



FY26 CSBG State Plan Webinar:

Diving Deeper Sections 1 - 7

The Office of Community Services
Division of Community Assistance

July 31, 2025

Agenda

- Welcome
- FY26 CSBG State Plan Overview
 - Timelines
 - CSBG Eligible Entity List
 - SF-424-M
 - Review of Sections 1 – 7 of the CSBG State Plan
- Closing Remarks
- Question and Answer

Upcoming Webinars

FY26 CSBG State Plan Webinar: Diving Deeper Section 8-15

This session will include detailed information regarding state plan submission requirements, with emphasis on Sections 8-15. State administrators who need in-depth exploration of state plans should bring a copy of the fillable tool and use this webinar as a state plan work session. While this session targets newer CSBG administrators, all CSBG administrators are welcome to attend.

August 4, 2025
3:00—4:00 p.m. ET



CSBG PRIORITIES



REDUCING POVERTY



**REVITALIZING LOW-
INCOME COMMUNITIES**



**EMPOWERING LOW-INCOME
INDIVIDUALS & FAMILIES**

The PEAAC Framework

Performance Evaluation Accountability Availability and Knowledge

Performance	Evaluation	Accountability	Availability	Knowledge
<ul style="list-style-type: none">• Community Needs Assessment• American Customer Satisfaction Index (ACSI)• Organizational Standards• Accountability Measures• ROMA Next Gen• Training and Technical Assistance	<ul style="list-style-type: none">• Organizational Standards• Accountability Measures• ROMA Next Gen• Monitoring• Oversight• Training and Technical Assistance	<ul style="list-style-type: none">• Monitoring• Oversight• CSBG State Plan• CSBG Annual Report• Training and Technical Assistance	<ul style="list-style-type: none">• OCS Annual Report• Congressional Report• CSBG Performance Management website• CSBG Service Finder App• Training and Technical Assistance	<ul style="list-style-type: none">• CSBG State Plan• State Profile Sheets• CSBG Annual Report• CSBG Performance Management website• CSBG Spotlight Videos• Training and Technical Assistance

“

“STATE APPLICATION AND PLAN.—Beginning with fiscal year 2000, to be eligible to receive a grant or allotment under section 675A or 675B, a State shall prepare and submit to the Secretary an application and State plan covering a period of not less than 1 fiscal year and not more than 2 fiscal years.”

CSBG Act Section 676(b) [42 USC § 9908]

CSBG State Plans are Due September 1, 2025

A complete CSBG State Plan submission includes:

- CSBG Eligible Entity List (a separate form available in OLDC)
- Standard Form for Federal Assistance (SF-424-M) (CSBG State Plan Cover Page)
- CSBG State Plan, Sections 1-14, including the letter designating an authorizing official
- Certifications, Section 15

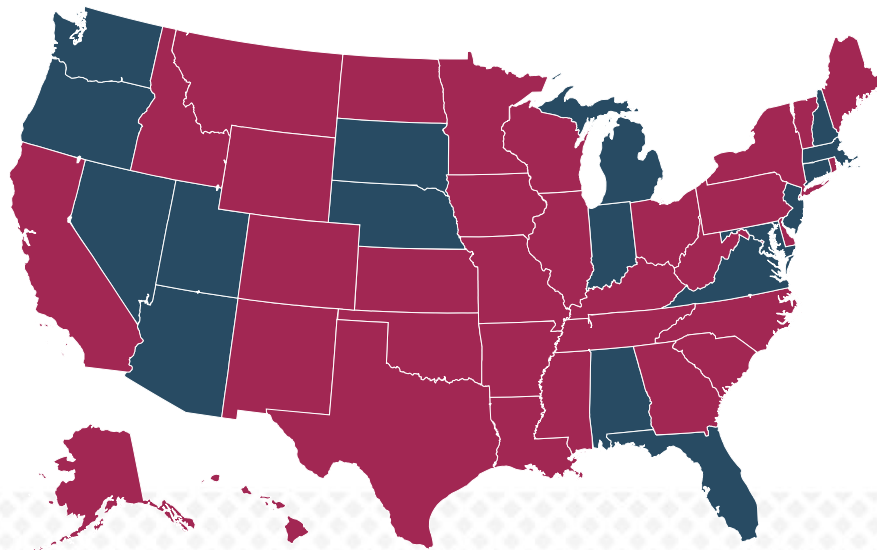
**The CSBG State Plan is based on the federal fiscal year (FY):
October 1 — September 30.**

CSBG Grant Recipients can submit a plan for one or two consecutive FYs

Grant Recipients Submitting a FY26 State Plan

Group A States/Territories (Maroon)

Alaska, American Samoa, Arkansas, California, Colorado, Delaware, Georgia, Hawaii, Idaho, Illinois, Iowa, Kansas, Kentucky, Louisiana, Maine, Minnesota, Missouri, Mississippi, Montana, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Pennsylvania, Puerto Rico, Rhode Island, South Carolina, Tennessee, Texas, Vermont, West Virginia, Wisconsin, Wyoming

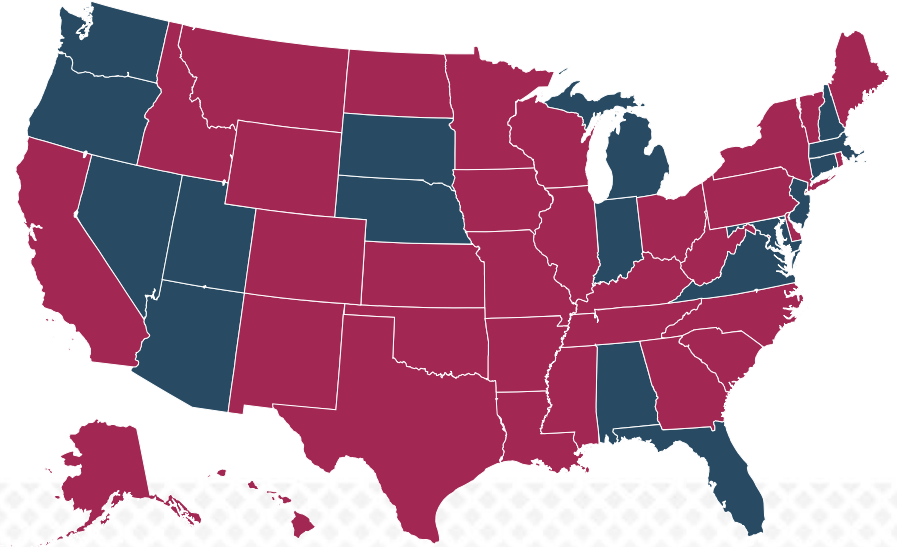


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Grant Recipients Not Required to Submit a FY26 State Plan

Group B States/Territories (Teal)

Alabama, Arizona, Connecticut, District of Columbia, Florida, Indiana, Maryland, Massachusetts, Michigan, Nebraska, Nevada, New Hampshire, New Jersey, Oregon, South Dakota, Utah, Virginia, Washington



Group B grant recipients are required to review and revise accepted plans or notify OCS that no revision is necessary by November 3, 2025

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CSBG State Plan Sections

- **CSBG Eligible Entity List**
- **CSBG Cover Page (SF-424M)**
- **Section 1:** CSBG Administrative Information
- **Section 2:** State Legislation and Regulation
- **Section 3:** State Plan Development and Statewide Goals
- **Section 4:** CSBG Hearing Requirements
- **Section 5:** CSBG Eligible Entities
- **Section 6:** Organizational Standards for Eligible Entities
- **Section 7:** State Use of Funds
- **Section 8:** State Training and Technical Assistance
- **Section 9:** State Linkages and Communication
- **Section 10:** Monitoring, Corrective Action, and Fiscal Controls
- **Section 11:** Eligible Entity Tripartite Board
- **Section 12:** Individual and Community Income Eligibility Requirements
- **Section 13:** Results Oriented Management and Accountability (ROMA) System
- **Section 14:** CSBG Programmatic Assurances and Information Narrative
- **Section 15:** Federal Certifications

CSBG Eligible Entity List

Purpose of CSBG Eligible Entity List (CEEL)

- An official listing of all CSBG eligible entities receiving the “not less than 90% funds” of each CSBG allocation
- Includes the Unique Entity Identifier (UEI)
 - Serves as an identifying number for each CSBG eligible entity
 - Included in CSBG SmartForms to assist with tracking due to any changes

CSBG Eligible Entity List (CEEL) and CSBG State Plan

- The CSBG Eligible Entity List must be **submitted prior** to initializing a new CSBG State Plan.
- Pre-populates the following sections of the CSBG State Plan (CSP):
 - 5.1. – CSBG Eligible Entities
 - 7.2. – Planned Allocations to CSBG Eligible Entities
 - 10.2. – Monitoring Plan
- Complete revisions **as soon as possible**

Revise CSBG Eligible Entity List (CEEL)

- Add or Remove CSBG Eligible Entities, as necessary:
 - Designations and/or re-designations (CSP 5.3a)
 - De-designations and/or Voluntary Relinquishments (CSP 5.3b)
 - Mergers (CSP 5.3c)

If the CSBG Eligible Entity List has changed in year 2 of an accepted CSBG State Plan, please work with your CSBG Program Specialist and Policy, Data, and Evaluation Specialist to revise.

SF-424-M

The SF-424-M

- Submitted as the *Cover Page* of the CSBG State Plan
- Required by the Office of Grants Management (OGM)
 - Used to send the Notice of Award (NOA) to the Authorized Official
 - **Individual listed in SF-424-M must match the Authorized Official (CSP 1.2.) as designated in the Designation Letter (CSP 1.3.)**
- Prior to submitting the SF-424-M, it is critical to ensure the UEI is correct

IMPORTANT NOTE!

- *If the Authorized Official changes*, CSBG grant recipients with accepted two-year CSBG State Plans are **required** to revise the following for their CSBG State Plan:
 - SF-424-M
 - Authorized Official (CSP 1.2.)
 - Designation Letter (CSP 1.3.)

Please notify your Program Specialist of any changes to the Authorized Official.

Section 1: CSBG Lead Agency, CSBG Authorized Official, CSBG Point of Contact, and Official State Designation Letter



Section 1: CSBG Lead Agency, CSBG Authorized Official, CSBG Point of Contact, and Official State Designation Letter

- **Purpose:** To collect information on
 - Type of CSBG State Plan
 - State CSBG Lead Agency
 - Authorized Official
 - State CSBG Program Contact
- The Designation Letter
- The CSP **must** be certified by the designated authorized official as noted in the designation letter.

Section 2: State Legislation and Regulation



Section 2: State Legislation and Regulation

- **Purpose:** To collect information on
 - State legislation
 - State regulation
- Include attachment or functional hyperlink.
- If the state legislation or regulation is silent, the CSBG Act will govern.

Section 3: State Plan Development and Statewide Goals



Section 3: State Plan Development and Statewide Goals

- **Purpose:** To collect information on the state CSBG lead agency's vision to utilize CSBG funds in accordance with the CSBG Act and the State Accountability Measures.
 - The mission and responsibilities
 - The CSBG-specific goals
 - Resources used to develop the State Plan
 - Tools, consultations, eligible entities

Continuous Learning and Improvement

- Stakeholder input is key for the development of a strong CSBG State plan
- Consider Performance Management data while developing state goals
- Review [CSBG IM #150 Use of the American Customer Satisfaction Index \(ACSI\) to Improve Network Effectiveness](#)

Section 4: CSBG Hearing Requirements



Section 4: CSBG Hearing Requirements

- **Purpose:** Verifies that the state has met requirements for the public notice, the public hearing, and the legislative hearing.
- Includes information on:
 - The process for ensuring access for public inspection
 - Public hearing (each year) vs. Legislative hearing (three years)
 - Combined Hearings
 - Documentation

Be sure to keep policies, procedures and any rules updated to include your state's hearing process

Things to Consider for Hearings...

- Consider the purpose of the hearings alongside the tenets of community action, i.e., “maximum feasible participation”
- Provide more than 30 days notice to the public
- Request feedback from entities during development
- Think creatively to encourage participation



In the Chat

Share a best practice for encouraging participation in public hearings

Share what a successful public hearing looks like in your state.

Section 5: CSBG Eligible Entities



Section 5: CSBG Eligible Entities

- **Purpose:** to collect entity-level data on CSBG eligible entities including:
 - Entity type
 - Service area
 - Changes to eligible entity list

Section 5 and the CSBG Eligible Entity List

- Item 5.1 is an official listing of all CSBG eligible entities receiving the “not less than 90% of funds” allocated to CSBG grant recipients
- The CSBG Eligible Entity List pre-populates Item 5.1 of the CSBG State Plan
 - This section is read-only and revisions must be made in the CSBG Eligible Entity List prior to initializing

If CSBG eligible entities do not pre-populate, contact your Program Specialist.

Understanding Changes to Eligible Entities

5.3a. Designations and Re-Designations	5.3b. Terminations and Voluntary Relinquishments	5.3c. Mergers
<p>Newly designated or re-designated CSBG eligible entities that have completed the full designation process as described in the CSBG state lead agency's policies (CSP 10.8 and 10.10) and will receive funding for the FY(s) which the CSBG State Plan covers</p>	<p>CSBG eligible entities that have been de-designated and/or voluntarily relinquished as described in the CSBG state lead agency's policies (CSP 10.9) and will no longer receive funding for the FY(s) the CSBG State Plan covers</p>	<p>Two or more CSBG eligible entities that were previously designated and are merging to provide services.</p>
<p>If the geographical area that an agency serves has been updated, include that information as a re-designation.</p>	<p>The eligible entity (or entities) must no longer appear under 5.1 and the CSBG Eligible Entity List.</p>	

Section 6: Organizational Standards for Eligible Entities

Poll Question

Grant recipients must implement the COE's CSBG Organizational Standards for eligible entities.

- a) True
- b) False



Section 6: Organizational Standards for Eligible Entities

- **Purpose:** Describes state process related to Organizational Standards, including:
 - Grant recipient's choice of standards
 - The state-level implementation process
 - Assessment procedures, including corrective action procedures
 - Special circumstances and/or exceptions

Review: [CSBG IM #138 State Establishment of Organizational Standards for CSBG Eligible Entities](#)

Organizational Standards Background

- The CSBG Organizational Standards Center of Excellence (COE) – Cooperative Agreement was funded in 2012.
- The resulting organizational standards included input from:
 - Local, state, and national partners
 - CSBG Working Group consisting of
 - 50 members, including representation from eligible entities, CSBG lead agencies, community action state associations, national partners, technical assistance providers, and external content experts

Organizational Standards Background Cont.

- The Organizational Standards became effective in FY16
- Includes three thematic groups comprising nine categories, and a total of 58 standards for private, nonprofit eligible entities and 50 for public entities.

Reference: [CSBG IM #138 State Establishment of Organizational Standards for CSBG Eligible Entities](#)

Thematic Groups:

1. Maximum Feasible Participation
2. Vision and Direction
3. Operations and Accountability

Using Standards to Improve Organizational Performance

- **For Items 6.3 and 6.3.a**, the state must establish a **robust** assessment process that includes:
 - ***Clear communication*** to eligible entities
 - ***Annual assessment*** on the status of standards among **all** the eligible entities for reporting to OCS on the standards in the CSBG Annual Report
 - ***Assurance that the assessment of standards is independently verified*** by the state or a third party
- **For Item 6.5**, the state is encouraged to review current trends and collaborate with eligible entities and the state association prior to target setting.

Section 7: State Use of Funds



Section 7: State Use of Funds

- **Purpose:** The collection of information on the state's distribution process and how the state utilizes any remaining discretionary funds in three areas:
- Eligible Entity Allocation (90 Percent Funds)
- Administrative Funds
- Use of Remainder/Discretionary Funds

Section 7.2 Planned Distribution of Funds

Section	
7.2- Planned Allocation	<ul style="list-style-type: none">▪ Compliance Requirement under Section 675C(a) of the CSBG Act.▪ Specifies the percentage of allocated funds for each eligible entity receiving funds▪ Pre-populates the CSBG state Annual Report, Module 1, Table E.2

Section 7.4 Distribution Timeframe

Section	
7.4- Distribution Timeframe	<ul style="list-style-type: none">▪ Ensure funds reach those in need in a timely manner.
7.4a-Distribution Consistency	<ul style="list-style-type: none">▪ Describes the states procedures to ensure funds are made available consistently and without interruption.▪ Linked to State Accountability Measure 2Sa, may automatically populate on CSBG State Annual Report.

Section 7.6 Allocated Funds (Administrative Funds)

Section	
7.6- Allocated Funds (Administrative funds)	<ul style="list-style-type: none">▪ No greater than 5% of the CSBG allotment.▪ Pre-populates the CSBG State Annual Report, Module 1, E.4.▪ Review your budget and historical allocation percentages for administrative activities.▪ Determine if adjustment is needed for upcoming fiscal year▪ Consider the impact of new programs/initiatives that may require additional administrative support.▪ Align percentages with strategic plan/goals for community development.▪ Document support for allocation decisions as a reference.

Section 7.9 Use of Remainder/Discretionary Funds

Section	
7.9- Use of Remainder/Discretionary Funds	<ul style="list-style-type: none">▪ Funds remaining after the 90% (minus administrative funds)▪ Pre-populates the CSBG State Annual Report, Module 1, Table E.7.▪ This information is associated with State Accountability Measures 3Sa.▪ The table, including items 7.9a through 7.9h, details the distribution of remainder funds across authorized uses (listed under CSBG Act 675C(b)(1)). Requires a brief narrative to describe activities.

On-Line Data Collection (OLDC)

On-Line Data Collection (OLDC)

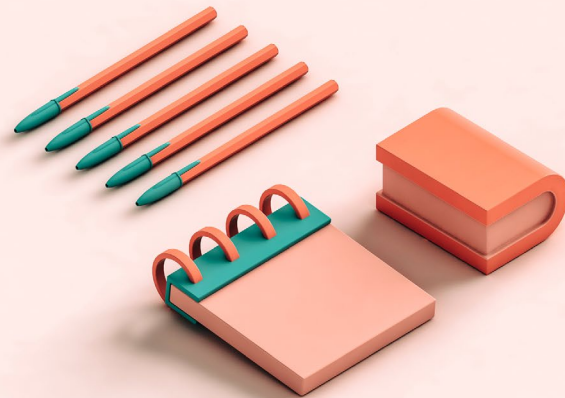
OLDC is the system within GrantSolutions for completing and submitting the CSBG State Plan.

- Both the person completing the CSBG State Plan and the Authorized Official will need OLDC access.
- The Authorized Official **must** be the one to certify and submit the finalized CSBG State Plan.
- To request assistance with OLDC, please contact the Policy, Data, and Evaluation branch and copy your Program Specialist.



Technical Assistance

- **Federal Staff per Region**
 - Program Specialist
 - Policy, Data and Evaluation Specialist
- **Targeted Training and Technical Assistance**
 - [Email Regional Program Specialist and PDE Specialist](#)
- **OLDC Account Issues**
 - help@grantsolutions.gov and copy regional program and PDE specialists



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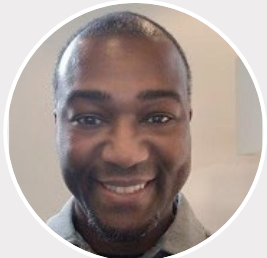
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Upcoming Events

CSBG State Plan Office Hours	<u>August 7, 2025</u> <u>10:00—11:00 a.m. ET</u>
	<u>August 12, 2025</u> <u>3:00—4:00 p.m. ET</u>

Verna P. Best

Program Operations Branch Chief

Division of Community Assistance

Office of Community Services

Administration for Children and Families


Department of Health and Human Services



Webinar Feedback

Before you log off, please provide us with feedback:

How useful was today's webinar in providing an overview of the CSBG State Plan, Sections 1 - 7?



1	2	3	4	5
Not Useful	Somewhat Useful	Useful	Very Useful	Extremely Useful

QUESTIONS



THANK YOU