

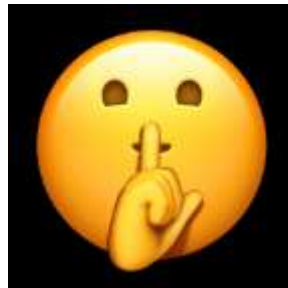
WEBINAR HOUSEKEEPING

Webinar participants MUST dial into the conference line separately to hear audio:

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PIN 717513 #

Please mute your phone to reduce disruptions





COMMUNITY SERVICES BLOCK GRANT (CSBG)

NOVEMBER 2018 PROGRAM UPDATES

November 2018

Center for Community Services
Division of Policy and Programs

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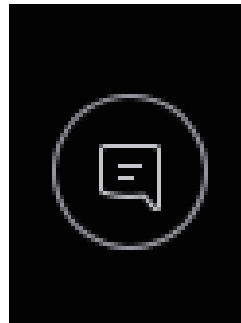
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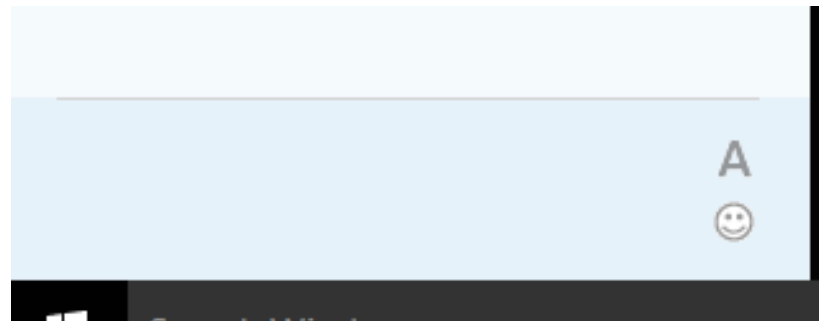
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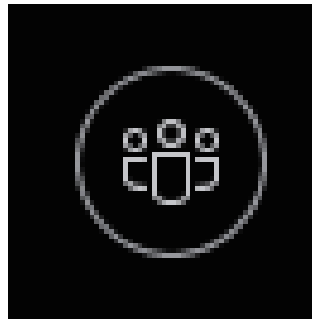


- Clicking the icon will open the Conversation pane:

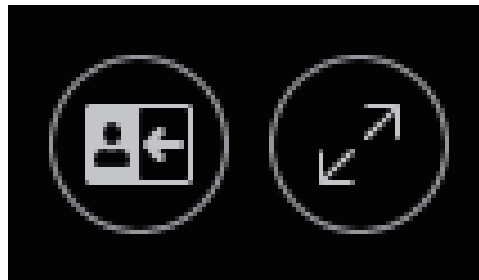


WEBINAR HOUSEKEEPING

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- Change the layout and size of the presentation with these icons in the top right corner:



WEBINAR OBJECTIVES

- CSBG Announcements
- COPOS November Release
- Annual Reporting – Module 3 next steps
- 2019 Allocations and Workplan Information
- Targeted Discretionary Funding
- Updated CSBG Directives



PRESENTERS

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& ECONOMIC DEVELOPMENT

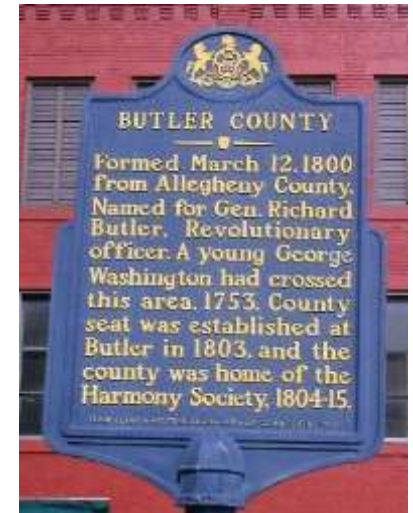
CSBG ANNOUNCEMENTS

NOVEMBER 2018 UPDATES

Jesse Kowalick
Chief, Division of Policy and Programs

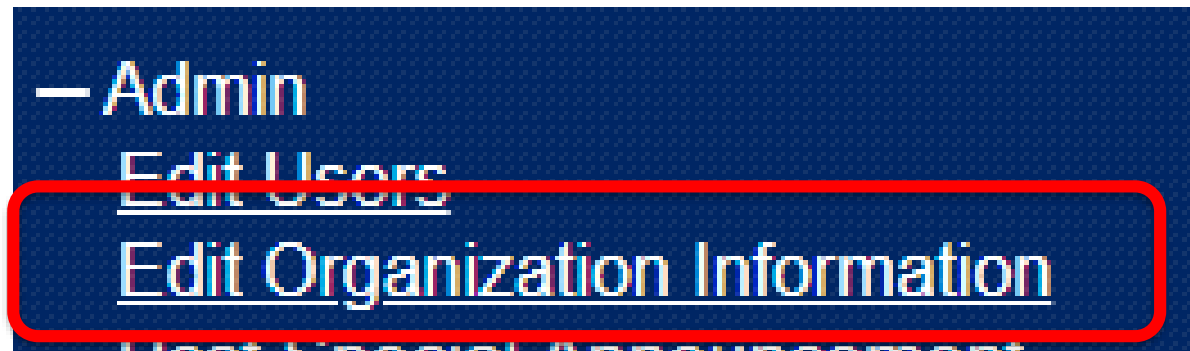
CSBG ANNOUNCEMENTS

- Butler County CSBG will be served by Community Partnership beginning January 1, 2019
- Community Partnership Executive Director - Mike Robb
- Community Partnership CSBG Program Manager - Sandra Curry
- Please welcome Community Partnership to the CSBG network as Pennsylvania's newest Community Action Agency!



CSBG ANNOUNCEMENTS

- Tripartite Board and Agency Key Staff data entry requirements became effective with updated CSBG directives on October 1, 2018
- To date, most agencies have entered their board member and key staff information into COPOS



CSBG ANNOUNCEMENTS

Agency Key Staff

- Agency Key Staff includes CSBG-related program and administrative staff who are typically involved in decision-making and information-sharing processes at the agency
- It is not necessary to enter agency staff who are not affiliated with CSBG administration, programs, or services

CSBG ANNOUNCEMENTS

Board Member Information

- Provide the email address for the **board chairperson**
- It is not necessary to provide email or telephone contact information for other board members
- The board chairperson will be CC'd when CSBG monitoring reports are distributed

CSBG ANNOUNCEMENTS

- These are the ***required*** board member details:

Board Member Details	
First Name:	Example
Middle Initial:	
Last Name:	Review
Suffix:	Sr
Board Start Date:	01/01/2017
Title:	
Position:	President
Committees:	Finance
Phone Number:	(717) 346-0806
Email:	example@pa.gov
Term Length:	Start Date (MM/DD/YYYY): 01/01/2016 End Date (MM/DD/YYYY): 12/31/2019
Sector:	Public Sector ?
Representative First Name:	
Representative Last Name:	
Geographic Area Represented:	
Organization:	
Insert Cancel	

CSBG ANNOUNCEMENTS

The COPOS User Manual is updated and provides instructions for updating organizational information beginning on page 38:

13. Edit Organization Information

Local Administrators and the Executive Director have the ability to edit their Organization's information by clicking the **Edit Organization Information** link in the navigation panel (see [System Interface](#)).

The Edit Organization Information page contains three tabs **Board Management**, **Key Staff**, and **Organization Management** (Figure 13.1).

Board Management | Key Staff Management | Organization Management

Figure 13.1 - Edit Organization Information Tabs

Board Management Tab

The Board Management Tab (Figure 13.2) displays the names and board positions of an agency's board members. Starting at the top of the tab, the email and download buttons (Figure 13.2 - Item 1) create a PDF of the page. The **Sectors Radio Button List** (Figure 13.2- Item 2) allows the user to select which sector is visible. Selecting all sectors will display public, private, and low-income sectors as well as the **Board Vacancy History Table** (Figure 13.2- Item 3). This table displays the history of vacant board seats at the agency and shows if there are any open board positions for the current month (Figure 13.2 - Item 4). The **Board Member Tables** (Figure 13.2 - Item 5) display the first name, last name, and board position of current board members in that sector.

Note: The number of board members established in bylaws must be set on the Organization Management tab before this tab can be accessed.

Board Management | Key Staff Management | Organization Management

Number of Board Members Established in bylaws: 18
Current Number of Board Members: 17

Sector

* All Sectors | Public Official | Private Sector | Low-Income Sector

This view is a read-only summary. To make changes, select a board sector above.

Sector	Jul 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	Jun 2018
Public Sector Board Members												
Private Sector Board Members												

CSBG ANNOUNCEMENTS

2018 CSBG Roll-Over

- If your agency anticipates rolling over 2018 funds into 2019, you must contact your CSBG Program Specialist promptly and CC the Center for Community Services resource account at RA-DCEDOCS@PA.GOV
- **First quarter 2019 (Q1) allocations will be announced via email after the webinar**



pennsylvania
DEPARTMENT OF COMMUNITY
& ECONOMIC DEVELOPMENT

COMMUNITY ORGANIZATION PLANNING & OUTCOME SYSTEM (COPOS)

NOVEMBER 2018 UPDATES

Melanie Sheeler
Business Analyst

COPOS NOVEMBER 2018 ENHANCEMENTS

COPOS is back online after undergoing scheduled upgrades



COPOS NOVEMBER 2018 ENHANCEMENTS

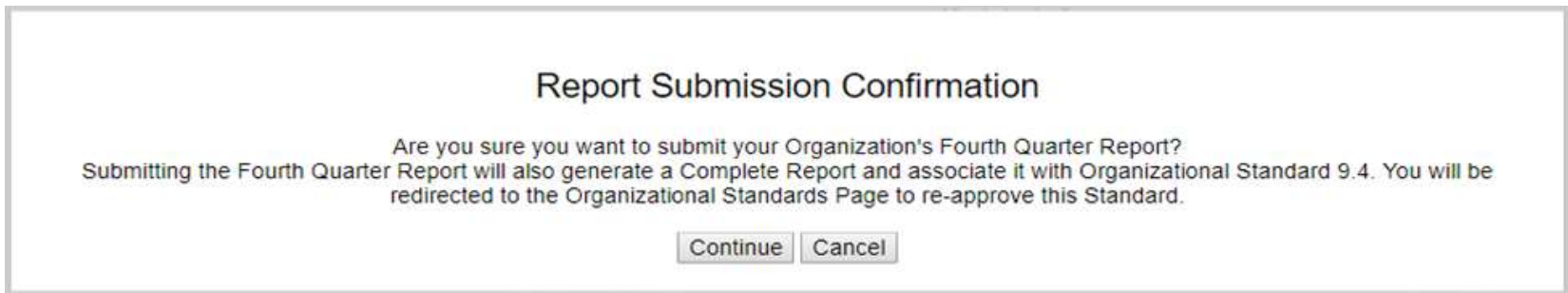
Your CSBG Program Specialist should be your first stop for technical assistance, questions, and guidance related to COPOS reporting.



COPOS NOVEMBER 2018 ENHANCEMENTS

Streamlined Organizational Standard 9.4

- Effective with the 2018 Annual Report submission process, when the agency executive director signs off on the Annual Report in COPOS, a confirmation page will appear:

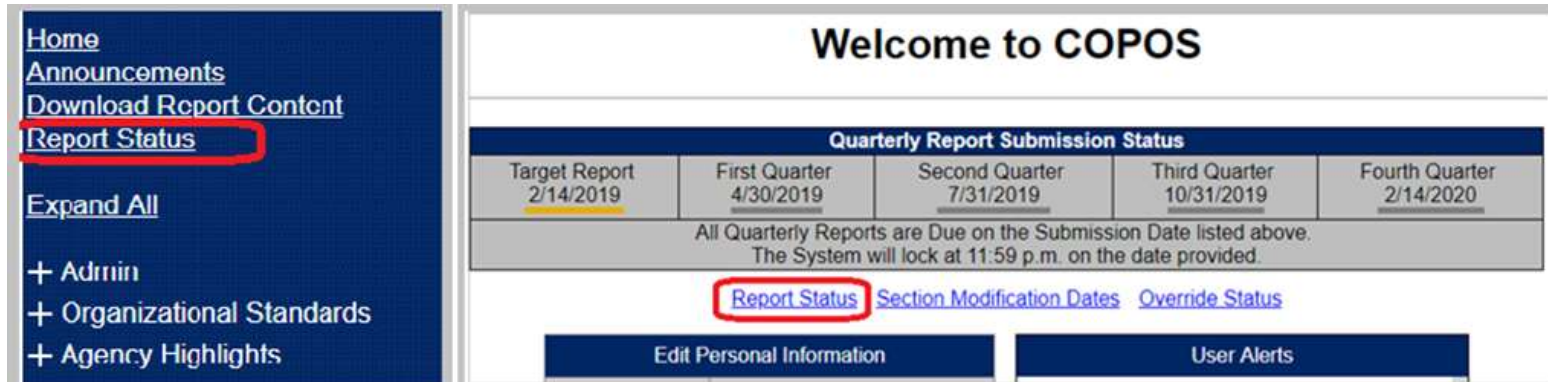
A screenshot of a web-based confirmation dialog box. The title is 'Report Submission Confirmation'. The text inside asks: 'Are you sure you want to submit your Organization's Fourth Quarter Report? Submitting the Fourth Quarter Report will also generate a Complete Report and associate it with Organizational Standard 9.4. You will be redirected to the Organizational Standards Page to re-approve this Standard.' At the bottom, there are two buttons: 'Continue' and 'Cancel'.

- COPOS will generate the report and attach it to 9.4
- The executive director must still manually APPROVE the standard
- COPOS will automatically redirect the executive director to the approval page

COPOS NOVEMBER 2018 ENHANCEMENTS

Report Status update

- Previously, the complete/incomplete report was available only during the 4th quarter (Q4)
- The Report Status link is now available:



The screenshot displays the COPOS system interface. On the left is a dark blue sidebar with white text links: [Home](#), [Announcements](#), [Download Report Content](#), [Report Status](#) (highlighted with a red box), [Expand All](#), [+ Admin](#), [+ Organizational Standards](#), and [+ Agency Highlights](#). The main content area has a white background. At the top, it says 'Welcome to COPOS'. Below this is a table titled 'Quarterly Report Submission Status' with columns for 'Target Report', 'First Quarter', 'Second Quarter', 'Third Quarter', and 'Fourth Quarter'. The 'Target Report' column shows '2/14/2019' (underlined in yellow). The other columns show their respective submission dates. Below the table, a message states: 'All Quarterly Reports are Due on the Submission Date listed above. The System will lock at 11:59 p.m. on the date provided.' Below this message, the [Report Status](#) link is highlighted with a red box, followed by [Section Modification Dates](#) and [Override Status](#). At the bottom, there are two dark blue buttons: 'Edit Personal Information' and 'User Alerts'.

Quarterly Report Submission Status				
Target Report 2/14/2019	First Quarter 4/30/2019	Second Quarter 7/31/2019	Third Quarter 10/31/2019	Fourth Quarter 2/14/2020

All Quarterly Reports are Due on the Submission Date listed above.
The System will lock at 11:59 p.m. on the date provided.

[Report Status](#) [Section Modification Dates](#) [Override Status](#)

Edit Personal Information User Alerts

COPOS NOVEMBER 2018 ENHANCEMENTS

Report Status update (continued)

- Once selected, the Report Status page will appear:

Agency Highlights	
Delivering Services	Complete
Mobilizing Resources	Complete
Analytic Approaches	Complete
Module 2	
Section A: A.2	Complete
Section A: A.4	Complete
Section B	Complete
Section C	Complete
Module 3	
Example 1 Module 3: A Details	Complete
Example 1 Module 3: B Report	Incomplete
Example 2 Module 3: A Details	Complete
Example 2 Module 3: B Report	N/A
Module 4: A (Quarterly)	
FNPI 1 - Employment	Complete
FNPI 2 - Education/Cognitive Development	Incomplete
FNPI 3 - Income/Asset Building	Complete
FNPI 4 - Housing	Complete
FNPI 5 - Health and Social	Complete

COPOS NOVEMBER 2018 ENHANCEMENTS

Executive Director Alerts Panel

- A new user alerts box identifies tasks requiring attention:

The screenshot shows a 'User Alerts' panel with a dark blue header. Below the header, there are two alert boxes. The first box has a dark blue header 'Organizational Info Needs Attention' and contains red text stating 'Your Organization's Board and Key staff Information requires approval.' followed by a request to approve the data using an 'Edit Organization Page' link. The second box has a dark blue header 'Organizational Standards Need Attention' and contains text stating 'The following Standards are not met: 5.4. The following Standards require approval: 7.4.' followed by a request to see the 'OS Report Page' link. A third dark blue header 'Password Expiration' is visible at the bottom of the panel.

User Alerts
Organizational Info Needs Attention Your Organization's Board and Key staff Information requires approval. Please approve this data using the Edit Organization Page .
Organizational Standards Need Attention The following Standards are not met: 5.4. The following Standards require approval: 7.4. Please see the OS Report Page .
Password Expiration

COPOS NOVEMBER 2018 ENHANCEMENTS

Narrative Character Count for Agency Highlights

Example:

Describe the third of three management accomplishments achieved by your agency during the reporting year. Be sure to explain how responsible, informed leadership and effective efficient processes related to this accomplishment led to high-quality, accessible, and well-managed services.

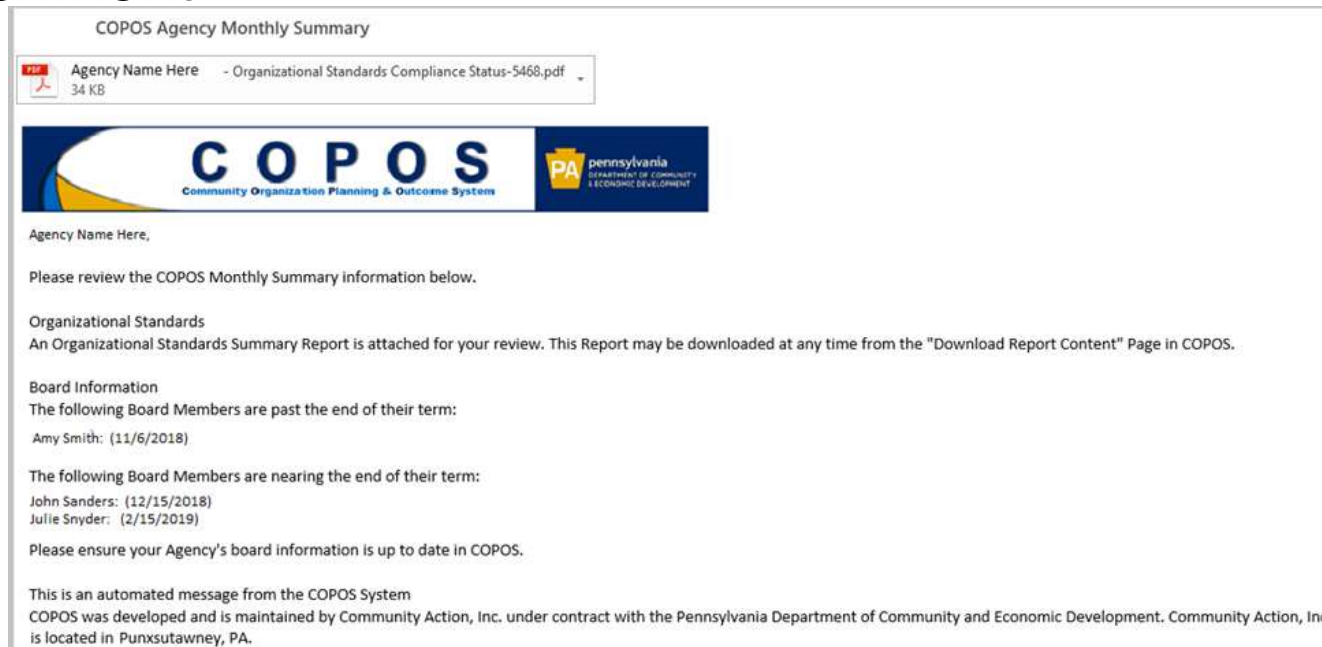
Our team completed additional ROMA training...

46/2500 Characters Used

COPOS NOVEMBER 2018 ENHANCEMENTS

Updated COPOS Agency Monthly Update email

- The monthly email will now show board members with expiring terms (within 90 days)
- Organizational Standard monthly report will continue as an attachment



COPOS NOVEMBER 2018 ENHANCEMENTS

Module 3 Initiative Entry Page Now Auto-Saves

- When entering data within Module 3, the entry screen will auto-save your changes each time you leave a textbox
- When saving an initiative with errors, a new error message will be displayed:

Save

Last saved by Melanie Sheeler on 10/29/2018 4:13:49 PM. Initiative details are not validated, please ensure all red errors have been addressed, then click the 'Save' button to validate the initiative details.

COPOS NOVEMBER 2018 ENHANCEMENTS

Annual Report Renumbering

- The Annual Report in COPOS is renumbered to match the most recent guidance provided by the federal Office of Community Services (OCS)

– Module 3: B
Create M3 CNPI

– Module 4: A (Quarterly)
FNPI 1 - Employment
FNPI 2 - Education/Cognitive Development
FNPI 3 - Income/Asset Building
FNPI 4 - Housing
FNPI 5 - Health and Social
FNPI 6 - Civic Engagement
FNPI 7 - Multiple Domains

– Module 4: B
SRV 1 - Employment
SRV 2 - Education/Cognitive Development
SRV 3 - Income/Asset Building
SRV 4 - Housing
SRV 5 - Health and Social
SRV 6 - Civic Engagement
SRV 7 - Multiple Domains

– Module 4: C
General
1. Gender

COPOS NOVEMBER 2018 ENHANCEMENTS

Bug Fixes

- Organizational Standard documentation "other" checkbox now requires text

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

Met: ☐ Yes ☐ No Date of Compliance: Executive Director Approval: [Help](#)

Documentation	Notes
<input type="checkbox"/> Advisory Group Documents <input type="checkbox"/> Advisory Group Minutes <input type="checkbox"/> Activity Participation Lists <input checked="" type="checkbox"/> Board Minutes / Committee Minutes <input type="checkbox"/> Board / Advisory Body Pre-Meeting Materials / Packet <input checked="" type="checkbox"/> Volunteer Lists / Documents <input checked="" type="checkbox"/> Other <input type="text" value=""/> <small>*required</small>	

- Duplicate emails no longer sent when account reactivated
- User accounts with permissions can now access Module 3

COPOS NOVEMBER 2018 ENHANCEMENTS

Reminder

- The Commonwealth's information technology (IT) protocol requires periodic security recertification
- The first time you sign into COPOS in 2019, you will be prompted to sign a new security agreement





2018 ANNUAL REPORTING – NEXT STEPS

Kathleen Bodek
CSBG Program Specialist

2018 ANNUAL REPORTING

Module 3 Carry-Over Process

- All agencies with Module 3 initiatives in 2018 must identify the initiatives that will transfer (carry-over) for reporting from 2018 to the 2019 program year
- **Before COPOS can know which initiatives you intend to carry-over, you must take action before January 11, 2019 to identify the appropriate “Final Status” of the initiative for 2018 in Module 3A**

#15 Final Status	No	Yes	Only "Initiative Active" initiatives are copied over. This status must be updated to one of the "ended" statuses once the Initiative has ended.
------------------	----	-----	---

2018 ANNUAL REPORTING

Module 3 Carry-Over Process (continued)

- All Module 3A fields will be copied over to 2019 with the exception of fields that require annual updates
- Questions 1 through 11 will be copied over, but questions 12 through 16 will not be carried over into 2019

Module 3 Copy Over Information			
Question Number	Copy?	Edit?	Notes & Information
#11 Strategy(ies)	Yes	Yes	These fields are editable as you may need to add or change strategies during a project. Strategies completed in 2018 should remain on the Initiative for all reporting years.
#12 Progress on Outcomes / Indicators	No	Yes	Outcome Progress is specific to the year reported. It is possible that any year in the project may be a planning year in which no outcomes will be reported. This should be manually updated at the beginning of each year after the copy over has occurred.
#13 Impact of Outcomes	No	Yes	This is year specific to summarize the impact which will be made each calendar year.
#14 Outcomes / Indicators to Report	No	Yes	Outcomes to be accomplished this year should be updated at the beginning of each year and updated accordingly.
#15 Final Status	No	Yes	Only "Initiative Active" initiatives are copied over. This status must be updated to one of the "ended" statuses once the Initiative has ended.
#16 Lessons Learned	No	Yes	Each year has its own lessons learned on this Initiative.

2018 ANNUAL REPORTING

Module 3 Carry-Over Process (continued)

- Remember, updates to Module 3A for 2018 are due before Close of Business (5:00 PM) on **Friday, January 11, 2019**
- Initiatives with a 2018 Final Status of “Initiative Active” will be carried over into 2019, while initiatives identified as “Initiative Ended Early, Initiative Ended as Planned, or Completed Still Delivering Value” will NOT carry over into 2019
- Reporting 2018 outcomes in Module 3B can occur from January 1, 2019 until the Annual Report submission deadline on Thursday, February 14, 2019

DEADLINE

2018 ANNUAL REPORTING

Agency Highlights Module

- Formerly Section D of the Information Survey (IS)
- Similar questions as 2017 but now with multiple parts including text character counts

[Home](#)
[Announcements](#)
[Download Report Content](#)
[Report Status](#)
[Expand All](#)

+ Admin
+ Organizational Standards
- Agency Highlights
 [Delivering Services](#)
 **[Mobilizing Resources](#)
 [Analytic Approaches](#)
+ Module 2
+ Module 3: A - Management
+ Module 3: B
+ Module 4: A (Quarterly)
+ Module 4: B
+ Module 4: C

Agency Highlights

Mobilizing Resources to Support Innovative Solutions

Please describe how your agency addressed a specific cause or condition of poverty in the community using an innovative or creative approach. Showcase how your agency relied on mobilization and coordination of resources to help reach interim and final outcomes. Demonstrate "how CSBG works" as it funds staff activities, investments, or services to meet a community need.

(0 Characters)

Investment, program, service, or activity name (no acronyms, please)?

(0 Characters)

CSBG domains affected or impacted?

☐ Employment
☐ Education and Cognitive Development
☐ Income, Infrastructure, and Asset Building
☐ Health and Social/Behavioral Development
☐ Civic Engagement and Community Involvement
☐ Housing

2018 ANNUAL REPORTING

Reminders

- Complete your Module 3A status update by Friday, January 11, 2019
- If you discover an error that requires revision after the carry-over process is completed, you will need to make the initiative updates separately for 2018 **and** 2019
- COPOS is open for 2018 reporting and 2019 targeting from January 1, 2019 through February 14, 2019

2018 ANNUAL REPORTING

Reminders (continued)

- Remember to complete your 2018 Annual Report for Modules 2, 3, and 4 along with the new Agency Highlights module (formerly Section D of the IS)
- Remember that some NPIs from 2017 are now service counts (SRV) in 2018
- **Plan ahead to avoid overrides, extensions, and other unexpected challenges - don't wait until the last minute to complete your reporting**

2018 ANNUAL REPORTING

2018 CSBG Annual Report Timeline

- 1/11/2019** – Module 3A status update for 2018. Review all questions in Module 3A for reporting year 2018 to ensure valid data will be copied to the 2019 reporting year
- 1/15/2019** – Begin entering updates for 2019 in Module 3A (Note: Your existing 2018 initiatives will not display in 2019 until the carry-over process has been completed)
- 2/14/2019** – All of the following report data is due by 2/14/2019:
- Submit full 2018 Annual Report (including completion of 2018 Module 3B)
 - Executive Director approves Organizational Standard 9.4
 - Review and Update Module 3A for 2019
 - Update 2019 Targets including Module 3B and Module 4A

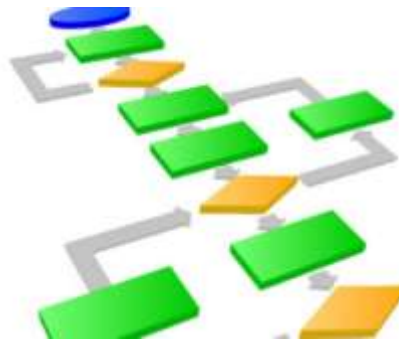


2019 WORKPLAN INFORMATION

Melissa Tabb
CSBG Program Specialist

WORKPLAN INFORMATION

- 2019 CSBG Workplans are due by Wednesday, December 19, 2018 using the updated template
- First quarter (Q1) 2019 allocations will be announced today via email after the webinar



- Updated 2019 template includes four (4) sections along with the Workplan Charts document in Excel format

WORKPLAN INFORMATION

2019 Workplan Format

Section 1 – Community Needs Assessment (CNA) executive summary including Community Needs tab of Workplan Charts document

Section 2 – Narrative workplan including Sub-Contractors tab of Workplan Charts document

Section 3 – ROMA-based targets including Goals and Objectives tab of Workplan Charts document

Section 4 – Additional documents including tripartite board roster, job descriptions for new positions, and 2019 budget

WORKPLAN INFORMATION

Workplan Charts

Section 1 – Community Needs Assessment (CNA) executive summary including Community Needs tab of Workplan Charts document

Community Needs			
Top Needs	Agency Priority Yes/No	Brief Description of programs/services provided by your agency	Community Coordination Efforts

Section 2 – Narrative workplan including Sub-Contractors tab of Workplan Charts document

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WORKPLAN INFORMATION

Workplan Charts

Section 3 – ROMA-based targets including Goals and Objectives tab of Workplan Charts document

Goals and Objectives				
Family National Performance Indicators (Module 4)				
FNPI	Indicator Description	Target #	out of	Enrollment #
Employment Indicators				
FNPI 1a	The number of unemployed youth who obtained employment to gain skills or income.		out of	
FNPI 1b	The number of unemployed adults who obtained employment (up to a living wage).		out of	
FNPI 1c	The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).		out of	
FNPI 1d	The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).		out of	
FNPI 1e	The number of unemployed adults who obtained employment (with a living wage or higher).		out of	
FNPI 1f	The number of unemployed adults who obtained and maintained employment for at least 90 days (with a living wage or higher).		out of	

Community Needs
Sub-Contractors
Goals and Objectives

WORKPLAN INFORMATION

Recap

- If your agency anticipates rolling over 2018 funds into 2019, you must contact your CSBG Program Specialist promptly and CC the Center for Community Services resource account at RA-DCEDOCS@PA.GOV
- 2019 CSBG Workplans are due by **Wednesday, December 19, 2018** by submitting your workplan packet to your CSBG Program Specialist AND the Center for Community Services resource account at RA-DCEDOCS@PA.GOV



TARGETED DISCRETIONARY FUNDING

John Winters
CSBG Program Specialist

TARGETED DISCRETIONARY FUNDING

- The second round of general 2018 CSBG discretionary funding was finalized and announced in the email attachment on October 29, 2018
- Targeted CSBG discretionary funding is now available for all agencies
- This targeted funding is non-competitive, and is instead based on the agency's need as identified in its discretionary application
- **Up to \$15,000 per agency is available for targeted purposes**

TARGETED DISCRETIONARY FUNDING

- Targeted applications must be aimed at staff development, infrastructure upgrades, training and technical assistance planning, and compliance, and will not be approved to provide direct services, programs, or client supports
- Targeted projects are intended to help the agency comply with Organizational Standards, improve technology infrastructure, identify and mitigate risk, etc.
- While not a competitive process, factors such as 2018 roll-over will be considered in the evaluation
- **The targeted expenditure period is limited, and funds expire September 30, 2019**

TARGETED DISCRETIONARY FUNDING

Examples of targeted discretionary categories:

- Development of agency-wide Training and Technical Assistance (T/TA) Plan or staff development training
- Efforts to comply with Organizational Standards
- Risk assessment and mitigation activities
- Information technology (IT) security and infrastructure upgrades
- Succession planning efforts and strategies
- Agency governance and financial management improvements
- Strategic planning, communication, and marketing enhancements

TARGETED DISCRETIONARY FUNDING

Targeted Discretionary Funding Application format:

Section A – Agency information

Section B – Targeted Narrative including Statement of
Need and Area(s) of Focus

Section C – Outcomes, Implementation Approach,
Collaborations, and Sustainability aspects

Section D – Budget Justification

DUE DATE: Wednesday, December 19, 2018 at 5:00PM

TARGETED DISCRETIONARY FUNDING

Next Steps

- Targeted discretionary funding template will be distributed with the updated CSBG Work Plan guidance in the coming days
- Discretionary funding applications should be submitted at the same time as your CSBG Work Plan
- Submit the application to your CSBG Program Specialist, and CC the Center for Community Services resource account at RA-DCEDOCS@PA.GOV

DUE DATE: Wednesday, December 19, 2018 at 5:00PM



CSBG DIRECTIVES - UPDATES

Jesse Kowalick
Chief, Division of Policy and Programs

CSBG DIRECTIVES - UPDATES

Revised CSBG Directives are effective October 1, 2018

Revisions focus on:

- Clarifications from the federal Office of Community Services (OCS),
- Changes in reporting as a result of the CSBG Annual Report and COPOS enhancements, and
- Feedback from the CSBG network through program monitoring and technical assistance

CSBG DIRECTIVES - UPDATES

C2018-01 Administrative Procedures for CSBG

- Updated language in several sections to better match the Federal CSBG legislation and CSBG Organizational Standards
 - ❑ Specifying frequency of board review of by-laws
 - ❑ Clarifying tripartite board composition
- Specifications about frequency of ROMA training for board, agency staff, and subcontractors
- Updated conflict of interest and non-discrimination policies to match DCED requirements

CSBG DIRECTIVES - UPDATES

C2018-02 Governing Boards for Private Entities

- Updated purpose and description of tripartite board sectors and composition
- Added code of ethics and board meeting requirements sections to align with C2018-01
- Reformatted the sections for clarity and readability

CSBG DIRECTIVES - UPDATES

C2018-03 Administrative Boards for Public Entities

- Revised and clarified the Selection of Administrative Boards section
- Added specific information about tripartite board composition by sector
- Clarified language and corrected errors for accuracy and readability

CSBG DIRECTIVES - UPDATES

C2018-04 Income Eligibility Determination

- Updated language in several sections to better match the Federal CSBG legislation and CSBG Organizational Standards, clarifying:
 - ☐ How funds are used for administrative purposes based on client income eligibility
 - ☐ Documentation that must be included in files for client self-declaration of income
- Updates to what should be included and excluded in income determinations
- Expectation of what the agency should do if client cannot provide proof of income eligibility within 90 days

CSBG DIRECTIVES - UPDATES

C2018-05 Reporting Requirements

- Community Organization and Planning Outcomes System (COPOS) is the official system of record
- Replace former Information Survey (IS) process with new CSBG Annual Report requirements
 - ☐ Modules 2, 3, and 4
 - ☐ Agency Highlights (formerly IS Section D)
 - ☐ Board and Key Staff Module
- Quarterly and Annual Reporting Schedule
- Organizational Standards Reporting in COPOS

CSBG DIRECTIVES - UPDATES

C2018-06 Monitoring Procedures

- Revisions include Pre-Monitoring Questionnaire, Desk Monitoring Tool, and On-Site Monitoring Tool
- Emphasis on tripartite board governance including composition, meetings, minutes, by-laws, etc.
- Client, staff, and board member sample questions
- CSBG discretionary grant monitoring added to tools
- Corrective action response and implementation process
- Technical Assistance Plan (TAP) and Quality Improvement Plan (QIP) processes

CSBG DIRECTIVES - UPDATES

C2018-07 Organizational Standards

- Attachments that identify possible documentation that can be uploaded in COPOS to substantiate compliance
- Updates to emphasize Organizational Standards are now fully implemented and mandatory
- Documentation to support compliance must be uploaded to COPOS, the official system of record

CSBG DIRECTIVES - UPDATES

C2018-08 Risk Assessment (pending early 2019)

- Continuous process of assessing risk
- Identify areas where resources such as training, technical assistance, and monitoring should be directed
- Considers monitoring, audits, agency history and changes
- Implementation of risk-based monitoring



CSBG DIRECTIVES - UPDATES

C2018-09 Results Oriented Management and Accountability (ROMA) Next Generation

- ROMA performance management framework is a federal CSBG operational requirement
 - ☐ Requirements for ROMA training and implementation
 - ☐ Roles such as NCRI and NCRT
 - ☐ Who can conduct ROMA training
 - ☐ Frequency of training
 - ☐ Applicability to agency, tripartite board, and subcontractors
- Implementation of statewide ROMA Task Force



RECAPS, REMINDERS, AND NEXT STEPS

Jesse Kowalick
Chief, Division of Policy and Programs

COPOS REMINDERS

For technical issues related to COPOS functionality such as cell errors, override requests, system-related concerns, and to offer feedback, use the COPOS Questions/Comments Form:

Questions/Comments Form

Please provide us with your feedback!	
Comments entered into the box below will be emailed directly to COPOS administrators.	
First Name:	<input type="text" value="Jesse"/>
Last Name:	<input type="text" value="Kowalick"/>
Email:	<input type="text" value="jkowalick@pa.gov"/>
Organization Name:	<input type="text" value="DCED Admins"/>
Phone Number:	<input type="text" value="(717) 720-7357"/> ext. <input type="text"/>
Subject:	<input type="text" value="Unable to Close Section"/>
Explanation:	<input type="text" value="I entered all of my data and everything is validated, but I am still unable to close the report section. Can you help?"/>

COPOS REMINDERS

- Agencies should have a back-up plan for COPOS data entry responsibilities.
- We recommend two Local Administrators at each agency
- **Remember that your agency's COPOS Local Administrator can reset passwords, activate inactive COPOS accounts, and add new COPOS users**
- Refer to the COPOS User Manual



WEBINAR RECAP

We covered:

- Welcoming Community Partnership to CSBG
- COPOS November Updates
- Annual Reporting – Module 3 next steps
- 2019 Workplan Information
- Targeted Discretionary Funding
- Updated CSBG Directives



WEBINAR RECAP

Next steps:

- Share this information with your staff, board members, and community stakeholders
- Ensure you've completed your board and key staff details in COPOS
- Review the updated CSBG directives
- Prepare your 2019 CSBG Workplan
- Consider discretionary funding to target risk areas and to enhance Organizational Standard compliance



WEBINAR RECAP

Due dates:

- CSBG Workplans and Targeted Discretionary Applications are due by December 19, 2018
- Review and update the status of your Module 3 initiatives by January 11, 2019

Don't Miss the
DEADLINE!

WEBINAR RECAP

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717-720-1471

Kathleen Bodek, kbodek@pa.gov

717-720-7441

Melissa Tabb, mtabb@pa.gov

717-425-7598

For fastest response, please also CC our resource
account:

RA-DCEDOCS@PA.GOV

COMMENTS / QUESTIONS

Comments & Questions ??



COMMUNITY SERVICES BLOCK GRANT (CSBG)

NOVEMBER 2018 PROGRAM UPDATES

November 2018

Center for Community Services
Division of Policy and Programs