

State Management Work Group 2.0 | Streamlined Administrative Requirements and Processes

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 Streamlined Administrative Requirements and Processes?

The intentional simplification, alignment, or reduction of administrative tasks, documentation, and reporting requirements for CSBG eligible entities. This may include consolidating forms, aligning deadlines across funding sources, simplifying tools and/or templates, or utilizing technology to ease submission or reporting processes.

Promising Practices

1. **[Conduct a statewide Community Needs Assessment or equivalent](#)** – The State Office leads or coordinates a comprehensive Community Needs Assessment for its entire Network, to identify the key characteristics of the population for the state, but also to identify gaps in services and programs and to ensure programs and services address the local gaps, priorities, and track emerging trends.
2. **[Reduce both the frequency and content of reporting and monitoring](#)** – The elimination and/or reduction of administratively burdensome reporting and/or monitoring content that is not a requirement of the CSBG Act, OCS Guidance, and/or State laws or regulations.
3. **[Coordinate with other state agencies to reduce duplication of information collected](#)** – The connection, collaboration, and coordination with other State departments to reduce duplication of information sharing (e.g., reporting, monitoring, etc.) at the eligible entities level.

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1. **Conduct a statewide Community Needs Assessment or equivalent** – The State Office leads or coordinates a comprehensive Community Needs Assessment for its entire Network, to identify the key characteristics of the population for the state, but also to identify gaps in services and programs, and to ensure programs and services address the local gaps, priorities, and track emerging trends.

States Who Have Employed This Practice:

Connecticut, Maine, Montana, North Dakota

Purpose:

CSBG statewide Community Needs Assessment (CNA) serves as a powerful tool in meeting the CSBG Act and Organizational Standards requirements and for identifying shared strengths, challenges, and service gaps across diverse communities. This is particularly true for rural eligible entities, which often face resource constraints, limited infrastructure, and geographic isolation. A statewide CNA can reduce administrative burden and redundant data, be cost-efficient, provide a standard of consistency, and enhance strategic capacity, especially for eligible entities serving rural communities.

Method:

State offices, in conjunction with the State Association and eligible entities, need to determine the value of conducting a statewide CNA. Connecticut, Maine, Montana, and North Dakota all hired and/or worked with a consultant to engage their State Association and eligible entities in gathering information and determining the needs in their local communities. The use of surveys, workgroups, focus groups, and other regularly scheduled meetings to gather input for the CNA allows for robust data to be collected. The process allows for individual eligible entities to review and revise the information collected based on local needs. States will need to regularly review the process and revise the tools to ensure the needs of the communities are captured accurately and in a timely manner.

Challenges:

Smaller state offices may have difficulties justifying the resources (staff time) and the costs (using a consultant) of conducting a statewide CNA. Smaller state offices may be able to leverage CSBG discretionary funds to offset the costs of conducting a statewide CNA. Some states have also implemented cost-sharing models in which eligible entities contribute a portion of the funding. Additionally, asking eligible entities to participate in workgroups or focus groups can be a challenge, as their time is already limited to the administrative and operational needs of the organization. Due to the daily demands of smaller organizations and rural communities, having eligible entity staff review key findings, make recommendations, and meet timelines can be difficult. Several states have found success by

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offering flexible participation options, such as virtual meetings, asynchronous feedback tools, or integrating CNA discussions into existing regional meetings.

Benefits:

A statewide CNA provides a standard of consistency in reporting key findings and data. Having a statewide CNA reduces the amount of data examination and produces a comprehensive report using consistent language. Larger eligible entities typically have the resources to produce a thorough CNA; having a statewide report allows the smaller eligible entities to have the same scope of key findings and data, specific to all communities across the state. Eligible entities can review their specific key findings and data and provide information to individualize the report for their communities.

State offices that have used a consultant/contractor typically save time for both the state office and eligible entities, and use of resources, allowing for cost-sharing and savings. State Offices may also partner with other stakeholders (within the state government system to build linkages. For example, the state department of health may be interested in the findings on social determinants of health, or the local school system may be interested in seeing if there is an increase in children under 5 for a pre-k program.)

Tools/Templates/Resources

- [MT - Statewide CNA: A Comprehensive Guide](#)
- [MT - Statewide CNA Survey RFP 2024](#)
- [MT - CNA Report 2024](#)
- [MT - CNA Survey 2025](#)
- [MT - CSBG Assessment VISTA Job Description](#)
- [MT - HRDC Directors Association](#)
- [MT - HRDCs Phase 2 Costs Table](#)
- [MT - MCVP Host Site Application 2023](#)
- [MT - MCVP Host Site Readiness Assessment](#)
- [MT - MCVP Recruitment Assurances 2023](#) (Fillable PDF)
- [MT - VISTA Letter of Support](#)

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- 2. *Reduce both the frequency and content of reporting and monitoring*** – The elimination and/or reduction of administratively burdensome reporting and/or monitoring content that is not a requirement of the CSBG Act, OCS Guidance, and/or State laws or regulations.

States Who Have Employed This Practice:

Connecticut, Maine, Nevada, Virginia

Purpose:

The intentional elimination or scaling back of administratively burdensome reporting and monitoring requirements that go beyond what is mandated by the CSBG Act, OCS guidance, or state laws and regulations. By focusing only on essential data and compliance elements, states can significantly ease the workload on eligible entities. This is especially impactful for rural eligible entities, which often operate with smaller staff and limited administrative resources. Reducing unnecessary reporting and monitoring demands allows these eligible entities to redirect time and capacity toward delivering programs and services, improving responsiveness to community needs, and enhancing overall program quality in geographically isolated or resource-constrained areas.

Method:

One effective way to streamline processes for the benefit of rural eligible entities and the broader CSBG network is to reduce the frequency and scope of monitoring and reporting to the extent possible while still collecting the necessary information to demonstrate compliance. States like Maine and Virginia that engage eligible entities in reviewing existing processes, seeking their input, and making incremental, thoughtful changes over time found the adjustments made were both practical and effective. Eliminating unnecessary reports and providing training and technical assistance on any new procedures further supports successful implementation. States, such as Connecticut and Nevada, also identified coordinating with other state agencies to minimize duplicative requests as key strategies for reducing administrative burden. Additionally, states like Maine and Virginia, which rely more on desk reviews to complement on-site monitoring, saw positive impacts on rural agencies. States that used standardized reporting templates like Connecticut, Maine, and Virginia, whether through a shared online data collection and reporting system or other state-approved tools, proved to be an important method for achieving consistency and efficiency in reporting.

Challenges:

State offices face the challenge of reducing the burden on eligible entities while maintaining full compliance with on-site monitoring and reporting requirements. It's important that the

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state office has a good understanding of the CSBG Act, OCS Guidance, and/or State laws or regulations that impact reporting and monitoring requirements. Securing buy-in from both eligible entities and other state agencies involved in streamlining efforts can be difficult, as each may have different priorities and processes. High staff turnover at eligible entities can hinder knowledge retention, making it harder to implement and sustain changes effectively. In addition, it was difficult to balance the diverse needs of eligible entities of varying sizes and levels of rurality, ensuring that streamlined processes are reasonable, practical, and responsive to all parts of the network.

Benefits:

State offices that have streamlined monitoring and reporting processes report benefits for state offices, eligible entities, and the clients they serve. Shorter on-site monitoring visits reduce travel time and costs for state staff and create more opportunities for meaningful, solution-focused conversations, as much of the compliance-related document review is completed in advance. Eligible entities gain time for direct service delivery due to reduced administrative duties and benefit from greater consistency in the review process over time. This reduction in administrative burden is especially valuable for smaller rural agencies operating with limited capacity and resources. Clients ultimately benefit as eligible entities can dedicate more staff time and resources to programs and services, and streamlined reporting often produces higher-quality data that can be leveraged to secure additional funding to better meet community needs.

Tools/Templates/Resources

- [ME - CSBG Reporter & Org Standard Assessment Manual](#)
- [ME - Organizational Standard Workplan Template](#)
- [VA - CSBG Monitoring](#)
- [VA - Organizational Standards Private](#)
- [VA - Org Standards Public](#)

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3. ***Coordinate with other state agencies to reduce duplication of information collected*** – The connection, collaboration, and coordination with other State departments to reduce duplication of information sharing (e.g., reporting, monitoring, etc.) at the eligible entities level.

States Who Have Employed This Practice:

Connecticut, Georgia, Illinois, Nevada, Vermont

Purpose:

This promising practice focuses on enhancing collaboration between CSBG State Offices and other state agencies to reduce redundant data collection, streamline monitoring, and improve efficiency across programs. The goal is to alleviate the administrative burden on eligible entities, particularly those in rural communities, by aligning definitions, timelines, and reporting requirements. This coordination ultimately leads to more efficient service delivery and improved outcomes for low-income individuals and families.

Method:

State Offices that employed this promising practice began by mapping overlapping programs and identifying shared needs. Early efforts focused on outreach, joint meetings, and pilot partnerships. Illinois conducted outreach to other state partner agencies, such as the Departments of Human Services, Corrections, Children and Family Services, the Governor's Office, and the Broadband Office. Other states, like Connecticut, worked within their own department, which served similar anti-poverty initiatives like CSBG, such as SNAP, LIHEAP, SSBG, and housing programs. Other states, like Nevada, focused on practical integration through joint monitoring, shared information practices, and the coordination of state staff at eligible entities' locations, especially rural communities. Some states, like Vermont, worked with other programs through cross-program staff management, joint meetings with housing and shelter providers, and a supported whole-family approach. Sustaining the effort required regular communication, shared tools (such as crosswalk documents and monitoring reports), and embedding collaboration into contracts, staffing models, and training plans. It is important that State Offices share their coordination efforts with the Network and explain the benefits.

Challenges:

Capacity was found to be a significant challenge. State offices that began with other receptive state agencies and demonstrated value were able to build early momentum. State offices often encounter resistance or a lack of participation from certain departments. State offices found that sharing success stories and emphasizing mutual benefits encouraged buy-in. Rural and geographic barriers were also identified as a challenge. State offices that were

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able to leverage technology, position state personnel at rural CAAs, and support regional service hubs were able to combat this challenge. States also found that the need for leadership justification and support was often required. Those who framed coordination as a resource-saving and data-strengthening approach aligned with strategic goals were able to increase success.

Benefits:

Coordinating with other state agencies to reduce duplication of information collected offers significant benefits across the CSBG network, particularly for rural communities and eligible entities. For local eligible entities with limited staff capacity, especially in rural areas, the reduction in duplicated intake, forms, and monitoring requirements allows more time and resources to be devoted directly to client services. Streamlined processes also enhance operational efficiency and make it easier for smaller agencies to remain in compliance. Additionally, more coordinated systems improve access to services for clients, helping them better navigate the network of programs available to meet their needs.

At the state level, consolidating data collection and reporting supports more effective storytelling, strategic planning, and legislative advocacy. It also enables states to better align resources across departments, resulting in more efficient use of public funds. For the broader CSBG network, this practice fosters stronger cross-sector partnerships, particularly with agencies focused on housing, energy, broadband, and human services, and builds overall capacity by encouraging shared tools, joint training, and collaborative staffing approaches. These benefits collectively strengthen the Network's ability to serve low-income individuals and families across diverse communities, specifically in underserved rural communities.

Tools/Templates/Resources

- Connect with [State Offices](#) to learn more (CT, GA, IL, NV, VT).
- [GA - CSBG and LIHEAP Pre-Visit Questionnaire](#)