

Expand Your Reach with Reporting

CAPLAW 2010 National Training Conference

June 17, 2010
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Savannah, GA

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Handouts:

1. Beck PowerPoint slides
2. Lombard PowerPoint slides
3. Sieber PowerPoint slides

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Expand Your Reach with Reporting





Tabitha Beck, Data Analyst
National Association for State Community Services Programs (NASCSP)

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CSBG ARRA Facts

- ARRA delivered \$1 billion in Community Services Block Grant funds to the Community Action Network for the reduction of poverty, revitalization of low-income communities, and empowerment of low-income families and individuals in rural and urban areas to achieve economic security.
- States retained 1% specifically for Benefits Enrollment and Coordination activities. The remaining 99% went to eligible entities.
- Client eligibility was increased for regular CSBG and CSBG ARRA to 200% Federal Poverty Level for FY 2009 and FY 2010.

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WAP ARRA Facts

- ARRA delivered \$5 billion to the Weatherization Assistance Program to help get America back on the right track and assist those who are most affected by rising prices and diminishing salaries.
- The Weatherization network intends and is on track to fulfill the Obama Administration's goal of weatherizing 600,000 homes by March 2012.
- States and local agencies have hired thousands of new staff during the ramp up period, spurring the creation of the new "green collar" workforce for the new "green" economy.

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ARRA 1512 Federal Reporting Requirements

- Quarterly reporting required
- Number of Jobs Created/Retained
- Funds Received & Expenditures
- Quarterly Activities/ Project Description
- Data broken down for Prime Recipient, Sub Recipient, and Vendors
- www.federalreporting.gov

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CSBG Section 1512 Report Findings

1Q2010

- As compared to the last quarter, the CSBG Network reported:
 - receiving 63% more funds
 - expending 79% more funds
 - creating 62% more jobs

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WAP Section 1512 Report Findings

1Q2010

As reported, the national WAP network:

- Received 15% (\$715.7m) of the total award (\$4.7B)
- Expended 69% (\$729.5m) more funds than 4Q2009 (\$427m)
- Created or retained 10,607 jobs, 24% more than 4Q2009 (8,536)
- 2 States did not report jobs
- 1 State did not report funds received or expended

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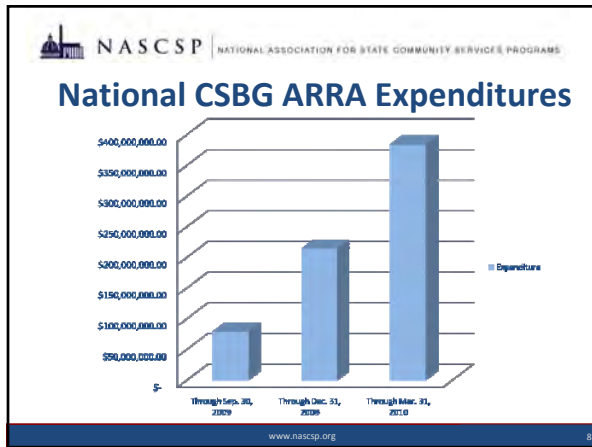
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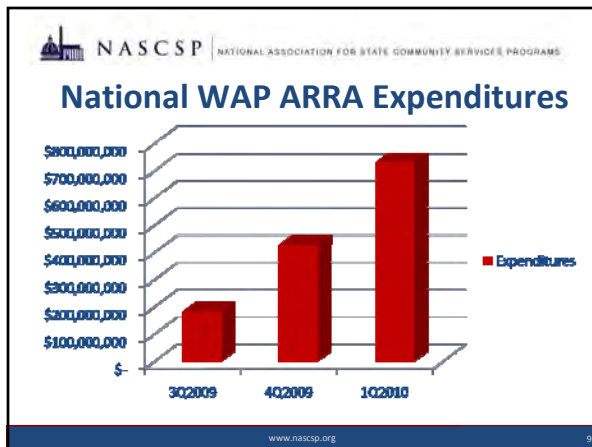
CSBG Section 1512 Report Findings

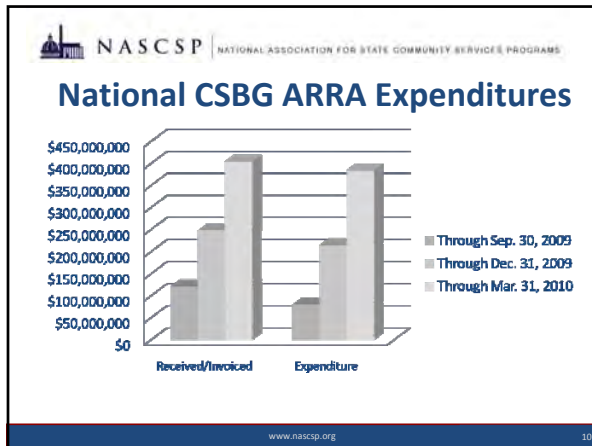
1Q2010

- **Received/Invoiced:**
 - **1 State** reported a decrease in their amount of funds received/invoiced, since the last quarter.
 - **3 States** reported no change in funds received/invoiced.
 - The remaining **51 States** reported an increase in the amount of funds received/invoiced
- **Expenditures:**
 - All 55 States reported an increase in their expenditures since the last quarter

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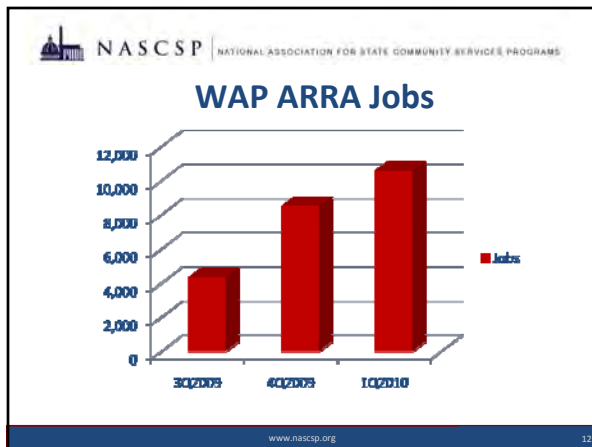


CSBG ARRA Jobs

Reporting Period	Total - Jobs
Jan-March 2010 (1Q2010)	7,827.72
Oct-Dec 2009 (4Q2009)	4,842.20
July-Sept 2009 (3Q2009)	3,808.91

A Comparison of 1Q2010 to 4Q2009 Jobs Numbers:

- 6 States reported a decrease in jobs since the last reporting period.
- 2 States reported no change in jobs since the last reporting period.
- 47 States reported an increase in jobs
- Overall:
 - 13 States reported 1-50 jobs
 - 13 States reported 50-100 jobs
 - 18 States reported 100-200 jobs
 - 10 States reported more than 200 jobs



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WAP & CSBG Rank at the Top of Job Creation!

RECOVERY.GOV TRACK THE MONEY

Recovery.gov is the U.S. government's official website that provides ARRA access to 2009 Federal Recovery Act funding and allows for the monitoring of Recovery Act release and usage.

Home | About | Accountability | Links to the Recovery Act | Commentaries | News | Press & Media | Contact Us

See Where the Money is Going

TOP PROGRAMS, AS REPORTED BY RECIPIENTS (JAN 4 - MAR 31, 2010)

Program Name	\$ MIL
State Fiscal Stabilization Fund (SFSF) - Education State Grants, Recovery Act	30754.45
Special Education Grants to States, Recovery Act	17479.00
State Fiscal Stabilization Fund (SFSF) - Government Activities, Recovery Act	11881.81
Title I Grants to Local Educational Agencies, Recovery Act	7020.91
Transportation	4919.00
Recovery Act Recovery Act Infrastructure Program	3627.00
Housing Planning and Construction	3390.00
Emergency Food Assistance	2842.34
Healthcare Assistance for Low-Income Patients	1912.00
Problem Solving Capital Fund (Recovery Act General Recovery Act Funds)	1650.00
Job Generation Initiative	946.25
ARRA - COMMUNITY SERVICES-BLOCKGRANT	790.97
ARRA - Health Center Integrated Services Co-financing Initiative	171.94

#9 WAP
#12 CSBG

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CSBG ARRA Expenditure Deadline

<http://www.acf.hhs.gov/programs/ocs/csbg/qna.html>

Q: How long do States and eligible entities have to obligate and expend Recovery Act Funds?

A: The authorization allows for the obligation of Recovery Act Funds in 2009 and 2010, the fiscal year funds were made available and the subsequent fiscal year. States have until **September 30, 2010**, to obligate the additional funds. Normal liquidation requirements under the CSBG program would apply.

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CSBG ARRA Expenditure Deadline

<http://www.acf.hhs.gov/programs/ocs/csbg/qna.html>

Q: Does the obligation deadline differ based on the type of accounting system used?

A: No, if using an accrual accounting system, services must be provided on or before September 30, 2010; and liquidated on or before December 29, 2010. A final report is due on or before December 29, 2010. If using a cash accounting system, funds for services **must be obligated on or before September 30, 2010** and final report is due on or before December 29, 2010.

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CSBG ARRA Voluntary Reporting Request

The Federal Office of Community Services (OCS) has asked NASCSP to work with the States to collect CSBG ARRA data on a voluntary basis.

Even though it is voluntary, it is critical that as many States and eligible entities report this information to better tell the story of what the Network is accomplishing with ARRA funding.


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CSBG ARRA Voluntary Reporting Request

- Number of individuals served with CSBA ARRA funds
- Demographics of individuals served with CSBG ARRA funds
- Outcomes (National Performance Indicators) of individuals served with CSBG ARRA funds

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Using Your CSBG ARRA Data



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Using Your WAP ARRA Data


ENERGY ASSISTANCE WEATHERIZATION ASSISTANCE PROGRAM

THE RECOVERY ACT: WEST VIRGINIA CLOSE-UP

West Virginia's Recovery Act funding for the Weatherization Assistance Program (WAP) is the largest in the nation. The state has received over \$100 million in federal funding to help low-income households reduce energy costs and improve energy efficiency. This funding is used to pay for energy audits, weatherstripping, insulation, and other energy-saving measures.

West Virginia's WAP is a critical program for the state's low-income households. It helps them save money on their energy bills and improves their living conditions. The program is a key part of the state's economic recovery plan.

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Weatherization Works

Weatherization works to improve the energy efficiency of homes. It involves a variety of measures, including weatherstripping doors and windows, adding insulation to walls and attics, and sealing air leaks. These measures help to reduce energy costs and improve indoor air quality.

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Questions?

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Expand Your Reach with Reporting

Marjorie Lombard, Director of Finance
Action for Boston Community Development

Expand Your Reach with Reporting Using ARRA

- Brought an increase in service levels and types of services as well as pilot programs; all of which can be used to seek program funding beyond ARRA – either private funding or other public funding.
- Approach new funding sources with a report on the measurable outcomes the new ARRA activities produced.
- Also report on tried and true programs that were able to expand their reach into new locations and allowed for expansion of existing services to new clients.
- Use the ARRA state reporting system to find and reach out to organizations as a way to find potential partners / collaborators.

Expand Your Reach with Reporting

- Join forces with like-minded organizations to reach a common goal.
 - Partnerships, delegates, sub-grantees, vendors or any relationship that involves mutual goals and an exchange of funds.
 - Develop and use collaborative efforts that involve mutual goals without the exchange of funds.

Expand Your Reach with Reporting Considerations and Concerns

- Cost Sharing or Matching
- Budget Implications
 - Time and Effort
 - Allocations
 - ❖ Indirect / Administrative Costs
 - ❖ Space

Expand Your Reach with Reporting Cost Sharing or Matching

- Applicable Regulation from the Office of Management and Budget (OMB)
2 CFR 215 (OMB Circular A-110)
- All contributions shall be accepted as part of a recipient's cost sharing or matching when they meet the following criteria:

Expand Your Reach with Reporting Cost Sharing or Matching

- Criteria
 1. Are verifiable from recipient's records.
 2. Are not included as contributions for any other federally funded program or project.
 3. Are necessary and reasonable to accomplish project or program goals.
 4. Meet applicable cost principles.

Expand Your Reach with Reporting Cost Sharing or Matching

- Criteria, continued:
 5. Are not paid by the Federal Government under another award (except where otherwise authorized).
 6. Are included in the approved budget.
 7. Conform to other provisions of 2 CFR 215 (OMB Circular A-110) and may include: volunteer services, unrecovered indirect costs, remaining life of a property, donated supplies such as, expendable equipment, office or program supplies, and donated space.

Expand Your Reach with Reporting Budget Implications

- Need to have an effective time and effort reporting system in place to support and document employees' work effort.
- Need to have either a federally approved indirect cost rate or another method to document the allocation of administrative costs.
- Also need to document allocation of space.



Why Not the Bull's-Eye?

Getting to the Next Big Question for Community
Action Accountability

CAPLAW ♦ Savannah ♦ 2010

The Power of Information at a
"Hinge Point" in the History of
Community Action

You are the key!

The Man in the River

- "Keep your head above water!"
- "Keep paddling!"
- "Watch where you're going!"



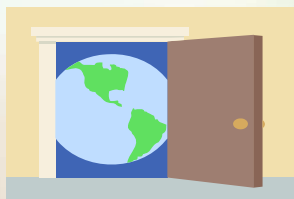
Where are we in our journey as a network?



- **An historical “hinge point”**
- **We can be winners—or the alternative**
- **Tools for meeting the historical challenge**

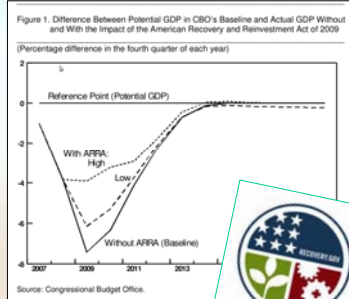
Why is this a “hinge point”?

- ARRA—an experiment
- Talking about poverty
- Measuring anti-poverty impacts
- Others share our goals
- New initiatives



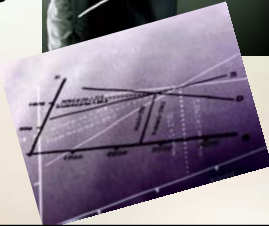
ARRA as a Test

**A HUGE
INPUT
=
WHAT
OUTCOMES?**



Talking about Poverty Reduction

- Not a "dead issue" politically
- Active debate on theories of change
- Prizes for measuring poverty reduction—in the Third World!




New Players and New Initiatives



- Others share our goals
- Place-based initiatives and others
- Government and philanthropy look for better outcomes: "input but no impact"

What Do We Need to Do?
We need to manage FOUR levels of "why" with data.



The image shows four numbers, 1, 2, 3, and 4, each written in black marker on a separate, slightly overlapping, colored sticky note. The sticky notes are orange, pink, orange, and green from left to right.

The Four Levels of "Why" in Data Management

- 1 Data because "they said so"
- 2 Data because it can be put to work for the agency
- 3 Data because managers need it
- 4 AND...the next level



Let's get away from this...

2

We can sharpen our game in putting data to work.

Data for Agency Audiences

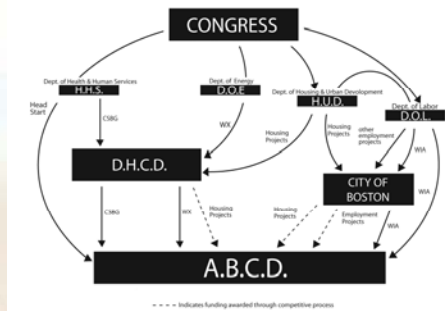
It's about integrating the basic elements: statistics (clients, activities, OUTCOMES); stories; maps; and dollars.

It's about integrating across funding and program boundaries.

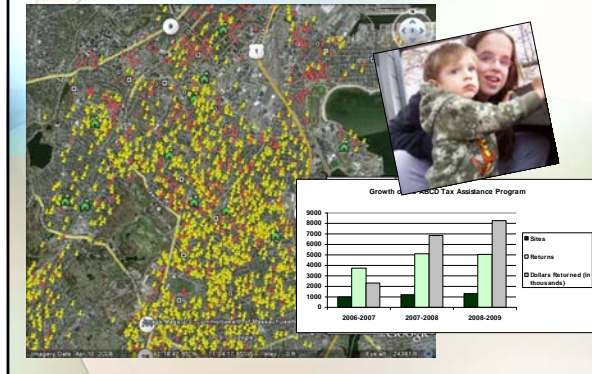
It's about using the data to make the points YOU want to make.

It's about using new technologies, too.

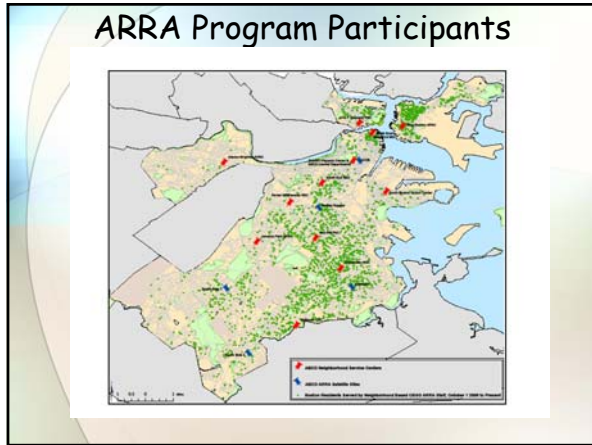
Integrating Data Across Boundaries



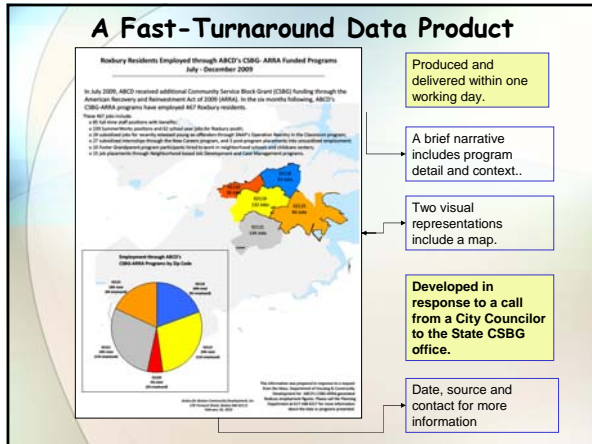
Integrating Types of Information

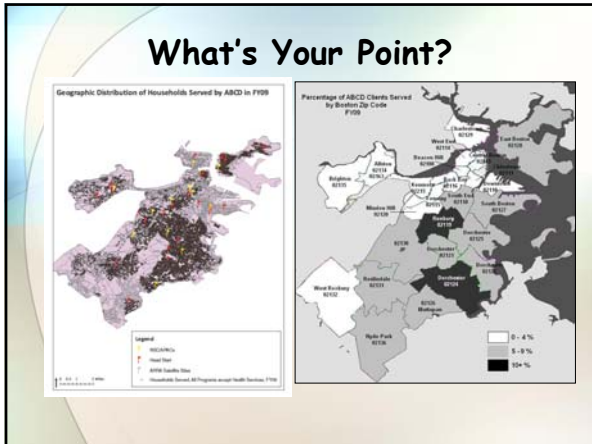


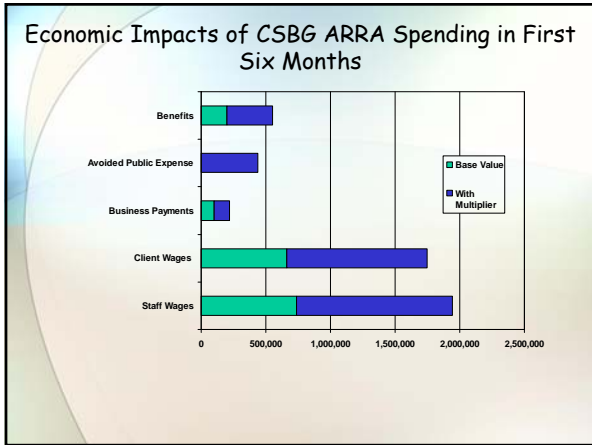
ARRA Program Participants



A Fast-Turnaround Data Product









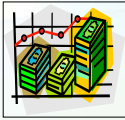
We can make our data systems more self-sustaining by engaging managers better.

Data to Help Managers Manage

- It's about engaging managers in establishing their own data needs.
- Teaching "why" before "what" and how
(Check out the training exercise for field managers)
- Working with Quality Improvement tactics

Motivating Managers to Seek Outcomes

Oswald's Opportunity: Using outcomes to obtain more funding



Keisha's Controversy: Using outcomes to support staff supervision



Stan's Stumbling Block: Using outcomes to handle political challenges



Fuad's Fight: Using outcomes to respond effectively to community change

4

This is the bull's-eye...

Pushing Beyond the Short Term

- The Question
- Why are we afraid to ask?
- What would it take to answer the question?
- What would the answer mean?

The Question

Can Community Action Agencies succeed in helping households escape poverty?

SHOULD We Ask the Question?

Or is it a NECESSITY to ask the question?

Why Are We Afraid to Ask?

- Political risk
- Uncertainty about results
- History of being burned by over-promising
- Difficulty of defining a useful measurement approach
- Difficulty in managing a measurement process

What Suggests We Should Ask?

- The “Hinge”
- We have competition—not only for dollars, but for legitimacy.
- Failure to ask—and answer—limits the country’s ability to address poverty policy.
- We have a base of learning and experience that may be lost or discounted.

The “Macro” Variables We Don’t Control

- National policy
- National macroeconomic trends: Inflation/deflation
- Regional growth trends
- Local labor markets; local cost of living
- Technology and productivity trends
- Cultural factors; racism and other discrimination
- Local infrastructure...*et cetera*

With Such Limited Control, Can Even the Best "Programs" Show Significant, Sustainable Results?

Yes. But...

- Not for everyone
- Not over every part of the life trajectory
- Not equally in all domains of life
- Not over the short term
- Not without concentration and continuity of inputs
- Not always a "home run"

What Does It Take to Answer the Question?

- Longitudinal tracking over 10-20 years
- Significant group size
- A clear theory of change (logic model)
- Selection of useful dependent variables
- Quasi-experimental design?

Can We Get the Right Answer?

Do we have a Community Action Hypothesis?

What Might it Take to Get a Positive Answer?

Based on the current research, significant, sustainable change in family economic status appears to be related to several characteristics in "program" inputs.

Some Program Structure Factors

- Long-term active involvement (5-20 years)
- Start at a young age
- Involve more than one generation
- Multiple inputs (for individuals and households)
- Combination of short-term, medium-term, long-term program activities
- High degree of service coordination

Some Program Content Factors

- Focus on proven human development activities (education at all levels, training associated with career ladders) linked to increased adult wages
- Attention to barrier reduction, stabilization and crisis reduction
- Incorporation of proven asset development activities
- Incorporation of consistent individual and group supports

Some Participant and Community Factors

- Voluntary participation
- Initial "select-in" for high motivation
- Contract or other commitment required; standards for continued participation
- Program responsive to community-identified needs and shaped by community input
- Congruent with/supported by local informal support networks

Can We Do This?

And what would it mean for Community Action?

This is Our River