

# **FY25 CSBG ANNUAL REPORT: TIPS FOR QUALITY ASSURANCE AND COMMENTING**

Monthly State Administrator Webinar

January 15, 2026



# SETTING THE STAGE



## DISCLAIMER

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## TODAY'S OBJECTIVES

### **Ultimate Objectives:**

- **Promote Accuracy and Completeness:** CSBG FY25 CAR submissions are accurate and complete.
- **Reduce Post-Submission Follow Up:** CSBG Lead Agency receives few items on its review memo requiring follow up.

### **Today's Focus:**

- How to use a pre-submission Quality Assurance/Data Validation (QADV) review of EE reports to ensure accuracy and completeness.
- How to use the optional Comment Template to provide explanations about EE data.

# ANNOUNCEMENTS



## SMARTFORMS AND TTA OPPORTUNITIES

- SmartForms distributed on January 14
  - Not received? Contact your Data and Evaluation Specialist
- Annual Report National Webinars
  - January 20, 2:00-3:30 p.m. ET – FY25 CSBG Annual Report Kickoff
  - January 21, 2:00 – 4:00 p.m. ET – Successfully Reporting Eligible Entity Expenditures, Services, and Outcomes
  - January 29, 2:00 – 3:00 p.m. ET – Using State Systems for Reporting
- Other TTA Opportunities
  - OCS Open Office Hours
  - Direct support from your Program and Data & Evaluation Specialists
  - Direct support from NASCSP

# QUALITY ASSURANCE & DATA VALIDATION (QADV) REVIEW

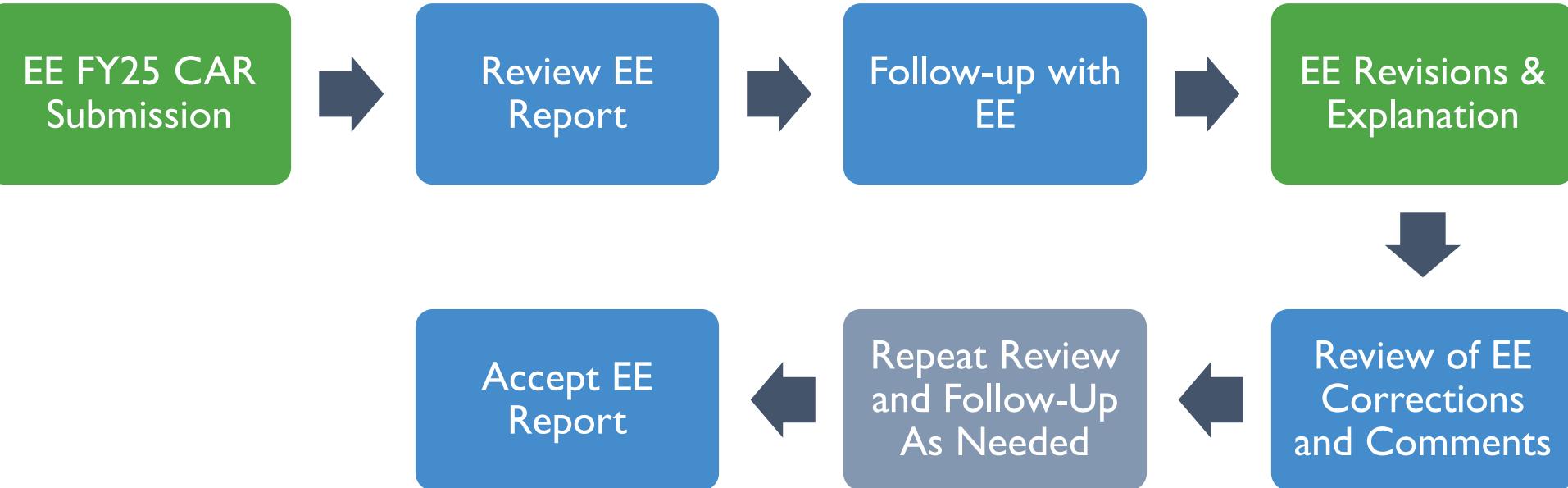


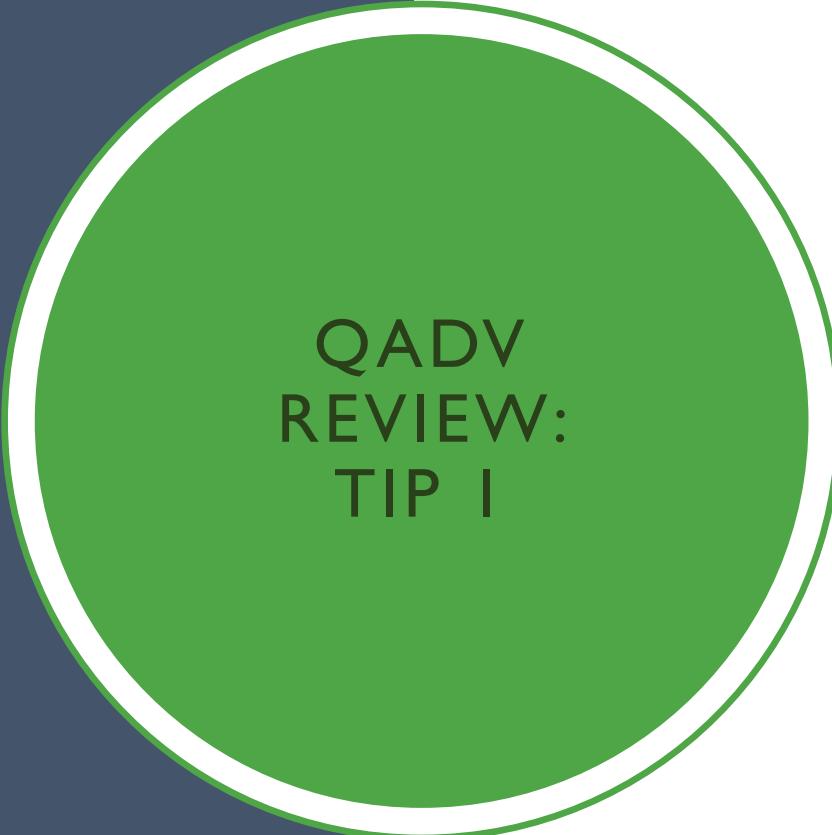
## QADV REVIEW: PURPOSE

# **Ensure Accuracy and Completeness of EE Reports**

- Knowledge Gathering
  - Identifying errors
  - Identifying “second look” needs
- Taking Action
  - Correcting errors
  - Making other revisions that increase data quality and completeness
  - Providing explanations where needed

## QADV REVIEW: PROCESS





## QADV REVIEW: TIP I

### **Know what is included in the Federal Quality Assurance Review (FQAR).**

- Data Dictionary/Data Validations
- SmartForms

# CLOSER LOOK AT THE VALIDATION COMPONENTS

## I. Module, Section, and Datapoint

- Roadmap.

Module	Section	Datapoint
M_2	Expenditures	A.2d.

Module	Section	Datapoint
M_2	Capacity	B.3a.1.

## 2. Message Description

- Error or Warning
- Issue Identification

WARNING: Significant difference between current and previous year

ERROR: Subset datapoint larger than the primary datapoint

## 3. Action Required

- Issue Specifics
- The “Ask”

Current year value is \$0.00, while the previous year's value was larger than \$0.00. Please review the reported information. If correct as initially submitted, please confirm and provide an explanation. If incorrect, please revise.

B.3a.1. cannot exceed B.3a. Please review these two datapoints and determine which one (or both) needs to be corrected. Please make the necessary revision(s) so that the number of volunteer hours donated by individuals with low-incomes is not larger than the total number of all volunteer hours donated.

# REVISION LEADING TO ANOTHER VALIDATION EXAMPLE

## I. Original: CY = \$0 AND PY = \$200,000

Module	Section	Datapoint	Message Description	Action Required
M_2	Expenditures	A.2d.	WARNING: Significant difference between current and previous year	Current year value is \$0.00, while the previous year's value was larger than \$0.00. Please review the reported information. If correct as initially submitted, please confirm and provide an explanation. If incorrect, please revise.

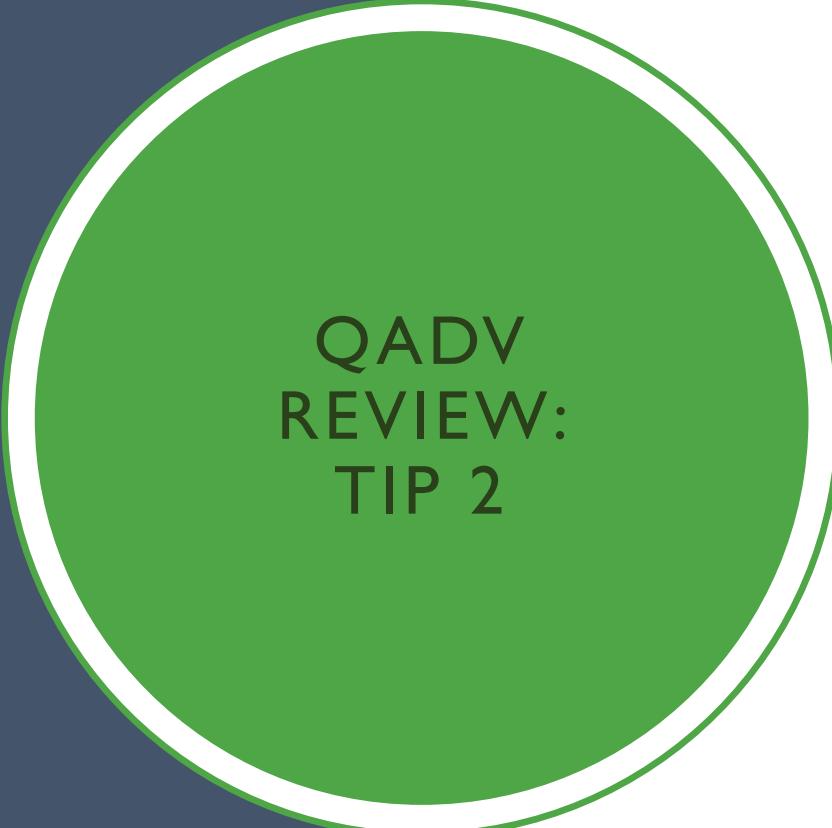
## 2a. Revised Example 1: CY = \$190,000 AND PY = \$200,000

Original validation goes away and is not replaced because there is not a significant difference between the CY and PY numbers.

## 2b. Revised Example 2: CY = \$100,000 AND PY = \$200,000

Original validation goes away and is replaced because there is a significant difference between the CY and PY numbers. Explanation included on the optional Comments Templated suggested.

Module	Section	Datapoint	Message Description	Action Required
M_2	Expenditures	A.2d.	WARNING: Significant difference between current and previous year	Current year value is either at least 100% more than or 50% less than the previous year's value. If correct as initially submitted, please confirm and provide an explanation. If incorrect, please revise.



## QADV REVIEW: TIP 2

**SmartForms are a valuable resource in your QADV Review toolbox. State Systems too if these features are built in.**

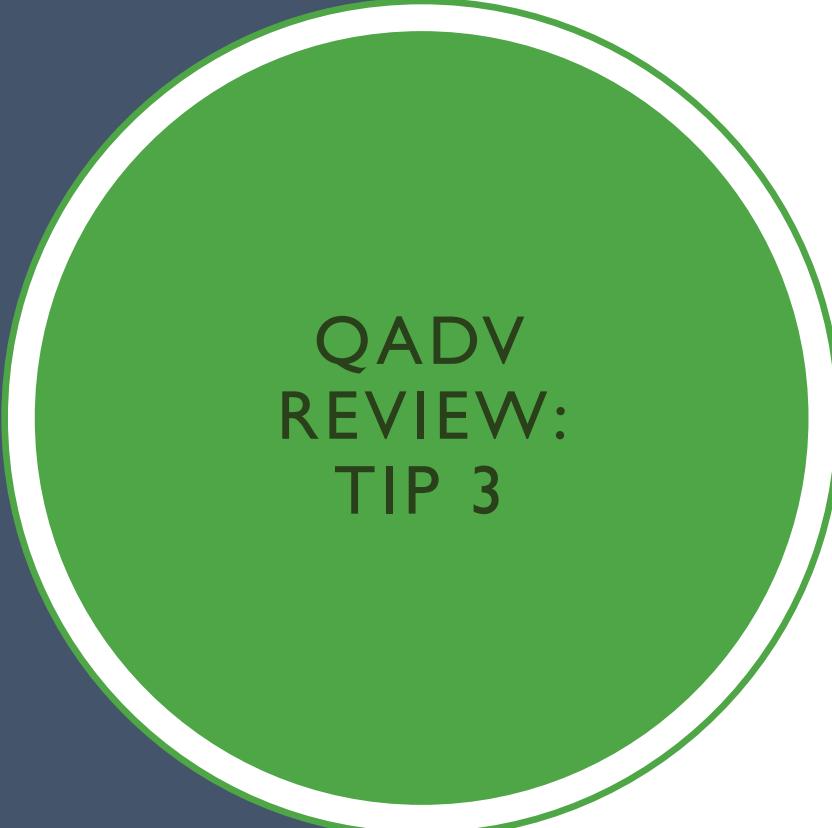
- Aligned with the FQAR process
- Constant, up-to-date feedback
- Can help EEs initially submit more accurate and complete reports
- Can make EE follow up easier
- Can help speed up completion of the Comments Template

**Did you know?**

You can still use the SmartForms even if your EEs are already using a state system. And best yet, it does not require double-data entry or a major overhaul to current practices. All it requires is importing data into the SmartForms. NASCSP can help with this!

## **CLOSER LOOK AT THE SMARTFORMS FEATURES THAT CAN HELP WITH THE QADV**

**Let's look at the SmartForm features from the previous slide.**



## QADV REVIEW: TIP 3

### Consider where most of the issues occur.

- ACR C. and ACR D. totals not matching the applicable “parent datapoint” (ACR A., ACR B., or Specific Age Range)
- Significant differences between current and previous year numbers on Expenditures and Resources sections
- Irregularity between related datapoints
  - Expenditure but no service
  - Indicator but no service or Service but no indicator
  - Service or indicator # > than ACR # Comparison (ACR A. or Specified Trait such as age range or disability status)
  - Service but no allocation OR Allocation but no service (WZN, HS, EHS, and LIHEAP – Fuel Assistance)
  - Trend of No Targets, No Actual Results or Same Served and Actual Results #



## QADV REVIEW: TIP 4

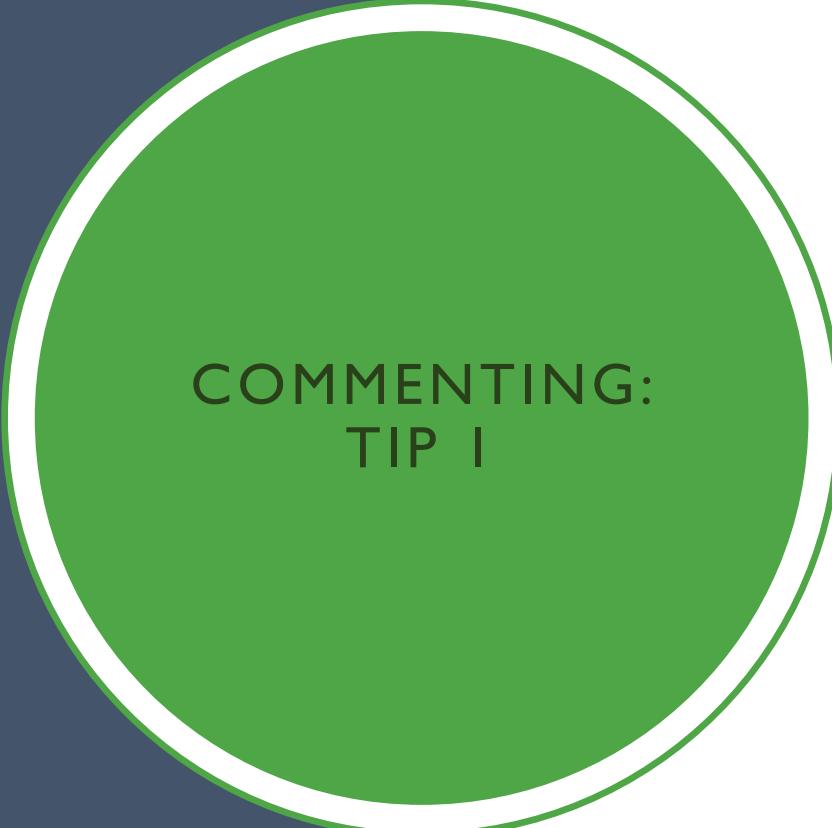
**Other resources are available to help you with the QADV review.**

- [OCS' CSBG Annual Report Webinar Series](#)
- [OCS's CSBG Annual Report Toolkit](#)
  - Module 3 Pre-Submission Review
  - Modules 2 and 4 Checklist
  - [How to Open SmartForms](#)
- [Moodle CAR v2.1 e-Course](#)
- Other TTA Opportunities
  - FY25 CSBG Annual Report Webinar for EEs
  - Individualized TTA from OCS and/or NASCSP
    - OCS' FY25 CAR Open Office Hours
    - Other options upon request

**Did you know?**

An EE can incorporate the CSBG Annual Report resources into its QADV process to help ensure an accurate and complete report is submitted and explanations are provided when needed. This can save time for both you and them.

# TIPS FOR EFFECTIVE COMMENTING

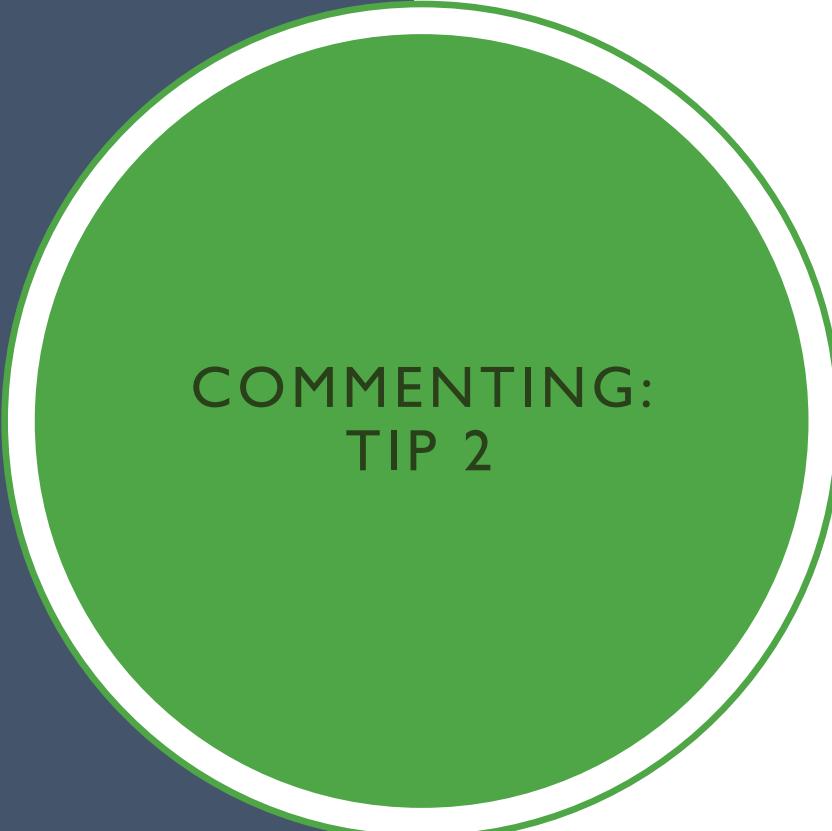


## COMMENTING: TIP 1

**Provide an explanation for all “unfixed” errors and remaining warnings on the optional **Comments Template**.**

**Recommendation for Future Reports**

If there is an error that cannot be fixed prior to submission, work with the EE to identify steps that can be implemented forward going to help prevent the same error from re-occurring.



## COMMENTING: TIP 2

### Confirm and provide a brief explanation.

There are LIHEAP Fuel Assistance services (SRV 4i.) but there are no LIHEAP – Fuel Assistance resources reported for C.3b.1. If correct as initially submitted, please confirm and provide an explanation. If the agency received federal LIHEAP – Fuel Assistance funds to fund this service, please add the amount allocated for C.3b.1. to reflect this.

#### Example 1

*Does not follow guidance fully*

“Data is correct.”

#### Example 2

*Follows guidance*

“Data is correct as submitted. The agency uses Emergency Solutions Grant funds to provide utility payments reported in SRV 4i.”

## COMMENTING: TIP 3

**Make sure the explanation addresses the issue.**

Current year value is either at least 100% more than or 50% less than the previous year's value. If correct as initially submitted, please confirm and provide an explanation. If incorrect, please revise.

FY25

C.3b.1. \$ 503,225.00

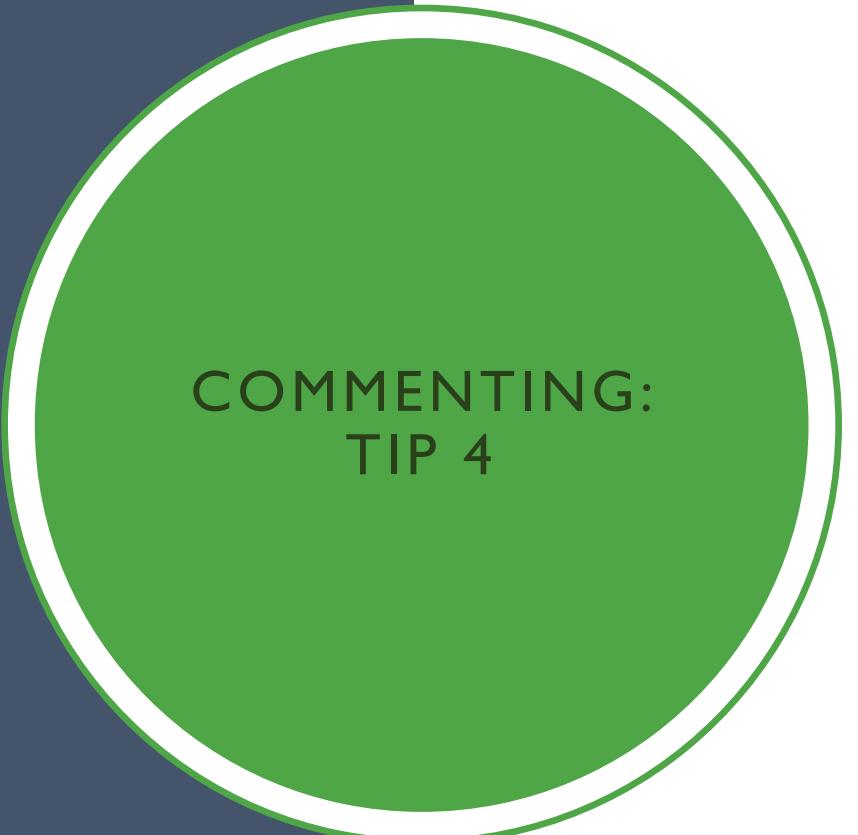
FY24

C.3b.1. \$ 1,503,225.00

### Mismatched Comment

“The agency received additional funding for the Weatherization Program.”

A comparison of the CY and PY numbers shows that funding decreased but the EEs explanation says that more money was received.



**Familiarity with the changes that have occurred to the validations over the years can help lessen the lift.**

Here are a examples of things to be in the “know” about:

- **Expenditures:** There is no longer a 20% admin check.
- **Expenditures and Resources.:** Not all “100% More or 50% Less” and “\$0 one year but > \$0 the other year” require comments. Only those with a difference is \$100,000 or more do.
- **Capacity, FNPIs, and SRV.:** No year-to-year checks.
- **FNPIs:** Not calling out every instance of “No Target”, “No Actual Results” or “ Same Served and Actual Results #s”. Looking at all FNPIs as a whole to see if there is a trend of at least 75% of the indicators.
  - Example 1: 7 of the 10 indicators (70%) no do have targets - **Trend Threshold Not Met = No Comment Need**
  - Example 2: 9 of the 10 indicators (90%) Actual Results # same as Served # - **Trend Threshold Met = Comment Suggested (Tip – Only 1 comment for all indicators as a single group, not 1 for each of the 9 FNPIs**

# WRAPPING UP



## QUESTIONS

- What questions do you have?



## CONTACT INFO

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THANK YOU!

thank you