### COPOS Task Force

<table>
<thead>
<tr>
<th>COPOS Task Force</th>
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</thead>
<tbody>
<tr>
<td>Rachelle Abbott</td>
<td>Rachel Luehm</td>
</tr>
<tr>
<td>Tracy Cherry</td>
<td>Erin Lukoss</td>
</tr>
<tr>
<td>Georgia Del Freo</td>
<td>Lisa Phillips</td>
</tr>
<tr>
<td>Jeff Fondelier</td>
<td>Megan Shreve</td>
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<tr>
<td>Dan Leppo</td>
<td>Jen Warabak</td>
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<tr>
<td>John Litz</td>
<td>Jen Wintermyer</td>
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**Vision**

2018 – Transition to CSBG Annual Report

2019 & beyond – Seize Opportunities
May 20th Release Date

- Webinar with additional details is May 15 from 11:00AM – 12:00PM
- COPOS will be unavailable beginning May 15th at 12:00PM

This presentation will highlight the key features of this release:

- New menu
- New dashboard
- Module 4 A screen simplification
- Save & Continue feature on pages within a module
2019 CAAP/DCED COMMUNITY ACTION ACTION SYMPOSIUM
CSBG Two-Year State Plan
2019-2021

Melissa Tabb
• The current Pennsylvania 2017-2019 CSBG State Plan will expire on September 30, 2019.

• The new two year State Plan will set the direction and tone for State administration during the 2019-2021 Federal Fiscal years.
• An email was sent on April 23rd to all directors containing a chart and requesting feedback on several items from the State Plan.

• Comments are due back by May 13th.

• A draft will be created taking the suggestions into consideration and will be distributed for final comment before hearings take place in July.
## State plan goals

<table>
<thead>
<tr>
<th>State Plan Section</th>
<th>2017-19 Current Statement/ Plan</th>
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<tbody>
<tr>
<td><strong>3.2 State Plan Goals:</strong> Describe the State's CSBG-specific goals for State administration of CSBG under this State Plan.</td>
<td>“The Commonwealth's goal for the CSBG program is to reduce poverty by supporting eligible entities to become agents of change in their efforts to assist the low-income population of Pennsylvania with and through communities to move individuals and families out of poverty. The Pennsylvania state CSBG office will support eligible entities to increase their flexibility and agility to respond to the diverse needs of their service areas by utilizing ROMA Next Generation and fostering partnerships and linkages to create meaningful solutions.”</td>
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</tbody>
</table>

- Do these goals still apply?
- Are there new or different goals to be considered?
Organizational Standards Performance

**6.6 Performance Target:** What percentage of eligible entities in the state does the state expect will meet all the state-adopted organizational standards in the next year?

<table>
<thead>
<tr>
<th>Current: 85%</th>
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<tbody>
<tr>
<td>For reference, the 2018 Annual Report will show:</td>
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<tr>
<td>• 41% (18/44) meeting all</td>
</tr>
<tr>
<td>• 18 (8/44) meeting 90-99%</td>
</tr>
<tr>
<td>• 27% (12/44) meeting 80-89%</td>
</tr>
<tr>
<td>• 2% (1/44) meeting 70-79%</td>
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• Through monitoring we know these numbers may not be accurate.

• How can we assure that what we are reporting is verified as compliant?

• What is an appropriate goal?
# Training and Technical Assistance

**8.1 Training and Technical Assistance:**
Describe the State's plan for delivering CSBG-funded training and technical assistance to eligible entities under this State Plan.

<table>
<thead>
<tr>
<th>Current DCED/CAAP T&amp;TA plans:</th>
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<tbody>
<tr>
<td>• ROMA</td>
</tr>
<tr>
<td>• Board Governance</td>
</tr>
<tr>
<td>• Organizational Standards</td>
</tr>
<tr>
<td>• COPOS/ Annual Report/ Data Analysis</td>
</tr>
<tr>
<td>• Collaboration with Workforce Partners through WIOA</td>
</tr>
</tbody>
</table>

- Are these still top needs?
- What are some emerging needs?
- What is on the horizon?
### Discretionary Priorities

<table>
<thead>
<tr>
<th>7.9/14.2 Discretionary Funds: Describe how the State plans to use discretionary funds.</th>
<th>Recent priorities have been:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Community catalytic work</td>
</tr>
<tr>
<td></td>
<td>• Organizational Standards compliance</td>
</tr>
<tr>
<td></td>
<td>• Training and technical assistance</td>
</tr>
<tr>
<td></td>
<td>• IT Security and infrastructure updates</td>
</tr>
<tr>
<td></td>
<td>• Strategic Planning</td>
</tr>
<tr>
<td></td>
<td>• WIOA Combined State Plan-infrastructure</td>
</tr>
</tbody>
</table>

- Are there any new or different priorities we should consider?
Linkages and Coordination

9.1 State Linkages and Coordination at the State level: Describe the linkage and coordination at the State level that the State plans to create or maintain to ensure increased access to CSBG services to low-income people and communities under this State Plan and avoid duplication of services.

The Center for Community Services also houses the state Weatherization Office which receives 15% of the Pennsylvania LIHEAP Allocation for use in their weatherization and emergency heating crisis programs. Approximately 75% of the weatherization providers in Pennsylvania are also CSBG agencies. The Center for Community Services also collaborates with the Department’s Center for Community Development that administers Community Development Block Grants, HOME, and other HUD funded programs.

- The new plan will mention our partnership with Labor and Industry on the WIOA funding.
- We will also include our intentions to partner with Health and Human services as we did on the Opioid Forum.
9.2 State Linkages and Coordination at the Local Level: Describe the linkages and coordination at the local level that the State and eligible entities plan to create or maintain to ensure increased access to CSBG services to low-income people and communities and avoid duplication of services.

The Center also operates the Neighborhood Assistance Tax Credit Program. This is a state supported tax credit program geared toward providing services to low income clients through donations by corporate entities. A large portion of this program is dedicated to forming partnerships between non-profits and corporate entities to further community development efforts in targeted areas of Pennsylvania. Additionally, the CSBG eligible entities are mandated partners under the WIOA Combined State Plan and will coordinate employment and training activities with and through their local One-Stop Workforce service providers. The CSBG Lead Agency has coordinated with the local One-Stop workforce service providers to develop MOUs at the local level. This will strengthen efforts and result in improved partnerships and linkages at the local level.

• What other local partnerships or coordinated efforts should the State Office be encouraging or helping to facilitate?
Currently:

• We monitor annually by alternating between desk and on-site methods.

• The Organizational Standards compliance and documentation review is occurring during the time of monitoring.

• Whatever standards are out of compliance at the time of monitoring are cited as findings and require corrective action.

• During 2018 we began the use of Technical Assistance Plans (TAPs) and Quality Improvement Plans (QIPs) as applicable in cases of persistent findings.
MONITORING CHANGES

Risk Based Monitoring

• Currently developing a Risk Assessment methodology for CSBG monitoring

• Using Weatherization’s Risk Assessment as a template.

• Will allow us to schedule the frequency and type of monitoring based on risk level.
MONITORING CHANGES

Risk Based Monitoring

- Will be assessing risk in several categories:
  - Management
  - Program Planning and Evaluation
  - Board Compliance
  - Communication
  - Reporting
  - Previous Monitoring

- Examples:
  - The more subcontractors an agency has, the more points they will receive and the higher their level of risk would be for that category.
  - If the board members receive detailed financial reports at each meeting the agency will receive less points and a lower risk score for that measure.
MONITORING CHANGES

Risk Based Monitoring

• Monitoring frequency and type will be based on scoring level.

• Each agency will be monitored on site at least every three years regardless of risk level, per Federal CSBG legislation.

• Goal is to begin using this process with the start of the new State Plan this fall to create monitoring schedules for 2020.

• Comments and suggestions on this change should also be provided when sending feedback regarding the other state plan items.
Questions?? Comments!! Discussion..
QUESTIONS?

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For fastest response, please CC our resource account: RA_DCEDOCS@PA.GOV
2019 CAAP/DCED COMMUNITY ACTION ACTION SYMPOSIUM