



# **FY24 CSBG Annual Reporting Webinar Series**

## **CSBG Annual Report: Module 1**

**Office of Community Services (OCS)**  
**Division of Community Assistance (DCA)**

October 23, 2024

# Community Services Block Grant (CSBG)



## CSBG PRIORITIES



**REDUCING POVERTY**



**REVITALIZING LOW-  
INCOME COMMUNITIES**



**EMPOWERING LOW-INCOME  
INDIVIDUALS & FAMILIES**



# Webinar Agenda

- Welcome
- Reporting Requirements Review
- Module 1 Explained
- Resources
- Question and Answer

# Meet the Presenters

The Office of Community Services, Division of Community Assistance



**Charles  
Chear**

Statistician



**Jessica  
Cain**

Program Specialist

# Reporting Requirements Review

# Statutory Authority

---

“

Each State shall annually prepare and submit to the Secretary a report on the measured performance of the State and the eligible entities in the State... an accounting of expenditure of funds received by the State through the community services block grant program, including an accounting of funds spent on administrative costs by the State...also include in the report a summary describing the training and technical assistance offered by the State...

CSBG Act, Section 678E(a)(2), 42 USC § 9917

Answer in the chat...

## When is the Fiscal Year 2024 CSBG Annual Report due?

- A. April 1, 2025
- B. September 30, 2025
- C. March 31, 2025**
- D. October 1, 2025



ADMINISTRATION FOR  
**CHILDREN & FAMILIES**  
Office of Community Services





# Fiscal Year 2024 (FY24) CSBG Annual Report

**Due Date: March 31, 2025**

- The FY24 Annual Report **does not** require reporting for CARES nor Disaster as they are closed.
- The FY24 Annual Report **does not** include the proposed changes of Annual Report 3.0.



[ACF-OCS-CSBG-AT-25-01 Annual Report Submission FY24](#)



# The Purpose of Reporting

- Shared Responsibility
- Efficiency, Effectiveness, and Accountability
- Outcomes Management
- Performance Management and Evidence-based Practices

# Reporting Process

## SmartForm State Database

CSBG Eligible entities submit data to the grant recipient via the SmartForm or Database. Grant Recipients review the data.



## OLDC Upload

States upload the XMLs for all CSBG eligible entities into OLDC via GrantSolutions.



## Annual Report Review

OCS sends Review Memo with feedback to the states for subsequent revisions.



## Telling the Story

OCS Annual Report  
CSBG Report to Congress  
CSBG Performance Management website.



## XML Export

States export the data into XMLs.

## Submit Data to OCS

States directly enter data into OLDC and submit state-level data in Module 1. States submit aggregated state-level data and local-level data in OLDC by submitting state-level forms for Modules 2-4.

## Finalization

States respond to Review Memo confirming accuracy, clarifying information, or updating data points. States work with CSBG eligible entities to revise data via SmartForm or State Database, export and upload XML, and resubmit state-level form. OCS accepts the final submission in OLDC.

# Module 1

# FY24 CSBG Annual Report Module 1

**Module 1 focuses on State Administration and is comprised of:**

- **Section A:** CSBG Lead Agency, CSBG Authorized Official, CSBG Point of Contact
- **Section B:** Statewide Goals and Accomplishments
- **Section C:** CSBG Eligible Entity Update
- **Section D:** Organizational Standards for Eligible Entities
- **Section E:** State Use of Funds
- **Section F:** State Training and Technical Assistance
- **Section G:** State Linkages and Communication
- **Section H:** Monitoring, Corrective Action, and Fiscal Controls
- **Section I:** Results Oriented Management and Accountability (ROMA)

# Important Considerations

- **Consider feedback from outside sources**
- **Consider performance improvement**
- **Final Check**
  - Ensure you are in the correct year (10/01/2023 – 09/30/2024).
  - Ensure each question is answered or selected.
  - Ensure data is reported under the correct item.
  - Look for consistency, ensure unique answers, and catch small errors like incorrect dates or values.
  - Ensure plan is updated to reflect changes.

# Section A: State Administration

# Section A: State Administration

**Only update Section A if there has been a change to the State Plan**

- **A.1d. Authorized official of the lead agency**
  - Please note we ask for the Authorized Official's (AO) name, not the point of contact.
- **A.2. Additional programs administered by the state CSBG Lead Agency**
  - Please ensure you check the appropriate boxes.
  - If the USDA, HUD, DOL or Other is chosen, please specify by writing in the grant or program.



# Section B: Statewide Goals and Accomplishments

# Section B: Statewide Goals and Accomplishments

- **B.1. Progress on State Plan Goals**
  - All Goals Accomplished
  - Goals Partially Accomplished
  - Goals Not Accomplished
- **B.2. CSBG Eligible Entity Overall Satisfaction Targets**
- **B.3. CSBG Eligible Entity Feedback and Involvement**
- **B.4. State Management Accomplishment**
- **B.5. CSBG Eligible Entity Management Accomplishments**
  - Three notable and separate accomplishments
- **B.6. Innovative Solutions Highlights**
  - Three examples of innovative or creative approaches



# Section C: CSBG Eligible Entity Update

# Section C: CSBG Eligible Entity Update

- **C.1. Changes to Eligible Entities**
  - De-designation
  - Voluntarily relinquishment
  - Merger
- If there has been a change, please provide a short narrative description.
- Please ensure any changes are reflected in the eligible entity master list and the CSP.
- Please inform OCS of any changes prior to the annual report review period.



# Section D: Organizational Standards for Eligible Entities

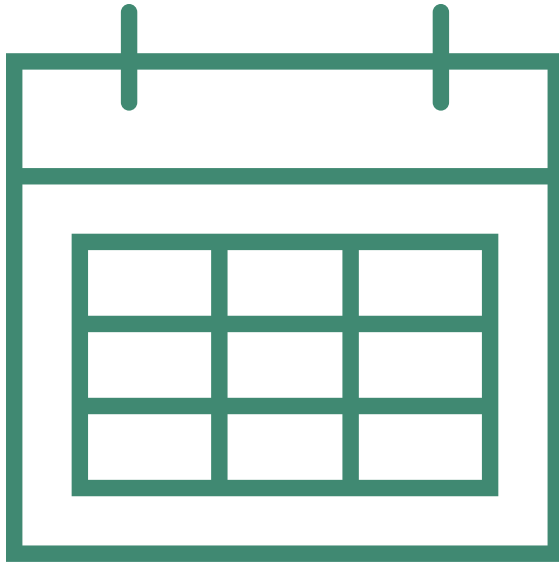
# Section D: Organizational Standards for Eligible Entities

- **D.1. Assessment of Organizational Standards**
  - If the type of organizational standards changed, please update in the CSP.
  - Provide more detail on the assessment process in D.1a. And D.1b.
- **D.2. Organizational Standards Performance**
  - Please provide additional details on challenges if target is not met.
- **D.3. Technical Assistance Plans for Unmet Organizational Standards**
- IM 138 [State Establishment of Organizational Standards for CSBG Eligible Entities](#)

# Section E: State Use of Funds



# Section E: State Use of Funds



- **CSBG Awards:**
  - FY23 Award 10/1/2022 – 9/30/2023 (Year 2)
  - FY24 Award 10/1/2023 – 9/30/2024 (Year 1)
  
- **State Administrative and Discretionary Funds**
  - The allocation and utilization of funds for state administrative purposes and discretionary activities under CSBG.

# Section E: State Use of Funds Cont.

- **E.2. Planned vs. Actual Allocation and Obligations**
  - Amount of funds obligated from the 90%.
- **E.4. State Administrative Use of Funds- Total obligations of current year funds**
  - Only enter amount of Current Year Funds obligated in the federal fiscal year.
- **E.7. Remainder/Discretionary Funds**
  - Do not include amounts reported in E.2 or E.4.
  - If no discretionary/remainder funds are available, enter zero.

Answer in the chat...

For E.7. Remainder/Discretionary funds, if no discretionary/remainder funds are available, then \_\_\_\_\_.

- A. Fill N/A
- B. Leave blank
- C. Enter zero**
- D. Write "no discretion/remainder funds are available"



# Section E: State Use of Funds Cont.

- **E.10. Total Obligation and Expenditure**
  - **E.10a: Prior Year Carryover (FY23)**
    - Should equal the amount obligated but not liquidated at the end of the previous fiscal year.
    - Include amounts not yet paid to eligible entities and unspent state portion of CSBG.
  - **E.10b: Carryover for This Fiscal Year (FY24)**
    - Should equal the authorized amount less the amount paid to eligible entities and drawn for state expenditures.

# Section F: State Training and Technical Assistance

# Section F: State Training and Technical Assistance (TTA)

- **F.1. Training and Technical Assistance Plan**
  - Describe how the state delivered CSBG-funded training and technical assistance to CSBG eligible entities.
- **F.2. Training and Technical Assistance Organizations**
  - Indicate the types of organizations through which the state provided training and/or technical and briefly describe their involvement.



# Section G: State Linkages and Communication



# Section G: State Linkages and Communication

- **G.1. Linkages and Coordination at the State Level to Ensure Access**
  - Provide a clear description of how the state created or maintained linkages and coordination.
- **G.2. State Linkages and Coordination at the Local Level**
  - Review and update the actual activities for linkages and coordination at the local level that the state created or maintained.
- **G.3 CSBG Eligible Entity Linkages and Coordination**
  - G.3a. State Assurance of CSBG Eligible Entity Linkages and Coordination
  - G.3b. State Assurance of Eligible Entity Linkages to Fill Service Gaps
- **Across narratives, include a description of any changes from the CSP.**

# Section G: State Linkages and Communication

- **G.4. Workforce Innovation and Opportunity Act (WIOA) Employment and Training Combined Plan Activities**
  - Answer if CSBG is a “Combined Plan Partner Program” for the WIOA Combined State Plan.
  - **For FY24:** Louisiana, Maryland, Missouri, Pennsylvania, Tennessee, Washington, West Virginia
- **G.5. Coordination among CSBG Eligible Entities and the State Community Action Association**
- **G.6. Feedback to CSBG Eligible Entities and State Community Action Association**
  - With regards to performance on State Accountability Measures

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

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

## ■ H.1. Monitoring Schedule

- If monitoring was planned but not implemented, provide a brief explanation.

## ■ Corrective Action, Termination, and Reduction of Funding and Assurance Requirements

- Please contact your program specialist regarding corrective action, termination or reduction and funding early.

## ■ H.6. Single Audit Review

- OCS reconciles the data in the CSBG Annual Report to that reported in the Federal Audit Clearinghouse (FAC).

## ■ H.7. Single Audit Management Decisions

- Provide a description of single audit CSBG-related management decisions issued during the reporting year, including Audit Finding Reference number, description of required actions, timelines for corrective actions.

Answer in the chat...

For item H.1., if monitoring was planned but not implemented, \_\_\_\_\_."

- A. Do not provide any explanation.
- B. Provide a brief explanation.**
- C. Only report on the date it was originally scheduled.
- D. Only provide the name of the eligible entity that was supposed to be monitored.



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

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

- **I.1. Performance Management System Participation**
  - I.1a. Provide response if ROMA was selected in I.1.
  - I.1b. Provide response if ROMA was not selected in I.1.
- **I.2. State ROMA Support**
- **I.3. State Review of CSBG Eligible Entity Data**
- **I.4. State Feedback on Data Collection, Analysis, and Reporting**
- **I.5. State and Eligible Entity Continuous Improvement**
  - Provide 2 to 3 examples of changes made by CSBG eligible entities to improve service delivery and enhance impact based on their analysis of performance data.



# Resources

# Reaching PEAAK through Training and Technical Assistance

- Grant recipients have a wide range of tools, training, and technical assistance available to support a complete and timely submission.

Tools	Training	Technical Assistance
<ul style="list-style-type: none"><li>• CSBG Annual Report Toolkit</li><li>• SmartForms</li><li>• Vendor Portal</li><li>• Online Data Collection System</li></ul>	<ul style="list-style-type: none"><li>• <i>Understanding the CSBG Annual Report for Performance Series</i></li><li>• Recorded Webinars</li></ul>	<ul style="list-style-type: none"><li>• Data and Evaluation Specialist</li><li>• FY24 Annual Report Office Hours</li><li>• Targeted TTA Referrals</li></ul>

# Tools

- [CSBG Annual Report Toolkit](#)
- [Vendor Portal](#)
- [Online Data Collection \(OLDC\)](#)

CSBG Fact Sheet	+
Grant Recipients Resources	+
Grant Recipient Spotlights	+
Policy & Guidance	+
Reports	+
Laws and Regulations	+
CSBG FAQs	+
Contacts	+



## Grant Recipients Resources



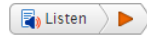
- CSBG State Plan Toolkit
- CSBG Annual Report Toolkit
- CSBG Project Impact Toolkit
- CSBG CARES Act Toolkit
- CSBG Disaster Supplemental Toolkit
- CSBG Events Calendar
- CSBG Webinars



# Trainings

- [CSBG Events Calendar](#)
- [On-Demand Webinars \(previously recorded\)](#)

## CSBG Events Calendar



**Publication Date:** July 3, 2023 **Current as of:** October 21, 2024

This page provides information on Community Services Block Grant (CSBG) events by fiscal year (FY) and quarter.

### FY25

**Quarter 1:** October 1, 2024 — December 31, 2024

DATE	TIME	EVENT	PURPOSE	LINKS (AS APPLICABLE)
October 15, 2024	2:00-3:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Annual Report Kickoff	Share highlights of data from the previous Annual Report, status updates on the congressional reporting, performance reporting, lessons learned, and overview of the process to review data.	<a href="#">FY24 CSBG Annual Report Webinar Series: Annual Report Kickoff Recording</a>
October 23, 2024	1:00-2:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Submitting the State Administration (Module 1)	Intended for State and Territory Administrators and state and territory program staff completing Module 1 of the CSBG Annual Report. The webinar will review the requirements and their connection to the CSBG State and Territory Plan.	<a href="#">FY24 CSBG Annual Report Webinar Series: Submitting the State Administration (Module 1) Registration</a>
October 24, 2024	3:00-4:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Understanding the Tribal Annual Report and Tribal Annual Report (Short Form)	Intended for Tribal Administrators and Tribal Program Managers completing the annual report. The webinar will review the requirements and how to submit the report.	<a href="#">FY24 CSBG Annual Report Webinar Series: Understanding the Tribal Annual Report and Tribal Annual Report (Short Form) Registration</a>
November 14, 2024	2:00-3:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Explaining Eligible Entity Expenditures, Capacity, and Resources (Module 2)	Intended for CSBG eligible entities completing Module 2 of the CSBG Annual Report. The webinar will review the requirements for capturing expenditures and the resources for eligible entities.	<a href="#">FY24 CSBG Annual Report Webinar Series: Explaining Eligible Entity Expenditures, Capacity, and Resources (Module 2) Registration</a>
November 19, 2024	1:00-2:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Capturing Community Level Transformation (Module 3)	Intended for CSBG eligible entities and state completing and reviewing Module 3 of the CSBG Annual Report. The webinar will review recommended strategies and the changes to the feedback process.	<a href="#">FY24 CSBG Annual Report Webinar Series: Capturing Community Level Transformation (Module 3) Registration</a>
November 21, 2024	2:00-3:30 p.m. ET	FY24 CSBG Annual Report Webinar Series: Collecting Individual and Family Characteristics (Module 4)	Intended for CSBG eligible entities completing Module 4 of the CSBG Annual Report to review the reporting of services, performance indicators, and characteristics data of individuals	<a href="#">FY24 CSBG Annual Report Webinar Series: Collecting Individual and Family Characteristics (Module 4) Registration</a>

# Next Webinar

## **FY24 CSBG Annual Report Webinar Series: Explaining Eligible Entity Expenditures, Capacity and Resources (Module 2)**

**November 14, 2024, at 2:00–3:30 p.m. ET**

Intended for CSBG eligible entities completing Module 2 of the CSBG Annual Report. The webinar will review the requirements for capturing expenditures and the resources for eligible entities.

Advanced Registration Required: [CSBG Events Calendar](#)

# FY24 CSBG Annual Report Training

## Understanding the CSBG Annual Report for Performance

- **November 14:** Explaining Eligible Entity Expenditures, Capacity, and Resources
- **November 19:** Capturing Community Level Transformation
- **November 21:** Collecting Individual and Family Characteristics

## Leveraging Systems and Tools for Annual Report Submissions

- **December 3:** Using State Systems for Reporting
- **December 5:** Understanding and Troubleshooting SmartForms
- **December 9:** Accessing the Online Data Collection

# Technical Assistance

- **Federal Staff**
  - [Program Specialist](#)
  - [Data and Evaluation Specialist](#)
- **FY24 Annual Report Office Hours**
  - March 4, 2025
  - March 6, 2025
- **Targeted Training and Technical Assistance**
  - [Email Data and Evaluation Specialist](#)



# Questions and Answers

- **Where can I find the Word version of Module 1?**
  - It can be found on the Action Transmittal for FY2024 Annual Report. Please see: [ACF-OCS-CSBG-AT-25-01 Annual Report Submission FY24 | The Administration for Children and Families](#)
- **How do we answer B.2. if the ACSI survey was last conducted in 2021?**
  - For Prior Target, please use the target that you set last year. For the most recent ACSI score, please use the FY21 score that you received. When thinking about the future target, please set the target considering what steps you have taken since FY21 was based on the feedback that you've received during that survey to increase customer satisfaction.
- **Any updates on when ACSI will be released?**
  - We are working to release the ACSI within the coming weeks.
- **Is OLDC updated so we can start inputting?**
  - Not yet. We are finalizing testing with a target of November.
- **When will SmartForms go out?**
  - SmartForms are estimated to be released in November. Those will be delivered by your assigned Data and Evaluation Specialists through a Box.com folder link.





# THANK YOU