



pennsylvania
DEPARTMENT OF COMMUNITY
& ECONOMIC DEVELOPMENT

2018 COPOS FUNCTIONALITY WEBINAR

January 9, 2018
Presentation Version

Community Services Block Grant (CSBG)
DCED, Center for Community Services

PRESENTERS

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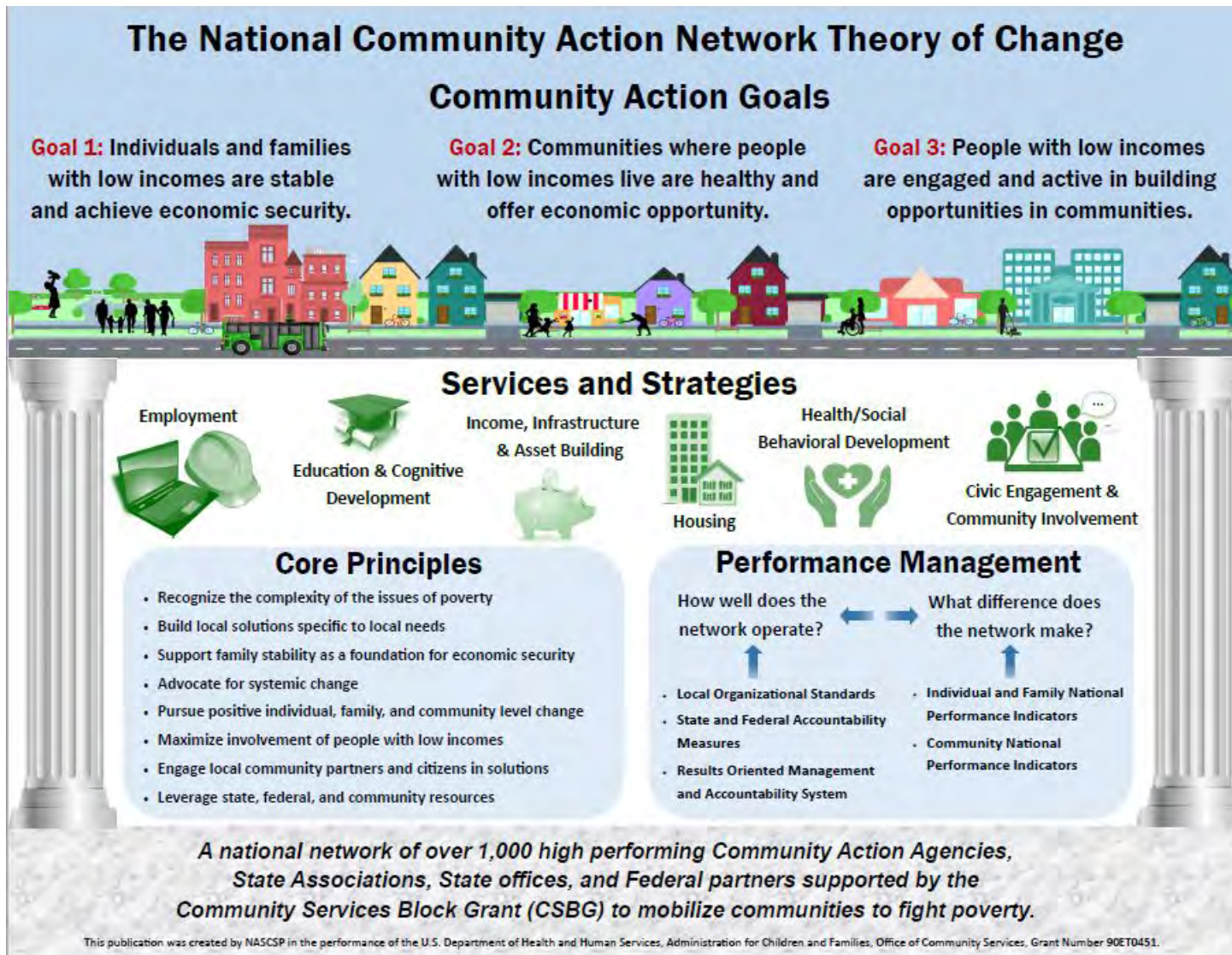
Lynette Praster, **Director, Center for Community Services**

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AGENDA

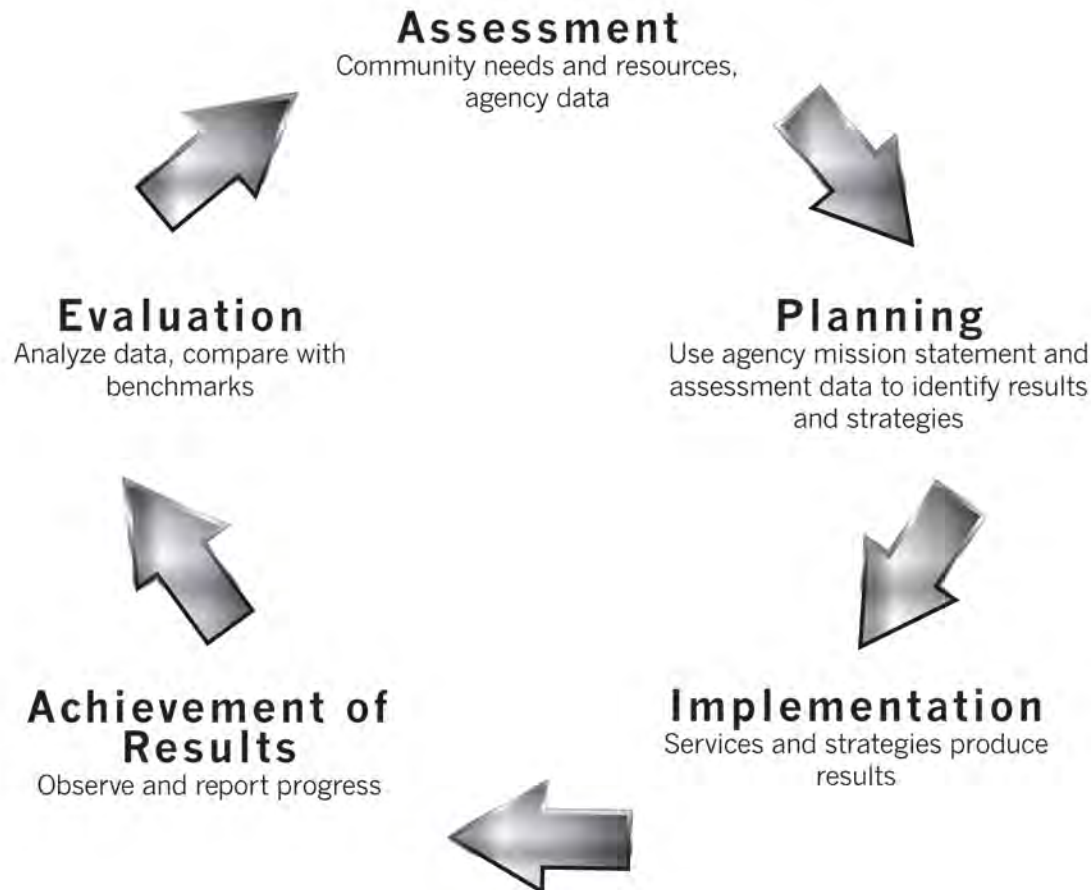
- Introduction and Background
- Overview of COPOS Enhancements for 2018
 - Modules 2, 3, and 4 – Key Considerations
- Organizational Standards and Document Management
 - User Management
 - Timeline for Future Enhancements
 - Frequently Asked Questions
 - Next Steps

INTRODUCTION AND BACKGROUND



PERFORMANCE MANAGEMENT

The Results Oriented Management and Accountability Cycle



PERFORMANCE MANAGEMENT

Performance Management Framework

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability system and ROMA Next Generation
- CSBG Annual Report, which includes an updated and refined set of CSBG outcome measures (FNPIs and SRVs).

HOW DOES IT ALL FIT TOGETHER



INTRODUCTION AND BACKGROUND

- All agencies were invited to a COPOS training and testing event held on August 16, 2017
- The primary difficulty expressed was related to Module 3 – determining and deciding on characteristics for community initiatives, i.e. counts of change versus rates of change and partnerships versus collaborative initiatives that create collective impact
- We continue to work on this – a video of the August 16th event was posted and suggested for viewing by those agencies who were not able to participate and a further testing period occurred during the last two weeks in September

INTRODUCTION AND BACKGROUND

- That brings us to today's webinar. We have received some questions from you that will be addressed and we are open to the issues about COPOS and ROMA Next Gen that you have on your mind.
- We will explore data dumping in response to the agencies' suggestions last June, but must at the current time focus on these current COPOS changes.
- We will work with each agency on a case by case basis to help them understand how to best report in Module 3 – we are all TRANSFORMING to meet these goals!

ANNUAL REPORTING DEADLINES

2017 CSBG Information Survey (IS) data in COPOS

- **Wednesday, February 14th** by close of business
- Be prepared to quickly respond to data scrubbing process

2018 CSBG Annual Report in COPOS

- Module 3A: Establish Community-level Initiatives
- Modules 3B and 4: Targets and baselines
- **Wednesday, February 14th** by close of business

QUARTERLY REPORTING DEADLINES

Welcome to COPOS

Quarterly Report Submission Status				
Target Report 2/14/2018	First Quarter 4/30/2018	Second Quarter 7/30/2018	Third Quarter 10/30/2018	Fourth Quarter 2/14/2019
All Quarterly Reports are Due on the Submission Date listed above. The System will lock at 11:59 p.m. on the date provided.				

MODULE 2 – COPOS FUNCTIONALITY

CSBG Annual Report

Module 1

- State Administration

Module 2

- CSBG Eligible Entity Expenditures, Capacity, and Resources

Module 3

- Community Level

Module 4

- Individual and Family Level

MODULE 2

Module 2 of the 2018 CSBG Annual Report is largely unchanged from the 2017 CSBG IS report.

Section A is your explanation of your total CSBG expenditures during the reporting period. It is broken into two subsections, A:B and A:C:

— Module 2
 ** Section A: B **
 Section A: C
 Section B
 Section C

MODULE 2

Section B reflects your agency's capacity-building activities, and should include capacity and resources derived from CSBG and other funding sources.

— Module 2
Section A: B
Section A: C
** Section B **
Section C

Section C should tell the story about how your agency leveraged funds from federal, state, local, and private sources.

— Module 2
Section A: B
Section A: C
Section B
** Section C **

MODULE 2

It is important to use the Notes function to provide an explanation. Your notes are essential, especially during the data review process that occurs before the CSBG network's data is submitted to DHHS/OCS.

B. Hours of A

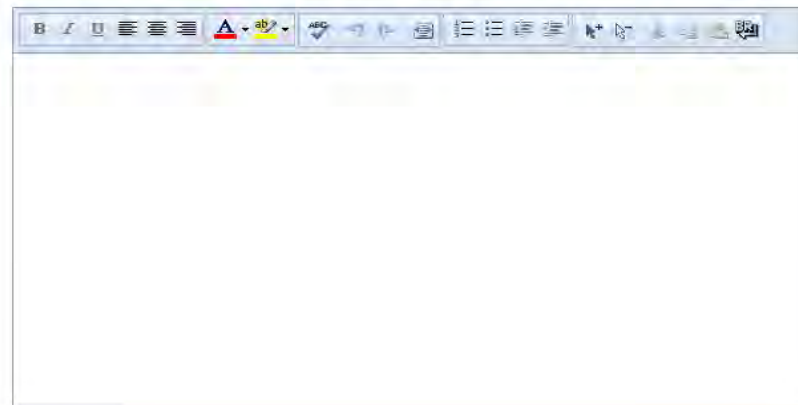
1. Hours of Board Notes

2. Hours of Ag

NPI Notes

1. Hours of Board Members in capacity building activities

Announcement Body:



The screenshot shows a web-based form for entering notes. At the top is a toolbar with various icons for text formatting (bold, italic, underline, bulleted list, numbered list, indent, outdent, link, unlink, undo, redo) and a color picker. Below the toolbar is a large, empty text area for entering the note content.

Save Note

Delete Note (Admins Only)

MODULE 2

There are some new fields that you can use to report in Module 2 A:B CSBG Expenditures for 2018:

6. Civic Engagement and Community Involvement Notes	CSBG Funds <input type="text" value="0"/>
9. Agency Capacity Building <i>(detailed in Section A:C)</i> Notes	CSBG Funds <input type="text" value="0"/>

MODULE 3 – COPOS FUNCTIONALITY

CSBG Annual Report

Module 1

- State Administration

Module 2

- CSBG Eligible Entity Expenditures, Capacity, and Resources

Module 3

- Community Level

Module 4

- Individual and Family Level

MODULE 3 – COPOS FUNCTIONALITY

- Module 3 reflects the renewed understanding that the CSBG network needs to work toward community change as well as individual and family outcomes.
- The creation of Module 3 provides reporting space for agencies confronting community level issues that was never available before.
- This section of the annual report collects information on the agency's community level initiatives and illustrates the connection between initiatives and outcomes.

MODULE 3 – COPOS FUNCTIONALITY

This screen will show all of your active initiatives, and allow you to add new ones:



Home
Announcements
Download Report Content

Expand All

+ Admin
+ Organizational Standards
+ Module 2
- Module 3: A - Management
 **Manage Community Initiatives
 Add New Community Initiatives
 Search Community Initiatives
+ Module 3: B
+ Module 4: A (Quarterly)
+ Module 4: B
+ Module 4: C

[Instructions](#) | [Help](#) | [Search Initiatives](#)

Community Initiatives

No initiatives found

[New Initiative](#)
[View Deleted Initiatives](#)

Note: Module 3 Initiatives may be added throughout the year as new initiatives arise. **Active** initiatives will carry over in COPOS to the following year.

MODULE 3 – COPOS FUNCTIONALITY

6. Ultimate Expected Outcome Help	Employment Indicators —		
	<input type="checkbox"/>	Number of jobs created to increase opportunities for people with low incomes in the identified community.	
	<input type="checkbox"/>	Number of job opportunities maintained in the identified community.	
	<input type="checkbox"/>	Number of "living wage " jobs created in the identified community*.	
	<input type="checkbox"/>	Number of "living wage" jobs maintained in the identified community*.	
	<input type="checkbox"/>	Number of jobs created in the identified community with a benefit package.	
	<input type="checkbox"/>	Percent decrease of the unemployment rate.	
	<input type="checkbox"/>	Percent decrease of the youth unemployment rate.	
	<input type="checkbox"/>	Percent decrease of the underemployment rate.	
	<input type="checkbox"/>	Other	
		Education and Cognitive Development Indicators	+
		Infrastructure and Asset Building Indicators	+
		Housing Indicators	+
		Health and Social/Behavioral Development Indicators	+
		Community Support Indicators	+
	Emergency Management Indicators	+	
	Civic Engagement and Community Involvement Indicators	+	

The indicators you choose in #6 determine the outcomes that are visible in #14.

MODULE 3 – COPOS FUNCTIONALITY

What you choose in #14 determines the outcomes and indicators you will report on in Module 3B.

Example:

14. Outcomes/Indicators to Report (For This Report Year) Help	<div>Employment Indicators</div> <div>Education and Cognitive Development Indicators</div> <div>Infrastructure and Asset Building Indicators</div> <div>Housing Indicators</div> <div>Health and Social/Behavioral Development Indicators</div> <div> <input type="checkbox"/> Number of accessible and affordable healthy food resources created in the identified community. </div> <div>Community Support Indicators</div> <div>Emergency Management Indicators</div> <div>Civic Engagement and Community Involvement Indicators</div>
15. Final Status	<div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div>

MODULE 3 – COPOS FUNCTIONALITY

- Only report on initiatives with community level outcomes that are planned or achieved.
- Community level initiatives that the CAA undertakes alone or in partnership with other agencies should be included.
- Do not report on activities that are not designed to pursue specific community outcomes.

MODULE 4 – COPOS FUNCTIONALITY

CSBG Annual Report

Module 1

- State Administration

Module 2

- CSBG Eligible Entity Expenditures, Capacity, and Resources

Module 3

- Community Level

Module 4

- Individual and Family Level

MODULE 4 – COPOS FUNCTIONALITY

Key Points for Module 4

- Formerly Goals 1 and 6
- Reporting is optional for many data points - report only on programs and services your agency provides or coordinates, and for which your agency collects data.
- There are new questions under Income and Asset Building and Housing

MODULE 4 – COPOS FUNCTIONALITY

Key Points for Module 4

- Reporting on Civic Engagement is new
- Reporting on Multiple and Various Domains is enhanced
- Remember to use the Help function on each Module 4 page

MODULE 4 – COPOS FUNCTIONALITY

Home
Announcements
Download Report Content

Expand All

+ Admin
+ Organizational Standards
+ Module 2
+ Module 3: A - Management
+ Module 3: B
- Module 4: A (Quarterly)
 Employment
 Education/Cognitive Development
 Income/Asset Building
 Housing
 Health and Social
 Civic Engagement
 ** Multiple Domains **
+ Module 4: B
+ Module 4: C

Module 4A Individual & Family Performance Indicators (Quarterly)

Section A: Outcomes Across Multiple Domains

Outcomes Across Multiple Domains	Target	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
<p>1. The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains.</p> <p>Notes</p>	<p>Number of Participants Expected to Achieve Outcome</p> <p>0</p>	<p>Number of Participants Enrolled in Program(s)</p> <p>0</p> <p>Number of Participants Achieving Outcome in Reporting Period</p> <p>0</p>	<p>Total Participants Enrolled in Program(s)</p> <p>0</p> <p>Total Participants Achieving Outcome</p> <p>0</p> <p>Number of New Participants Enrolled in Program(s) This Quarter</p> <p>0</p> <p>Number of New Participants Achieving Outcome This Quarter</p> <p>0</p> <p>Performance Target Accuracy 2nd Quarter Total / Target = % Achieving</p> <p>.00</p>	<p>Total Participants Enrolled in Program(s)</p> <p>0</p> <p>Total Participants Achieving Outcome</p> <p>0</p> <p>Number of New Participants Enrolled in Program(s) This Quarter</p> <p>0</p> <p>Number of New Participants Achieving Outcome This Quarter</p> <p>0</p>	<p>Number of Participants Enrolled in Program(s)</p> <p>0</p> <p>Total Participants Achieving Outcome</p> <p>0</p> <p>Number of New Participants Enrolled in Program(s) This Quarter</p> <p>0</p> <p>Number of New Participants Achieving Outcome This Quarter</p> <p>0</p> <p>Percentage Achieving Outcome in Reporting Period 4th Quarter Total / Participants Enrolled = % Achieving</p> <p>.00</p> <p>Performance Target Accuracy 4th Quarter Total / Target = % Accuracy</p> <p>.00</p>
Other Outcome Indicator					
<p>2. The number of individuals or households</p> <p>Notes</p>	<p>Number of Participants Expected to Achieve Outcome</p> <p>0</p>	<p>Number of Participants Enrolled in Program(s)</p> <p>0</p> <p>Number of Participants Achieving Outcome in Reporting Period</p> <p>0</p>	<p>Total Participants Enrolled in Program(s)</p> <p>0</p> <p>Total Participants Achieving Outcome</p> <p>0</p> <p>Number of New Participants Enrolled in Program(s) This Quarter</p> <p>0</p> <p>Number of New Participants Achieving Outcome This Quarter</p> <p>0</p>	<p>Total Participants Enrolled in Program(s)</p> <p>0</p> <p>Total Participants Achieving Outcome</p> <p>0</p> <p>Number of New Participants Enrolled in Program(s) This Quarter</p> <p>0</p> <p>Number of New Participants Achieving Outcome This Quarter</p> <p>0</p>	<p>Number of Participants Enrolled in Program(s)</p> <p>0</p> <p>Total Participants Achieving Outcome</p> <p>0</p> <p>Number of New Participants Enrolled in Program(s) This Quarter</p> <p>0</p> <p>Number of New Participants Achieving Outcome This Quarter</p> <p>0</p> <p>Percentage Achieving Outcome in Reporting Period</p>

MODULE 4 – COPOS FUNCTIONALITY

Use this section is to report an outcome if it isn't reported elsewhere:

[Home](#)
[Announcements](#)
[Download Report Content](#)

[Expand All](#)

+ Admin
+ Organizational Standards
+ Module 2
+ Module 3: A - Management
+ Module 3: B
+ Module 4: A (Quarterly)
+ Module 4: B
- Module 4: C
 [General](#)
 1. [Gender](#)
 2. [Age](#)
 3. [Education Levels](#)
 4. [Disconnected Youth](#)
 5. [Health](#)
 6. [Ethnicity / Race](#)
 7. [Military Status](#)
 8. [Work Status](#)
 9. [Household Type](#)
 10. [Household Size](#)
 11. [Housing](#)
 12. [Level of Household Income](#)
 13. [Source of Household Income](#)
 14. [Other Income Source](#)
 15. [Non-Cash Benefits](#)
 ** [Individuals Not Included in 4:C 1-15 **](#)

Module 4C Characteristics of Those Served

Section C: All Characteristics - Individuals Not Included in 4:C 1-15

Individuals Not Included in 4:C 1-15	Fourth Quarter
E. Number of Individuals Not Included in the Totals Above (due to data collection system integration barriers)	
1. Please list the unduplicated number of INDIVIDUALS served in each program*:	
Program Name <input type="text"/> Notes	Number of Individuals <input type="text"/> 0
Program Name <input type="text"/> Notes	Number of Individuals <input type="text"/> 0
Program Name <input type="text"/> Notes	Number of Individuals <input type="text"/> 0
Program Name <input type="text"/> Notes	Number of Individuals <input type="text"/> 0
Program Name <input type="text"/> Notes	Number of Individuals <input type="text"/> 0
Program Name <input type="text"/> Notes	Number of Individuals <input type="text"/> 0

MODULE 4 – COPOS FUNCTIONALITY

Crosswalks and more information are available using COPOS Help on the Resources page:



COPOS Help and Information

If you have any questions or comments regarding COPOS, please complete the [Questions/Comments](#) form.

COPOS Resources

[COPOS User Manual - Version 2018-1.0](#)
[COPOS Webinar 12/15/2016](#)
[Frequently Asked Questions](#)

CSBG AR 2018 Resources

[CSBG Annual Report](#)
[High Level Crosswalk CSBG AR - CSBG IS](#)
[Module 2 Excel Document](#)
[Module 3 Excel Document](#)
[Module 3 Section A - Guide \(Pennsylvania\)](#)
[Module 3 Section B](#)
[Module 3 Community Strategies Poster](#)
[Module 3 Section C - Community Strategies List](#)
[Module 4 Excel Document](#)
[COPOS Modules Question and Answer](#)
[COPOS Test Event Training Video](#)
[COPOS Test Environment – Access and Testing Instructions](#)

CSBG IS 2016 Resources

ORGANIZATIONAL STANDARDS MANAGEMENT

- 1** CONSUMER INPUT AND INVOLVEMENT
- 2** COMMUNITY ENGAGEMENT
- 3** COMMUNITY ASSESSMENT
- 4** ORGANIZATIONAL LEADERSHIP
- 5** BOARD GOVERNANCE
- 6** STRATEGIC PLANNING
- 7** HUMAN RESOURCE MANAGEMENT
- 8** FINANCIAL OPERATIONS AND OVERSIGHT
- 9** DATA AND ANALYSIS



CSBG Organizational Standards

ORGANIZATIONAL STANDARDS MANAGEMENT

- Meeting the Organizational Standards must be an ongoing systematic approach - Regular, consistent, on a schedule.
- Demonstrates the board and program staff have reviewed and considered the data.
- Not as concerned with the definition of the precise day that a standard was met, as much as that there is a plan in place where standards are met on a consistent and timely basis. As such, the agency should have a plan to “consider the data” to ensure a consistent/timely schedule.

ORGANIZATIONAL STANDARDS MANAGEMENT

Default View allows display for multiple standards/status:

Maximum Feasible Participation	Vision and Direction	Operations and Accountability
Consumer Input and Involvement	Organizational Leadership	Human Resource Management
Community Engagement	Board Governance	Financial Operations and Oversight
Community Assessment	Strategic Planning	Data and Analysis

Maximum Feasible Participation

Consumer Input and Involvement

Standard 1.1 - The organization demonstrates low-income individuals' participation in its activities.

Not Met (Needs Documentation)

Standard 1.2 - The organization analyzes information collected directly from low-income individuals as part of the community assessment.

Met until 11/11/2020

Standard 1.3 - The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.

Met on 12/7/2017 (No Expiration)

Community Engagement

Standard 2.1 - The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.

Met

Standard 2.2 - The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational

Met until 5/19/2019

ORGANIZATIONAL STANDARDS MANAGEMENT

Scrolling down will also display a back to the top on the right side of the screen:



Vision and Direction

Organizational Leadership

Standard 4.1 - The governing board has reviewed the organization's mission statement within the past 5 years and assured that:

Met until 7/23/2020



Standard 4.2 - The organization's Community Action plan is outcome-based, anti-poverty focused, and ties directly to the community assessment.

Met



Standard 4.3 - The organization's Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (ROMA) cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the

Met on 11/11/2017 (No Expiration)



Standard 4.4 - The governing board receives an annual update on the success of specific strategies included in the Community Action plan.

Met until 11/11/2018



Standard 4.5 - The organization has a written succession plan in place for the CEO/ED, approved by the governing board, which contains procedures for covering an emergency/unplanned, short-term absence of 3 months or less, as well as outlines the process for filling a permanent vacancy.

Met



Standard 4.6 - An organization-wide, comprehensive risk assessment has been completed within the past 2 years and reported to the governing board.

Met until 5/19/2018



ORGANIZATIONAL STANDARDS MANAGEMENT

Click on the down arrow beside the specific OS and click the edit button in order to change:

Standard 1.1 - The organization demonstrates low-income individuals' participation in its activities.



Not Met (Needs Documentation)

Standard 1.1 - The organization demonstrates low-income individuals' participation in its activities.

Met:

Date of Compliance:

Executive Director Approval:

[Help](#)

Documentation

- ☒ Advisory Group Documents
- ☐ Advisory Group Minutes
- ☐ Activity Participation Lists
- ☐ Board Minutes / Committee Minutes
- ☐ Board / Advisory Body Pre-Meeting Materials / Packet
- ☒ Volunteer Lists / Documents
- ☐ Other

Add Documents:

-- Select --



Documentation For This Standard:
(none)

[Manage Documents](#)

[Save](#)

[Cancel](#)

Notes

ORGANIZATIONAL STANDARDS MANAGEMENT

Click on Add (in Add Documents) to tie a document that exists in COPOS to this standard:

Documentation	Notes
<input checked="" type="checkbox"/> Advisory Group Documents <input type="checkbox"/> Advisory Group Minutes <input type="checkbox"/> Activity Participation Lists <input type="checkbox"/> Board / Advisory Body Minutes <input type="checkbox"/> Board / Advisory Body Pre-Meeting Materials / Packet <input checked="" type="checkbox"/> Volunteer Lists / Documents <input type="checkbox"/> Other	
<p>Add Documents:</p> <div><div>-- Select -- COPOS User Manual - April 29, 20... csbg annual report_frn2_annotate... csbg_stfactsheetsdraft_fy15_mast... schedule.png</div><div>Add</div></div> <p>Manage Documents</p> <p>Save</p>	

Maximum Feasible Participation

[illegible]

DOCUMENT MANAGEMENT

Click Manage Documents to upload and manage Organizational Standard documents:

The screenshot shows a web interface for uploading documents. At the top, the word "Upload" is centered under a dark blue horizontal line. Below this is a large white rectangular area with the text "Drag Files Here". Underneath this area is the word "or". Below "or" is the text "Upload a new file:" followed by a text input field and a "Browse..." button. Below the input field is an "Upload" button. Further down, a bold heading reads "Files uploaded to COPOS must meet the following criteria:". Below this heading is a rounded rectangular box containing two paragraphs of text. The first paragraph lists file extensions: ".one .pdf .xls .xlsx .xlsb .xlsm .doc .docx .ppt .pptx .pptm .pps .gif .png .jpg .jpeg". The second paragraph states "The filename may not contain the following characters:" followed by a list of characters: ". ' \" / \ -- & % # \$". At the bottom of the interface, a line of text says "Uploaded documents can be managed below.".

Upload

Drag Files Here

or

Upload a new file: Browse...

Upload

Files uploaded to COPOS must meet the following criteria:

Files must have one of the following file extensions:
.one .pdf .xls .xlsx .xlsb .xlsm .doc .docx .ppt .pptx
.pptm .pps .gif .png .jpg .jpeg

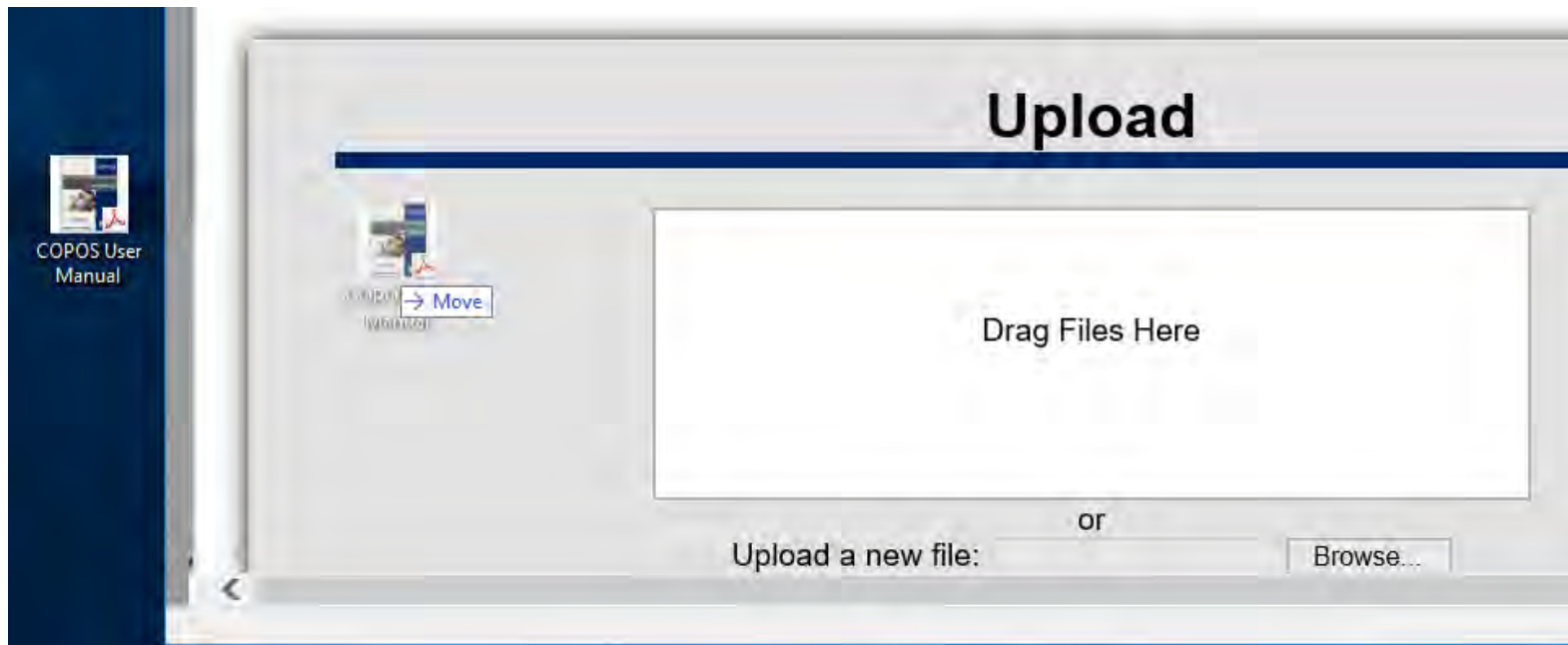
The filename may not contain the following characters:
. ' \" / \ -- & % # \$

Uploaded documents can be managed below.

DOCUMENT MANAGEMENT

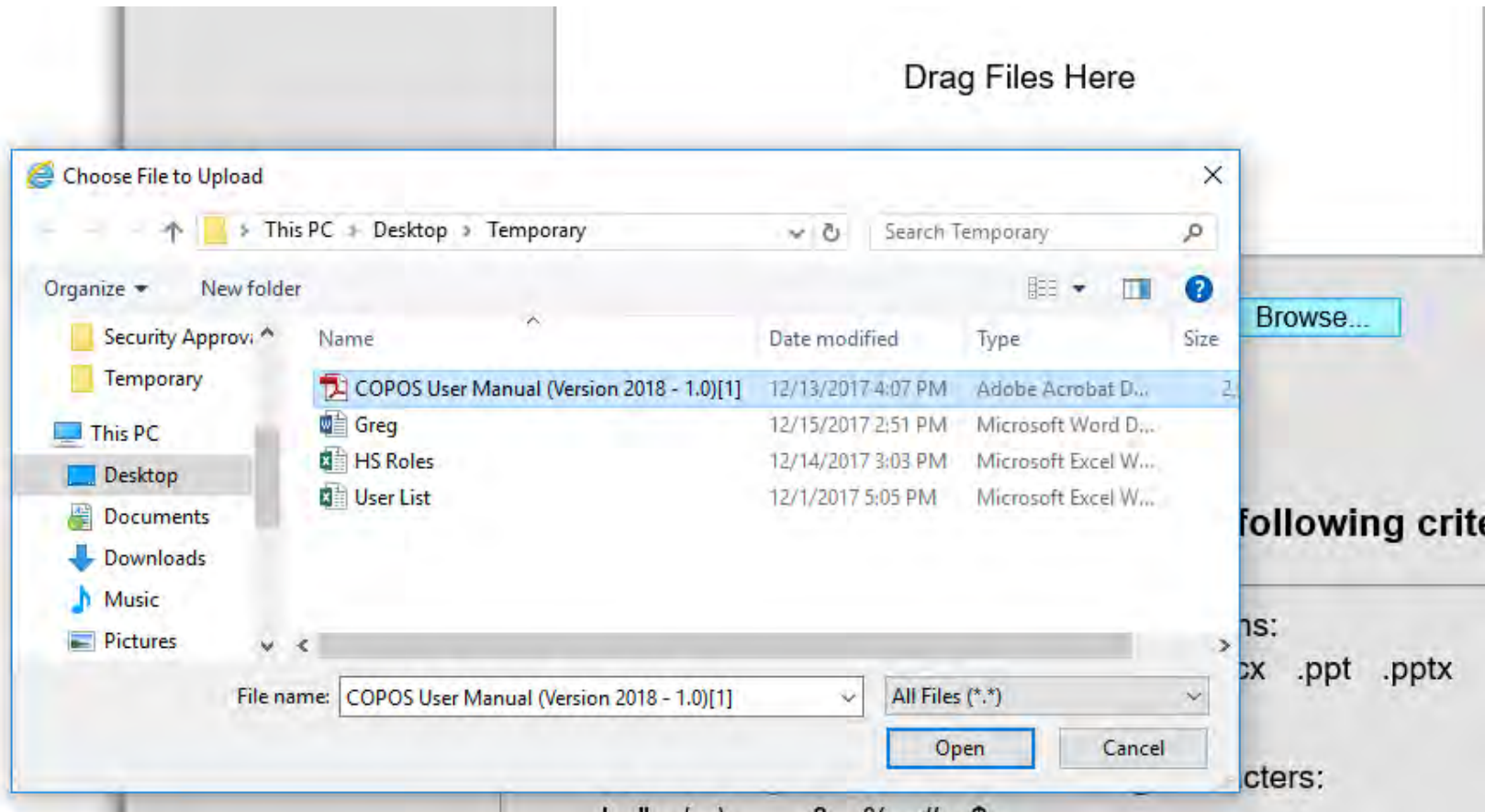
There are two ways to bring a file into COPOS:

- Drag a file to **Drag Files Here** space
- Click **Browse** to find and locate file to be uploaded



DOCUMENT MANAGEMENT




To upload a file into COPOS using “Browse”:



DOCUMENT MANAGEMENT

Once a file is uploaded, use **Manage** to connect it to specific Organizational Standards:

Manage

 COPOS User Manual - April 29, 2014.pdf	4 Standard(s)	Manage
 csbg annual report_frn2_annotated 10 29 16.pdf	No Standard(s)	Manage
 csbg_stfactsheetsdraft_fy15_master_f_pa.pdf	No Standard(s)	Manage
 schedule.png	1 Standard(s)	Manage

[View Archived](#)

DOCUMENT MANAGEMENT

Select **Document Type**, **Share (Y/N)**, **Add to Standard #s**:

Title	COPOS User Manual - April 29, 2014.pdf
Upload Date	7/15/2015
Archive	Archive Document Replace Document
Document Type	<div>- Select -</div>
Share	<div><input type="radio"/> Yes <input checked="" type="radio"/> No</div> <p><i>Please select a Document Type if you share this document.</i></p>
Add To Standard	<div>- Select -</div> <div>Add</div>
Associated Standards	<div>Standard 3.1 (public) - The department conducted or was engaged in a community assessment and issued a report within the past 3 years, if no other report exists.</div>

Close

DOCUMENT MANAGEMENT

Click **Add** then **Close**:

Upload Date	7/15/2015	
Archive	Archive Document Replace Document	
Document Type	- Select -	
Share	<input type="radio"/> Yes <input checked="" type="radio"/> No	
	<i>Please select a Document Type if you share this document.</i>	
	Standard 4.2 (public)	
Add To Standard	<p>Standard 4.2 (public) - The department's Community Action plan is outcome-based, anti-poverty focused, and ties directly to the community assessment.</p> <p>Add</p>	
	<p>Standard 3.1 (public) - The department conducted or was engaged in a community assessment and issued a report within the past 3 years, if no other report exists.</p>	
Associated Standards		

DOCUMENT MANAGEMENT

Remember you can also tie the uploaded document directly to an Organizational Standard on the OS Report page:

Standard 1.1 - The department demonstrates low-income individuals' participation in its activities.

Awaiting ED Approval



Standard 1.1 - The department demonstrates low-income individuals' participation in its activities.

Met: Date of Compliance: Executive Director Approval: [Help](#)

Documentation

- ☒ Advisory Group Documents
- ☐ Advisory Group Minutes
- ☐ Activity Participation Lists
- ☐ Board / Advisory Body Minutes
- ☐ Board / Advisory Body Pre-Meeting Materials / Packet
- ☒ Volunteer Lists / Documents
- ☐ Other

Add Documents:

Documentation For This Standard:
(none)

[Manage Documents](#)

[Save](#)

[Cancel](#)

Notes

USER ADMINISTRATION AND MANAGEMENT

Under **Admin** link: **Edit Users** to modify user types and access;

- For many agencies, the ideal is one (1) or two (2) local administrators, and at least two (2) to three (3) COPOS users

User Management

Organization:

Users									
Options	User Name	First Name	Last Name	Email Address	User Type	Last Login	Browser	Status	
Select Delete	tblue	Test	Blue	tgriffith@jccap.org	User	11/15/2017 8:24:48 AM	InternetExplorer 11.0	Active	
Select Delete	testred	Test	Red	tgriffith@jccap.org	Local Administrator	11/15/2017 8:37:57 AM	InternetExplorer 11.0	Active	
Select Delete	torange	Testing	Orange	tgriffith@jccap.org	User	11/15/2017 8:22:29 AM	InternetExplorer 11.0	Active	
Select Delete	ortest	Orange	Test	tgriffith@jccap.org	Executive Director	10/26/2017 1:42:21 PM	InternetExplorer 11.0	Active	

[New](#) [View](#) [Deleted](#)

[Transaction History](#)

USER ADMINISTRATION AND MANAGEMENT

Select **USER** and scroll down to see this user's access and to modify:

Report Access Permissions				
	Part	No Access	Read Access	Write Access
Edit	Module 2 Expenditures, Capacity, & Resource	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit	Module 3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Module 4A Individual & Family Performance Indicators (Quarterly)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Module 4B Individuals & Families Served	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit	Module 4C Characteristics of Those Served	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Check All		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Organizational Standards Access Permissions				
	Category	No Access	Read Access	Write Access
Edit	Category one: Consumer Input and Involvement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Category two: Community Engagement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Category three: Community Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Category four: Organizational Leadership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Category five: Board Governance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Category six: Strategic Planning	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Category seven: Human Resource Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Category eight: Financial Operations and Oversight	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Category nine: Data and Analysis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check All		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR QUESTIONS AND ANSWERS

We received several questions from agencies, and the answers might benefit everyone.



YOUR QUESTIONS AND ANSWERS

- Q-1: How will COPOS handle comparisons and variances for new 2018 data that does not have a corresponding 2017 data element?
- A-1: Since some data elements are new for 2018 reporting, COPOS will not make a comparison to previous data in those situations. For any new data elements you enter, be sure to provide any notes to support your data to minimize questions during data review.

YOUR QUESTIONS AND ANSWERS

Q-2: Why is the COPOS numbering different than the latest NASCSP Excel document that shows FNPIs and SRVs rather than simply NPIs?

A-2: The federal Office of Management and Budget (OMB) cleared the 2018 Annual Report documents in early 2017. COPOS was developed using the approved documents. A recent change occurred, resulting in FNPIs and SRVs. A future COPOS update will align the numbering accordingly.

YOUR QUESTIONS AND ANSWERS

Q-3: Why is there an overlap between Modules 3 and 4? If we're reporting individual and family outcomes, why do we also have to report them as initiatives?

A-3: Module 3 is used to report Community-Level Initiatives such as community catalytic activities, partnerships aimed at improving conditions across the community, and other organized activities. Module 4 is used to report Individual and Family Level Services and Outcomes.

YOUR QUESTIONS AND ANSWERS

Q-4: How many Module 3 Community-Level Initiatives should our agency have?

A-4: The answer really depends on how active and engaged your agency is with community-level and community catalytic work. We expect to see all agencies report at least one or two initiatives in Module 3 this year. However, some agencies are more active and engaged in community work while some agencies are focused in services and outcomes. Still others are a blend of both.

YOUR QUESTIONS AND ANSWERS

- Q-5: Can we indicate in Module 4 that all WIC recipients meet nutrition, physical health and improved skills since WIC has documented improvements in all of these areas (specifically related to FNPI 5: a – e)?
- A-5: While these are appropriate indicators, additional tests, surveys, or data collection and analysis would be required to show each individual's improvement in each area.

YOUR QUESTIONS AND ANSWERS

Q-6: Should Weatherization Crisis be reported in Module 4 (specifically for FNPI 4: g – h)?

A-6: FNPI 4g is appropriate when weatherization actually reduces lead or makes electrical situations safer. Some furnace replacements could fit here, especially if they correct electrical issues, however, many furnace replacements wouldn't since they are simply replacing a furnace. You can report this work as Housing Services in Module 4B.

YOUR QUESTIONS AND ANSWERS

Q-7: Where should we report outcomes from our fresh fruits and vegetables program?

A-7: This is a good example of an “Other” indicator that can be reported accordingly.

FUTURE COPOS ENHANCEMENTS

- Release schedule and timeline
 - Tri-annual COPOS updates
 - May, August, November
- Electronic user security agreements
 - User agreements and ED certifications are required
 - Before access is granted for new COPOS users
 - Recurring basis for all COPOS users
- Board Management and Key Staff Module
- Refinement of FNPI/SRV numbering
- Reports Management enhancements

FUTURE COPOS ENHANCEMENTS

- Board Management and Key Staff Module
 - Board roster, sector, and term at minimum
 - Vacancies identified as they occur
 - Key staff changes identified as they occur
- Refinement of FNPI/SRV numbering
 - Based on newest documents from NASCSP reflecting Individual and Family National Performance Indicators (FNPI) and Individual and Family Services (SRV)
- Reports Management enhancements
 - Access and identification of report content

QUESTIONS FOR AGENCIES

Speaking of reports...

- Are COPOS reports used by your board?
- What current reports do you use most?
- What new reports would you like to see for your agency?
- Is there additional data from COPOS that can be available to you in a report format?

RECAP

- Highlights of Modules 2, 3, and 4
- Organizational Standard enhancements
- Documentation management improvements
- User administration functionality
- Tri-annual COPOS enhancements and updates
- Your wish list for COPOS reports
- Responses to your questions and answers
- Next steps...

NEXT STEPS

- Ensure you continue to update COPOS users as staffing changes occur.
- Security agreements are required for all COPOS users, and recurring agreements
- Executive Director certification of COPOS user access is required by Commonwealth IT policy
- Complete your 2017 CSBG IS Report by February 14th, and anticipate the data review process
- Complete your 2018 CSBG Annual Report targets and baselines in Module 4, and identify your current community-level initiatives in Module 3

NEXT STEPS

- Complete your First Quarter 2018 Module 4 data entry timely by May 2, 2018 to avoid lockout
- Submit COPOS-related questions through the COPOS Questions/Comments link:

[Home](#) | [COPOS Help](#) | [Questions/Comments](#) | [Logout](#)

- Submit CSBG programmatic questions to your CSBG Program Specialist
- Use the resource account RA-DCEDOCS@PA.GOV if you are unsure about who to contact.

Thank you!!

DCED Center for Community Services
January 9, 2018