



# FY26 CSBG State Plan Webinar:

## General Overview

The Office of Community Services  
Division of Community Assistance

July 29, 2025

# Agenda

- Welcome
- FY26 CSBG State Plan Overview
  - Timelines
  - CSBG Eligible Entity List
  - Review of requirements for a complete CSBG State Plan
- Question and Answer



# 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





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

# Upcoming Webinars

## [FY26 CSBG State Plan Webinar: Diving Deeper Section 1-7](#)

This session will include detailed information regarding state plan submission requirements with emphasis on Sections 1-7. 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.

July 31, 2025  
3:00—4:00 p.m. ET

## [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

“

**“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**



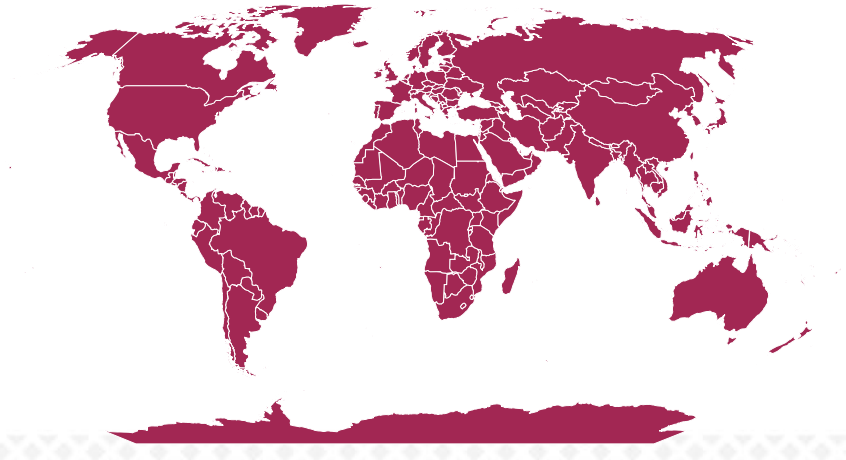
# CSBG State Plan Sections

- **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

# 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



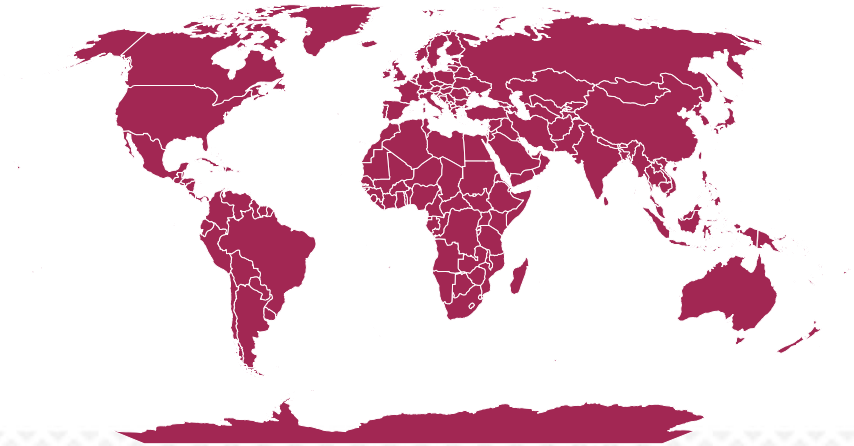
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# Grant Recipients Not Required to Submit a FY26 State Plan

## 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 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 conflicts with the CSBG Act, 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

# 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.**

# Section 6: Organizational Standards for Eligible Entities



# Poll Question #1

The CSBG Organizational Standards are outlined in this section of the CSBG Act.

- a) Section 675A
- b) Section 676B
- c) Section 678B
- d) None of the above



## 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](#)

# 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 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

# State Use of Funds in the CSBG State Plan

**Planned Allocation (Section 7.2):** 90%+ funds to eligible entities.

**Distribution Timeframe (Section 7.4):** Funds distributed within 30 days of federal award.

**Allocation of Funds (Section 7.6):** Percentage of funds for various activities.

Section 7 impacts Annual Report (Module 1 Table E.2 and Table E.4.).



# Section 8: State Training and Technical Assistance



## Section 8: State Training and Technical Assistance

- **Purpose:** Describes the state's plan for delivering CSBG-funded training and technical assistance to eligible entities, including:
  - The T/TA schedule
  - The planned budget
  - Technical Assistance Plans (TAPs)
  - Performance Management Adjustments



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**In the Chat**

What are some successful training models or topics you have covered in your state?

# Section 9: State Linkages and Communication



## Section 9: State Linkages and Communication

- **Purpose:** Addresses the state-level linkages and coordination the state intends to create or maintain to ensure access to CSBG services for people and communities with low income.

“


**“...the State and the eligible entities in the State will coordinate, and establish linkages between, governmental and other social services programs to assure the effective delivery of such services to low-income individuals and to avoid duplication of such services...”**

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

# Workforce Innovation and Opportunity Act (WIOA)

## Employment and Training Activities

- For 9.4, select “Yes” if CSBG is a ***Combined State Plan Partner Program*** under a WIOA Combined State Plan and complete 9.4.a.
- If you select “No” and are a ***Required One-Stop Partner***, complete the narrative for 9.4b.
- Current states that should answer yes and item 9.4a as a Combined State Plan Partner Program:
  - Florida, Georgia, Louisiana, Maryland, Missouri, Oregon, Pennsylvania, Tennessee, Washington, West Virginia



**Share with  
Us in the  
Chat!**

What is a new partnership your state has developed on the local or state level over the last two years?

Was there a gap in services that this partnership helped address?

# Section 10: Monitoring, Corrective Action, and Fiscal Controls





## Section 10: Monitoring, Corrective Action, and Fiscal Controls

- **Purpose:** Describes the planned monitoring of eligible entities and the associated policies and procedures. This section covers four areas:
  - The monitoring process
  - Corrective action, termination, and reduction of funding
  - Policies on eligible entity designation, de-designation, and re-designation
  - Fiscal controls and audits and cooperation assurance



# Legislative Requirement for Monitoring

- OCS conducts standard monitoring reviews as required under Section 678B(c) of the CSBG Act:
  - *“...shall conduct in several states in each fiscal year evaluations (including investigations) of the use of funds received by the states under this subtitle in order to evaluate compliance”.*
- Monitoring reviews follow a standard monitoring protocol addressing administrative, programmatic, and fiscal compliance with CSBG Act requirements.

# Monitoring Schedule

- Item 10.1 outlines the monitoring schedule for the state to review eligible entities.
- Remember that Section 678B(a)(1) of the CSBG Act requires:
  - a full onsite monitoring review of an entity at least once every three years
  - an onsite review of each newly designated entity immediately after the completion of the first year receiving funds
  - follow up reviews
  - other reviews as appropriate,

# Policies on Eligible Entity Designation, De-designation, and Re-designation

- CSBG Act Section 676(A) [42 USC § 9909] *Designation and Redesignation of Eligible Entities in Unserved Areas*
- [CSBG IM #116 Corrective Action, Termination, or Reduction of Funding](#)
- **Contact your program specialist as early as possible if a designation, de-designation, or re-designation is likely to occur.**

# Section 11: Eligible Entity Tripartite Board



## Section 11: Eligible Entity Tripartite Boards

- **Purpose:** To review the eligible entity tripartite board requirements including:
  - Tripartite Board verifications and measures
  - Tripartite Board updates
  - Tripartite Board representation assurance
  - Tripartite Board alternative representation

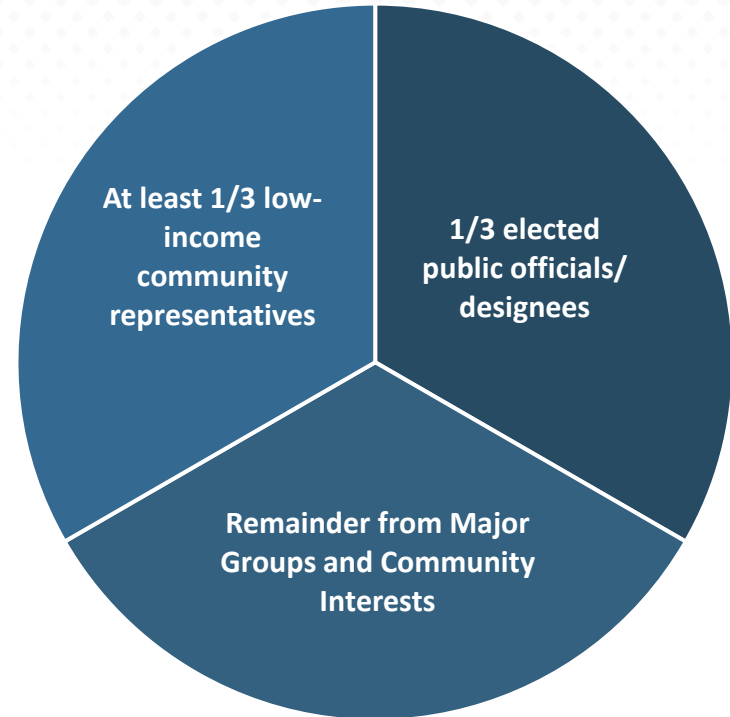
CSBG Act Section 676A [42 USC § 9910] *Tripartite Boards*  
[CSBG IM #82 Tripartite Boards](#)



# CSBG Tripartite Boards

- Section 678B of the CSBG Act
- To be considered an eligible entity, a private nonprofit entity shall administer the CSBG program through **a tripartite board.**
- A tripartite board must fully participate in the development, planning, implementation, and evaluation of CSBG-funded programs

Required Composition of the Tripartite Board





# Poll Question #2

**According to Section 678B of the CSBG Act, Tripartite Boards must fully participate in ...**

- a) At least 2 board meetings per year
- b) The development and evaluation of the program
- c) The development, planning, implementation, and evaluation of the program
- d) Direct service provision

# Section 12: Individual and Community Income Eligibility Requirements



## Section 12: Individual and Community Income Eligibility Requirements

- **Purpose:** Identify the eligibility threshold and practices for ensuring adherence by eligible entities in the following service areas:
  - Individual and family services
  - General/Short-Term Services
  - Community-Targeted Services
- Income eligibility threshold for services in the state are based on a percentage of the HHS poverty line.

“

**“Whenever a State determines that it serves the objectives of the block grant program established under this subtitle, the State may revise the poverty line to not to exceed 125 percent of the official poverty line...”**

CSBG Act Section 673(2) [42 USC § 9902]

# Income Eligibility Threshold – Notice of Award

- In FY20, the CARES Act authorized states to raise the income eligibility threshold to 200% of the FPL.
  - **This ceiling remains in effect and is an option for states until modified by Congressional action.**
  - Please check your Notice of Award (NOA) footnotes carefully for information on this change
- In Section 12 of the CSBG State Plan, states should consider language stating intentions to use 125% of the FPL unless authorized to utilize the 200% limit.

# Section 13: Results Oriented Management and Accountability (ROMA) System





## Section 13: Results Oriented Management and Accountability (ROMA) System

- **Purpose:** to collect information regarding performance measurement system used to support [state](#) and [eligible entity accountability](#) and reporting requirements as required by Section 678E(a) of the CSBG Act, and collects information related to the following assurances of the CSBG Act:
  - Section 676(b)(12) – performance management
  - Section 676(b)(11) – Community Action Plans and Assessments
- Responses in Section 13, will automatically link to the corresponding programmatic assurance in Section 14





# Poll Question #3

**True or False: The state must assure that they will secure a community action plan for each eligible entity, but it does not need to include a community needs assessment.**

- a) True
- b) False

# Section 14: CSBG Programmatic Assurance and Information Narrative



## Section 14: CSBG Programmatic Assurance and Information Narrative

- **Purpose:** Describes how the state will guarantee or assure that the CSBG funds **will** be used to carry out required activities.
  - Assurances required under Section 676(b) of the CSBG Act
  - Includes the provision of narrative responses and referrals to previously completed sections
  - Requires a checkbox to confirm the CSBG authorized official has certified these assurances.
- Assurances in Section 14 are linked to the responses from previous sections.

# Section 15: Federal Certifications



## Section 15: Federal Certifications

- **Purpose:** For the state to verify or acknowledge that CSBG funds will not be used to carry out prohibited activities and the reporting of such activities. Includes 4 certifications:
  - Lobbying
  - Drug-Free Workplace
  - Debarment, Suspension and Other Responsibility Matters
  - Environmental Tobacco Smoke
- Requires the CSBG Authorized official to check the box after each certification.



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# On-Line Data Collection (OLDC)



# On-Line Data Collection (OLDC)

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

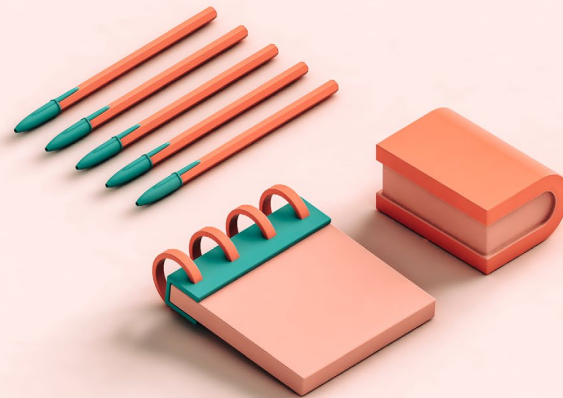
- Both the person completing the CSBG State Plan and the Authorized Official will need OLDC access.
- The Authorized Official **must** be the one to certify and submit the finalized CSBG State Plan.
- To request assistance with OLDC, please contact the Policy, Data, and Evaluation branch and copy your 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](mailto:help@grantsolutions.gov) and copy regional program and PDE specialists



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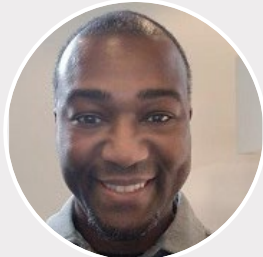
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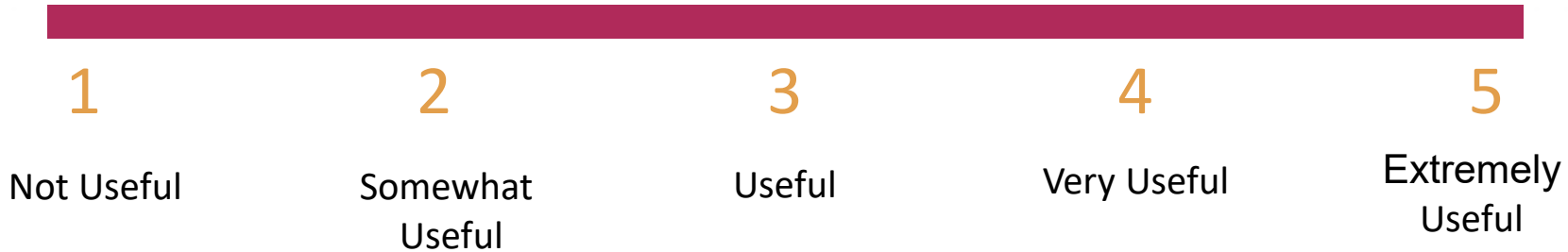
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# Webinar Feedback

**Before you log off, please provide us with feedback:**

How useful was today's webinar in providing an overview of the CSBG State Plan?



# QUESTIONS



# THANK YOU