



# **FY24 CSBG Annual Report Webinar Series**

## **Understanding the Tribal Annual Report and Tribal Annual Report (Short Form)**

**Office of Community Services (OCS)**

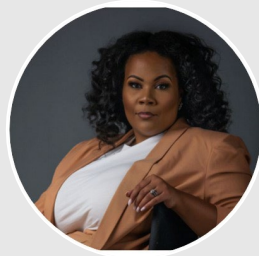
**Division of Community Assistance (DCA)**

Thursday, October 24, 2024



# WELCOME

# Meet the Presenters



**Minette  
Galindo**

Branch Chief



**Charles  
Chear**

Statistician



**Niki Frazier-  
Curry**

Senior Records  
Specialist

# Webinar Agenda

- Welcome
- OCS Overview
- CSBG Tribal Annual Report
- OLDC Access
- TTA Resources



# Community Services Block Grant (CSBG)



## CSBG PRIORITIES



**REDUCING POVERTY**



**REVITALIZING LOW-  
INCOME COMMUNITIES**



**EMPOWERING LOW-INCOME  
INDIVIDUALS & FAMILIES**

# Office of Community Services (OCS) 4 Priorities

## Administer

**Priority 1:** Administer high quality programs that reach those most in need

## Lift Up

**Priority 2:** Lift up voices from the field

## Implement

**Priority 3:** Implement cross-cutting initiatives

## Amplify

**Priority 4:** Amplify connections to Administration priorities



# PEAAK

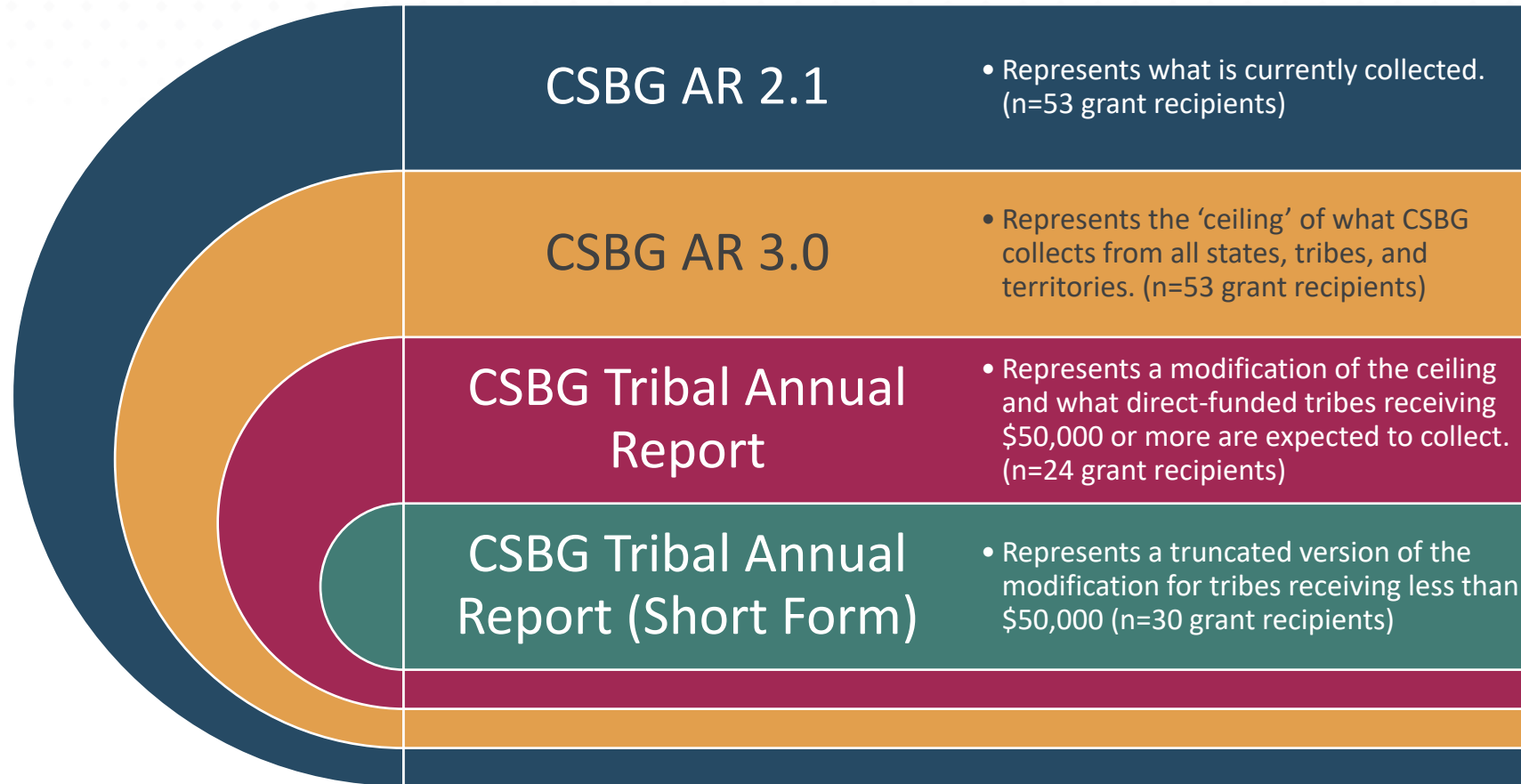
## Performance, Evaluation, Accountability, Accessibility, and Knowledge

Performance	Evaluation	Accountability	Accessibility	Knowledge
<ul style="list-style-type: none"><li>• Community Needs Assessment</li><li>• American Customer Satisfaction Index (ACSI)</li><li>• Training and Technical Assistance</li><li>• <b>Community engagement</b></li><li>• <b>Community defined outcomes</b></li></ul>	<ul style="list-style-type: none"><li>• Site Visits</li><li>• Training and Technical Assistance</li><li>• <b>Program Visits/Self-Assessments</b></li><li>• <b>Qualitative methods</b></li><li>• <b>Culturally relevant indicators</b></li></ul>	<ul style="list-style-type: none"><li>• Tribal Plan</li><li>• Tribal Annual Report</li><li>• Training and Technical Assistance</li><li>• <b>Elders and traditional leaders</b></li><li>• <b>Community meetings and engagement</b></li></ul>	<ul style="list-style-type: none"><li>• OCS Annual Report</li><li>• Report to Congress</li><li>• Training and Technical Assistance</li><li>• Spotlight videos</li><li>• <b>Promotion and awareness through community engagement</b></li><li>• <b>Creating partnerships</b></li></ul>	<ul style="list-style-type: none"><li>• Tribal Plan</li><li>• Tribal Annual Report</li><li>• Training and Technical Assistance</li><li>• <b>CSBG Act</b></li><li>• <b>Community Needs Assessment</b></li><li>• <b>Program visits</b></li></ul>

# CSBG Tribal Annual Report



# Coordinating Data Collection Efforts



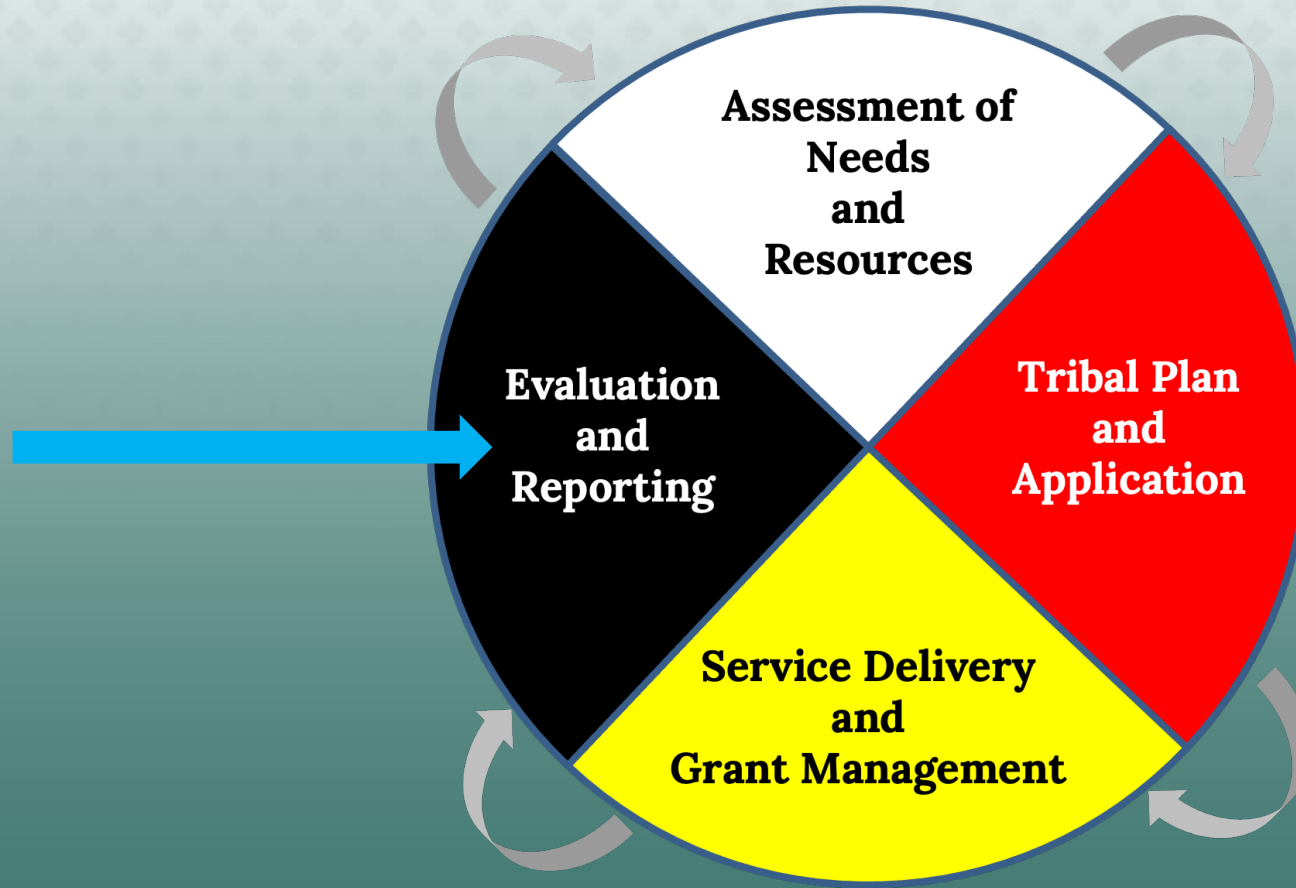
# Overview of CSBG Tribal Annual Report

## Tribal Annual Report

- Required reporting for CSBG direct-funded Tribes and Tribal Organizations receiving \$50,000 or more in annual funding.
- Due each year on March 31
- Submitted into OLDC

## Tribal Annual Report [Short Form]

- Required reporting for CSBG direct-funded Tribes and Tribal Organization receiving less than \$50,000.
- Due each year on March 31
- Submitted into OLDC



# Overview of CSBG Tribal Annual Report

CSBG funded Tribes submitting **either** the FY24 CSBG Tribal Annual Report or Tribal Short Form should plan to include:

- An accounting of how funds were spent on the delivery of services;
- Information on the way the CSBG program met its goals and objectives;
- Information on the way CSBG funding was mobilized to meet goals and objectives;
- Information on CSBG accomplishments; and
- Outcome of the data that addresses progress toward the implementation of the CSBG national goals.

# Overview of CSBG Tribal Annual Report

CSBG funded Tribes submitting only the FY24 CSBG Tribal Annual Report (and not the Tribal Annual Report [Short Form]) should **also** plan to include:

- Information on the number of and characteristics of clients served.

# Preparing for Tribal Annual Report

All the resources to support the submission of the FY24 CSBG Tribal Annual Report can be found in [ACF-OCS-CSBG-AT-2025-02 Tribal Annual Report Submission FY24](#)

- [FY24 CSBG Tribal Annual Report Fillable-PDF Tool](#)
- [FY24 CSBG Tribal Annual Report \(Short Form\) Fillable-PDF Tool](#)
- [Reporting by Allocation List](#)
- [CSBG Tribal Annual Report OLDC Instructions](#)



“

## **Deadline Reminder:**

**Submit FY24 CSBG Tribal Annual Report by March 31 via the Online Data Collection (OLDC).**

Answer in the chat...

A tribal grant recipient should only use the Tribal Annual Report (Short Form) if they receive:

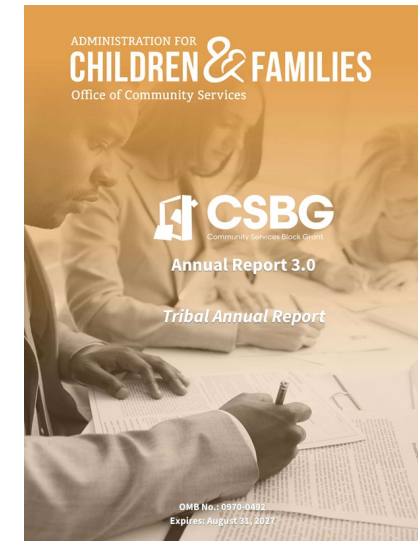
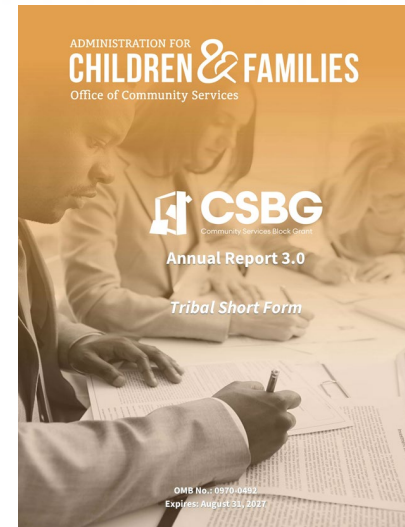
- A. More than \$1 million in annual funding.
- B. **Less than \$50,000 in annual funding.**
- C. \$50,000 or more in annual funding.
- D. Any amount in annual funding.



# FY24 CSBG Tribal Annual Report Fillable PDF Tool

# Annual Report Fillable PDF Tool

- All CSBG Tribal grant recipients must complete the CSBG Annual Report Fillable-PDF Tool.
- There are two versions:
  - ☐ Tribal Annual Report
  - ☐ Tribal Annual Report (Short Form)
- **Use only one by allocation level**
- The CSBG Annual Report Fillable-PDF Tool is organized to comply with federal requirements.





# Download the Fillable PDF Tool

- Be sure to download the fillable-PDF tool and save a copy on your computer.
- Loss of data will occur if the tool is not downloaded, saved, and opened in Adobe.
- Saving a working copy allows you to modify as needed.

“

### Adobe Tip:

**Be sure to download the PDF Tool in Adobe. You will note the fillable fields are outlines in red in Adobe. If the fields are not outlined in red, you will not be able to save or edit the document.**



# Fillable PDF Modules

## Module 1

Tribal Administration

## Module 2

Tribal CSBG Expenditures

## Module 3

Individual and Family

# Module 1, Section A: Tribal Administration

# Items A.1a.-A.1e.

- CSBG Tribal Grant Recipient (Tribe or Tribal Organization)
- Identify your Tribe or Tribal Organization's CSBG Program Contact Person's Name, Title, Telephone Number, Email Address, and Fax.

“

**Module 1, Section A Reminder:**  
**Remember to save your  
document as you work.**

Answer in the chat...

A tribal grant recipient must provide their website information. True or false?

- A. True
- B. **False**



ADMINISTRATION FOR  
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Office of Community Services



# Module 2, Section A: Tribal CSBG Expenditures



# Module 2, Section A

## CSBG Expenditures

- Identify the amounts of FY24 CSBG Funds were spent to deliver services.

# Expenditure Domains

- How did you spend the CSBG Funds to deliver services?
- Identify the amounts of FY24 CSBG Funds spent to deliver services by Expenditure Domain.

## Tribal CSBG Expenditures Section A: Tribal CSBG Expenditures

Name of CSBG Tribal Agency:	
<b>A.2. CSBG Expenditures Domains</b>	<b>CSBG Funds</b>
A.2a. Employment	
A.2b. Childcare, Early Childhood, Youth Development, and Adult Education	
A.2c. Income and Asset Building	
A.2d. Housing	
A.2e. Health and Nutrition	
A.2f. Civic Engagement and Community Involvement	
A.2g. Transportation	
A.2h. Partnerships, Linkages, and Coordination	
A.2i. Other	
<b>A.2j. Total CSBG Expenditures (auto calculated)</b>	<b>0</b>
<b>A.3. Report the total amount used for Administration. <a href="#">For more information on what qualifies as Administration, refer to IM37.</a></b>	

“

**Module 2 Reminder:**  
**The reporting timeframes for all information  
in the tribal expenditures' module is based  
on the Federal Fiscal Year (October 1, 2023-  
September 30, 2024).**

# Module 3, Section A: Individual and Family

# Tribal Service Domains



# SRV 1 – Employment Services

- Job development and job placement
- Vocational and skills training
- Eliminating barriers to work



# SRV 2 – Childcare, Early Childhood, Youth Development, and Adult Education Services

- Adult education
- Literacy programs
- Scholarships
- Child development and Head Start enhancement programs
- Anti-drug education
- Youth development: mediation programs, life skills training, and after-school childcare

# SRV 3 – Income and Asset Building Services

- Budgeting assistance
- Tax preparation
- Tax credit information
- Medical benefits claims assistance
- Savings programs

# SRV 4 – Housing Services

- Homeownership counseling
- Loan assistance
- Landlord and tenant relations
- Housing assistance
- Homeless services
- Home repair and rehabilitation

# SRV 5 – Health and Nutrition Services

- Food banks and food delivery services
- Food production programs
- Health education and counseling
- Transportation to health services
- Community garden programs

# SRV 6 - Civic Engagement and Community Involvement Services

- Partnerships with Tribal and local agencies, housing authorities, private foundations, and other public and private partners.
- Programs to help low-income families and individuals achieve greater participation in the affairs of their communities

# SRV 7 – Transportation Services

- Describe all transportation related activities such as transportation vouchers, public transit fare assistance, medical transportation services, community shuttle services, and rideshare programs.

# SRV 8 – Partnerships, Linkages, and Coordination Services

- Information, referrals, eligibility coordination, and case management
- Linkages and coordination between anti-poverty programs
- Coordination with other public and private sources

“

### **Module 3, Section A Reminder:**

**If you did not provide a service in one of the core service areas, indicate “NA” for not applicable in that section.**



Answer in the chat...

Which of the following is NOT a service domain in the Tribal Annual Report?

- A. Health and Nutrition
- B. Transportation
- C. **Political Lobbying**
- D. Housing



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**CHILDREN & FAMILIES**  
Office of Community Services



# Module 3, Section B: All Characteristics Report

# Reminder: Tribal Annual Report versus Tribal Short Form

## Tribal Annual Report

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## Tribal Short Form

- Required reporting for CSBG direct-funded Tribes and Tribal Organization receiving less than \$50,000.
- Due each year on March 31
- Submitted into OLDC

# All Characteristics Report

- This section only applies to tribal grant recipients that must complete the Tribal Annual Report.
- Tribal grant recipients that use the Tribal Short Form do not have this section to fill.

## Section B: All Characteristics Report

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

B. INDIVIDUAL LEVEL CHARACTERISTICS	
1. Gender	Number of Individuals
a. Self-Identified Male	
b. Self-Identified Female	
c. Other	
d. Unknown/not reported	
e. TOTAL (auto calculated)	0

2. Military Status	Number of Individuals
a. Veteran	
b. Active Military	
c. Never Served in the Military	
d. Unknown/not reported	
e. TOTAL (auto calculated)	0

3. Work Status (Individuals 18+)	Number of Individuals
a. Employed Full-Time	
b. Employed Part-Time	
c. Migrant or 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 or not reported	
i. Total (auto calculated)	0

# All Characteristics Report

- Individual level characteristics
- Military status
- Work status

## Section B: All Characteristics Report

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

B. INDIVIDUAL LEVEL CHARACTERISTICS	
1. Gender	Number of Individuals
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f. Unemployed (Not in Labor Force)	
g. Retired	
h. Unknown or not reported	
i. Total (auto calculated)	0

“

**Module 3, Section B Reminder:**  
**This section only applies to the Tribal Annual Report and not the Tribal Short Form.**

# On-Line Data Collection (OLDC) Access

“

**OLDC Tip:**

**Be sure to test your OLDC account prior to submitting to confirm login credentials are up to date. If you experience issues, please email [CSBGData@acf.hhs.gov](mailto:CSBGData@acf.hhs.gov)**



# Ensure OLDC Access

- Current CSBG Administrators
- New CSBG Administrators (Current Grant Recipients)
- Prospective New Grant Recipients
  - To request new accounts for OLDC via GrantSolutions.gov, please complete the [Recipient User Account Request Form](#) and the [OLDC Access Form](#) and submit both to the [GrantSolutions Helpdesk](#) to request a new account creation.

# Logging in to GrantSolutions

An official website of the United States government [Here's how you know](#) ▼


FAQS CONTACT US Q

GrantSolutions  
PARTNERS IN INNOVATION

ABOUT BENEFITS SERVICES RISK MANAGEMENT PARTNERS NEWS **LOGIN**

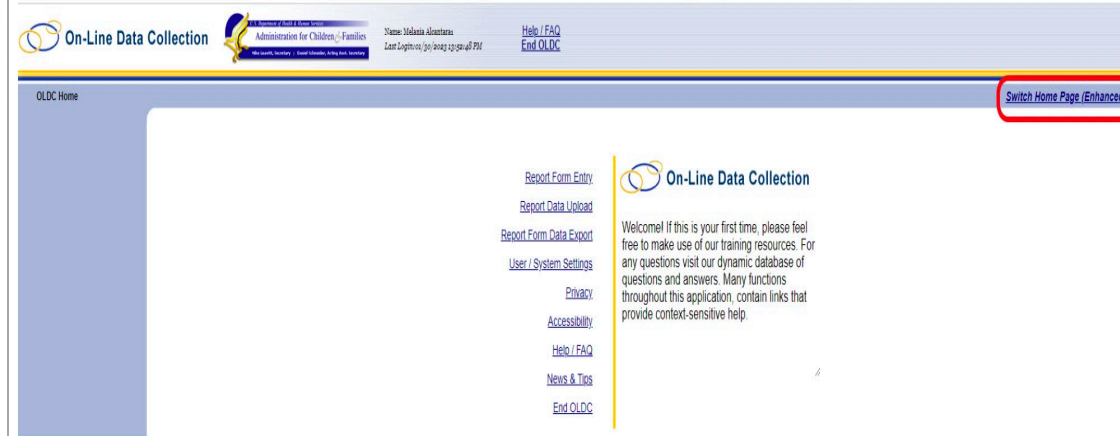
## Innovating to Better Serve the Grants Community

GrantSolutions' Partner-centric mindset builds a solid foundation of services common across the national community using cutting edge technology with continuous innovation to solve unique, mission-essential challenges.

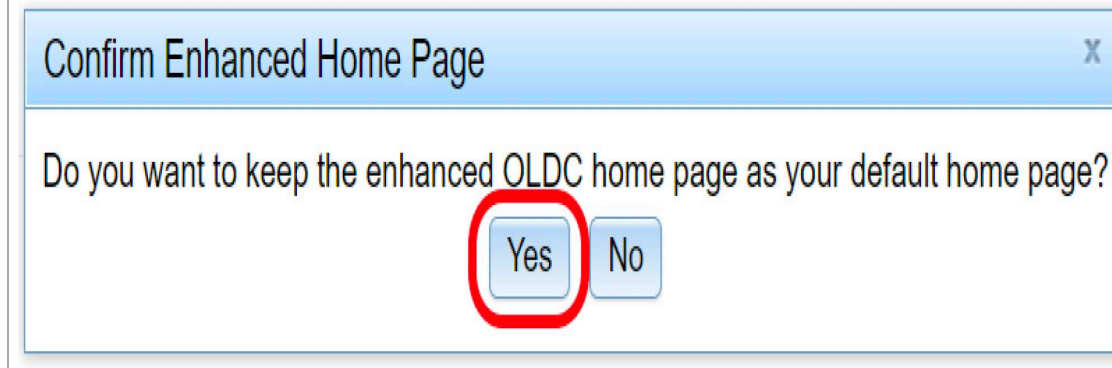


# OLDC Home Page

1. On the OLDC Home page, click on “Switch Home Page (Enhanced)”.



2. Click “Yes” on the Confirm Enhanced Home Page popup to make the enhanced view your default.



# OLDC Step-by-Step Guidance

# OLDC Step-by-Step Instructions

The Step-by-Step Guide is accessible via [ACF-OCS-CSBG AT-2025-02 CSBG Tribal Annual Report Submission FY24](#)

- [FY24 CSBG Tribal Annual Report OLDC Submission Step-by-Step Instructions](#)

# Navigating the Instruction Guide



## CSBG Tribal Annual Report On-Line Data Collection (OLDC) Submission Step-by-Step Instructions

The Community Services Block Grant (CSBG) Tribal Annual Report is an annual requirement as specified by the CSBG Act Section 678E. CSBG tribal grant recipients must submit their Fiscal Year (FY) 2024 CSBG Tribal Annual Report by March 31, 2025, via the On-Line Data Collection (OLDC) via [GrantSolutions.gov](https://grantsolutions.gov).

The following is a step-by-step guide to submit the CSBG Tribal Annual Report via OLDC.

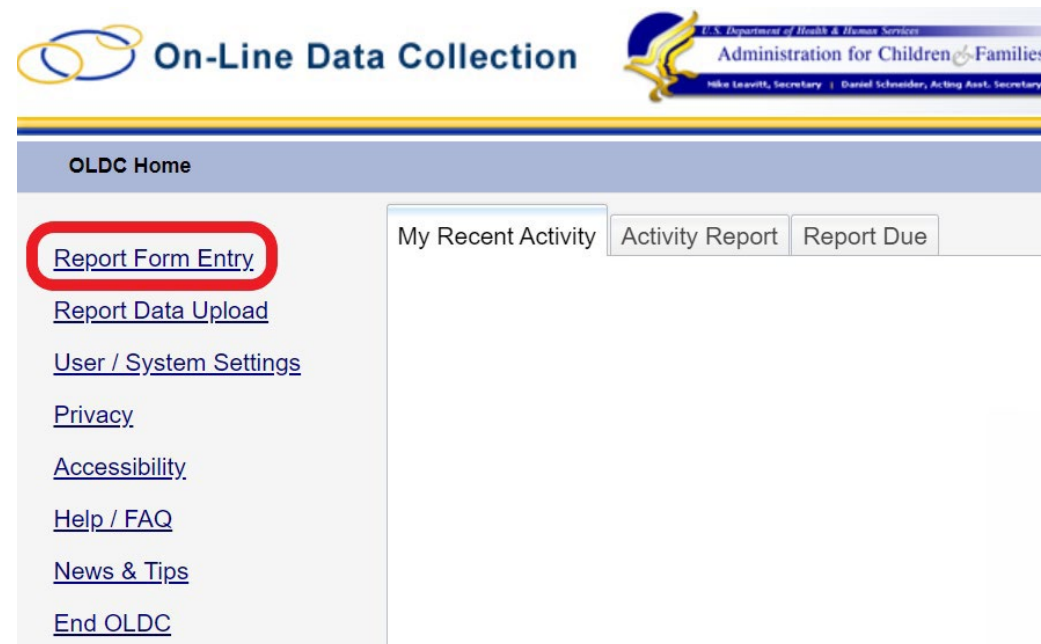
### Contents

Introduction .....	ii
GrantSolutions and OLDC Accounts.....	ii
Requesting New Accounts .....	ii
Updating Existing Accounts .....	iii
Changing your User Role or Account Functions .....	iii
Requesting Access to Notice of Awards .....	iii
Logging in to GrantSolutions.....	1
Regular vs Enhanced View .....	1
Accessing the Tribal Annual Report.....	2
The Tribal Annual Report Form.....	4
Attaching the CSBG Tribal Annual Report.....	4
Validate the Report.....	6
Validate the Report.....	6
Submit the Report.....	7
Making Edits after Submission.....	8
Need Assistance? .....	8

# Accessing the Tribal Annual Report – Report Form Entry

The CSBG Tribal Annual Report is submitted as an attachment to the Tribal Annual Report form for the associated reporting period or federal fiscal year (FFY) for which you are submitting the CSBG Tribal Annual Report.

1. From the OLDC homepage, click on “Report Form Entry” on the left side of the screen to open the Form Selection screen.





# Accessing the Tribal Annual Report – Form Selection

2. On the Form Selection screen, complete the available fields as follows:
  - a. **Program Name:** Community Services Block Grant
  - b. **Grantee Name:** Select your Tribe or Tribal Organization Name (this should automatically populate)
  - c. **Report Name:** Tribal Annual Report (Tribal Annual Report)

Form Selection

**Program Name:**

**Grantee Name:**

**Report Name:**

Select a Report Name

CSBG Eligible Entity Master List (CSBG - Master List)

Expenditures (FFR SF-425)

Expenditures - Archive (SF-269A)

Mandatory Grant Application (SF-424 - M)

Module 2 (CSBG Module 2)

No Property Attachment A (SF-429 A No Property)

PMS FFR (FFR SF-425 )

Review (CSBG Model Plan)

Status Report Attachment A (SF-429 A)

Status Report Attachment B (SF-429 B)

Status Report Attachment C (SF-429 C)

Tribal Annual Report (Tribal Annual Report)



# Accessing the Tribal Annual Report – Reporting Period

3. The Reporting Period table will open. Find the reporting period that aligns with the reporting period for which you are reporting activities. (For FY24, the reporting period is 10/1/2023 – 9/30/2024.)
  - a. Click the Plus sign (+) under the Actions column to open the report.

OLDC Home Form Selection

Form Selection

Program Name: Community Services Block Grant

Grantee Name: AL [1 630705119 A1] (1993-2024) POARCH BAND OF CREEK INDIANS - No. 01

Report Name: Tribal Annual Report (Tribal Annual Report)

Show 15 entries Search:

Reporting Period	Report Status	Actions
10/01/2024 - 09/30/2025		+
10/01/2023 - 09/30/2024		+
10/01/2022 - 09/30/2023		+

# Tribal Annual Report – Cover Page

The Tribal Annual Report form sections are read-only and do not allow for edits.

[OLDC Home](#) [Form Selection](#) [Report](#) [Report Form Status](#)

Program Name: Community Services Block Grant  
Grantee Name: POARCH BAND OF CREEK INDIANS - No. 01  
Report Name: Tribal Annual Report - CSBG  
Report Period: 10/01/2023 - 09/30/2024  
Report Status: Initialized

Report Progress

Initialized	Edit-Saved	Validated	Submitted	In Review	C/O Approved
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save](#) [View/Add Attachments](#) [Validate](#) [Print](#)

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES  
Administration for Children and Families  
Community Services Block Grant (CSBG)

Tribal Annual Report  
Cover Page

Form Approved  
OMB No: ##### - #####  
Expires: ##/##/####

<u>1. Federal Agency and Organizational Element to Which Report is Submitted</u> Office of Community Services		<u>2. Federal Grant or Other Identifying Number Assigned by the awarding Federal agency</u>		<u>3a. UEI</u> X3G1ZDHMA5N5
				<u>3b. EIN</u>
<u>4. Recipient Organization</u>				<u>5. Recipient Identifying Number or Account Number:</u>
4a. Address Line 1:				
4b. Address Line 2:				
4c. Address Line 3:				
4d. City:		4e. State:	4f. Zip 5:	4g. Zip 4:
<u>6a. Project/Grant Period Start Date</u>	<u>6b. Project/Grant Period End Date:</u>	<u>7. Reporting Period End Date:</u>		<u>8. Final Report</u>
<u>10. Performance Narrative</u>				<u>9. Report or Frequency</u> Annual
<u>11. Other Attachments</u>				

[Save](#) [View/Add Attachments](#) [Validate](#) [Print](#)

# Attaching the CSBG Tribal Annual Report

Follow the steps below you will attach your CSBG Tribal Annual Report. Do **not** use the View/Add Attachments button to attach your CSBG Tribal Annual Report document(s).

1. At the end of the form, click the paperclip symbol under *10. Performance Narrative*. Attach your CSBG Tribal Annual Report under this cell. This will open the **Cell Level Attachments** pop-up screen.
2. Note: All documents should be attached using the paperclip.

6a. Project/Grant Period Start Date	6b. Project/Grant Period End Date:	7. Reporting Period End Date:	8. Final Report
10. Performance Narrative			9. Report or Frequency Annual
11. Other Attachments			

3. On the **Cell Level Attachments** pop-up screen, click “Choose File”. This will open a pop-up window showing the files available on your computer.

# Attaching the CSBG Tribal Annual Report – Cell Level Attachments

3. On the **Cell Level Attachments** pop-up screen, click “Choose File”. This will open a pop-up window showing the files available on your computer.

Manage Attachments

Cell Level Attachments

10. Performance Narrative

[Local Attachment](#)

Choose File

 No file chosen

Attach File

Cell Level Attachments

Form Level Attachments

Show 10 entries

Search:

Cell Location	File Name	Uploaded Date	Upload Status	Uploaded By	Actions
No data available in table					

Showing 0 to 0 of 0 entries

Previous

Next

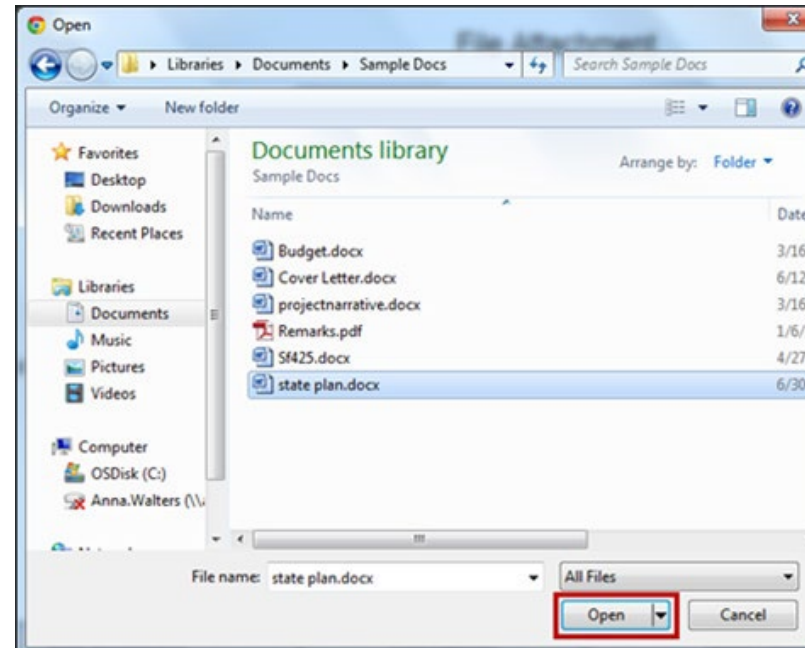
Close

GrantSolutions Privacy Policy Notice

No Personally Identifiable Information (PII) should be uploaded into GrantSolutions.

# Attaching the CSBG Tribal Annual Report – File Selection

4. Navigate to the correct folder (as necessary) and select the CSBG Tribal Annual Report. Then click the “Open” button. The **Cell Level Attachments** pop-up screen will then reappear showing the selected file.



# Attaching the CSBG Tribal Annual Report – Attach File

5. Confirm that the selected document is listed and click the “Attach File” button.  
The Cell Level Attachment pop-up screen will refresh automatically and display an attachments table with your document listed.

Click the “Close” button at the bottom of the File Attachment pop-up screen to return to the Report Form screen. Navigate to the correct folder (as necessary) and select the CSBG Tribal Annual Report.



**Note: OLDC will run a virus scan in the background while you continue to the next step.**

# Validating the Report

When you close the **Cell Level Attachment**, you will return to the Tribal Annual Report form. Prior to submitting, be sure to validate the report.

## *Validate the Report*

On the Report Progress screen, click the **Validate** button.

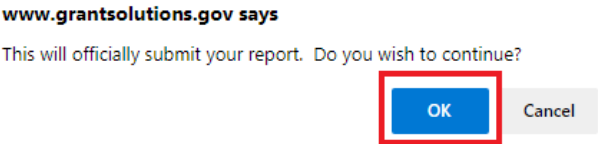


# Submitting the Report

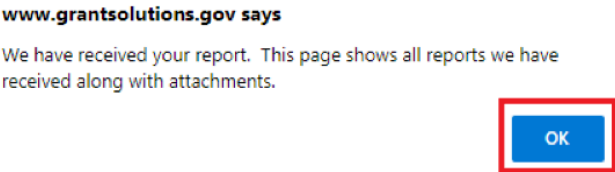
1. The report form is now ready to be submitted. Click **Submit**.



2. A pop-up message will appear saying: “This will officially submit your report. Do you wish to continue?” Click “OK” to continue.



3. The Report Form Status screen will appear, and a pop-up message will display: “We have received your report. This page shows all reports we have received along with attachments.” Click **OK**.



4. Congratulations! You have submitted your CSBG Tribal Annual Report! You will see the report now listed in the Report Status History section of the Report Form Status page.

Report Form Status				
Report Submissions:	Report Status:	Status Date:	Report Action:	Print:
<a href="#">View Original</a>	Submitted	08/14/2020	<a href="#">Unsubmit Report</a>	HTML Print Form <a href="#">Go</a>



# Tools, Training, and Technical Assistance

# Tools

All the resources to support the submission of the FY24 CSBG Tribal Annual Report can be found in [ACF-OCS-CSBG-AT-2025-02 Tribal Annual Report Submission FY24:](#)

- [FY24 CSBG Tribal Annual Report Fillable-PDF Tool](#)
- [FY24 CSBG Tribal Annual Report \(Short Form\) Fillable-PDF Tool](#)
- [Reporting by Allocation List](#)
- [CSBG Tribal Annual Report OLDC Instructions](#)

# Technical Assistance

- **Federal Staff**

- [Program Specialist](#)

- [Data and Evaluation Specialist](#)

- **FY24 Annual Report Office Hours for Tribal Annual Report**

- Tuesday, February 11, 2025, 3:00pm-4:00pm ET

- **Targeted Training and Technical Assistance**

- [Email Data and Evaluation Specialist](#)

# Regional Contacts

Region	Program Specialist	Policy, Data, and Evaluation Specialist
I	Roneika Carr	Melanie Durley
II	Roneika Carr	Melanie Durley
III	Mitch Navetta	Charles Chear
IV	Renee Brooks	M. Monique Alcantara
V	Kathryn Maddux	Kayla Lennon
VI	Isaac Davis	M. Monique Alcantara
VII	Mitch Navetta	M. Monique Alcantara
VIII	Jessica Cain	Lena Kotanchyan
IX	Kathryn Maddux	Kayla Lennon
X	Renee Brooks	Charles Chear



# THANK YOU