NATIONAL ASSOCIATION FOR STATE COMMUNITY SERVICES PROGRAMS

Regions 8 & 10 Community Action Conference
May 16-18, 2017

CSBG Annual Report

AGENDA

- ROMA Next Generation Overview

- CSBG Annual Report:

  – Module 2: Expenditures, Capacity and Resources

  – Module 3: Community Level

  – Module 4: Individual/Family Level

  – Module 1: State Administration

Building on the ROMA Foundation

ROMA NEXT GENERATION

ROMA Next Generation

- ROMA is a system for **continuous quality improvement** to enable the network to measure, analyze, and communicate performance.

- ROMA NG moves Community Action at all three levels to a **culture of continuous learning** rather than a compliance and reporting culture.

- Ultimately, ROMA NG will help the CSBG Network **generate more robust results** for individuals with low-incomes and the communities served.

ROMA Next Generation

- OCS, States and CAAs *use performance data to achieve greater stability and economic security* for families and communities.

- Each level of the CSBG Network
  - **executes the *full* ROMA cycle.**
  - **uses data on people, services, and outcomes for decision making.**

- The foundation of ROMA NG is the **National Community Action Theory of Change.**

What's new in ROMA Next Generation?

- The adoption of a **National Community Action Theory of Change.**
  - Support of creation of Local Theories of Change
- Renewal of the CSBG network understanding of the necessity of working toward **community change** as well as individual and family outcomes.
- Focus on **improved collection and analysis of data.**
  - **New Annual Report with OMB clearance**
  - Increased use of data at every point of the full ROMA Cycle.
- Increased **Integration of the phases of the ROMA Cycle**.

ROMA NG: The CSBG Annual Report and the CSBG IS Report

Improving Performance Management

- Under the IS reporting system we found some things missing:

Which have been added to the new Annual Report
Reporting of services and strategies
Data on state and federal accountability measures
Data on Organizational Standards
Additional Community Level outcomes (new NPIs)
Ability to show progress on community work over time
Additional infrastructure for multi level data analysis
OMB clearance for 3 years (as of January 2017)

Where are we now?

- CSBG Annual report received a *3-year clearance* from the Office of Management and Budget (OMB) on January 12, 2017.

- This starts the *phase-in* of the CSBG Annual Report and the *phase-out* of the CSBG IS Survey.

Where are we going?
CSBG Annual Report Implementation:
Two Phases

Phase 1

- FY16 & FY17 – Module 1 only.
- Only affects state offices and not agencies.
- Local Agency data is completed in the CSBG IS Survey

Phase 2

- FY 18
- Modules 2-4 are implemented.
- No data is reported in the CSBG IS Survey

CSBG Annual Report Implementation: Data Collection for Modules 2-4

- **Modules 2-4 are based on the State reporting period. Data collection for Modules 2-4 will depend on your State's CSBG reporting period.**
  - July 1, 2017 – June 30, 2018
  - October 1, 2017 – September 30, 2018
  - January 1, 2018 – December 31, 2018

Region VIII State Reporting Periods

- Colorado: January, 2017

- Montana: January, 2017

- North Dakota: January, 2017

- South Dakota: October, 2017

- Utah: October, 2017

- Wyoming: October, 2017

Region X State Reporting Periods

- Alaska: October, 2017

- Idaho: January, 2017

- Oregon: January, 2017

- Washington: October, 2017

Reporting Timelines: October 1 – September 30

Federal Fiscal Year (FFY)	State Reporting Period October 1 – September 30	Data Submission for States:	Data Submission for local CSBG Eligible Entities:
FFY 2016: October 1, 2015- September 30, 2016	✓ **State Reporting Period:** October 1, 2015- September 30, 2016	**Due March 31, 2017:** CSBG IS Survey is submitted to NASCSP. Module 1 is completed based on the 2016 Federal Fiscal Year and submitted through the On-Line Data Collection system (OLDC).	**CSBG IS Survey**
FFY 2017: October 1, 2016- September 30, 2017	**State Reporting Period:** October 1, 2016- September 30, 2017 **(In Progress)**	**Due March 31, 2018:** CSBG IS Survey is submitted to NASCSP. Module 1 is completed based on the 2017 Federal Fiscal Year and submitted through OLDC.	**CSBG IS Survey**
FFY 2018: October 1, 2017- September 30, 2018	**State Reporting Period:** October 1, 2017- September 30, 2018	**Due March 31, 2019:** CSBG Annual Report (Modules 1-4) is submitted through OLDC.	**CSBG Annual Report (replaces CSBG IS Survey)**

Reporting Timelines: January 1 – December 31

Federal Fiscal Year (FFY)	State Reporting Period January 1 – December 31	Data Submission for States:	Data Submission for local CSBG Eligible Entities:
FFY 2016: October 1, 2015- September 30, 2016	✔ **State Reporting Period:** January 1, 2016- December 31, 2016	**Due March 31, 2017:** CSBG IS Survey is submitted to NASCSP. Module 1 is completed based on the 2016 Federal Fiscal Year and submitted through the On-Line Data Collection system (OLDC).	**CSBG IS Survey**
FFY 2017: October 1, 2016- September 30, 2017	**State Reporting Period:** January 1, 2017- December 31, 2017 **(In Progress)**	**Due March 31, 2018:** CSBG IS Survey is submitted to NASCSP. Module 1 is completed based on the 2017 Federal Fiscal Year and submitted through OLDC.	**CSBG IS Survey**
FFY 2018: October 1, 2017- September 30, 2018	**State Reporting Period:** January 1, 2018- December 31, 2018	**Due March 31, 2019:** CSBG Annual Report (Modules 1-4) is submitted through OLDC.	**CSBG Annual Report (replaces CSBG IS Survey)**

How do we get there?

Assessment and Planning

Communication & Coordination

Training and Technical Assistance
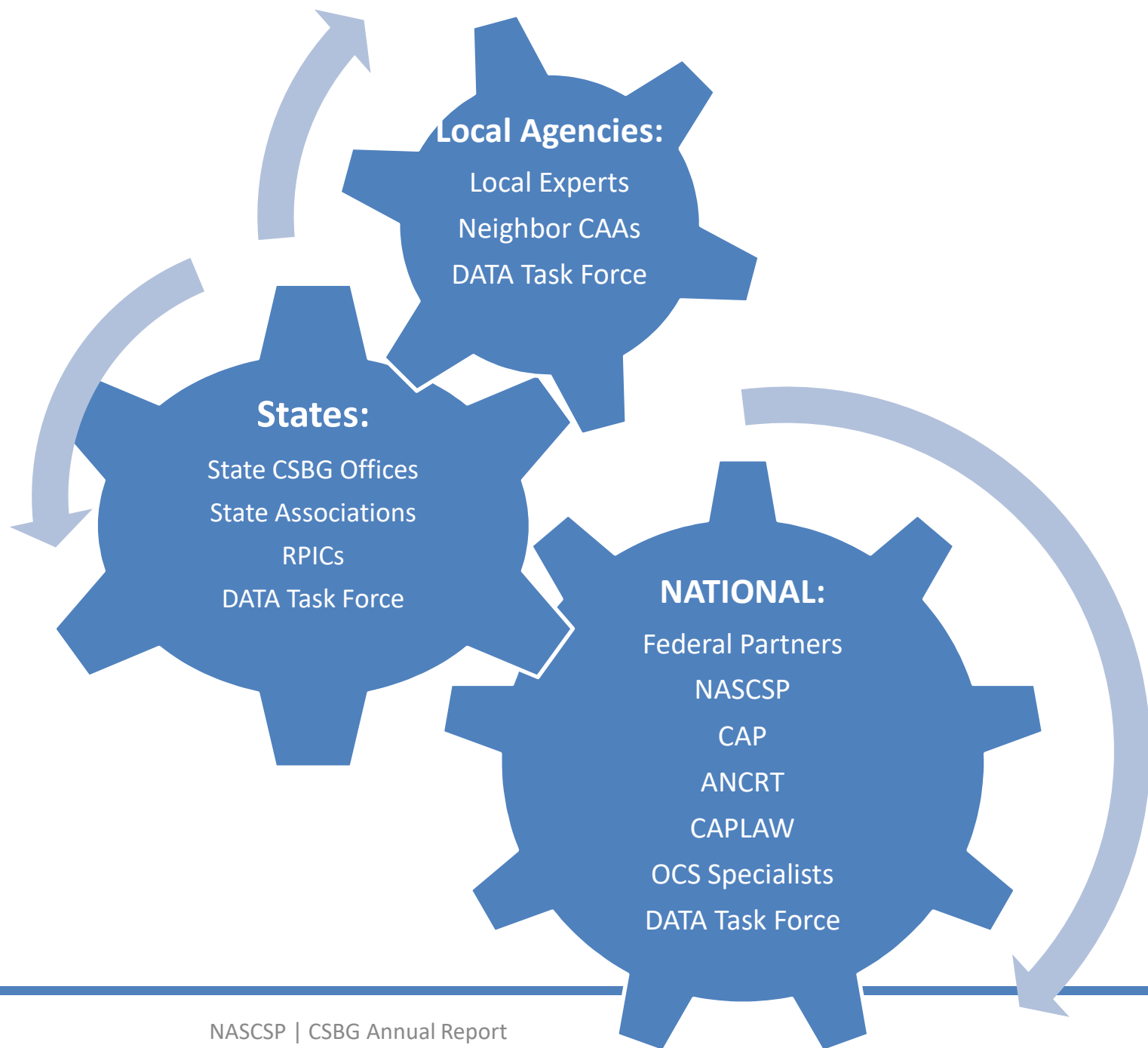
Assessment and Planning

NASCSP: Data procurement templates, survey states for technical assessment and implementation timeline, automation of Modules 2-4 in OLDC.

Local Agencies: Review of current data systems, timelines, T/TA needs, crosswalk what was reported in the CSBG IS that can be reported in the CSBG Annual Report, identify staff or committee to lead implementation.

States: Review of current data systems, timelines, and T/TA.

Preparing to Report on Modules 2-4

Research Modules 2-4.
Talk with your state,
talk with your
association, identify
new indicators that
you plan to utilize

Begin Data Collection.
How can your state or
NASCSP assist?

Do you need new
intake forms, data
collection processes or
training?

Local Agencies:

Local Experts

Neighbor CAAs

DATA Task Force

States:

State CSBG Offices

State Associations

RPICs

DATA Task Force

NATIONAL:

Federal Partners

NASCSP

CAP

ANCRT

CAPLAW

OCS Specialists

DATA Task Force

ROMA NG: The CSBG Annual Report and the CSBG IS Report

CSBG Annual Report

Module 1	• State Administration
Module 2	• CSBG Eligible Entity Expenditures, Capacity, and Resources
Module 3	• Community Level
Module 4	• Individual and Family Level

New Annual Report: Modules 2 - 4

- **Question:** What kind of data do I report in Modules 2 – 4?

Module 2

CSBG ELIGIBLE ENTITY EXPENDITURES, CAPACITY, AND RESOURCES

MODULE 2: CSBG ELIGIBLE ENTITY EXPENDITURES, CAPACITY, AND RESOURCES

- **Similar to Sections E-F in the CSBG IS**

- Completed by eligible entities; reviewed, evaluated, and analyzed by State CSBG Lead Agencies.

- **Section A** meets the Congressional requirement for an explanation of the total amount of CSBG funding expended during the reporting period based on categories referenced in the CSBG Act.

- **Section B** provides detail on agency capacity building funded by CSBG and other funding sources.

- **Section C** provides data on resources allocated to, administered through, and generated by the CSBG Eligible Entity.

MODULE 2: CSBG ELIGIBLE ENTITY EXPENDITURES, CAPACITY, AND RESOURCES

Module 2 – CSBG Eligible Entity Expenditures, Capacity, and Resources	CSBG IS Survey
Section A: Local Agency CSBG Expenditures	Section E. CSBG Expenditures by Service Category
Section B: Local Agency Capacity Building	National Performance Indicator 2.3 – Community Engagement National Performance Indicator 3.1 - Community Empowerment through Maximum Feasible Participation National Performance Indicator 4.1 - Expanding Opportunities through Community-Wide Partnerships National Performance Indicator 5.1 – Expanding Opportunities through Community-Wide Partnerships
Section C: Local Agency Resources Administered by the CSBG Eligible Entity	Section F. Resources Administered and Generated by the CSBG Network

Module 2, Section A: CSBG Expenditures by CSBG Eligible Entity - Data Entry Form

Name of CSBG Eligible Entity Reporting: _____

A. CSBG Eligible Entity Reporting Period	"X"
1. July 1 - June 30	
2. October 1 - September 30	
3. January 1 - December 31	

B. CSBG Expenditures Domains	CSBG Funds
1. Employment	
2. Education and Cognitive Development	
3. Income, Infrastructure, and Asset Building	
4. Housing	
5. Health and Social/Behavioral Development *(includes nutrition)*	
6. Civic Engagement and Community Involvement	
7. Services Supporting Multiple Domains	
8. Linkages *(e.g. partnerships that support multiple domains)*	
9. Agency Capacity Building *(detailed below in Table C)*	
10. Other *(e.g. emergency management/disaster relief)*	
Total CSBG Expenditures (auto calculated)	**$0**

Of the CSBG funds reported above, report the total amount used for Administration. For more information on what qualifies as Administration, refer to IM37.	

Module 2

C. Details on Agency Capacity Building Activities Funded by CSBG:

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

- ☐ Community Needs Assessment
- ☐ Strategic Planning
- ☐ Data Management & Reporting
- ☐ Training & Technical Assistance
- ☐ Other*

Below please specify Other Activities funded by CSBG under Agency Capacity:

Module 3

COMMUNITY LEVEL

CSBG ANNUAL REPORT | Module 3

- Collects **information** on the agency's community level initiatives.

- Showcases the **connection** between initiatives and outcomes.

- Demonstrates how initiatives would be **reported on over time.**

- **Auto-population** where information carries over from year to year.

- Expects that most CAAs have a handful of initiatives that include community strategies and **achieve community level change.**

Module 3 – Community Level	CSBG IS Survey
Section A: Community Initiative Status Form	National Performance Indicator 4.1 - Expanding Opportunities through Community-Wide Partnerships
Section B: Community National Performance Indicators (NPIs)	National Performance Indicator 2.1 – Community Improvement and Revitalization National Performance Indicator 2.2 – Community Quality of Life and Assets National Performance Indicator 2.3 – Community Engagement National Performance Indicator 3.2 – Community Empowerment through Maximum Feasible Participation
Section C: Community Strategies	National Performance Indicator 2.1 – Community Improvement and Revitalization

COMMUNITY NATIONAL PERFORMANCE INDICATORS | ARRANGED BY DOMAINS

- Like the Individual and Family Indicators, the Community Level Indicators are organized by six domains.
  - Employment
  - Education and Cognitive Development
  - Infrastructure and Asset Building
  - Housing
  - Health and Social/Behavioral Development
  - Civic Engagement and Community Involvement

Module 3, Section A: Community Initiative Status Form

Name of CSBG Eligible Entity Reporting: _____

	Use the dropdown menu to select the response where appropriate.
1. Initiative Name	
2. Initiative Year	1-7+ years
3. Problem Identification	Narrative (Provide a narrative on the scope of the problem)
4. Goal/Agenda	Narrative (Provide a narrative on the goal/agenda)
5. Issue/CSBG Community Domains	Employment; Education and Cognitive Development; Income, Infrastructure, and Asset Building; Housing; Health and Social/Behavioral Development; or Civic Engagement and Community Involvement
6. Ultimate Expected Outcome	Community Level National Performance Indicators (NPIs) (Reference the Community NPIs listed in Section B)
7. Identified Community	Neighborhood, City, School District, County, Service Area, State, Region, or Other
8. Expected Duration	Narrative (Provide the range in years, e.g. 1-3 years)
9. Partnership Type	Independent CAA Initiative, CAA is the core organizer of multi-partner Initiative, or CAA is one of multiple active investors and partners

Module 3, Section A: Community Initiative Status Form

10. Partners	Narrative (Provide a narrative on the key 1-3 partners)
11. Strategy(ies)	Select from the Community Level Strategies listed in Section C
12. Progress on Outcomes/Indicators	No Outcomes to Report, Interim Outcomes, Final Outcomes
13. Impact of Outcomes	Narrative (Provide additional information on the scope of the impact of these outcomes. e.g. If an initiative created a health clinic, please describe how many individuals and families are expected to be impacted.)
14. Outcomes/Indicators to Report	Community Level National Performance Indicators (NPIs) (Reference the Community NPIs listed in Section B)
15. Final Status	Initiative Active, Initiative Ended Early, Initiative Ended as Planned, Completed Still Delivering Value
16. Lessons Learned	Narrative

What is in the new Annual Report?

Module 3, Section C: Community Strategies List

Housing Strategies
End Chronic Homelessness Campaign
New Affordable Single Unit Housing Creation
New Affordable Multi- Unit Housing Creation (Single Resident Occupancy (SRO), temporary housing, transitional housing)
Tenants' Rights Campaign
New Shelters Creation (including day shelters and domestic violence shelters)
Housing or Land Trust Creation
Building Codes Campaign
Housing Policy Changes
Housing Legislative Changes
Other Housing Strategy: (please specify)

Health and Social/Behavioral Development Strategies
Health Specific Campaign
Farmers Market or Community Garden Development
Grocery Store Development
Gun Safety/Control Campaign
Healthy Food Campaign
Nutrition Education Collaborative
Food Bank Development
Domestic Violence Court Development
Drug Court Development
Alternative Energy Source Development
Develop or Maintain a Health Clinic
Health and Social/Behavioral Development Policy Changes
Health and Social/Behavioral Development Legislative Changes
Other Health and Social/Behavioral Development Strategy: (please specify)

Reporting on Community Work

- Counts of Change
  - These are basic measures that provide the number of units being measured.
    - e.g. jobs, houses, resources, etc. that have been added (created) and in some cases maintained, or undesirable conditions subtracted (eliminated), in the community the CSBG Eligible Entity has targeted.

Reporting on Community Work

Module 3, Section B: Community National Performance Indicators (NPIs) - Data Entry Form
Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.
Housing Indicators

Name of CSBG Eligible Entity Reporting: _____

	Counts of Change for Housing Indicators	I.) Identified Community (auto-populated)	II.) Target (#)	III.) Actual Results (#)	IV.) Performance target accuracy (% auto calculated)
Counts of Change	1. Number of safe and affordable housing units **developed in** the identified community (e.g. built or set aside units for people with low incomes).				
	2. Number of safe and affordable housing units **maintained** and/or **improved** through WAP or other rehabilitation efforts in the identified community.				
	3. Number of shelter beds **created** in the identified community.				
	4. Number of shelter beds **maintained** in the identified community.				

	Other Counts of Change for Housing Indicators- Please specify below.	I.) Identified Community (auto-populated)	II.) Target (#)	III.) Actual Results (#)	IV.) Performance target accuracy (% auto calculated)
Other Counts of Change					

Reporting on Community Work

- Rates of Change
  - These measures call for reporting the "percent change"—the increase or decrease of some rate from one year to the next.
    - Require more data and information than counts
  - These indicate the magnitude of the impact a community initiative has had in a community.

Reporting on Community Work

Rates of Change	Rates of Change for Housing Indicators	I.) Identified Community (auto-populated)	II.) Baseline existing starting point used for comparisons (#)	III.) Target (#)	IV.) Expected % change from baseline (Target % auto calculated)	V.) Actual Results (#)	VI.) Actual % change from baseline (% auto calculated)	VII.) Performance target accuracy (% auto calculated)
	1. Percent decrease in the rate of homelessness in the identified community.							
	2. Percent decrease in the foreclosure rate in the identified community.							
	3. Percent increase in the rate of home ownership of people with low incomes in the identified community.							
	4. Percent increase of affordable housing in the identified community.							
	5. Percent increase of shelter beds in the identified community.							

Other Rates of Change	Other Rates of Change for Housing Indicators - Please specify below.	I.) Identified Community (auto populated)	II.) Baseline existing starting point used for comparisons (#)	III.) Target (#)	IV.) Expected % change from baseline (Target % auto calculated)	V.) Actual Results (#)	VI.) Actual % change from baseline (% auto calculated)	VII.) Performance target accuracy (% auto calculated)

General comments:

Module 4

INDIVIDUAL AND FAMILY LEVEL

CSBG ANNUAL REPORT | MODULE 4

- **Section A:** Individual and Family National Performance Indicators

- **Section B:** Individual and Family Services

- **Section C:** All Characteristics Report

Module 4 – Individual and Family Level	CSBG IS Survey
Section A: Individual and Family National Performance Indicators (NPI)	National Performance Indicator 1.1 – Employment National Performance Indicator 1.2 – Employment Supports National Performance Indicator 1.3 – Employment Asset Enhancement and Utilization National Performance Indicator 6.1 – Independent Living National Performance Indicator 6.3 – Child and Family Development
Section B: Individual and Family Services	National Performance Indicator 1.2 – Employment Supports National Performance Indicator 6.2 – Emergency Assistance National Performance Indicator 6.4 – Family Supports National Performance Indicator 6.5 – Services Counts
Section C: All Characteristics Report	Section G. Program Participant Characteristics

INDIVIDUAL AND FAMILY LEVEL| NATIONAL PERFORMANCE INDICATORS

Organized by Domains:

1. Employment

2. Education and Cognitive Development

3. Income and Asset Building

4. Housing

5. Health and Social/Behavioral Development

6. Civic Engagement and Community Involvement

What is in the new Annual Report?

Module 4, Section A: Individual and Family National Performance Indicators (NPIs) - Data Entry Form

Goal 1: Individuals and Families with low incomes are stable and achieve economic security.

Employment Indicators

Name of CSBG Eligible Entity Reporting:

Employment	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/ I = IV] (% auto calculated)	V.) Performance Target Accuracy (III/II = V] (% auto calculated)
1. The number of unemployed youth who obtained employment to gain skills or income.					
2. The number of unemployed adults who obtained employment (up to a living wage).					
3. The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).					
4. The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).					
5. The number of unemployed adults who obtained employment (with a living wage or higher).					
6. The number of unemployed adults who obtained and maintained employment for at least 90 days (with a living wage or higher).					
7. The number of unemployed adults who obtained and maintained employment for at least 180 days (with a living wage or higher).					

Housing	I.) Number of Participants Served in program(s) (#)	II.) Target (#)	III.) Actual Results (#)	IV.) Percentage Achieving Outcome [III/ I = IV] (% auto calculated)	V.) Performance Target Accuracy (III/II = V] (% auto calculated)
1. The number of households experiencing homelessness who obtained **safe temporary shelter**.					
2. The number of households who obtained **safe and affordable housing**.					
3. The number of households who maintained safe and affordable housing for **90 days**.					
4. The number of households who maintained safe and affordable housing for **180 days**.					
5. The number of households who **avoided eviction**.					
6. The number of households who **avoided foreclosure**.					
7. The number of households who **experienced improved health and safety** due to improvements within their home (e.g. reduction or elimination of lead, radon, carbon dioxide and/or fire hazards or electrical issues, etc).					
8. The number of households with **improved energy efficiency and/or energy burden reduction** in their homes.					

PROPOSED SERVICES LIST

- New list in the Annual Report.

- The things (services) we deliver to individuals and families.

- Critics have cited that some of our outputs and outcomes are mixed together.

- Services and outcomes have been separated so that we can better understand and tell the story of what services are being provided by the Network to achieve results for individuals and families.

PROPOSED SERVICES LIST| DOMAINS

- **Arranged by domains to match the NPIs**
  - Employment
  - Education and Cognitive Development
  - Income and Asset Building
  - Housing
  - Health and Social/Behavioral Development
  - Support Services
    - Services provided to support agency efforts in the employment, education, income/asset building, housing and health domains. These are services that support efforts/activities in multiple domains.
  - Civic Engagement and Community Involvement

What is in the new Annual Report?

Module 4, Section B: Individual and Family Services -
Data Entry Form

Goal 1: Individuals and Families with low incomes are stable and achieve economic security.

Health and Social/Behavioral Development

Name of CSBG Eligible Entity Reporting: _____

Health and Social/Behavioral Development Services	Unduplicated Number of Individuals Served
Health Services, Screening and Assessments	
Immunizations	
Physicals	
Developmental Delay Screening	
Vision Screening	
Prescription Payments	
Doctor Visit Payments	
Maternal/Child Health	
Nursing Care Sessions	
In-Home Affordable Seniors/Disabled Care Sessions (Nursing, Chores, Personal Care Services)	
Health Insurance Options Counseling	
Reproductive Health Services	
Coaching Sessions	
Family Planning Classes	
Contraceptives	
STI/HIV Prevention Counseling Sessions	
STI/HIV Screenings	
Wellness Education	
Wellness Classes (stress reduction, medication management, mindfulness, etc.)	

Module 4, Section B: Individual and Family Services - Data Entry Form
Goal 1: Individuals and Families with low incomes are stable and achieve economic security.
Housing Services

Name of CSBG Eligible Entity Reporting: _____

Housing Services	Unduplicated Number of Individuals Served
Housing Payment Assistance	
Financial Capability Skill Training	
Financial Coaching/Counseling	
Rent Payments (includes Emergency Rent Payments)	
Deposit Payments	
Mortgage Payments (includes Emergency Mortgage Payments)	
Eviction Prevention Services	
Eviction Counseling	
Landlord/Tenant Mediations	
Landlord/Tenant Rights Education	

Module 4, Section C: All Characteristics Report - Data Entry Form
Goal 1: Individuals and Families with low-incomes are stable and achieve economic security.

Name of CSBG Eligible Entity Reporting:

A. Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained:

B. Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained:

C. INDIVIDUAL LEVEL CHARACTERISTICS

1. Gender	Number of Individuals
a. Male	
b. Female	
c. Other	
d. Unknown/not reported	
TOTAL (auto calculated)	0

2. Age	Number of Individuals
a. 0-5	
b. 6-13	
c. 14-17	
d. 18-24	
e. 25-44	
f. 45-54	
g. 55-59	
h. 60-64	
i. 65-74	
j. 75+	
k. Unknown/not reported	
TOTAL (auto calculated)	0

6. Ethnicity/Race	Number of Individuals
I. Ethnicity	
a. Hispanic, Latino or Spanish Origins	
b. Not Hispanic, Latino or Spanish Origins	
c. Unknown/not reported	
TOTAL (auto calculated)	0
II. Race	
a. American Indian or Alaska Native	
b. Asian	
c. Black or African American	
d. Native Hawaiian and Other Pacific Islander	
e. White	
f. Other	
g. Multi-race (two or more of the above)	
h. Unknown/not reported	
TOTAL (auto calculated)	0

7. Military Status	Number of Individuals
a. Veteran	

j. 75+
k. Unknown/not reported
   TOTAL (auto calculated) | 0

3. Education Levels

Number of Individuals

	[ages 14-24]	[ages 25+]
a. Grades 0-8		
b. Grades 9-12/Non-Graduate		
c. High School Graduate/ Equivalency Diploma		
d. 12 grade + Some Post-Secondary		
e. 2 or 4 years College Graduate		
f. Graduate of other post-secondary school		
g. Unknown/not reported		
TOTAL (auto calculated)	0	0

4. Disconnected Youth

Number of Individuals

a. Youth ages 14-24 who are neither working or in school

5. Health

Number of Individuals

	Yes	No	Unknown
a. Disabling Condition			

	Yes	No	Unknown
b. Health Insurance*			

*If an individual reported that they had Health Insurance please identify the source of health insurance below.

Health Insurance Sources

i. Medicaid
ii. Medicare
iii. State Children's Health Insurance Program
iv. State Health Insurance for Adults
v. Military Health Care
vi. Direct-Purchase
vii. Employment Based
viii. Unknown/not reported
TOTAL (auto calculated) | 0

7. Military Status

Number of Individuals

a. Veteran
b. Active Military
c. Unknown/not reported
TOTAL (auto calculated) | 0

8. Work Status (Individuals 18+)

Number of Individuals

a. Employed Full-Time
b. Employed Part-Time
c. Migrant Seasonal Farm Worker
d. Unemployed (Short-Term, 6 months or less)
e. Unemployed (Long-Term, more than 6 months)
f. Unemployed (Not in Labor Force)
g. Retired
h. Unknown/not reported
   TOTAL (auto calculated) | 0

Module 4, Section C: All Characteristics Report - Data Entry Form
Goal 1: Individuals and Families with low-incomes are stable and achieve economic security.

Name of CSBG Eligible Entity Reporting: [   ]

D. HOUSEHOLD LEVEL CHARACTERISTICS

9. Household Type	Number of Households
a. Single Person	
b. Two Adults NO Children	
c. Single Parent Female	
d. Single Parent Male	
e. Two Parent Household	
f. Non-related Adults with Children	
g. Multigenerational Household	
h. Other	
i. Unknown/not reported	
TOTAL (auto calculated)	0

10. Household Size	Number of Households
a. Single Person	
b. Two	
c. Three	
d. Four	
e. Five	
f. Six or more	
g. Unknown/not reported	
TOTAL (auto calculated)	0

13. Sources of Household Income	Number of Households
a. Income from Employment Only	
b. Income from Employment and Other Income Source	
c. Income from Employment, Other Income Source, and Non-Cash Benefits	
d. Income from Employment and Non-Cash Benefits	
e. Other Income Source Only	
f. Other Income Source and Non-Cash Benefits	
g. No Income	
h. Non-Cash Benefits Only	
i. Unknown/not reported	
TOTAL (auto calculated)	0

Below, please report the types of Other income and/or non-cash benefits received by the households who reported sources other than employment

14. Other Income Source	Number of Households
a. TANF	
b. Supplemental Security Income (SSI)	
c. Social Security Disability Income (SSDI)	
d. VA Service-Connected Disability Compensation	
e. VA Non-Service Connected Disability Pension	
f. Private Disability Insurance	
g. Worker's Compensation	

CSBG IS and the CSBG Annual Report

- **1.1 A Unemployed and obtained a job**
  - **Module 4, Section A, Employment**
    - **1. The number of unemployed youth who obtained employment to gain skills or income**
    - **2. The number of unemployed adults who obtained employment (up to a living wage).**
- **1.1 B Employed and maintained a job for at least 90 days**
  - **Module 4, Section A, Employment,**
    - **3. The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).**
    - **6. The number of unemployed adults who obtained and maintained employment for at least 90 days (with a living wage or higher).**

CSBG IS and the CSBG Annual Report

2.1 D Safe and affordable housing units in the community preserved or improved through construction, weatherization or rehabilitation achieved by Community Action activity or advocacy

- Module 3, Section B, Housing
    - 2. Number of safe and affordable housing units maintained and/or improved through WAP or other rehabilitation efforts in the identified community.

11. Housing	Number of Households
a. Own	
b. Rent	
c. Other permanent housing	
d. Homeless	
e. Other	
f. Unknown/not reported	
TOTAL (auto calculated)	0

	Number of Households
g. Worker's Compensation	
h. Retirement Income from Social Security	
i. Pension	
j. Child Support	
k. Alimony or other Spousal Support	
l. Unemployment Insurance	
m. EITC	
n. Other	
o. Unknown/not reported	

12. Level of Household Income	Number of Households
(% of HHS Guideline)	
a. Up to 50%	
b. 51% to 75%	
c. 76% to 100%	
d. 101% to 125%	
e. 126% to 150%	
f. 151% to 175%	
g. 176% to 200%	
h. 201% to 250%	
i. 250% and over	
j. Unknown/not reported	
TOTAL (auto calculated)	0

15. Non-Cash Benefits	Number of Households
a. SNAP	
b. WIC	
c. LIHEAP	
d. Housing Choice Voucher	
e. Public Housing	
f. Permanent Supportive Housing	
g. HUD-VASH	
h. Childcare Voucher	
i. Affordable Care Act Subsidy	
j. Other	
k. Unknown/not reported	

E. Number of Individuals Not Included in the Totals Above *(due to data collection system integration barriers)*

1. Please list the unduplicated number of INDIVIDUALS served in each program*:

Program Name	Number of Individuals

F. Number of Households Not Included in the Totals Above *(due to data collection system integration barriers)*

1. Please list the unduplicated number of HOUSEHOLDS served in each program*:
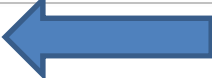
Program Name	Number of Households

*The system will add rows to allow reporting on multiple programs.

MODULE 1

CSBG Annual Report, Module 1

- Information is based on actual performance of activities identified in the state plan.

- Includes strategies for improving performance as appropriate and necessary.

- States receive feedback on their performance in these activity areas from the American Customer Satisfaction Index (ACSI).

Module 1 - State Administration	CSBG IS Survey
Section A: CSBG Lead Agency, CSBG Authorized Official, CSBG Point of Contact	Section C. General Information on State CSBG office
Section B: Statewide Goals and Accomplishments	Section D. Accomplishments and Coordination of Funds
Section C: CSBG Eligible Entity Update	Section B. General Information on Local CSBG Agencies
Section D: Organizational Standards for Eligible Entities	n/a
Section E: State Use of Funds	Section A. State Use of CSBG Funds Section B. General Information on Local CSBG Agencies
Section F: State Training and Technical Assistance	T/TA Survey Section B. General Information on Local CSBG Agencies
Section G: State Linkages and Communication	n/a
Section H: Monitoring, Corrective Action, and Fiscal Controls	n/a
Section I: Results Oriented Management and Accountability (ROMA)	n/a

Target vs. Actual Performance on the Organizational Standards				
Fiscal Year	**State CSBG Plan Target**	**Number of Entities Assessed**	**Number that Met All (100%) of State Standards**	**Actual Percentage Meeting All (100%) of State Standards**
Auto-populated	[Auto-populated target from question 6.6. of the State CSBG plan].	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]

Progress Indicators
Indicate the number of entities that met the following percentages of Organizational Standards.

	Number of Entities Assessed	**Number that Met between 90% and 99% of State Standards**	**Actual Percentage**
	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
Note – While the State targets the percent of CSBG Eligible Entities to meet 100% of the Organizational Standards, targets are not set in the State Plan for 90%, 80%, 70%, and 60% progress indicators.	**Number of Entities Assessed**	**Number that met between 80% and 89% of State Standards**	**Actual Percentage**
	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
	Number of Entities Assessed	**Number that met between 70% and 79% of State Standards**	**Actual Percentage**
	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]

Percentage Meeting Organizational Standards by Category			
Category	Number of Entities Assessed	Number that Met All Standards in Category	Actual Percentage
1. Consumer Input and Involvement	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
2. Community Engagement	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
3. Community Assessment	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
4. Organizational Leadership	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
5. Board Governance	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
6. Strategic Planning	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
7. Human Resource Management	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
8. Financial Operations & Oversight	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]
9. Data and Analysis	[Insert a number between 0 – 99]	[Insert a number between 0 – 99]	[Auto-calculated]

I.3. State Review and Feedback on Data

I.3 State Review of CSBG Eligible Entity Data: Describe the *procedures and activities* the State used to *review the ROMA data* (i.e. all data from elements of the ROMA cycle) from CSBG Eligible Entities for *completion and accuracy* (e.g. methodology used for validating the data submitted annually by the local agencies).

I.4. State Review and Feedback on Data

I.4 State Feedback on Data Collection, Analysis, and Reporting: Has the state provided each CSBG Eligible Entity *written, timely* (at a minimum within 60 days of the submission) *feedback* regarding the entity's *performance in meeting ROMA goals* as measured through *national performance data*? How did the state *review and provide feedback* on ROMA data?

State Accountability Measure 5S(ii)

I.5. State and CSBG Eligible Entity Continuous Improvement

- Provide *2-3 examples* of changes made by CSBG Eligible Entities to *improve service delivery* and *enhance impact* for individuals, families, and communities with low-incomes *based on their in-depth analysis of performance data*.

Planning

PLANNING

- Crosswalk of the CSBG IS and CSBG Annual Report
  - Establish the "low hanging fruit"
- Identify agency staff to lead the transition
- Establish internal timelines and work plans
- Review contracts and RFPs
- Work together as a State (State Office, State Association, local CAAs)
- TTA needs…what can NASCSP do for you?
  - Tools for public CAAs
  - Definitions

HOW DO WE GET THERE?

Annotated CSBG Annual Report

CSBG IS – CSBG Annual Report Crosswalk

NPI	CSBG IS Description	CSBG Annual Report		
		Very Similar Language	Similar Language	No Similar Language
1.1	**EMPLOYMENT**			
Goal 1: Low-income people become more self-sufficient.				
1.1 A	Unemployed and obtained a job		Module 4, Section A, Employment, 1. The number of unemployed youth who obtained employment to gain skills or income. 2. The number of unemployed adults who obtained employment (up to a living wage).	
1.1 B	Employed and maintained a job for at least 90 days		Module 4, Section A, Employment, 3. The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).	
1.1 C	Employed and obtained an increase in employment income and/or benefits		Module 4, Section A, Employment, 8. The number of employed participants in a career advancement related program who entered or transitioned into a position that provided increased income and/or benefits.	

April 4, 2017

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CSBG

CSBG Services and Technical Assistance

CSBG TTA Center

Resources and Recordings

   Training Request Form

State Plan Information

Organizational Standards

ROMA

   ROMA Next Generation

      FRN2 30 Day Comment Period

      FRN1 60 Day Comment Period

      Initial Feedback Period

      Archive

   National ROMA Peer to Peer Training

CSBG IS Survey

   CSBG IS 2016 Submission Form

CSBG Annual Report and Resources

   Archive

CSBG Policy and Government Affairs

Weatherization

Healthy Homes

Carbon Project

State Contacts

Tools

FINAL CSBG Annual Report - This pdf is the OMB cleared CSBG Annual Report and is unchanged from the version included in the second Federal Register Notice (FRN#2), 30-day comment period in November 2016.

Module 2: Expenditure, Capacity, Resources Excel Forms, Module 3: Community Level Excel Forms, Module 4: Individual and Family Level Excel Forms - Download the excel forms for each module of the CSBG Annual report.

CSBG Reporting Timelines for States and local CSBG Eligible Entitie s - This chart shows the timeline for reporting on the CSBG Annual Report. Click here to see your State's CSBG Reporting Period.

State Reporting Periods for FY18 - Modules 2-4 are based on the State's CSBG Reporting Period and reporting starts in FY18. Check out this chart to see your State's Reporting Period.

Module 1 Resources:

CSBG Annual Report - Module 1: State Administration Instruction Manual - This document contains detailed instructions to guide your completion of Module 1.

Module 1 FAQs and Highlights - This 2-page flyer provides quick, important information about completing Module 1.

Module 1 Word Document - Module 1, State Administration of the CSBG Annual Report is now available in a word document.

OLDC Demos:

Take a look at these quick videos demonstrating how to complete each section of Module 1 in OLDC: Section A , Section B , Section C , Section D , Section E , Section F , Section G ,   Section H , Section I

Crosswalks:

High Level CSBG Annual Report/CSBG IS Survey Crosswalk - Use this quick reference tool to identify how the CSBG Annual Report and CSBG IS Survey overlap!

Annotated CSBG Annual Report -This detailed document provides line by line notations on which CSBG IS NPIs and Sections are included, expanded upon, or used to inform the CSBG Annual Report.

CSBG IS/CSBG Annual Report Crosswalk - Starting to map out how you will transition from the CSBG IS to the CSBG Annual Report? This detailed crosswalk starts with the NPIs in the CSBG IS Survey and identifies similar indicators in the CSBG Annual Report.

Training and Technical Assistance

- Additional Tools:
  - New numbering system for the CSBG Annual Report
  - CSBG Annual Report Crosswalk with LIHEAP, Head Start, WIOA, and Weatherization
  - Webinar Series
  - 2-day CSBG Annual Report Training
  - Data Dictionary
  - Instruction Manual and Lexicon

Questions?

- What have you already done to get ready for implementation of modules 2-4?
- How have you considered changing current planning or reporting processes?
- What do you need from NASCSP and other partners?

RESOURCES

- [National Theory of Change](#)

- [How does ROMA NG fit into ROMA](#)

- [CSBG – ROMA – ROMA Next Generation](#)

Questions?

Contact us!