

Systems That Support CSBG

April 16, 2026



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Agenda

- What's a Statewide CSBG Data System?
- Why Statewide Data Systems Help
- Common System Types and Uses
- State Spotlights
- Wrap Up



What's a Statewide CSBG Data System?

A centralized system that can be used by states and CAAs to:

Collect client and service data

Track outcomes (ROMA, NPIs, etc.)

Generate the CSBG Annual Report

Monitor agency performance

Why Statewide Data Systems Help

Ensure accountability & compliance: Track use of CSBG funds and align with federal and state requirements

Support accurate, timely reporting: Streamline collection of data for the CSBG Annual Report and other requirements

Strengthen oversight & monitoring: Identify risks, track performance, and support data-informed monitoring

Drive decision-making: Use real-time data to inform funding, technical assistance, and policy decisions

Improve network consistency: Standardize data collection and reporting across all CAAs

Enhance transparency & communication: Provide clear insights to state leadership, agencies, and stakeholders

Common System Types

Vendor Platforms (Out-of-the-Box Solutions)

- Pre-built systems designed for human services (e.g., ClientTrack, CAP60, EmpowOR)
- Faster implementation
 - Built-in reporting (including CSBG Annual Report)
 - Ongoing vendor support

State-Developed Systems

- Custom-built systems designed specifically for state needs
- Tailored to state policies and workflows
 - Greater control over features and data structure
 - Requires internal IT capacity and maintenance

Hybrid Solutions

- Combination of vendor tools and/or state-developed components
- Flexibility to meet unique needs
 - May integrate multiple systems (data warehouse, reporting tools)

SharePoint / Internal Tools

- Lower-cost or interim solutions using platforms like SharePoint or Excel-based tracking
- Useful for document management, grants tracking, or communication
 - Limited functionality for full data reporting and outcomes tracking

What Do These Systems Do?

Reporting & Data Visualization

- Generate the CSBG Annual Report and NPIs
- Create dashboards to track performance and trends
- Provide real-time or near real-time data access

Monitoring & Oversight

- Track agency performance and outcomes
- Identify risks and flag compliance issues
- Support on-site and virtual monitoring activities

Grants & Contract Management

- Manage contracts, budgets, and funding allocations
- Track reimbursement requests
- Monitor contract performance and deliverables

Client & Service Data Tracking

- Capture demographic, service, and outcome data
- Align with ROMA and performance management frameworks
- Ensure consistent data collection across CAAs

Communication &

- Collaboration Share updates, guidance, and resources with agencies
- Provide a centralized location for documents and tools
- Support coordination between state offices and CAAs

Data Quality & Validation

- Built-in checks to reduce errors and improve accuracy
- Standardize data entry and definitions
- Support data cleaning and validation processes

What Makes a System Effective?

User-friendly for state & local agencies

- Intuitive design for both state staff and CAAs
- Minimal training required; reduces data entry burden
- Role-based access for different users

Accurate & timely data

- Real-time or near real-time data entry and reporting
- Built-in validation rules to reduce errors
- Supports reliable performance tracking

Security (PII protection)

- Protects sensitive client information (PII)
- Role-based permissions and secure data storage
- Aligns with federal and state data security standards

Customizable & scalable

- Adapts to changing CSBG requirements and reporting updates
- Flexible fields, reports, and dashboards
- Can grow with program needs over time

Supports federal & state requirements

- Aligns with CSBG Act, ROMA, and Annual Report requirements
- Tracks outcomes, not just outputs
- Supports monitoring, risk assessment, and continuous improvement

CAR and the RFP

State System Purpose


- Will CEEs have their own data systems and use the state system for reporting purposes only?
- Will the system be used by CEEs to collect data on customers in real time?

CAR Compatible

- Can all CAR data points be captured accurately and robustly?
- Can it produce the correct output?
 - Module 2 and Module 4 XML files
 - Module 3 Excel file
- How will it be updated when changes are made?

Quality Assurance and Data Validation Review

- Is there functionality to compare the data to the FQAR validations?
- How will the system be updated when needed?

A stylized spotlight graphic is positioned in the top-left corner, casting a wide, soft yellow beam of light across the center of the slide. The background is white with various decorative elements: a purple circle at the top, a green triangle at the top-right, a green circle and blue dashes at the bottom-left, and purple dashes on the right side.

State Spotlights

Abby Hanks, VA
Adrian Angel, IL

Statewide Database

Virginia's Statewide Database Overview

Presented By: Abby Hanks

4/2026



Background



Before implementing the statewide system, data collection relied on multiple tools—Excel spreadsheets, emails, Word documents, and various forms—resulting in fragmented processes, added burden on agencies, and challenging review workflows for state staff.



In 2016 we began working with CSBG Reporter, started as a place for organizational standards documentation, over the past 10 years we have now grown our system as a place that houses everything our office reviews from agencies.



We work closely with our developer to make changes to not only add items to the system periodically but also change and adapt.

What's in our system

Organizational Standards

Community Action Plan

ROMA Implementer Plan

- ROMA Quarterly Report

Financials

- Annual Budgets
- Match Information
- Monthly Invoicing

Board information

- Meeting Schedule
- Board Minutes
- Board Roster

Reporting

- Quarterly Progress
- Annual report – all components (export to XML)

Organizational Standards

- Agencies upload documentation for all 58 standards
- State staff can review and approve standards within the system.
- Both agencies and state can export reports to show status of standards.
- Real time view of standards status.

Organizational Standards

Standards★

CSBG Standards★

Reporting

TA Plans

Set Durations

Community Action Plan

Financials

Board Information

Admin

Help

Reporting

Supplemental

Standard1 Standard2 Standard3 Standard4 Standard5 Standard6 Standard7 Standard8 Standard9

Standard 2.1

Standard 2.2

Standard 2.3

Standard 2.4

Key

- Submitted/Not Reviewed
- Needs Work
- State Review
- Due This Year

The department documents the number of volunteers and hours mobilized in support of its activities.

Documentation	File(s)	Remove	Page/Citation	File Date
Board minutes	July 2025 Minutes.doc	<input type="button" value="Archive"/>	attendance tracking sample	8/4/2025 1:58:25 PM
	June 2025 minutes.doc	<input type="button" value="Archive"/>		8/4/2025 1:58:22 PM
Data on number of volunteers and hours provided	FY 25 board volunteer hours.pdf	<input type="button" value="Archive"/>		9/16/2025 2:50:17 PM
Documentation of tracking system(s)	FY25 FINAL LOCALITY & OUTCOMES REPORT (1).pdf	<input type="button" value="Archive"/>	volunteer hours tracked by subgrantee (sample)	9/16/2025 2:50:21 PM
Other				

Status

Met

UnMet

Year

1st

Repeat

TA Plan Issued

Yes

No

Date Corrected

Latest Agency Comments [Show History](#)

State Staff Comments

This standard was completed on: October 2025

This standard is valid through: October 2028

Duration **Duration Period Begins on** **Current Begin Date (Editable)**

Three Years ▼ On Approval Date ▼ 10/01/2025

State Completed Review On: 10/01/2025

Organizational Standards Report

Choose Report: Standards Status And Due Date

Filter Reports:

Status: All

Agency: My Agency

[View Report](#)

Your Report Results

1 of 1 Find | Next

My Agency				
Title	Submission Status	Status	Approved On	Due On
Standard 1.1	Not Started			
Standard 1.2	Not Started		August 2023	August 2023
Standard 1.3	Not Started		July 2024	July 2024
Standard 2.1	Not Started		January 1903	January 1903
Standard 2.2	Not Started		November 2023	November 2023
Standard 2.3	Not Started		July 2024	July 2024
Standard 2.4	Not Started		July 2024	July 2024
Standard 3.1	Not Started			
Standard 3.2	Not Started			

Community Action Plan

Agencies develop their CAP in the system; they customize it to choose services and outcomes that then turn into their progress reports.

The CAP identifies sources of funding for programs, targets for outcomes, the needs associated to programs from the needs assessment and the gaps and linkages.

Gaps and Linkages

Gaps and Linkages

- **Identifying Unmet Needs (Gaps)**
- **Clearly specify which needs from your most recent needs assessment** your agency **does not** currently have programs or services to address (i.e., the programming gaps).
- **Addressing the Gaps (Strategies)**
- For the identified gaps, **describe any specific strategies** planned for the upcoming year to address them.
- These strategies can be either:
 - **Agency Strategies:** New programs, internal initiatives, or resource allocation changes.
 - **Community Strategies:** Partnerships, advocacy efforts, or collaborative projects with other organizations.

Locality	Gaps In Service	Status
Franklin County	Public Transportation	Current Status set to Saved on 03/23/2026

[Update](#)

[Add New](#)

Gaps and Linkages

Locality	Gaps In Service	Status
Franklin County	Public Transportation	Current Status set to Saved on 03/23/2026

[Update](#)

[Add New](#)

Gaps And Linkages

County:

Franklin County

Gaps In Service:

Public Transportation

Gap To Be Addressed:

Community Strategy:

The town council has a workgroup to review possible transit lines in populated areas of the county.

Agency Strategy:

The agency will participate in the workgroup, and advocate for those with low-incomes in the community.

My Comments [Show History](#)

StaffComments

Do you use TANF funds in this program? Yes No

empowOR Programs Associated to this CSBG Reporter Program

Note: If this dropdown list is empty, then all of your empowOR programs have already been associated to a CSBG Reporter program

Select a Program ▾ Anticipated Number of People Served

No EmpowOR program records have been added

Total Anticipated Number of People Served

Needs as Identified by Community Needs Assessment

Insert a Need ▾

Need Description	
transportation	<input type="button" value="Remove"/>

Services/Strategies Provided by Program/Initiative

Select Service(s) ▾

Service

- SRV 1b On-the-Job and other Work Experience
- SRV 1e Self-Employment Skills Training
- SRV 2a Early Head Start
- SRV 2bb Scholarships
- SRV 2n Summer Education Programs
- SRV 2p Mentoring
- SRV 3f Small Business Start-Up and Development Counseling Sessions/Classes
- SRV 3i Social Security/SSI Payments

Outcomes

Indicator	Outcome	Target	Previous Year Target	
FNPI4 Housing	FNPI 4f The number of individuals who avoided foreclosure.	<input type="text" value="45"/>	0	<input type="button" value="Remove"/>
FNPI5 Health and Social/Behavioral	FNPI 5c The number of individuals who demonstrated improved mental and behavioral health and well-being.	<input type="text" value="25"/>	0	<input type="button" value="Remove"/>
Choose an Indicator ▾	▾	<input type="text"/>		<input type="button" value="Add New"/>

CSBG Funded

CSBG Funded Yes No Funding Amount Percentage Amount

Describe the program.

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

This program offers assistance to families including children who need childcare support.

CAP Plan Programs

ROMA Implementer Plan



Each agency is required to submit a ROMA Implementer Plan, this identifies how they will incorporate ROMA practices within their agency over the upcoming year.



That turns into the quarterly progress report where they report on the actual ROMA activities each quarter.

ROMA Implementer Plan

ROMA Implementer 2026-2027

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?

Item 4: Performance Metrics:

- How will the agency measure success and impact of ROMA-related activities?
- Section for agencies to upload two (2) measurement tools demonstrating how a CAA will measure the outcomes/changes that have happened as a result of the activities. Measurement tools related to the activities can also be uploaded (to demonstrate that was done by the NCRP and the other agency staff and partners).

ROMA Implementer Report

ROMA Implementation Plan

Period	Actual Activities for ROMA Implementer (Reported each quarter)
1st Quarter	
2nd Quarter	
3rd Quarter	
4th Quarter	

upload Documentation

File	Notes	Period Uploaded
<input type="button" value="Choose File"/> No file chosen		<input type="button" value="Add"/>

Financials

- Annually agencies submit their budgets both CSBG and Agency budget along with match. The budget is broken down by domains that match the CSBG Report.
- Agencies also submit their monthly invoices within this system. They are approved by State Staff and records are kept within the system to get real time updates of remaining funding.

CSBG Budget

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

Federal Budget

BreakdownCategory	Salaries & Wages	Fringe Benefits	Professional Services	Travel	Space Costs & Rent	Consumable Supplies	Equipment Lease/Purchase	Indirect Costs	Other Costs	Totals
Employment	\$5.00	\$3.00	\$3.00	\$2.00	\$5.00	\$0.00	\$0.00	\$0.00	\$0.00	\$18.00
Education and Youth Development	\$4.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4.00
Income and Asset Building	\$3.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3.00
Housing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Health and Nutrition	\$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
Transportation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Linkages (e.g. partnerships that support multiple domains)	\$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 (e.g. emergency management/disaster relief)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Totals	\$12.00	\$3.00	\$3.00	\$2.00	\$5.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00

Save

Budget and Match

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

Current Year Budget

CategoryName	Federal CSBG	Non-CSBG Match	Other Resources	TANF	Totals
Salaries & Wages	\$12.00	\$0.00	\$0.00	\$0.00	\$12.00
Fringe Benefits	\$3.00	\$0.00	\$0.00	\$0.00	\$3.00
Professional Services	\$3.00	\$0.00	\$0.00	\$0.00	\$3.00
Travel	\$2.00	\$0.00	\$0.00	\$0.00	\$2.00
Space Costs & Rent	\$5.00	\$0.00	\$0.00	\$0.00	\$5.00
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
Totals	\$25.00	\$0.00	\$0.00	\$0.00	\$25.00

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

My Comments [Show History](#) StaffComments

What cost method are you using?

NICRA (Negotiated Indirect Cost Rate Agreement)

Cost Allocation Plan

Attach supporting document

No file chosen

Match

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	\$0.00		
Fringe Benefits	\$0.00		
Professional Services	\$0.00		
Travel	\$0.00		
Space Costs & Rent	\$0.00		
Consumable Supplies	\$0.00		
Equipment Lease/Purchase	\$0.00		
Indirect Costs	\$0.00		
Other Costs	\$0.00		

My Comments [Show History](#) StaffComments

Board Information



Annually agencies enter their board meetings dates for the year



This generates a page where agencies upload the board minutes and packet from each meeting. (this also links to standards)



There is a board roster, this is to be updated at least annually with the CAP Plan but we request that it is updated as changes occur.

Board Minutes

Board Meeting Schedule

Meeting Setup ▾

Meeting Date

Wednesday September 18 2026

Wednesday November 18 2026

Wednesday January 20 2027

Thursday March 18 2027

Add

Comments and History ▾

No Activity

Submit Cancel

Board Minutes

Meeting Information ▾

Meeting Date	Upload Minutes	Map Minutes to Org Standards	Upload Meeting Packet	Map Packet to Org Standards	Meeting Notes
Wednesday September 18 2026	<input type="button" value="Choose File"/> No file chosen	Board minutes <input checked="" type="checkbox"/> Select All 1.1 - The organization demonstr... <input checked="" type="checkbox"/> Board minutes 1.3 - The organization has a sys... <input checked="" type="checkbox"/> Board/Committee Minutes 2.2 - The department utilizes in... <input type="checkbox"/> Board/Committee or staff me... 2.4 - The organization documen... <input type="checkbox"/> Board minutes OK Cancel	<input type="button" value="Choose File"/> No file chosen	<input type="text" value="Choose All That Apply"/>	
Wednesday November 18 2026	<input type="button" value="Choose File"/> No file chosen		<input type="button" value="Choose File"/> No file chosen	<input type="text" value="Choose All That Apply"/>	
Wednesday January 20 2027	<input type="button" value="Choose File"/> No file chosen		<input type="button" value="Choose File"/> No file chosen	<input type="text" value="Choose All That Apply"/>	
Thursday March 18 2027	<input type="button" value="Choose File"/> No file chosen	<input type="text" value="Choose All That Apply"/>	<input type="button" value="Choose File"/> No file chosen	<input type="text" value="Choose All That Apply"/>	

Comments and History ▾

No Activity

Board Roster

Board Roster

List of Grantee Board of Directors ▼

Total number of board members, as stated in current bylaws

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

Total # of Vacancies

Name	Email Address	Description	Committee Assignment	Board Officer Role	Designee	Elected Official or Government Entity Represented	
<input type="text" value="test"/>	<input type="text" value="test@test.com"/>	<input type="text" value="test"/>	<input type="text" value="test"/>	<input type="text" value="test"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/>	<input type="button" value="Remove"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<input type="button" value="Add"/>

Democratically-Selected Representatives of the Low-Income Community

Total # of Seats

Total # of Vacancies

Name	Email Address	Description	Committee Assignment	Board Officer Role	
<input type="text" value="testing"/>	<input type="text" value="test@test.com"/>	<input type="text" value="2022-2024"/>	<input type="text" value="program"/>	<input type="text" value="president"/>	<input type="button" value="Remove"/>
<input type="text" value="Sandra Smith"/>	<input type="text" value="test@test.com"/>	<input type="text" value="2022-2026"/>	<input type="text" value="evaluation"/>	<input type="text"/>	<input type="button" value="Remove"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Private Sector Representatives

Total # of Seats

Total # of Vacancies

Name	Email Address	Description	Committee Assignment	Board Officer Role	
<input type="text" value="testtestt"/>	<input type="text" value="test"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Remove"/>
<input type="text" value="Sally Hurt"/>	<input type="text" value="test@ab3.com"/>	<input type="text" value="2021-2026"/>	<input type="text" value="program"/>	<input type="text" value="vice chair"/>	<input type="button" value="Remove"/>
<input type="text" value="person 23"/>	<input type="text" value="testing@abc.com"/>	<input type="text" value="2021-2024"/>	<input type="text" value="governance"/>	<input type="text"/>	<input type="button" value="Remove"/>
<input type="text" value="bob jones"/>	<input type="text" value="test@asb.com"/>	<input type="text" value="2012-2012"/>	<input type="text" value="n/a"/>	<input type="text" value="secretary"/>	<input type="button" value="Remove"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Comments and History ▼

No Activity

Reporting



The quarterly progress report is generated directly from the CAP Plan.



The Family NPI report is created from the quarterly progress report and creates the Module 4 XML. There are built in warnings and errors.



The CSBG Expenditures, Resources, and Capacity building reports are also completed within the system.

Quarterly Progress report

- Key**
- Saved
 - Submitted
 - Approved
 - Previous Quarter Item Modified
 - Previous Quarter Modified in latest emPowOR update
 - Entry Manually Changed

Childcare

Initiative Name	Quarter 1	YTD Actual	Target	Percent Difference	My Comments	State	Staff Comments
FNPI4 Housing - FNPI 4f	<input type="text" value="0"/>	0	45	0.00%	View/Edit		
FNPI5 Health and Social/Behavioral - FNPI 5c	<input type="text" value="0"/>	0	25	0.00%	View/Edit		

[Save](#)

employment

test program

Initiative Name	Quarter 1	YTD Actual	Target	Percent Difference	My Comments	State	Staff Comments
FNPI1 Employment - FNPI 1a	<input type="text" value="0"/>	0	12	0.00%	View/Edit		

[Save](#)

Unduplicated Count of Individuals Achieving One or More Outcomes

Workforce Development

Services

Service Name	Quarter 1 YTD Actual	State	Staff Comments
SRV 1b On-the-Job and other Work Experience	<input type="text" value="0"/>	0	View/Edit
SRV 1e Self-Employment Skills Training	<input type="text" value="0"/>	0	View/Edit
SRV 2a Early Head Start	<input type="text" value="0"/>	0	View/Edit
SRV 2bb Scholarships	<input type="text" value="0"/>	0	View/Edit
SRV 2n Summer Education Programs	<input type="text" value="0"/>	0	View/Edit
SRV 2p Mentoring	<input type="text" value="0"/>	0	View/Edit
SRV 3f Small Business Start-Up and Development Counseling Sessions/Classes	<input type="text" value="0"/>	0	View/Edit
SRV 3i Social Security/SSI Payments	<input type="text" value="0"/>	0	View/Edit
SRV 4e Mortgage Payments (includes Emergency Mortgage Payments)	<input type="text" value="0"/>	0	View/Edit

FNPI Report

FNPI1 Employment

	I.) Number of Participants Served In program(s) (#)	II.) Target(#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [(III) = IV] %	V.) Performance Target Accuracy [(III) = V]
FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.	<input type="text"/>	12.00	15.00	0%	125%
<input type="button" value="Save"/>					

FNPI2 Education and Cognitive Development

FNPI3 Income and Asset Building

FNPI4 Housing

	I.) Number of Participants Served In program(s) (#)	II.) Target(#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [(III) = IV] %	V.) Performance Target Accuracy [(III) = V]
FNPI 4f The number of individuals who avoided foreclosure.	<input type="text"/>	45.00	15.00	0%	33.33%
<input type="button" value="Save"/>					

FNPI5 Health and Social/Behavioral

	I.) Number of Participants Served In program(s) (#)	II.) Target(#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [(III) = IV] %	V.) Performance Target Accuracy [(III) = V]
FNPI 5c The number of individuals who demonstrated improved mental and behavioral health and well-being.	<input type="text"/>	25.00	23.00	0%	92%
<input type="button" value="Save"/>					

FNPI6 Civic Engagement and Community Involvement

FNPI7 Outcomes Across One or More Domains

Services

Services

Employment Services (SRV 1)

Skills Training and Opportunities for Experience (SRV 1a-j)	Unduplicated Number of Individuals Served
SRV 1b On-the-Job and other Work Experience	10.00
SRV 1e Self-Employment Skills Training	56.00
Career Counseling (SRV 1g-h)	Unduplicated Number of Individuals Served
Job Search (SRV 1i-n)	Unduplicated Number of Individuals Served
Post Employment Supports (SRV 1o-p)	Unduplicated Number of Individuals Served
Employment Supplies (SRV 1q)	Unduplicated Number of Individuals Served

Education and Cognitive Development Services (SRV 2)

Child/young Adult Education Programs(SRV 2a-j)	Unduplicated Number of Individuals Served
SRV 2a Early Head Start	22.00
School Supplies (SRV 2k)	Unduplicated Number of Individuals Served
Extra-curricular Program (SRV 2l-q)	Unduplicated Number of Individuals Served
SRV 2n Summer Education Programs	56.00
SRV 2p Mentoring	89.00
Adult Education Programs (SRV 2r-z)	Unduplicated Number of Individuals Served
Post-Secondary Education Supports (SRV 2aa)	Unduplicated Number of Individuals Served
Financial Aid Assistance (SRV 2bb)	Unduplicated Number of Individuals Served

Individual Demographics

Family Demographics

Number of unduplicated Individuals receiving services this reporting period

	Number of Individuals	Previous Year
Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained	0	650.00
Total	0	650

Number of Individuals Not Included In the Totals Above		
Program Name	Number of Individuals	Action
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Gender

Gender	Number of Individuals	Previous Year
Male	0	325.00
Female	0	325.00
Other	0	0.00
Unknown/not reported	0	0.00
Total	0	650

Age

Age	Number of Individuals	Previous Year
0-5	0	5.00
6-13	0	15.00
14-17	0	55.00
18-24	0	50.00
25-44	0	100.00
45-54	0	80.00
55-69	0	100.00
60-64	0	35.00
65-74	0	50.00
75+	0	100.00
Unknown/not reported	0	80.00
Total	0	650

Education Level (ages 14 - 24)

Education Level (ages 25+)

Disconnected Youth

Health (Disabling Condition)

Number of unduplicated Households receiving services this reporting period

	Number of Households	Previous Year
Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained	0	400.00
Total	0	400

Household Types

Household Type	Number of Households	Previous Year
Single Person	0	200.00
Two Adults NO Children	0	0.00
Single Parent Female	0	50.00
Single Parent Male	0	50.00
Two Parent Household	0	0.00
Non-related Adults with Children	0	0.00
Multigenerational Household	0	50.00
Other	0	0.00
Unknown/not reported	0	50.00
Total	0	400

Household Size

Household Size	Number of Households	Previous Year
Single Person	0	200.00
Two	0	50.00
Three	0	0.00
Four	0	50.00
Five	0	100.00
Six or more	0	0.00
Unknown/not reported	0	0.00
Total	0	400

Housing

Housing	Number of Households	Previous Year
Own	0	150.00
Rent	0	250.00
Other permanent housing	0	0.00
Homeless	0	0.00
Other	0	0.00
Unknown/not reported	0	0.00

CSBG Expenditures

CSBG Resources

CSBG Expenditures Domains

BreakdownCategory	Federal CSBG
Employment	\$0.00
Education and Youth Development	\$0.00
Income and Asset Building	\$0.00
Housing	\$0.00
Health and Nutrition	\$0.00
Civic Engagement and Community Involvement	\$0.00
Transportation	\$0.00
Linkages (e.g. partnerships that support multiple domains)	\$0.00
Agency Capacity Building	\$0.00
Other (e.g. emergency management/disaster relief)	\$0.00
Totals	\$0.00

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

My Comments [Show History](#)

StaffComments

Fiscal 2026-2027 allotment

	Previous Year	
Amount of FY CSBG allocated to reporting entity	\$0.00	\$0.00
Total	\$0.00	\$0.00

Federal Resources Allocated (Other than CSBG)

Weatherization (DOE)

	Previous Year	
Weatherization (DOE) (include oil overcharge \$\$)	\$0.00	\$0.00
Total	\$0.00	\$0.00

Health and Human Services (HHS)

	Previous Year	
LIHEAP - Fuel Assistance (include oil overcharge \$\$)	\$0.00	\$0.00
LIHEAP - Weatherization (include oil overcharge \$\$)	\$0.00	\$0.00
Head Start	\$0.00	\$0.00
Early Head Start	\$0.00	\$0.00
Older Americans Act	\$0.00	\$0.00
Social Services Block Grant (SSBG)	\$0.00	\$0.00
Medicare/Medicaid	\$0.00	\$0.00
Assets for Independence (AFI)	\$0.00	\$0.00
Temporary Assistance for Needy Families (TANF)	\$0.00	\$0.00
Child Care Development Block Grant (CCDBG)	\$0.00	\$0.00
Community Economic Development (CED)	\$0.00	\$0.00
Total	\$0.00	\$0.00

Other HHS Resource Description

Description	CFDA #	Amount	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Department of Agriculture (USDA)

	Previous Year	
Special Supplemental Nutrition for Women, Infants, and Children	\$0.00	\$0.00

Capacity Building

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

		Previous Year
Hours of Board Members in capacity building activities	0	15.00
Hours of Agency Staff in capacity building activities	0	50.00
Total	0	65

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

		Previous Year
Total number of volunteer hours donated to the agency	0	1500.00
Total	0	1500

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

		Previous Year
Total number of volunteer hours donated by individuals with low-incomes	0	1200.00
Total	0	1200

The number of staff who hold certifications that increase agency capacity to achieve family and community outcomes

		Previous Year
Number of Nationally Certified ROMA Trainers	0	0.00
Number of Nationally Certified ROMA Implementers	0	1.00
Number of Certified Community Action Professionals (CCAP)	0	0.00
Number of Staff with a child development certification	0	0.00
Number of Staff with a family development certification	0	0.00
Number of Pathways Reviewers	0	0.00
Number of LEED Risk Certified assessors	0	0.00
Number of Building Performance Institute (BPI) certified professionals	0	0.00
Number of Classroom Assessment Scoring System (CLASS) certified professionals	0	0.00
Number of Certified Housing Quality Standards (HQS) Inspectors	0	0.00
Number of American Institute of Certified Planners (AICP)	0	0.00
Total	0	1

Number of Staff with Home Energy Professional Certifications

		Previous Year
Number of Energy Auditors	0	0.00
Number of Retrofit Installer Technicians	0	0.00
Number of Crew Leaders	0	0.00

State Level Reports

FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.					
	I.) Number of Participants Served in program(s) (#)	II.) Target(#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [(III/II) = IV] %	V.) Performance Target Accuracy [(III/IV) = V]
Alexandria Office of Community Services	0	722	0	0%	0%
Appalachian Community Action & Development Agency, Inc.	191	722	0	0%	0%
Arlington County	0	722	0	0%	0%
Bay Aging	0	722	0	0%	0%
Capital Area Partnership Uplifting People	0	722	0	0%	0%
Clinch Valley Community Action	0	722	0	0%	0%
Community Action Partnership of Staunton, Augusta and	0	722	0	0%	0%

	Alexandria Office of Community Services	Appalachian Community Action & Development Agency, Inc.	Arlington County	Bay Aging
Employment Services (SRV 1)	0	0	0	0
SRV 1a Vocational Training	0	0	0	0
SRV 1b On-the-Job and other Work Experience	0	0	0	0
SRV 1c Youth Summer Work Placements	0	0	0	0
SRV 1d Apprenticeship/Internship	0	0	0	0
SRV 1e Self-Employment Skills Training	0	0	0	0
SRV 1f Job Readiness Training	0	0	2	14
SRV 1g Workshops	9	0	0	0
SRV 1h Coaching	0	1	0	0
SRV 1i Coaching	0	4	0	0
SRV 1j Resume Development	0	0	0	0
SRV 1k Interview Skills Training	0	0	0	0
SRV 1l Job Referrals	0	3	0	0
SRV 1m Job Placements	0	0	0	4
SRV 1n Pre-employment physicals, background checks, etc.	0	0	0	0
SRV 1o Coaching	0	39	0	0
SRV 1p Interactions with employers	0	0	0	0
SRV 1q Employment Supplies	0	2	0	0
Education and Cognitive Development Services (SRV 2)	0	0	0	0
SRV 2a Early Head Start	0	0	0	0
SRV 2b Head Start	0	0	0	0
SRV 2c Other Early-Childhood (0-5 yr. old) Education	0	527	0	0
SRV 2d K-12 Education	0	0	2	0
SRV 2e K-12 Support Services	0	0	0	0
SRV 2f Financial Literacy Education	0	0	0	0
SRV 2g Literacy/English Language Education	0	0	0	0
SRV 2h College-Readiness Preparation/Support	0	0	0	0
SRV 2i Other Post Secondary Preparation	0	0	0	0

Key Takeaways



XML EXPORT FUNCTIONALITY
ENABLES DIRECT OLDC IMPORT



EVERY SYSTEM HAS LIMITATIONS—
PLAN FOR CONTINUOUS
IMPROVEMENT



REGULAR REVIEW AND REVISION
HELP MAINTAIN ACCURACY AND
USABILITY



COLLABORATION WITH THE
DEVELOPER IS KEY TO LONG-TERM
SYSTEM EFFECTIVENESS

2026 Statewide Database

Illinois's Statewide Database Overview



Illinois
Department of Commerce
& Economic Opportunity

JB Pritzker, Governor

WHERE WE STARTED

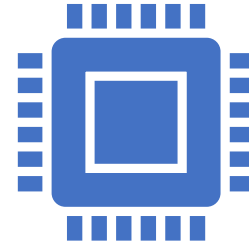


Tracker 1992-2008

Required each CAA to maintain a single stand-alone terminal

CAA controlled the set up

Reporting was a combination of Tracker Reports and a Lotus 123 spreadsheet



Adsystem 2009-2010

Vendor purchased statewide internet-based system

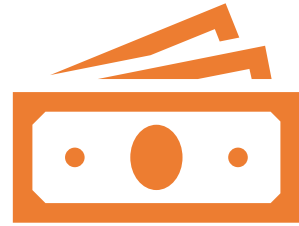
State controlled the set up

Reporting function was over promised and under delivered

Most CAA's forced into dual entry



WHERE WE ENDED UP: STARS



State developed system

Developed utilizing a combination of State IT staff and Contractors

Utilized input from ALL user groups in development

Paid for with State General Revenue Fund



Developed with 4 Modules (Currently has 6 Modules)

CAA Admin

Intake

CSBG

LIHEAP

Monitoring

Reports



HOW IT WORKS: CAA ADMIN



Maintain Users

- Add/Inactive Users
- Reset Passwords
- Maintain Security Groups



Maintain Community Action Agency Information

- General Agency Information
- Locations Served
- Hours of Operation
- Board Data
 - Required Composition
 - Board Member Detail



Maintaining CAA Information

Agency Information Summary

Agency Name	BCMW Community Services
Agency Address	909 E. Rexford P.O. Box 729 Centralia, IL 62801-3033
Agency FEIN	37-0899785
Agency Phone	(618) 532-7388
Agency Fax	(618) 532-0204
Agency Director	Jessica Backs (jessica.backs@bcmw-il.org)
Agency Fiscal Officer	Carrie Gordon (carrie.gordon@bcmw-il.org)

[Maintain Agency Information](#)

Locations Served

Active	Location Served	CSBG	LIHEAP	Weather
Active	Bond	Yes	Yes	
Active	Clinton	Yes	Yes	
Active	Marion	Yes	Yes	
Active	Washington	Yes	Yes	

Displaying items 1 - 4 of 4

Hours of Operation

Day(s) of Week	Hours of Operation	
Monday through Friday	8:00 to 4:00	Remove

[Add Hours of Operation](#)

Agency Board Composition

Sector	Expected	Filled	Vacancies
Client	5	5	0
Private	3	3	0
Public	5	5	0
Total Expected: 13		Total Filled: 13	Total Vacancies: 0

Explanation of Vacancies

[Maintain Board Composition](#)

Board Members

Name	Sector	Represents	Formatted Phone	Effective Date	Expiration Date
██████████	Public	City of Centralia	██████████	██████	██████
██████████	Public	Bond County Board	██████████	██████	██████
██████████	Private	City of Centralia	██████████	██████	
██████████	Private	Ruritan Club	██████████	██████	██████

Key Elements To Think About:

- How do you currently maintain a grantee directory?
- What board data do you currently collect?
- What board data would be good to know? For example, we do not collect when a board meets but that would be good to know when conducting an onsite visit

HOW IT WORK: INTAKE

Household/Family/Individual Characteristics

```
graph TD; A[Household/Family/Individual Characteristics] --> B[Family/Individual Income]; B --> C[Mainstream Benefits]; C --> D[Case Notes]; D --> E[Documentation Requests];
```

Family/Individual Income

Mainstream Benefits

Case Notes

Documentation Requests

INTAKE: Key Elements To Think About

- Do you want customers to be able to utilize a mobile device to apply for services?
- Is the flow of the layout user friendly?
- Will the intake be shared with other programs?
- What fields are important? What fields could be optional? Think about the Annual Report!
- How is PII handled?
- Is it able to collect and calculate income in a manner that meets your States rules?
- How easy is it to transfer individuals between families?

SO MANY QUESTIONS??????



HOW IT WORKS:

CSBG

CSBG Admin	Maintain Poverty Levels Maintain Federal Goals and Categories Maintain Work Program, Services, and Outcomes
CAA Program Coordination	Maintain Grants List Development of Grants and Scope of Work
CSBG Service Delivery	Maintain Client Services/Outcomes Service Delivery No Characteristics Community Resources (Module 3) Agency Capacity Building

Maintaining a Grant

[Home](#) > [CAA Grants](#)

CAA Grants

Drag a column header and drop it here to group by that column

Funding Agency Acronym	Grant Program	Program Year	Effective Date	Expiration Date
DCEO	CSBG	2026	01/01/2026	06/30/2027
IACAA	EBRF	2026	07/01/2025	06/30/2026
DCEO	CSBG	2025	01/01/2025	07/01/2026
IACAA	BRP	2025	07/01/2024	06/30/2025
IACAA	BRP	2024	07/01/2024	06/30/2025
IACAA	BRP	2024	07/01/2023	06/30/2024
DCEO	CSBG	2024	01/01/2024	02/15/2025
IACAA	BRP	2023	07/01/2022	06/30/2023
DCEO	CSBG	2023	01/01/2023	02/15/2024
DCEO	CSBG	2022	01/01/2022	01/31/2023

1 2 3

Displaying items 1 - 10 of 26

[Add Grant](#)

Key Elements To Think About:

- Do your CAA's have smaller grants that do not have their own systems?
- Is your Administration willing to allow CAA's to utilize the system for other grants?

Maintaining a Grant

Home > Grant List > Grant Summary > WP-04.011 Housing Payment Assistance (1)

Grant Program	26-231001 CSBG
Program Year	2026
Effective Date	01/01/2026
Expiration Date	06/30/2027

WP-04.011 Housing Payment Assistance (1)

Work Program

* Indicates required field

Work Program	WP-04.011 Housing Payment Assistance (1)
Summary *	CMW Needs Assessment stated that 40% of customers polled need Housing assistance in the counties that we serve. BCMW will have Emergency grants available for CSBG income-eligible customers for emergency rental and mortgage situations and homeowners/renters' insurance.
Objective *	<p>To provide financial support to low-income families in emergency situations across Bond, Clinton, Marion, and Washington counties.</p> <p>Funding Uses:</p> <p>Mortgage Assistance:</p> <p>Maximum assistance of \$1,800. Can cover one future month if due within 15 days of payment issuance. Anticipated beneficiaries: 4 families.</p> <p>Rent Assistance:</p> <p>Maximum assistance of \$1,000. Can include one future month's rent if due within 15 days of payment issuance. Anticipated beneficiaries: 7 families.</p>
Agency Activities *	<p>Provide outreach to the community on available assistance.</p> <p>Assess Needs: Intake staff will meet with customers to evaluate their needs.</p> <p>Income Eligibility: Staff will determine if the customer qualifies under the CSBG (Community Services Block Grant) income guidelines.</p> <p>Coordination: Staff will work with local landlords and financial institutions.</p>
Customer Steps *	<p>Emergency Request: The customer initiates a request for emergency assistance.</p> <p>Online Application: The customer completes an online application and submits supporting documentation, including proof of income and a landlord/mortgage statement.</p>
Method of Tracking *	<p>Payment Tracking: Customer payment information is entered into spreadsheets, categorized by county, and monitored to ensure that the one-time-per-year service requirement is met.</p> <p>Case Notes: The intake worker records case notes in the client file, which may include verification from sources such as employers, doctors, landlords, and banks.</p>
All Other Funding Source(s)	
Active	<input checked="" type="checkbox"/>
Program Support	<input type="text"/>
Client Assistance	<input type="text" value="14000.00"/>
Administration	<input type="text"/>
Special	<input type="text"/>
Total	<input type="text" value="14000"/>

Key Elements To Think About:

- How is your current Scope of Work Structured?
- What fields would be needed to ensure there is sufficient detail for both the CAA and State?
- How do you currently conduct monitoring and what data could you collect that would assist with the monitoring process?

CSBG Service Delivery

Home > O'Neal Family Service Summary >

Family Service Summary

127171 - O'Neal Family

Assessment Date 03/20/2026

[REDACTED]

Marion County

[REDACTED]

() -

90 Day Family Income 7537.44

HHS % of Poverty 188.908

[Transfer To Intake Family Summary](#)

Family Members

Client	Last 4 SSN	Age	Birth Date	Gender	Relationship to HOF	Disabled	Income
[REDACTED]	2203	59	12/29/1966	F	Self	No	\$7,537.44
Total Family Income:							\$7,537.44

[Set Verified Income Date](#)

Services

Services may pertain to members no longer in th

Service	Service Date	Request Date	Work Program	Client Status	Service Status	Cost	Pertains To	CAA	Year	Grant Number	Created
Mortgage Payments	03/20/2026	03/20/2026	Housing Payment Assistance (1)	Approved	Complete	\$3,000.00		BCMW	2025	25-231001	Liz Gar
Utility Payments (Primary and Secondary Heating Sources)	05/27/2025	05/27/2025	Case Management (2)	Approved	Complete	\$174.60		BCMW	2025	25-231001	Liz Gar
Mortgage Payments	03/30/2021	03/30/2021	COVID-19 Relief Housing (1)	Approved	Complete	\$750.00		BCMW	2020	20-211001	Tammy
Referrals	03/30/2021	03/30/2021	COVID-19 Relief Case Management	Approved	Complete		Crystal D O'Neal	BCMW	2020	20-211001	Tammy
Referrals	07/10/2020	07/10/2020	Case Management (1)	Approved	Complete	\$798.12	Crystal D O'Neal	BCMW	2020	20-231001	Tammy Chmiel
Referrals	07/10/2020	07/10/2020	Case Management (1)	Approved	Complete		Crystal D O'Neal	BCMW	2020	20-231001	Tammy Chmiel
Equipment/Uniform/Supplies for employment	08/31/2016	08/31/2016	Other Employment Projects	Approved	Complete	\$191.98	Crystal D O'Neal	BCMW	2016	16-231001	Sheila E
Referred to or from other sources	08/31/2016	08/31/2016	Information and Referral	Approved	Complete		Crystal D O'Neal	BCMW	2016	16-231001	Sheila E
Medical Assistance	07/22/2015	07/22/2015	Cash Assistance/Loans	Approved	Complete	\$50.00		BCMW	2015	15-231001	LeAnn S
Referred to or from other sources	07/22/2015	07/22/2015	Information and Referral	Approved	Complete		Crystal D O'Neal	BCMW	2015	15-231001	LeAnn S
Food Baskets	12/18/2013	12/18/2013	Food Pantries/Shelves	Approved	Complete		Crystal D O'Neal	BCMW	2013	13-231001	Sarah F
Referred to or from other sources	12/18/2013	12/18/2013	Information and	Approved	Complete		Crystal D	BCMW	2013	13-231001	Sarah F

Key Elements To Think About:

- How is PII displayed?
- How much customer history can be easily accessed?
- How do you track a customers progress? Do you need multiple statuses?
- Is there a financial component that meets your needs?
- How does the system handle both Individual Services and Family Services?
- How are case notes handled?

CSBG Service Delivery

[Home >](#)

Service Delivery No Characteristic

* Indicates required field

Capacity Building Ability *	<input type="text" value="--- Select an Activity ---"/>
Opportunity *	<input type="text" value="--- Select an Opportunity ---"/>
Activity Date *	<input type="text" value=""/> <input type="button" value="📅"/> (mm/dd/yyyy)
Amount Served *	<input type="text"/>
Comment	<input type="text"/>

[Return Without Save](#)

Key Elements To Think About:

- When system changes are needed what is the process? If you are purchasing from a vendor what does the ongoing maintenance fee look like? If you are building your own system will you have the tech support needed?
- This is an example of a screen that we currently have to collect data on services we provide with no characteristics collected. We have been trying for years to make some simple but necessary changes but due to our IT staff priorities, it never seems to get done.

HOW IT WORKS: Monitoring Tool



Questions and Tools

Question Library

Tool Library



Assignments

Program Tool Assignments

Can Assign Tools to Different Programs



Document Library

State Document Library

CAA Document Library



Monitoring Tool

Drag a column header and drop it here to group by that column

Program	▼					
CSBG	Link a Tool					
Tool	Description	Assigned Date	Due Date	Status		
2026 C1QRP	2026 CSBG 1st Quarter Report Programmatic	04/01/2026	04/30/2026	In Progress		
2026 OS Private	2026 CSBG Organizational Standards Monitoring - Private	04/01/2026	06/30/2026	In Progress		
2025 CM2	2025 CSBG Programmatic Modification 2	02/18/2026	03/03/2026	Completed		
2025 CAR	2025 CSBG Annual Report	01/15/2026	03/12/2026	In Review		
2025 C4QRP	2025 CSBG 4th Quarter Report Programmatic	01/05/2026	02/11/2026	Completed		
2025 C3QRP	2025 CSBG 3rd Quarter Report Programmatic	10/01/2025	11/19/2025	Completed		
2026 CAP	2026 Community Needs Assessment and Community Action Plan	07/02/2025	11/05/2025	Completed		
2026 CAPRO	2026 CSBG Programmatic Tool	07/01/2025	05/31/2026	Returned to Grantee		
2026 EO/AA Plan	2026 EO/AA Plan Submittal	07/01/2025	01/29/2026	Completed		
2025 C2QRP	2025 CSBG 2nd Quarter Report Programmatic	07/01/2025	08/13/2025	Completed		
1 2 3 4 5 6 7 8 9 10						
Fiscal	Link a Tool					
Tool	Description	Assigned Date	Due Date	Status		
2026 C1QRF	2026 CSBG 1st Quarter Report Fiscal	04/01/2026	04/30/2026	Not Started	Remove Tool	
26 EACM Ledger	2026 Energy Assistance Program Cost Ledger Sample	03/25/2026	04/10/2026	Ready for Submittal		
2025 CFM2	2025 CSBG Fiscal Modification 2	02/18/2026	03/16/2026	Completed		
2025 C4QRBUD	2025 CSBG Annual PFR & PPR for Period 1/1/25-12/31/25	01/16/2026	01/30/2026	Completed		
2025 C4QRF	2025 CSBG 4th Quarter Report Fiscal	01/05/2026	02/11/2026	Completed		
2025 C3QRF	2025 CSBG 3rd Quarter Report Fiscal	10/01/2025	11/26/2025	Completed		
2026 CABUD	2026 CSBG Budget Tool	07/30/2025	01/06/2026	Completed		
2025 C2QRF	2025 CSBG 2nd Quarter Report Fiscal	07/01/2025	07/31/2025	Completed		
2025 CFM1	2025 CSBG Fiscal Modification 1	04/21/2025	06/20/2025	Completed		
2025 C1QRF	2025 CSBG 1st Quarter Report Fiscal	04/01/2025	06/09/2025	Completed		
1 2 3 4						
Internal	Link a Tool					
Tool	Description	Assigned Date	Due Date	Status		
2024 CDMI	2024 CSBG Desktop Monitoring Internal	10/10/2024	10/17/2024	Completed		

Key Elements To Think About:

- What are your current monitoring requirements?
- Who should complete the monitoring tools?
- Who has access to view reports?

Monitoring Tool Questions

Program Tool	(2026 C1QRP) 2026 CSBG 1st Quarter Report Programmatic
Question	(CQ 01.003) Board Membership List
Question Text	Attach your Board Membership List generated from STARS.
Instructions	The board structure must be in compliance with the CSBG Act and agency by-laws.
Grantee Status	Answered

Grantee Response

Grantee Answer	Yes	No	N/A
	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

State Response

State Answer *	Yes	No	N/A	
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Monitoring Results *	Finding	Observations	Accepted	Follow Up
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Documents (0)	Grantee Response Comments (0)	State Response Comments (0)	Monitoring Comments(0)
Documents			
Drag a column header and drop it here to group by that column			
Name	Type	Folder Name	
No records to display.			
			Displaying items 0 - 0 of 0

* Indicates required field

Prev Next

Save Cancel

Key Elements To Think About:

- What types of questions do you ask? Yes/No, Essay, Likert, etc
- Can supporting documentation be attached to the responses?
- Is there an opportunity for back and forth with the CAA?
- How is the final determination documented?

Monitoring Tool Questions

Document Library

Grantee

Drag a column header and drop it here to group by that column

Program																							
CSBG	Add Folder																						
	<table border="1"> <thead> <tr> <th>Folder Name</th> <th></th> </tr> </thead> <tbody> <tr> <td>1 2023 Annual Report</td> <td>Add Document</td> </tr> <tr> <td>1 2023 CSBG Quarter 4 Report</td> <td>Add Document</td> </tr> <tr> <td>1 2024 1st Quarter Report CSBG</td> <td>Add Document</td> </tr> <tr> <td>1 2024 CSBG Annual Report</td> <td>Add Document</td> </tr> <tr> <td>1 2024 CSBG Fourth Quarter Report</td> <td>Add Document</td> </tr> <tr> <td>1 2025 CSBG 1st Quarter Report Programmatic</td> <td>Add Document</td> </tr> <tr> <td>1 2025 CSBG 3rd Quarter Report Programmatic</td> <td>Add Document</td> </tr> <tr> <td>1 2025 CSBG Annual Report</td> <td>Add Document</td> </tr> <tr> <td>1 2025 CSBG Programmatic Tool</td> <td>Add Document</td> </tr> <tr> <td>1 2025 Organizational Standards Monitoring</td> <td>Add Document</td> </tr> </tbody> </table>	Folder Name		1 2023 Annual Report	Add Document	1 2023 CSBG Quarter 4 Report	Add Document	1 2024 1st Quarter Report CSBG	Add Document	1 2024 CSBG Annual Report	Add Document	1 2024 CSBG Fourth Quarter Report	Add Document	1 2025 CSBG 1st Quarter Report Programmatic	Add Document	1 2025 CSBG 3rd Quarter Report Programmatic	Add Document	1 2025 CSBG Annual Report	Add Document	1 2025 CSBG Programmatic Tool	Add Document	1 2025 Organizational Standards Monitoring	Add Document
Folder Name																							
1 2023 Annual Report	Add Document																						
1 2023 CSBG Quarter 4 Report	Add Document																						
1 2024 1st Quarter Report CSBG	Add Document																						
1 2024 CSBG Annual Report	Add Document																						
1 2024 CSBG Fourth Quarter Report	Add Document																						
1 2025 CSBG 1st Quarter Report Programmatic	Add Document																						
1 2025 CSBG 3rd Quarter Report Programmatic	Add Document																						
1 2025 CSBG Annual Report	Add Document																						
1 2025 CSBG Programmatic Tool	Add Document																						
1 2025 Organizational Standards Monitoring	Add Document																						
Fiscal	Add Folder																						
Internal	Add Folder																						
Liheap	Add Folder																						
Weatherization	Add Folder																						

Key Elements To Think About:

- Who controls the set up of the CAA's Document Library
- Do you need a repository where CAA's can easily access IM's, PM's, or other important documents
- Does it have the capability to serve as a "Master File" for monitoring reports or other agency correspondence?
- Are there separate library's for the State and the CAA?

Reports: Key Elements To Think About

- What types of reports would assist a CAA in doing their job?
- What types of reports would assist the State in doing their job?
- Can anybody create a report or do you have to request it from IT?
- Are there both detail and summary reports?
- Can reports be exported to Excel or Word or .PDF?
- How is the data stored that the report utilizes? Does customer data change with time or does the report run off a “snapshot” of a moment in time?

SO MANY MORE QUESTIONS??????



▲ CSBG

- Activity Report
- Activity Report - Outcomes Only
- Activity Report - Services Only
- Board Membership List
- Characteristics Report
- Characteristics Report - Client Detail
- Characteristics Report - Family Detail
- Client List - ERA
- Client List by Outcome
- Client List by Service
- Client List by Work Program
- Family Service Notes
- Null Outcomes
- Work Program Detail Report
- Work Program Summary Report

▲ CSBG Monitoring Tools

- Agency Monitoring Tool Review
- CSBG Completed Tool Assessment by CAA
- CSBG Completed Tool Assessment D2
- CSBG Completed Tool Assessment D2b
- Monitoring Report
- Monitoring Tool Status History
- Monitoring Tool Summary
- Statewide Monitoring Report
- Technical Assistance Plan



Q & A



Illinois
Department of Commerce
& Economic Opportunity
JB Pritzker, Governor

Resources

- [Database RFP Guide](#)
- [CSBG Database Vendors](#)
- [Standards of Software](#) (login credentials required)

If you don't have member login credentials, please let us know!





Please scan
the QR code
to share your
feedback

