Using Your Annual Report Data

August 28, 2019
RAISE YOUR HAND IF YOU ARE...

- Less than 5 years in the CSBG Network
- More than 5 years in the CSBG Network
- ROMA Trainer/Implementor
- CCAP
- Front Line Staff
- Board Member
- Executive Director
NASCSP members are state administrators of the U.S. Department of Health and Human Services Community Services Block Grant (CSBG) and the U.S. Department of Energy's Weatherization Assistance Program (DOE/WAP). NASCSP provides research, analysis, training and technical assistance to State CSBG and WAP offices, Community Action Agencies, and State Associations in order to increase their capacity to prevent and reduce poverty and build economic and energy security.
ABOUT NASCSP | CORE STRENGTHS

- Communications and Resources
- Training and Technical Assistance
- Advocacy and Leadership
- Building Collaborative Relationships
We provide information.
Over 15.3 million low-income individuals were served by the CSBG Network.

More than 1.4 million families, over 32% of those served, were living in severe poverty.

For every $1 invested in the federal CSBG program, the network leveraged an additional $7.80 from state, local, and private sources.

By a total of 1018 CSBG funded organizations and partnering with 197,666 local organizations to promote family and community outcomes.

6.5 million participants gained employment or work supports.

The number of individuals experiencing greater income from employment increased by 13% from FFY 2016.

41 million volunteer hours donated to CAAs, valued over $1 billion of volunteers time.

Over 300 thousand low income individuals were mobilized toward community empowerment through participating in decision-making and policy setting, business and home ownership, or other community involvement.

180,515 low-income people obtained safe and affordable housing.

128,339 existing housing units improved or preserved through construction, weatherization, or rehabilitation, and 18,508 safe and affordable housing units were created.

114,229 Educational and training placement opportunities for low-income people created, expanded, or saved from elimination.

13,109 low-income people completed Adult Basic Education (ABE) or General Educational Development (GED) coursework.
**CSBG NETWORK PARTICIPANTS**

Vulnerable populations served by the CSBG Network include:

- 3.9 million children
- 1.8 million people with disabilities
- 2.4 million seniors
- 1.7 million people who lacked health insurance

50 States, Puerto Rico, and the District of Columbia administer CSBG to 1,018 agencies.

CSBG agencies provided services to over 15.3 million low-income individuals and over 6.3 million families.

Of the 6.3 million families served by Community Action, 82.8% were in poverty, living below 125% of the Federal Poverty Guidelines.

Of the 6.3 million families served by Community Action, over 32.7% were in severe poverty, living below 50% of the Federal Poverty Guidelines.

**CSBG NETWORK RESOURCES**

For every $1 of CSBG, the Network leveraged $7.80 from state, local, and private sources, including the value of volunteer hours at federal minimum wage.

- $2.06 State
- $2.38 Local
- $2.30 Private
- $0.44 Value of Volunteer Hours

$7.80

The CSBG Network’s funding totaled over $31.4 billion.

- Of the $14.1 billion, over $669.6 million CSBG dollars were allocated directly to CSBG Eligible Entities.
- Including all federal sources and volunteer hours, the CSBG Network leveraged $20.18 of non-CSBG dollars per $1 of CSBG.

**CSBG NETWORK NATIONAL PERFORMANCE OUTCOMES**

Below is a subset of the Network’s 32.2 million outcomes, including indicators of movement toward self-sufficiency and community revitalization.

- **8.5 million** Employment or Work Supports
  - Participants with low-incomes in the CSBG Network employment initiatives obtained supports which reduced or eliminated barriers to initial or continuous employment, acquired a job, obtained an increase in employment income, or achieved “living wage” employment and benefits.

- **0.8 million** Economic Asset Enhancement and Utilization
  - Households with low-incomes achieved an increase in financial assets or financial skills as a result of CSBG Network assistance.

- **4.4 million** Child and Family Development
  - Infants, children, youth, parents, and other adults participated in developmental or enrichment programs facilitated by the CSBG Network and achieved program goals.

- **3.1 million** Independent Living for Low-Income Vulnerable Populations
  - Vulnerable individuals with low-incomes received services from the CSBG Network and secured or maintained an independent living situation as a result.

- **4.3 million** Family Stability
  - Participants with low-incomes obtained supports which reduced or eliminated barriers to family stability through assistance from the CSBG Network.

- **9.1 million** Emergency Assistance
  - Individuals and families with low-incomes received emergency assistance from the CSBG Network.

- **2.9 million** Community Opportunities and Resources
  - Community opportunities or resources were improved or expanded for people with low-incomes as a result of CSBG Network projects or initiatives, or advocacy with other public and private agencies.

- **1.1 million** Community Empowerment
  - Community members and people with low-incomes mobilized to engage in activities that support and promote their own well-being and that of their community as a direct result of CSBG Network initiatives through maximum feasible participation.
DATA Task Force

What is the CSBG DATA Task Force?
The CSBG DATA Task Force is convened by the National Association for State Community Services Programs (NASCSP) to assist the Office of Community Services (OCS) and NASCSP in understanding and addressing the CSBG Network’s data needs and the use of data for analysis and continual improvement of results. The CSBG DATA Task Force will serve as a consultative body focused on the transition from the CSBG IS Survey to the CSBG Annual Report, as well as ongoing assistance in the implementation of the CSBG Annual Report. The task force consists of representatives from Community Action Agencies, State CSBG Offices, Community Action Agency State Associations, National Partner organizations, and OCS.

Update from Summer 2019 Meeting
The CSBG DATA Task Force held their third in-person meeting in Washington D.C. on July 31st and August 1st, 2019. Members from local agencies, state offices, and state associations met to discuss the technical assistance needs of the network pertaining to the CSBG Annual Report. The DATA TF discussed topics ranging from the first full submission of the new CSBG Annual Report back in April to the upcoming OMB Clearance processes.

It was recognized that overall the Network did a great job in its first year of reporting in the CSBG Annual Report but that TTA needs exist still. To that end, the DATA TF will develop new tools and resources based on what they’ve learned from the first round of reporting. Tools and resources will include guidance on targeting in Modules 3 and 4, best practices with data collection and outputs, a reporting “calendar,” new FAQs, a Module 4 “compendium of...
ABOUT NASCSP | ADVOCACY & LEADERSHIP

NASCSP serves as the national voice for state CSBG & WAP managers in Washington D.C.

• Communicate with Congressional staffers and federal agency staff

• Monitor legislation and keep members updated on legislative developments
  • Submitted testimony in support of CSBG & WAP funding allocations
SAVE THE DATE
SEPTEMBER 23 - 27, 2019
NASCSP 2019
ANNUAL TRAINING
CONFERENCE
LITTLE ROCK
How do you know if your agency is on track?
What Sources of Data Are in Your Organization?

- Annual Report Data
- Needs Assessment Data
- Customer Satisfaction Data
- Financial Data
- HR Data
- Other Program Data (HUD, Head Start, TANF, LIHEAP)
- Organizational Standards
You Need a Complete Picture to Make Data-Informed Decisions
CSBG Annual Report

Community Services Block Grant (CSBG) Annual Report
Role of the CSBG Annual Report

- Fulfills CSBG Act requirements.
- State Plans are required and indicate how the State plans to operate CSBG and use CSBG funding.
- Annual Reports are required and indicate how the state actually operated and used CSBG funding.
- Provides information on State progress with organizational standards and state accountability measures.
- Provides information for OCS, State and local CAAs to use to manage and improve results.
What Data is in my Annual Report?
Module 2: Agency Expenditures, Capacity, and Resources

- Funds spent by eligible entities on the direct delivery of local services and strategies
- Capacity development
- Information on funding devoted to administrative costs by the eligible entities

RAW DATA COLLECTION: General Ledgers, Expenditure Tracking, Program Tracking, Certification Tracking, Community Partner List
Module 3: Community Level

- Implementation for community-level strategies (Community Level indicators for each domain)
  - Baseline
  - Target
  - Actual Results

- Results achieved for community-level strategies

RAW DATA COLLECTION: Community Initiative Tracking
Module 4: Individual and Family Level

• Each Domain’s indicators contain data elements by:
  • Targets
  • Results
  • Percent Achieving Outcomes
  • Performance Target Accuracy

• Services provided to individuals and families

• Demographic characteristics of people served by eligible entities

RAW DATA COLLECTION: People and Households served Tracking System
Indicators provide a means to measure achievement of or movement towards the long term goals.

Document the number of people who receive services and the number who achieved outcomes.

Provide data for analysis:
- What change was expected?
- What change happened?
- How does the actual change compare with the expected change?
- How accurate were the projections?
- What percent of people served achieved the outcome?
Annual Report Data Analysis
Data Analysis

Data Analysis is the **process of exploring data and reports** in order to extract **meaningful insights**, to better understand and **improve agency performance**.

- **Tasks**: Analysis focuses on tasks including questioning, examining, interpreting, comparing, confirming, and testing with the goal of **discovering useful information, conclusions, and supporting decision making**.

- **Outputs (purpose is to provide insights)**: ad hoc responses and analysis presentations (infographics, annual reports, strategic plans, CAP plans, community needs assessments)

- **Context**: Context is critical to good analysis. In order to tell a meaningful story with the data to drive specific actions, context becomes an essential component of the storyline. It emphasizes data points that are significant, unique, or special – and explain why they are important to the agency.

The goal of analysis is to answer questions by **interpreting the data at a deeper level, identifying findings, and providing actionable recommendations**.
Data Analysis Process

Managers have a critical role to play in the data analysis process, framing the question and analyzing the results. Six questions that managers should ask:

1. What was the source of your data?
2. How well do the sample data represent the population?
3. Does your data distribution include outliers? How did they affect the results?
4. What assumptions are behind your analysis? Might certain conditions render your assumptions and your model invalid?
5. Why did you decide on that particular analytical approach? What alternatives did you consider?
6. How likely is it that the independent variables are actually causing the changes in the dependent variable? Might other analyses establish connections more clearly?
ROMA NG Questions

- Did the Outcomes achieved address the needs identified in the assessment phase?
- How well did we track our success?
- Did we meet our targets? Why or why not?
- What has changed for the people we served?
  - What has changed for our community?
  - What Outcomes were achieved and for whom?
  - What Services and Strategies contributed to achieving the Outcomes?
  - What can we improve to better respond to local needs?
Questions You Want To Answer With Your Data

• Did we do what we thought we would do?
• Did we serve the population we thought we would serve?
• Did we make an impact on the identified needs?
• Can we tell what services (or set of services) produced the best opportunity for results?
• Are some populations achieving outcomes at different rates than others?
• Did we recruit and enroll sufficient numbers to allow us to achieve our target outcomes?
• Do we need additional resources?
• Was there something unexpected that influenced the outcomes?
Did We Measure the Right Things?

There is a difference between **numbers** and **numbers that matter.**
Needs Assessment Data
What does Needs Assessment Data tell us?

• Level and extent of particular needs
  • Housing, Health, Employment, etc.
    • Does the agency work to address those needs?

• Strengths in the community
  • Are we seen as a strength?

• Gaps in the community
  • Are we addressing those gaps?
What could Needs Assessment Data tell us if we...

• Compared outcome data to assessment data?
  • Did the outcomes match the identified needs?
  • Did we have an underperforming program that was due to a missed community resource?

• Compared service data to assessment data?
  • Uncover that needs were not identified in assessment?
What does Customer Satisfaction data tell us?

• Overall, satisfaction with services at the agency.
  • Depending on the agency’s survey, may include:
    • Information on facilities
    • Information on agency processes
    • Information on staff interactions
What could Customer Satisfaction Data tell us if we...

• Reviewed customer satisfaction of participants who received services vs those who did not?

• Compared customer satisfaction data between agency sites?
  • Paired with outcome data between sites?

• Compared Customer Satisfaction data by program?
## Financial Data

| + 6.481  |
| + 2.175  |
| + 254    |
| + 3.281  |
| + 1.547  |
| + 458    |
| + 36.459 |

+ 42.631

+ 17.850

+ 1.422
What does Financial Data tell us?

- Total Budget
- Total Expenditures
- Budget vs Actual
- Cashflow
- Assets and Liabilities
- Financial Position
What could Financial Data tell us if we...

• Compared financial data to outcome data
  • Cost per outcome
    • Compared cost per outcome by program

• Compared total investment per program vs overall program performance
  • Are the services we are investing in producing outcomes?
  • Cost per service

• Compared financial data to needs assessment data
  • Are we investing in the areas of greatest need?
HR Data
What can HR Data tell us?

• Staff experience
• Staff expertise and credentials
• Overall staffing by program
• Staff satisfaction
• Staff performance
• Overall agency strengths and gaps in workforce
What could HR data tell us if we...

- Compared program data to staff experience or credentials?
  - Do certain levels of experience or credentials result in better outcomes?

- Compared overall staffing to overall program performance?
  - What level of staffing correlates with performance?

- Compared financial investment with staff satisfaction?
  - What is the “sweet spot” for compensation to retain satisfied and high performing staff?
Other Program Data
What can Other Program Data tell us?

- Performance of agency programs
  - LIHEAP, Head Start, HUD, Nutrition, TANF, etc

- Income/Expenditures of other programs
What could Other Program Data tell us if we...

• Compared total program performance of each program?
  • Certain domains/types of programs perform better in the agency?

• Compared financial data from programs?
  • Does financial data correlate with performance?

• Compared HR data from programs?
  • Does certain levels of staffing inform

• Compared total programs to Community Needs Assessment?
  • Do we operate programs that are needed?
Organizational Standards Data
What can Organizational Standards Data tell us?

How are we performing in each of the 9 domains?

Where are our best performing domains?

What domains do we have the greatest opportunity for improvement?
What could Organizational Standards Data tell us if we...

• Paired it with financial information?
  • Does investment lead to better compliance?

• Paired it with Needs Assessment data?
  • Does our needs assessment identify the same areas of need and strength in our organization?

• Compared with our strategic plan?
  • Does our Strategic Plan align with the areas of agency improvement identified in the Organizational Standards?
Using Data for Decision Making
Good Decision Making considers both data and intuition.

- Reporting shows you **what is happening**, while analysis focuses on explaining **why it is happening** and **what you can do about it**.

- Data Analysis’s **recommendations** provides specific guidance on what actions to take based on the key insights found in the data. Once a recommendation has been made, **follow-up** on a decisions is next (go/no go/explore further). Decision will be used in the next round of **ROMA Planning and Implementation**.
Bringing This Together

• It’s not enough to analyze your data, you have to USE it.

• Bring together the players in the organization to make decisions informed by data analysis of each of these components
  • And others, depending on your organization!
Annual Report Data Analysis Can Inform Decisions In...

- Development/Revision of Theory of Change
- Strategic Planning
- Program Structure/Implementation Plans
- Resource Planning
The National Community Action Network Theory of Change

Community Action Goals

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

**Goal 2:** Communities where people with low incomes live are healthy and offer economic opportunity.

**Goal 3:** People with low incomes are engaged and active in building opportunities in communities.

Services and Strategies

- Employment
- Education & Cognitive Development
- Income, Infrastructure & Asset Building
- Health/Social Behavioral Development
- Housing
- Civic Engagement & Community Involvement

Core Principles

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

Performance Management

- How well does the network operate?
- What difference does the network make?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System
- Individual and Family National Performance Indicators
- Community National Performance Indicators

A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.

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Theory of Change

• What does our data tell us about poverty in our community?
  • Does the data support your assumptions?
• Is the information consistent with your plans?
• What services and strategies lead to desired outcomes?
  • Do we need to update our Theory of Change to reflect different strategies or outcomes?
• Did you reach the goals you established?
  • Were they the right goals?
Strategic Plan

• Did analysis uncover change in the community/makeup that impacts our strategic goals?

• Do we have the necessary agency capacity to reach strategic goals?
  • Employee credentials
  • Expertise
  • Funds
  • Partners

• Are our goals attainable?
  • Do we need to update large strategic goals based on performance?
Community Action Plan/Implementation

- Changes to programs
  - Strengthen/abandon
  - Strategies
- Changes to performance targeting
- Changes to fund allocation
- Who operates programs?
  - Staff credentials, expertise
- Partnerships
Resource Planning

• Based on prior performance, do we have the right resources to reach program or strategic goals?
  • Human Resources
  • Funding Resources

• Do existing resources need to be realigned?
  • Move resources from underperforming programs or those with less strategic value to the organization to those that maximize investment
Next Steps
Questions?

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Your feedback is important to the Partnership.

We invite you to complete a brief evaluation of this session so we can continue to provide timely content.

*Please complete the evaluation on paper or in the Event App.*