

State Management Work Group 2.0 | Standardized Tools and Templates

Purpose

The promising practices identified, and tools, templates, and resources shared in this document are the result of extensive research conducted over a three-year period by the State Management Work Group 2.0 (SMWG 2.0). The purpose of the SMWG 2.0 is to assist states in addressing the challenges faced by low-income families in rural communities and the agencies that serve them. SMWG 2.0 members helped identify the information shared here by conducting in-depth research through surveys, focus groups, and interviews. This information was then analyzed to identify common themes to help State Administrators with the implementation of these promising practices. The goal of this work is to reduce administrative burden and improve service delivery, and enhance program efficiency, ultimately improving outcomes for low-income individuals and families, *especially in rural communities*.

What are Standardized Tools and Templates?

The development and use of consistent, uniform documents—such as forms, checklists, reporting templates, and guidance materials—across the CSBG network to support compliance, planning, monitoring, and reporting.

Promising Practices:

1. [Utilize a statewide data system to create a one-stop shop for documents](#) – The practice of using a centralized, digital platform, such as a data management system, shared drive, or online portal, to collect, organize, and provide easy access to key documents for eligible entities and state staff.
2. [Understand the requirements and the purpose of the tools and/or templates](#) – State CSBG staff are familiar with how and why specific tools and/or templates are used. This includes knowing what information is required, how the tool supports compliance with CSBG requirements, and how it contributes to broader goals such as performance management, accountability, or continuous improvement.
3. [Don't reinvent the wheel: develop standardized tools and/or templates, across multiple programs \(e.g., WAP, LIHEAP, Head Start, etc.\), utilizing the Network's input](#) – The practice of using available models and of creating shared, consistent tools and/or templates, with the Network's input, that can be used across various programs administered by eligible entities, if possible.

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- 1. Utilize a statewide data system to create a one-stop shop for documents** – The practice of using a centralized, digital platform, such as a data management system, shared drive, or online portal, to collect, organize, and provide easy access to key documents for eligible entities and state staff.

States Who Have Employed This Practice:

Arizona, Connecticut, Illinois, Maine, Virginia

Purpose:

Statewide data systems provide an effective way of integrating multiple monitoring and reporting functions into one system, and create a positive impact on rural service delivery, agency capacity, and state-level administrative efficiencies. Whenever possible, coordination with other programs (i.e., LIHEAP, Weatherization, Head Start, etc.) can help reduce the frequency of reporting requirements for eligible entities, especially for rural communities.

Statewide data systems aim to improve efficiency by providing a centralized, accessible, and comprehensive view of data across various reporting requirements for the Network. These systems facilitate data-driven policymaking, program evaluation, and research, leading to better outcomes for individuals and households served. By integrating data from different agencies and departments, statewide data systems can reduce redundancy and improve efficiency in data collection and management. This can lead to cost savings and better use of CSBG resources.

Method:

The first step of this promising practice is to identify a statewide data system, such as SharePoint (CT), Empower (ME), Community Software Group (AZ), CSBG Reporter (VA), or THO (MN), or a state-developed system (IL), etc. For any purchase, follow your state's procurement policy. It is important that states consult with their Network, especially their rural eligible entities, to identify their unique needs and research all possible options before purchasing any statewide data system. Additionally, eligible entities and State Association input in the development of the data system supports implementation and Network adoption of a new system. Many data system providers will offer demonstrations of their systems to prospective subscribers, and most data systems can be configured to the network's needs. Certain features will vary among data systems. Contracts for 3rd party services may be managed by the State Office or the State Association. The State Office needs to engage with and listen to the Network's training needs. Training materials, user guides, and webinars are recommended to accompany the system rollout to facilitate adoption and address staff turnover challenges effectively.

Challenges:

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Staff capacity at all levels (State, State Association, and eligible entities) was found to be a challenge. There may be a financial cost to purchase a data system, which may be burdensome to meet. The state's procurement policy may also be challenging. In this case, some states were able to work with their State Association to manage the contract. Data system compatibility challenges between Google and SharePoint have been identified as an issue. Some states reported that the process can be lengthy and time-intensive for data system research and implementation. The State Office may experience potential concerns and pushbacks regarding changes. States were able to mitigate this by listening to their Network and closing the communication loop on issues whenever possible. Engaging the Network throughout the development process and explaining the “why” behind the change and the benefits it will support helped Network buy-in and system implementation.

Benefits:

The benefits of a statewide data system are that it streamlines the process for both the State Office and eligible entities, simplifies data sharing, especially for those with satellite offices in more rural areas, and reduces burden by providing clear templates and guidance to help with staff turnover challenges. Utilization of a statewide data system allows more time for data collection and review, to provide faster feedback on data quality issues, and to increase consistency and comparability of data across agencies. It reduces or eliminates email back-and-forth and file size issues, provides real-time visibility into document uploads and deadlines, and centralizes multiple functions (reporting, Organizational Standards, etc.) to benefit eligible entities with limited staff. A statewide data system may include extensive warnings and error checking for quality data.

Tools/Templates/Resources

- [Database Vendor List](#)
- [Guide for Writing an RFP for CSBG System Procurement](#)
- [VA - Comprehensive CSBG Reporter User Guide](#)

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- 2. *Understand the requirements and the purpose of the tools and/or templates*** – State CSBG staff are familiar with how and why specific tools and/or templates are used. This includes knowing what information is required, how the tool supports compliance with CSBG requirements, and how it contributes to broader goals such as performance management, accountability, or continuous improvement.

States Who Have Employed This Practice:

Connecticut, Maine, Utah

Purpose:

When developing a standardized tool and/or template, it is important that states ensure that the tool aligns with all CSBG Federal and State requirements. This also helps states understand what data is truly needed for compliance, reducing the need for excessive data collection. In doing so, it also removes the need for eligible entities to review all CSBG requirements when creating their own CSBG tools, such as Community Need Assessment (CNA), Community Action Plan (CAP), and reporting tools for Organizational Standards. This ultimately reduces administrative burden, which particularly benefits rural agencies that tend to have less capacity.

Method:

When developing a standardized tool, it is important that states do a thorough review of all CSBG Act requirements, including any recent guidance provided by the Office of Community Services (OCS) through Dear Colleague Letters (DCL) or Information Memorandums (IMs). It is also critical to review state-specific requirements (e.g., State statutes, policies, contracts, etc.) that should be incorporated into the functionality of the tool. Again, states ought to determine what information is necessary to ensure compliance and seek to reduce collecting data that may not serve the intended purpose of the tool and/or template in meeting the CSBG Act and/or State-specific requirements. Additionally, states that employed this promising practice sought to reduce duplication among CSBG requirements, such as Maine and Utah, and/or other programs, like Connecticut, commonly administered by eligible entities, whenever possible among CSBG requirements. In essence, tools and/or templates can support a grantee in checking multiple boxes of requirements (eg., meeting organizational standards) simply by submitting one or two documents(s) to the State.

Challenges:

Bringing a network of grantees on board with a change resulting from the implementation of a new standardized tool was identified as one of the biggest challenges. States that sought feedback from their Network and involved them in the development process received less pushback. Some states commented that competing demands challenged

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timely communication and training needed to support roll-out of new tools. State administrators emphasized that proactive planning, clear prioritization, and leveraging existing communication structures made it feasible to provide T/TA into the new standardized tool and/or template without overwhelming current responsibilities. State leadership approval process was also identified as a challenge that could impede the development and/or use of a standardized tool due to bureaucracy and red tape. Including all relevant stakeholders (i.e., legal counsel, other state departments, etc.) within the State Office may help with the development of the tools and/or templates, reduce the need for rework, and help ensure timely approval.

Benefits:

As long as the process is transparent, well communicated, and engages all relevant stakeholders (i.e., legal counsel, other state departments, State Associations, eligible entities, etc.), the implementation of a standardized tool and/or template can significantly reduce administrative burden related to multiple reporting and compliance requirements for CSBG, for both the State Office and eligible entities, especially those serving rural communities.

Tools/Templates/Resources

- Connect with [State Offices](#) to learn more (CT, ME, UT).

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3. ***Don't reinvent the wheel: develop standardized tools and/or templates, across multiple programs (e.g., WAP, LIHEAP, Head Start, etc.), utilizing the Network's input*** – The practice of using available models and creating shared, consistent tools and/or templates, with the Network's input that can be used across various programs administered by eligible entities, if possible.

States Who Have Employed This Practice:

California, Connecticut, Illinois, Maine, Montana, Utah, Virginia, Wyoming

Purpose:

To reduce the burdensome collection of duplicative information, especially for rural eligible entities that typically have less capacity. The goal is to minimize redundant requests, streamline compliance processes, and ease administrative burden. State Offices may simplify and streamline eligible entity staff workload through the development and implementation of a variety of standardized tools. Standardized tools provide clear direction, expectations, and parameters for tasks performed by staff and thereby support the capacity of rural eligible entities that may be challenged by high turnover, large workloads, geographic distances, and lack of resources. Standardized tools also provide consistency, thereby helping to reduce State Office review processes. Coordination with other programs with similar data requirements may further reduce the work demand on eligible entities as well as State Office staff.

Examples of standardized tools include the following templates and tools:

- Community Needs Assessment (CA, CT, IL, LA, ME, MT, UT, WY, OK)
- Community Action Plan (CA, CT, GA, IL, LA, MT, NV, UT, VA, WY, MI)
- Strategic Plan (LA)
- Organizational Standards (compliance and documentary support) (CA, GA, LA, ME, NV, OH, UT, VA, WY, IA, KY)
- Quarterly and Annual Reporting (CA, IL, MT, NV, OH, UT, VA, IA, KY)
- Tripartite Board Reporting (ME, UT, WA, OH)
- Monitoring forms (AZ, CA, GA, IL, LA, ME, NV, OH, UT, VA, VT, WY, KY, WA)
- Payment systems (CA, NV, WY)
- Statewide data systems (AZ, CT, IL, LA, MT, NV, OH, VA)

Method:

It is important that the State Office first establish a clear understanding of Federal and State CSBG requirements and use this understanding to guide tool development (see Promising Practice: [Understand the requirements and the purpose of the tools and/or templates](#)). Additionally, states, like Connecticut, Illinois, Maine, and Virginia, consulted with their

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eligible entities and with the State Association on tool development, and thereby captured the perspective of the user and expanded their understanding of what tools were found to be beneficial. States interviewed for this promising practice emphasized the need to listen to the Network. Through listening, the State Office will discover the unique needs of its rural eligible entities. Additionally, eligible entities and State Association participation in the development of the tool(s) support implementation and Network adoption of the new practice.

The promising practice is to **not** reinvent the wheel. Great models exist for many tools that the State Office may be considering. Examples are included in this compendium, and others can be found in NASCS's member portal (login credentials required). Another tremendous resource is the Network of CSBG State Offices. Connecting with peers and learning directly from them helps individuals better understand the tool/template and if it is something they can implement at their State Office. Opportunities to ask and share include NASCS and OCS regional meetings, NASCS conferences, and other networking events. NASCS staff and board members are also resources for State Offices interested in tool development.

State Offices can streamline the work of tool development by accessing and adapting the work of other states. State Offices may simplify their own work through coordinating tool development with the interests and needs of other programs. For example, there may be opportunities to develop a tool that captures monitoring information for multiple programs (i.e., CSBG and LIHEAP) and thereby simplify monitoring tasks of the State Office and of the eligible entities.

Depending on the complexity of the tool needed, development could take just a day or two (i.e., tripartite board reporting form) or more than a year (i.e., statewide data system). To facilitate adoption of the developed tool, regardless of complexity, State Offices ought to include eligible entity and State Association input in the development and implementation process.

Challenges:

Change is its own challenge. Introducing new templates, tools, or processes may invite pushbacks and resistance as old ways are familiar. Pushback may also occur in an environment where there is no clear understanding of the “why” behind the change. States can address this by sharing “why” the tool is needed, the benefit, how the tool helps the Network, and how it builds capacity, if applicable. Engaging the Network in the development of the tool supports understanding of the need and role for the tool, as well as supporting Network buy-in and implementation.

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Additional challenges include the time and training needed to ensure successful implementation of the tool. States interviewed observed that offering training in several formats (in-person, remote, and recorded) was appreciated by rural eligible entities with limited staff and large jurisdictions. The flexibility offered is appreciated in the choice of training approach. Recording trainings also helps address training needs regarding staff turnover.

Benefits:

Standardized tools simplify work by clarifying expectations and processes. While this promising practice benefits all eligible entities, rural eligible entities especially benefit as their staff commonly face high workloads and frequent turnover. Tools such as statewide data systems provide one place for eligible entities to address their CSBG (and sometimes other) program requirements. Standardization also simplifies work for the State Office as information can be more efficiently collected from uniform sources, and training can be focused on the successful use of specific tools

Tools/Templates/Resources

- [CA- 2026-2027 CNA-CAP Template](#)
- [CT - CAP Form Guidance](#)
- [CT - CAP Update Form](#)
- [CT - Comprehensive CNA Handbook Most Recent](#)
- [CT - Comprehensive CNA Template](#)
- [GA - CSBG and LIHEAP Pre-Visit Questionnaire](#)
- [IL - CAP Template](#)
- [IL - CAP Template Guide](#)
- [LA - Strategic Plan Toolkit](#)
- [OK - CNA Survey](#)
- [UT - Community Action Plan Tool](#)
- [VA - CAP Plan Manual 25-26](#)
- [WY - FY26 CAP Template](#)
- [WY - FY26 Multi-County CAP Budget](#)
- [WY - CAP Mapping Worksheet](#)