

**CAAP IT Task Force  
July 22, 2003  
Harrisburg Hilton Hotel**

Meeting convened at 12:05.

**Present:** Harry Adrian (Union-Snyder Community Action Agency), Cheri Capela, Bob Cardamone, (Community Action, Inc.), Frank Gatti (Community Action Program of Lancaster County), Sandy Harber (Indiana County Community Action, Inc.), Todd Jackson (Fayette County Community Action Agency, Inc.), Doug Jennings (Community Action Agency of Delaware County, Inc.), Lisa Kovalick (Central Pennsylvania Community Action, Inc.), Josh Lightcap (Community Action, Inc.), Terry Malzi (Cambria County Community Action, Inc.), Jesse Newcomer (Community Action, Inc.), Leeretta Payne (Pittsburgh Community Services, Inc.), Tom Rawlings, Brian Reiter (DCED/OCS), Marc Spearman (Mayor's Office of Community Services), and Christine Womer (Union-Snyder Community Action Agency).

**CAAP Staff:** Deborah Gochenour, Donnie Hunsicker, and Brian Zeiders.

**Absent:** Laura Anderson (Westmoreland Human Opportunities, Inc.), Barb Andresky (Indiana County Community Action, Inc.), Damian Bond (Bucks County Opportunity Council, Inc.), Sergio Carmona (Blair County Community Action Agency), Hugh Daly (Central Pennsylvania Community Action, Inc.), Jeremy Hauger (Tableland Services, Inc.), Ken Heilman (Armstrong County Community Action Agency), Ed Sitter (Greater Erie Community Action Committee), Marty Stalneckner (Lawrence County Social Services), Walt Strowsky (Scranton-Lackawanna Human Development Agency, Inc.), Rick White (Armstrong County Community Action Agency), and John Wurzbacher (Community Progress Council, Inc.).

**Handouts:** Minutes of the May 13, 2003 Meeting, Data Entry Training Memorandum

Bob welcomed the IT Task Force members and introduced new member Leeretta Payne from Pittsburgh Community Services, Inc. Bob then reviewed the agenda. The FACS and Survey sub-committee groups were asked to share any updates of their progress, however, the subcommittees had no updates. Bob asked members of the sub-committees to join an alternative sub-committee if they would not be meeting on their selected topics.

**CAPA Training**

After discussion it was agreed that the CAPA CAA training dates would be August 12<sup>th</sup> and 13<sup>th</sup> from 10 AM – 4 PM and that the training plan would be the same for each day. The target audience for the training is one staff from each CAA using a train-the-trainer strategy. Bob noted that training must focus not only on CAPA registration but also on entering program and service data into CAPA, especially the I & R module.

Training content would include a:

1. CAPA brief history / discussion
2. Slide show to provide overview of the CAPA system
3. Demonstrations on how to load core CAPA information, events, volunteers, and services
4. CAPA hands-on that will enable trainees to become validated and enter their program and service information

Task Force members commented that each CAPA trainee should have access to a computer during the training and that ideally the ratio of trainers to trainees would be 1:1. Each trainee should attend the entire session, regardless of past CAPA experiences, to learn about recent system updates. Another suggestion involved having those most familiar with CAPA sit beside those that have no prior experience. Also, it was recommended that a handout of the taxonomy be provided to help users visualize and understand CAPA's use of hierarchical relationships with

the handouts being returned at the end of the training. CAPA “marketing and promoting” will also be discussed and sample presentation strategies and public relations materials provided.

Each participant will be provided with training material such as:

- CAPA User’s Manuals
- CAPA Quick Guide
- CAPA Slide Show
- CAPA Sample News Releases
- CAPA Points of contact

IT Task Force members stressed that the training agenda must use very descriptive wording such as “hands on” and “knowledge of CAA service information” so that agencies are able to determine who is best suited to attend training. Also, the training announcement/agenda must be sent to CAAs in a timely manner to ensure that attendees have adequate time to work the training into their regular work schedules.

A refresher course for the CAPA trainers was planned for the Monday evening proceeding the August 12<sup>th</sup> training session. Bob noted that this review should take approximately two hours and will ensure that everyone is on the same training page. Bob requested interested individuals to e-mail him as soon as possible if they wanted to be CAPA trainers.

Three data entry issues have been identified within CAPA. The first deals with user induced spelling errors causing empty searches. Bob noted that a spell check feature has been added; however, the user must click the spell check buttons to activate the functionality, and must be using Microsoft Word because the spell check function uses the Word dictionary. The second data entry issue involves not correctly identifying programs and services with the CAPA taxonomy terms or only tagging programs and services at the basic/highest hierarchical level. Bob noted that a feature has been added that will automatically associate user supplied keywords to the CAPA taxonomy. After the user selects all appropriate terms the utility “tags” the hierarchy. The third data entry issue deals with maintaining data entry standards. Users should be encouraged not to use abbreviations unless it is absolutely necessary and should avoid the use of typing in all capital letters.

Bob asked the group to brainstorm about CAPA “buy ins” or attention grabbers. The following are the results of that session:

- the power/recognition that comes to the organization that is responsible for sponsoring CAPA in their local communities
- revitalize the single point of reference
- reduces duplication of information
- another referral tool for case managers
- reduces work load for resource and referral managers
- testimonies of success
- use of prizes or handouts such as mouse pad with the web site or a raffle
- CD/Web-site with reference and training information

### **Annual Fall CAAP Conference**

The CAAP annual fall conference will again include technology workshops. Topic suggestions were as follows (note: all round tables must begin with a strategy):

- a round table on global consumer data collection, analysis of data, and tracking outcomes
- a round table for technology strategic planning
- methods of obtaining funding for technology
- staff training for new technology and how to fund training
- a round table of advanced technology issues
- techniques of convincing Executive Directors of the need for technology
- CAPA user’s group that focuses on community recruitment

### **Demo of CAPA**

Jesse demonstrated all the recent CAPA updates including: spell check, automated referral, concatenation of program descriptions when displayed for search criteria, and the taxonomy auto fill. Members concurred that Jesse should combine the reoccurring event calendar with the single event calendar. The Task Force members suggested that the automated referral label be modified to be more consumer friendly. There was discussion and a recommendation to alphabetize the results of the taxonomy auto-fill.

Jesse explained that there are some issues regarding some of the taxonomy terms such as the use of sex as opposed to gender. The group decided that the CAPA system should not in any way alter the national taxonomy.

The group briefly discussed giving CAPA a "face lift", however, it was agreed that the details of the face lift should be worked by the sub-committee.

The Task Force broke into sub-committees.

### **FACS Sub-Committee Brief**

The FACS sub-committee validated an assessment by Jamie Reed regarding the generation of the required Client Services by Service Category report from the FACS report. Cheri noted that generating the report from the FACS automated system will make the system less dynamic and will require coding changes if system reports are altered. The group has several questions that Brian Reiter will investigate. The questions included the following:

Question # 1 – The SERVICE COUNTS BY SERVICE CATEGORY report has a question (not within the grid....bottom of the report) that asks, "In this reporting period: TOTAL NUMBER OF PERSONS WHO MOVED FROM BELOW 125% Federal Poverty Guidelines to ABOVE 125% Federal Poverty Guidelines: \_\_\_\_\_." This piece of information was not identified by the analysis completed by Jamie, nor were we able to locate it on the FACS report. Is this question/information still required, and if so, where will it come from? Will it be added to the FACS report?

Question # 2 – The SERVICE COUNTS BY SERVICE CATEGORY report has a category called linkages. If linkages are to be counted, what definition of linkages will be used {note that the outcome section of the FACS report defines linkages as coordination with other entities and service agreements...versus the prior definition of linkages of clients to service ...eg. report the use of CAPA to link consumers to services}. What are we counting? If it is the count of connecting people to services, where do we find this information on the FACS report? Will it be added to the FACS report?

Question # 3 - Are agencies going to report individual services (eg. Weatherization, Adult Education, etc.), or totals for the entire agency? If they report by services, which services.....those only funded by CSBG, or all services provided by the agency?

Question #4 - The SERVICE COUNTS BY SERVICE CATEGORY report required data for DIRECT and INDIRECT within categories for consumers at or below 125% of Poverty. If we generate this report from the FACS report, the DIRECT / INDIRECT at or below 125% of Poverty data is not available without adding other requirements to the FACS report. Was this your intent?

Question #5 - The FACS references we received to generate the SERVICE COUNTS BY SERVICE CATEGORY report for the INCOME and NUTRITION categories defined more than one reference in the FACS report. Do we total those references -- that would produce a duplicative count; or, do we choose just one....which one?

### **IT Survey Sub-Committee Brief**

The Survey sub-committee reported that they do not believe that any additional CAAs will submit their surveys. It was reported that on several occasions the non-responsive CAAs had been contacted with no results. It was also noted that survey committee members felt they would not be welcomed to conduct an on-site visit. The Survey sub-committee requested that someone with clout, such as John Wilson or Ed Coleman, contact the non-responsive CAA before any on-site visits are attempted. The sub-committee would also like to streamline the existing survey and re-administer it to all CAA's. A discussion on using a web based application to collect the new survey information ensued. Bob stressed that a goal date should be set for completion of the stream-lined survey and asked that the committee review the modified survey for review by the IT Task Force at the next meeting.

Discussion followed. Many committee members felt that a needs assessment may generate more responses from those agencies that do not have technology. It was suggested that the assessment be completed during the CAAP Fall Annual conference. Marc suggested that survey information be assessed in two different ways. First, assess each CAA's technology status, and then assess the group as a whole. This will allow the analysis of the membership as a whole, and help to ensure that smaller agency technology deficiencies are not lost when combined with very large CAAs.

### **CAPA Sub-Committee Brief**

The issue of CAPA statistics tracking was discussed. Jesse confirmed that it is possible to track certain statistics. The sub-committee requested the following CAPA statistics be tracked:

- selected counties for search
- electronic referrals
- services selected the most
- keywords
- give entities the ability to generate statistical reports
- system response time, down time, other relevant technical information

Bob asked the members to review the system and submit any suggestions regarding statistical tracking.

It was agreed that the CAPA face-lift issue would not be dealt with quickly, as hoped, and will probably not be implemented before the training.

The sub-committee commented that they liked the draft Quick Guide. However, it was suggested that it be broken into three quick guides: I & R, Volunteer, and Calendar. Bob noted that the quick guides will be placed on-line.

### **Other Items of Interest**

The next meeting date was not set due to the fact that most IT Task Force members will be attending the August CAPA training. Bob again asked members to email him if they will be able to participate in the CAPA training.

Meeting adjourned at 5:15 PM.