI 1h(2). Of the above, the number of employed participants who increased income from employment through an increase in hours worked. Report the number of participants from the programs listed in FNPI 1h who increased their income specifically by increasing the number of hours worked. The increased hours should be directly related to the advancement of skills obtained through the programs in FNPI 1h. Participants who increased their income through increased hours should be reported in this indicators FNPI 1h(2) and FNPI 1h. If the participant increased their wage/salary and hours worked, then they should be reported in FNPI 1h, FNPI 1h(1) (wage/salary increase) and FNPI 1h(2) (hours increase).
- FNPI 1h(3). Of the above, the number of employed participants who increased benefits related to employment. Report the number of participants from the programs listed in FNPI 1h who increased their employment-related benefits. The increased benefits should be directly related to the advancement of skills obtained through the programs in FNPI 1h. Participants who increased their benefits should be reported in this indicator FNPI 1h(3) and FNPI 1h. If the participant increased their wage/salary, hours worked, and benefits, then they should be reported in FNPI 1h, FNPI 1h(1) (wage/salary increase), FNPI 1h(2) (hours increase), and FNPI 1h(3) (benefits increase).

**FNPI 2a.**

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

- *Emergent Literacy Skills refers to the knowledge and expertise or ability that lays the foundation for reading and writing for infants and toddlers.*
- Examples: Literacy Skills assessment: <https://www.doe.virginia.gov/teaching-learning-assessment/k-12-standards-instruction/english-reading-literacy/literacy>

**FNPI 2b.**

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

- Examples: School Readiness Assessment: <https://www.doe.virginia.gov/teaching-learning-assessment/early-childhood-care-education/school-readiness-copy>

**FNPI 2c.**

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

Examples: Observational Logs, report cards

[https://www.researchgate.net/publication/226636719\\_Positive\\_Approaches\\_to\\_Learning\\_in\\_the\\_Context\\_of\\_Preschool\\_Classroom\\_Activities](https://www.researchgate.net/publication/226636719_Positive_Approaches_to_Learning_in_the_Context_of_Preschool_Classroom_Activities)

**FNPI 2d.**

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

- Examples: Grade level entrance assessment: <https://www.doe.virginia.gov/teaching-learning-assessment/student-assessment>

**FNPI 2e.**

**The number of parents/caregivers who improved their home environments.**

- Examples: Observational Logs, checklist completed by client

**FNPI 2f.**

**The number of adults who demonstrated improved basic education.**

- *Basic education includes the basic skills adults need, such as reading, writing, math, English language proficiency, and problem solving, to be productive workers and citizens. This can also include the basic education needed as a prerequisite to obtain additional education.*
- Examples: pre/post assessments
- <https://www.doe.virginia.gov/teaching-learning-assessment/specialized-instruction/adult-education>

**FNPI 2g.**

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

- Examples: Obtain a copy of diploma/ certificate, or a declaration from school where diploma was received.

**FNPI 2h.**

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

- Examples: Obtain a copy of credential, certificate or degree, or declaration from school where credential was received.  
*(Note about indicator: Participants who are involved in CSBG Eligible Entity case management, coaching or other support programs who earned the above-mentioned certificate would qualify for this outcome)*

**FNPI 2i.**

**The number of individuals who obtained an associate degree.**

- Examples: Obtain a copy of associate degree, or declaration from school where associate degree was obtained. *(Note about indicator: Participants who are involved in CSBG Eligible Entity case management, coaching or other support programs who earned an associate degree would qualify for this outcome)*

**FNPI 2j.**

**The number of individuals who obtained a bachelor's degree.**

- Examples: Obtain a copy of bachelor's degree, or declaration from school to where bachelor's degree was obtained.  
*(Note about indicator: Participants who are involved in CSBG Eligible Entity case management, coaching or other support programs who earned a bachelor's degree would qualify for this outcome)*

**FNPI 3a.**

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

- Examples: Self-Assessment tool

**FNPI 3b.**

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

- Examples: Self-Assessment tool

**FNPI 3c.**

**The number of individuals who opened a savings account or IDA.**

- Examples: savings account documentation, or IDA documentation

**FNPI 3d.**

**The number of individuals who increased their savings.**

- Examples: bank statements showing increase in savings over time.

**FNPI 3e.**

**The number of individuals who used their savings to purchase an asset.**

- Examples: documentation showing purchase

**FNPI 3f.**

**The number of individuals who improved their credit scores.**

- Examples: Credit reports pulled at two different times

**FNPI 3g.**

**The number of individuals who increased their net worth.**

- *Net worth is defined as the total value of the participant's assets, minus the participant's total amount of debt.*
- Examples: Net worth Calculator completed at two points in time:  
<https://www.bankrate.com/smart-spending/personal-net-worth-calculator/>

**FNPI 3h.**

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

- Examples: Use of a pre and post financial wellbeing calculator or quiz.
- Example <https://www.consumerfinance.gov/consumer-tools/financial-well-being/>



**FNPI 4a.**

**The number of households experiencing homelessness who obtained safe temporary shelter.**

- Examples: Rental information, shelter logs

**FNPI 4b.**

**The number of households who obtained safe and affordable housing.**

- Examples: lease or mortgage documents

**FNPI 4c.**

**The number of households who maintained safe and affordable housing for 90 days.**

- Examples: rent or mortgage payments documentation

**FNPI 4d.**

**The number of households who maintained safe and affordable housing for 180 days.**

- Examples: rent or mortgage payments documentation

**FNPI 4e.**

**The number of households who avoided eviction.**

- Examples: rent or mortgage payments documentation, letter from mortgage/ rental company

**FNPI 4f.**

**The number of households who avoided foreclosure.**

- Examples: mortgage payment receipts, letter from mortgage company

**FNPI 4g.**

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

- Examples: health and safety inspection reports

**FNPI 4h.**

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

- Examples: energy bill, proof of installation of energy efficient materials, Weatherization Final Inspection Report and Client Sign Off Sheet; utilities bills pre and post service

**FNPI 5a.**

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

- Examples: Pre/Post test, observational logs, questionnaire.

**FNPI 5b.**

**The number of individuals who demonstrated improved physical health and well-being.**

- Examples: Self-Report Questionnaires -For Youth <https://youthrex.com/wp-content/uploads/2019/10/IPAQ-TM.pdf>
- Self-Report Activity Diaries/Logs
- Devices: Pedometers, Heart-Rate Monitors

**FNPI 5c.**

**The number of individuals who demonstrated improved mental and behavioral health and wellbeing.**

- Examples: Pre/post test, Confirmation from medical personnel

**FNPI 5d.**

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

- Examples: Pre/post test, Observational logs

**FNPI 5e.**

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

- Examples: Observational logs

**FNPI 5f.**

**The number of seniors (65+) who maintained an independent living situation.**

- Examples: Assessment to show the ability to live independently: <https://www.va.gov/files/2021-12/Assessment-Capacity-Live-Independently.pdf>
- Independent living scale: <https://www.tbims.org/combi/ils/index.html#:~:text=The%20ILS%20is%20designed%20as,initiation%20sub%2Dscale%20nine%20points.>

**FNPI 5g.**

**The number of individuals with disabilities who maintained an independent living situation.**

- Examples: home visit observations; verification of continued residence in private household, Activities of independent living scale: <https://www.alz.org/careplanning/downloads/lawton-iadl.pdf>

**FNPI 5h.**

**The number of individuals with chronic illness who maintained an independent living situation.**

- Examples: home visit observations; verification of continued residence in private household, Activities of independent living scale: <https://www.alz.org/careplanning/downloads/lawton-iadl.pdf>

**FNPI 5i.**

- **The number of individuals with no recidivating event for six months.**

Examples: Parole reports, Proof of no recidivating events

**FNPI 6a.**

**The number of Community Action program participants who increased skills, knowledge, and abilities to enable them to work with Community Action to improve conditions in the community.**

- Examples: Pre/post tests, Observational logs

**FNPI 7a.**

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

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

# GUIDANCE FOR ANNUAL ROMA PLANS

As part of our commitment to effective performance management and accountability, each Community Action Agency (CAA) is required to create an annual ROMA (Results-Oriented Management and Accountability) plan **due May 1**, within your Community Action Plan (CAP) in CSBG Reporter. This document outlines the importance of these plans, their purpose, benefits to your agency, and practical tips for completing them effectively, as outlined in agencies CSBG funding contract - Reference Section IV, Scope of Services and Deliverables.

## Why Create an Annual ROMA Plan?

The annual ROMA plan is essential for outlining the actionable activities your agency will undertake throughout the year to improve service delivery and outcomes. It helps to ensure that the principles of ROMA are integrated into your agency's operations, ultimately enhancing the effectiveness of your programs and services.

## Purpose of the CAA ROMA Plan

The ROMA plan aims to guide action, manage performance, and ensure accountability by providing a clear framework for implementing the ROMA cycle within your agency. It outlines specific activities and goals aligned with performance management strategies, facilitating progress measurement and outcome reporting to stakeholders. This framework helps agencies effectively address community needs and demonstrate their impact.

## ROMA Plan Checklist

When completing your ROMA plan, consider the following questions:

### Identification of ROMA Professional:

- ☐ Who is submitting the plan?
- ☐ Who is responsible for each activity of the plan?

### Yearly Goals and Objectives:

- ☐ What are your overall goals and objectives for improved use of ROMA principles and practices for the year as a ROMA certified Implementer/Trainer?
- ☐ How do these goals align with the organization's or community's strategic priorities?

### ROMA-Specific Activities:

- ☐ What specific ROMA activities will you engage in during the year (e.g., community needs assessment, strategic planning, board collaboration, program planning or evaluation, facilitating ROMA training sessions)?
- ☐ As an implementer/trainer, who are you sharing ROMA principles with within your organization (staff, upper management, board of directors), and how will this be accomplished?

### Performance Metrics:

- ☐ How will the agency measure the success and impact of ROMA-related activities?
- ☐ Please upload two (2) measurement tools that demonstrate how your CAA will assess the outcomes/changes resulting from these activities. Include any relevant measurement tools related to these activities.

### Partnerships and Collaboration:

- ☐ Are there any partnerships or collaborations you plan to establish or maintain to support your ROMA efforts?
- ☐ How will these collaborations enhance the effectiveness of your work?

### Note on Flexibility:

Please be aware that these questions are subject to modification in preparation for the next fiscal year.

## Submission and Review Process

CAA's ROMA plans will be submitted to the Office of Economic Opportunity (OEO) **annually on May 1 through CSBG Reporter**.

### Review Criteria

- **Clarity of Goals:** The specificity and measurability of your goals and objectives.
- **Alignment with Strategic Priorities:** How well your ROMA activities align with your organization's strategic priorities.
- **Details of Activities:** Thoroughness in outlining specific ROMA-related activities planned for the year.
- **Performance Metrics:** The robustness of the measurement tools provided to assess the effectiveness and impact of your activities.
- **Partnerships and Collaborations:** Evidence of planned partnerships that support your ROMA efforts.

The state office will also periodically follow up on these plans throughout the fiscal year to discuss the successes or challenges of the activities identified in your plan. Agencies are required to submit updates on their plans every quarter.

## Quarterly Expectations for CAAs Regarding Quarterly ROMA Reports

- 1 Timely Submission**  
Submit reports by designated deadlines for prompt review.
- 2 Completeness and Accuracy**  
Ensure all required sections are included and that data is accurate and verified.
- 3 Alignment with Goals**  
Clearly demonstrate how activities align with the ROMA plan's established goals and objectives.
- 4 Systemic Barriers**  
Identify and discuss any systemic barriers encountered and how they were addressed or planned to be addressed.
- 5 Stakeholder Engagement**  
Highlight community and stakeholder involvement in activities and decision-making.
- 6 Outcome Measurement and Continuous Improvement**  
Provide measurable outcomes related to community needs, discuss challenges faced, and describe adjustments made based on feedback.

4th Quarter Reporting (due **August 15<sup>th</sup>**): In CSBG Reporter, the 4th quarter report must include the following sections:

- Planned Activities for ROMA Implementer (submitted with the Community Action Plan)
- Actual Activities for ROMA Implementer (reported each quarter)
- Describe your biggest success and your biggest challenge/obstacle (only for the 4th quarter report)
- Top ROMA Training need for implementers and agency? (only for the 4th quarter report)

## Key Tips for Completing the ROMA Plan



### **Be Clear and Specific:**

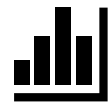
Clearly outline your agency's goals and the specific ROMA activities planned for the year.



**Align with Strategic Priorities:** Make sure that your ROMA goals and activities are in line with your organization's overall strategic objectives.



**Engage Stakeholders:** Involve staff, management, and board members in discussions about ROMA principles and activities to ensure buy-in.



**Utilize Measurement Tools:** Incorporate effective measurement tools to assess the success and impact of your ROMA activities.



**Document Collaborations:** Identify and describe partnerships that will enhance your ROMA efforts and how they will be maintained.

## Advantages for Your Agency for Creating a ROMA Plan

- **Improved Program Outcomes:** By focusing on results and accountability, your agency can enhance the effectiveness of its programs.
- **Strategic Alignment:** Ensuring that ROMA activities align with your organization's strategic priorities promotes cohesion and focus.
- **Informed Decision-Making:** Using data and performance metrics to assess activities helps inform future planning and resource allocation.
- **Stronger Collaborations:** Engaging with partners and stakeholders fosters a collaborative environment that supports shared goals.

## Sample- Agency ROMA Activities (not limited to):

- **Community Needs Assessment:** Conducting assessments to identify the needs and priorities of the communities they serve, ensuring programs are responsive and relevant.
- **Strategic Planning:** Developing long-term strategic plans that align with ROMA principles & incorporate community input/agency mission.
- **Program Planning and Evaluation:** Designing programs based on identified needs; evaluating their effectiveness using ROMA metrics.
- **Training and Capacity Building:** Providing training sessions for staff and board members on ROMA principles across departments (i.e. finance, weatherization, HR, head start, housing, workforce, re-entry, childcare, etc.).
- **Data Collection and Analysis:** Implementing systems to collect (i.e., databases, data management plans, data teams, etc.), analyze, and report on data related to program outcomes and community impact.
- **Board Development:** Establishing clear understanding around their responsibilities, roles, and oversight governance of the agency.
- **Stakeholder Engagement:** Involving community members and stakeholders in decision-making processes, program design, and evaluation.
- **Performance Monitoring:** Establishing key performance indicators (KPIs) to track the effectiveness of programs and services. Creating an internal agency auditing processes for fiscal and programs.
- **Collaborative Partnerships:** Forming partnerships with other organizations to enhance service delivery and share resources.
- **Feedback Mechanisms:** Creating systems to gather feedback from clients, staff, community members, to inform program adjustments and improvements.
- **Awareness Campaigns:** Raising awareness about community needs and the services offered by the agency, promoting engagement and participation.