ATTACHMENT F

GUIDE TO ORGANIZING & REPORTING

NATIONAL INDICATORS OF COMMUNITY ACTION PERFORMANCE

UPDATED SEPTEMBER 1, 2005

Guide

to

Organizing & Reporting

National Indicators

of

Community Action

Performance

Updated September 1, 2005

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Guide to Organizing and Reporting National Indicators of Community Action Performance

Purpose

This guide is intended to help state and local community action agencies better organize and report ROMA outcomes that constitute 12 national "indicators" of community action performance.

The 12 national performance indicators described in this guide were created collaboratively within the Community Services Network to enable approximately 1,100 diverse community action agencies in 52 states and territories to present a more uniform and coherent national picture of their work and accomplishments.

Reporting of national performance indicators is an important component of the broader community action initiative to use results-focused management principles to revitalize and strengthen the entire Community Services Network.

Coverage

Before using this guide, state and local community action agencies should keep in mind:

- **The 12 indicators are about community action, not just the Community Services Block Grant. Outcomes should be counted and reported from all relevant community action programs and activities.**

- **Agencies should report outcomes only for those national performance indicators for which they have supporting programs or activities.**

- **The 12 national performance indicators reflect only a portion of the work and accomplishments of community action. This is not our complete story, but a selective sampling of what we do.**

- **Agencies should continue to report annually on their full range of ROMA outcomes in addition to reporting on the 12 national indicators.**

- The National Performance Indicators require you to think about the context in which you are providing services in order to determine where various outcomes should be reported. Goal 1.2 pertains to family stability while Goal 6.2 refers to emergency-related outcomes. **Family maintenance outcomes should be included on the blank lines under indicator 6.3 (see that section of the guide for more details).**

Organization and Use

The guide provides for a two-step process for organizing and reporting national indicators of community action performance:

> ***Step 1****: Completing the "Preliminary Agency Checklist" to match community action agency activities to one or more of the 12 National Performance Indicators; and*
>
> ***Step 2****: Organizing and reporting "outcomes" from those activities under the appropriate national indicator.*

It is recommended that state and local agency officials responsible for compiling and reporting national performance indicator information read this entire guide before beginning their work.

Completion of Step 1, the "Preliminary Agency Checklist," will enable agencies to quickly identify which of the 12 national performance indicators correspond to their current programs and activities, and for which they should report outcome information.

Once relevant indicators are identified using the Checklist, an agency may proceed to use the guide to help them determine what and how to report information. For each of the 12 National Performance Indicators, the guide describes:

- which agencies should report outcomes;
- which programs or activities produce outcomes to be reported, including the most common funding sources; and
- what to report.

In almost all cases, the guide provides specific *examples* of how to measure and report information for each of the 12 national performance indicators and their subcategories. The forms for reporting these measures are Part II of the annual CSBG Information System Survey. The examples of agency activities described in this guide are not intended to capture all of the ways community action agencies function. Agencies are encouraged to fit their specific initiatives into the general categories of activities that could produce outcomes for each of the indicators.

Step 1: Preliminary Agency Checklist – Matching Activities to Performance Indicators

As indicated, community action agencies and eligible entities are asked to submit ROMA outcome information only for those national performance indicators for which they have supporting programs and activities (CSBG *and* all other funding sources).

In order to help agencies identify national performance indicators relevant to their programs and activities, the following **Preliminary Agency Checklist** cross-references various community action services, activities and funding sources to the 12 national performance indicators.

PRELIMINARY AGENCY CHECKLIST

Community Action Program or Activity	National Performance Indicator	Current ROMA Direct Measure (May be found at www.ROMA1.org)
Adult Basic Education	1.2	1l
Advocacy	2.1, 2.2	2g, 3e
After school Programs	1.2, 2.1, 6.3	6f
Agency Capacity	5.1, 4.1	5a
Aging Programs	6.1	6a
Asset Formation	1.3, 3.2	1n
Board Membership	3.2	3a
Child care	1.2, 2.1	1n
Child Development – Health	6.3	6i
Child Development -- Nutrition	6.3	6i
Child Development -- School Readiness	6.3	6i
Child Support	1.3	1h
Child care Tax Credit	1.3	1g
Civic Involvement	3.2	3a
Community Enhancement -- Businesses	3.2	3c. 3d
Community Enhancement -- Community Facilities	2.2	2d
Community Enhancement -- Housing	2.1	2e
Community Enhancement -- Jobs	2.1	2a
Community Enhancement – Safety and Health	2.2	2g
Community Enhancement -- Schools	2.2	2d
Community Enhancement -- Transportation	2.1	2f
Community Investments	3.2	2b
Community Organizing	3.2	3g
Daycare	1.2, 2.1	1n
Disability (Independent Living)	6.1	6b
Disaster Relief	6.2	6c
Earned Income Tax Credit (EITC)	1.3	1g
Domestic Violence Prevention/Intervention	6.2	6i
Economic Development	2.1	2g, 3c, 3d
Emergency Medical Care	6.2	6c
Emergency Services	6.2	6c
Employment	1.1	1a, 1d, 1f

Community Action Program or Activity	National Performance Indicator	Current ROMA Direct Measure
Faith Based Organizations	4.1	4a, 4b, 4c, 4d
Family Development	1.1, 1.2, 1.3, 6.3	6i, 6j
Family Functioning or Maintenance	6.3	6j
Food and Nutrition	1.2, 6.1, 6.2, 6.3	6i
GED	1.2	1l
Head Start	1.1, 1.2, 3.1, 3.2, 6.3	1a, 1l, 1m
Health Care	1.2, 2.1, 6.2, 6.3	1n, 2f, 6c, 6i
Higher Education	1.2, 2.1	1m
Home Budget Management	1.3	6j
Home Ownership	1.2, 3.2	1j, 3a
Homeless Programs	6.2	6d
Housing	1.2, 2.1, 3.2	1i, 1j, 1k
Housing Rehabilitation	2.1	2h
Individual Development Accounts (IDAs)	1.3, 3.2	1n
Income Increase -- Employment	1.1	1f
Income Increase -- Non-Employment	1.3	1g, 1h
Job Placement	1.1	1a
Job Skills Training	1.2	1m
Legal Assistance	6.2	6c, 6i
Leveraging Resources	5.1	5a
Life Skills Training	1.3, 6.3	6j
LIHEAP	6.2	6g
Mental Health	1.2, 2.1, 6.2	1n, 1f, 5o, 6c
Parent Involvement	3.1, 3.2	3e, 3f
Parenting Skills	6.3	6i
Partnerships	4.1	4a, 4b, 4c, 4d
Post-Secondary Education	1.2, 2.1	1m
Public Safety	2.2	2g
Recreational Resources/Facilities	2.2	2g
Section 8 Housing	1.2, 2.1	1i, 1j, 1k, 2g
Self-Employment	1.1, 2.1, 3.1 3.2	3c
Self-Sufficiency	1.1, 1.2, 1.3	5f
Shelter	6.2	6d
Substance Abuse	1.2, 2.1, 6.2	1n, 1f, 5o, 6c
Surplus Food	6.2	6c
TANF	1.1, 1.2, 2.1	1a, 1n
Transitional Housing	1.2, 2.1	1i
Transportation	1.2, 2.1	1n
Vendor Payments	6.2	6c
Volunteers	3.1, 3.2	3g
Women, Infants and Children (WIC)	6.3	6i
Weatherization	1.2, 1.3, 2.1	6g
Workforce Investment Act (WIA)	1.1, 1.2	1a, 1n
Youth Programs	1.2, 2.1, 2.2, 6.3	6f

Each local agency is encouraged to use this Preliminary Agency Checklist as a tool to sort through the 12 national performance measures and identify those that apply to programs and activities, and those that do not.

In addition, the Checklist can serve as a planning guide for transferring current ROMA outcome data to the national performance indicator section of the annual ROMA report. The Checklist shows the location of current ROMA outcome measures within the 12 new national performance indicators.

Step 2: Reporting Outcomes for National Performance Indicators

Once an agency has identified national performance indicators relevant to its programs, activities, and sources of funds, the agency may use the following guidance to report performance indicator information.

Agencies Currently Using Direct ROMA Measures

State and local agencies that currently use individual measures to report community action outcomes will, in most cases, find corresponding places among the twelve national indicators to report these outcomes. As noted, the Preliminary Agency Checklist cross-references outcomes included in the twelve national indicators and the current ROMA direct measures.

For some activities, outcomes may be reported under more than one indicator, depending upon the *context, or purpose,* of the activity. For example, food distributed to a working-poor family may support their continued stability and employment and be counted as an outcome under national performance indicator 1.2. Food distributed to meet the emergency needs of an unemployed family that has exhausted its monthly food stamp allotment may be counted and reported under national performance indicator 6.2.

Agencies Currently Using Scales to Report Outcomes

State and local agencies that use scales to measure and report incremental progress toward participant or community outcomes are asked to report the description(s) of improved conditions that are reflected in upward movement on scales. For example, an agency that uses a scale to register employment status gains among participants may record movement from "in crisis" to "stability." The definition of "in crisis" on the agency's scale may include a variety of conditions, including lack of adequate education or training, chronically or episodically unemployed. The definition of "stability" might include such conditions as gained needed education or training, achieved stable and full-time employment with benefits. In this example, the agency would count and report the number of participants achieving one or more of the conditions that comprise the "stable" ladder of the agency's employment scale.

Agencies Seeking to Report Significant Outcomes Not Described in the National Indicators

As indicated, agencies are encouraged to continue to submit ROMA reports containing outcomes for all their major programs and activities. In addition, State and local agencies may submit ***narrative reports*** describing activities and outcomes that support one or more of the national indicators in ways that may not be covered by the exact wording of the indicators. Among the kinds of outcomes that are most likely to be described in narratives are those that relate to special regional needs or conditions, or those that reflect innovative combinations of services, community interventions, or agency development activities that are not easily categorized or counted by more traditional outcome measures.

Performance Targeting

Over the past few years, both the Administration and the Congress have begun to seek ways to measure the effectiveness of various Federal programs, including the Community Services Block Grant. Specifically, the Office of Community Services is being asked by the Executive Office of the President, Office of Management and Budget, to establish performance targets for community action in addition to outcome measures, and report both the number and nature of our successes. Performance targets differ from outcomes in that they seek to determine not only what is accomplished through program funding, but also the relative quality, or adequacy, of such outcomes. For example, while a program intended to help participants gain employment may measure and report as an outcome the number of participants that actually get jobs within a particular funding period, the number employed does not speak to performance or effectiveness of the program. Performance targets, or anticipated levels of outcomes to be achieved that are set prior to program operation, often provide a standard to measure effectiveness.

In an attempt to assist states and agencies in creating their own standards for community action services and interventions, we will begin collecting baseline data. This data will allow us to respond to the evolving emphasis on determining not only the outcomes, but also the effectiveness, of federally funded programs. Expanding the current ROMA focus on outcomes to include locally determined performance targets will eventually apply to all of the national indicators.

As an initial step in that process, four of the 12 national performance indicators ask for agencies to report both the "number" of outcomes achieved and the "percentage" that number represents of the level of performance *expected* or *anticipated* by the agency:

- National Performance Indicator 1.1 – Employment
- National Performance Indicator 1.3 – Economic Asset Enhancement and Utilization
- National Performance Indicator 6.2 – Emergency Services
- National Performance Indicator 6.3 – Child and Family Development

These four indicators were selected for this initial focus on performance targeting because many agencies now provide information in their current ROMA reports concerning the number of individuals or households that achieve program outcomes relative to the number of participants *expected* to achieve success.

This guide describes how performance targets might be set and measured for these four national performance indicators and provides concrete examples of how to calculate the percentage of outcomes achieved in relation to *expected* or *anticipated* levels of success.

Goal 1: Low-Income People Become More Self-Sufficient

National Performance Indicator 1.1 – Employment

The number and percentage of low-income participants in community action employment initiatives who get a job or become self-employed as measured by one or more of the following:

A. Unemployed and obtained a job.
B. Employed and obtained an increase in employment income.
C. Achieved "living wage" employment and benefits.

Which Agencies?

Community action agencies that help participants get initial jobs, reenter the workforce, retain employment, or improve employment status (income, benefits, career opportunities) should report outcomes under National Performance Indicator 1.1.

Which Programs or Activities?

An agency should count and report outcomes for ***all*** its federal, state, local or privately funded programs or activities that focus on employment or self-sufficiency as a primary or complementary outcome, including those that promote:

- Initial job placement and retention among the chronically unemployed;
- Reentry into the workforce by those with a history of employment;
- Improved employment and income;
- Opportunities for self-employment;
- Achievement of "living wage" jobs; and
- Retention of "living wage" jobs.

Among the sources of support most common for such activities among community action agencies, and for which performance indicator outcomes should be reported are:

- Community Services Block Grant (CSBG)
- Temporary Assistance to Needy Families (TANF)
- Welfare to Work

- Work First
- Workforce Investment Act (WIA)
- Head Start
- Community Development Block Grant
- State, Local or Privately Funded Employment or Self-Sufficiency Initiatives

What to Report?

Number and Percentage of Participants Achieving Outcomes

The current national format for submitting ROMA outcome information asks for a number of counts, including: 1) The number of participants expected to achieve an outcome; and 2) The number that actually achieve that outcome. The new performance indicator report asks agencies to use these two counts to calculate and report the percentage of program participants achieving the outcome -- in this case, employment.

For the three subcategories of this employment indicator (getting a job, increasing income, or achieving a living wage job), two counts are requested:

1. The number of participants who achieve the outcome within the reporting period; and

2. The percentage this number represents of all those individuals who were part of the agency's employment effort *who were expected to achieve the outcome within the reporting period.* In many cases, the number "expected" to achieve the outcome can be found in grants or contracts for funding of the particular employment programs or activities.

   Example: An agency receives a TANF grant from the state to provide job training and placement services to 200 TANF recipients during the reporting period. In addition, the agency uses CSBG funds to train and place non-TANF program participants. The following outcomes are anticipated:
   - **150** TANF recipients are expected to be placed in jobs during the reporting period.

   - **50** non-TANF individuals are expected to gain employment as a result of CSBG-funded employment activities.

   Therefore, the total expected to achieve the outcome during this reporting period is **200**.

   Between the two programs (TANF and CSBG), the agency *expected* to place **200** individuals in jobs. At the end of the period, a total of **180** participants in employment programs achieved initial job placement:
   - **40** CSBG participants were placed in jobs
   - **140** TANF participants were placed in jobs

Therefore, **90%**, of those the agency *expected* to achieve employment were successful.

A. Unemployed and Obtained a Job

Among the most common community action situations that could generate outcomes to be reported in this category are:

- Unemployed individuals engaged in community action programs that specifically focus on employment training or placement, such as those funded by CSBG, TANF, WIA or other sources, who obtain an initial job;
- Unemployed individuals engaged in a case-managed initiative focusing on self-sufficiency who achieve employment as part of their overall progress toward self-sufficiency;
- Unemployed parents of Head Start or other child development programs who obtain initial employment in the context of parent and family development;
- Unemployed individuals who obtain initial employment within the community action agency;
- Unemployed individuals with a history of employment who seek assistance from community action to re-enter the workforce and are successful;
- Unemployed individuals who start their own business, or become self-employed, as a result of community action assistance;
- Unemployed individuals served by community action who achieve initial employment as a result of strategic partnerships with other agencies or organizations.

This measure should NOT be reported for each variation of employment-related services provided in the year; many community action agencies will have several programs or initiatives that help participants get, keep, or improve jobs. Rather, these work-related initiatives **should be seen as a single activity.** Agencies are asked to aggregate employment outcomes (numbers of participants and percentages achieving the outcome) for all similar programs and report totals for the agency's participants as a group.

Example: A community action agency has a formal working arrangement, such as a subcontract, with a vocational training and job placement facility to teach basic computer skills to and place 150 community action participants annually in entry-level jobs. Of the 150 participants referred to the vocational training facility, 75 ultimately achieved initial employment as a result of that referral.

In addition, the agency contracts with a commercial driving school to help participants receive trucking licenses. 12 people participated; 9 are now employed as long-haul truckers, and 3 dropped out. They may be counted and reported as follows:

84 (number of referrals achieving employment)
162 (number of expected employments thru referral) = 52%

The agency would report: "Of 162 unemployed community action participants expected to achieve employment, 84, or 52% achieved the outcome."

B. Employed and Obtained an Increase in Employment Income

This performance indicator subcategory is intended to capture community action efforts to help the "working poor" move toward greater self-sufficiency. Agencies are asked to report both the number of individuals achieving a verified increase in employment income and the percentage that number represents of all participants expected to achieve income increases during the reporting period because of community action efforts.

Among the situations that may generate outcome information in support of this subcategory are:

- Employed individuals whose income increases as a result of better wages, hours, or benefits because of community action:

    1. Continuing or vocational education;
    2. Employment within the agency;
    3. Job referral or employment placement assistance; and/or
    4. Employment counseling.

- Individuals who achieve higher income as a result of new or improved self-employment opportunities facilitated by community action.

    1. Micro business
    2. Day care providers achieve licensure

Again, community action agencies should report the total number of individuals experiencing improved employment income as a result of both direct service (funded by a variety of sources, including CSBG, Head Start, WIA, TANF, Welfare to Work, State/local/private programs), and as a result of partnerships with other agencies or organizations in the community.

C. Achieved "Living Wage" Employment and Benefits

This subcategory is intended to reflect the accomplishments of community action programs and activities, through all relevant funding sources, in helping low-income individuals move from dependency to relative economic independence, or self-sufficiency.

There is no definitive national "living wage." The amount of income and benefits needed to support the routine costs of individual or family life varies from community to community, state to state. As a result, each local agency must define what constitutes a "living wage" and appropriate benefits in their service area, and count and report the number of low-income program participants who are helped to reach or exceed those thresholds.

The Ford Foundation has funded a national non-profit organization, "Wider Opportunities for Women," to develop "living wage" calculations for 35 states. Wider Opportunities for Women (WOW) calls these calculations "self-sufficiency standards." Community action officials interested in learning more about this initiative may contact Wider Opportunities for Women by telephone at (202) 464-1596, or by mail at 1001 Connecticut Avenue, N.W. #930, Washington, D.C. 20036. In addition to the WOW "self-sufficiency standards," there is also a variety of ways to measure or define a "living wage." Individual CAAs and states are encouraged to review the various nationally recognized strategies. The ROMA website, www.roma1.org, will offer links to resources to help calculate a living wage in your state or community.

If you track the number of individuals who had no health insurance, but gain health insurance as a result of employment, you may want to include this as an Additional Indicator on a blank line. Also, if you track the number of individuals who retain employment (some agencies track 90 and 180 day periods), you may also want to include this information on a blank line.

Goal 1: Low-Income People Become More Self-Sufficient

National Performance Indicator 1.2 – Employment Supports

The number of low-income participants for whom barriers to initial or continuous employment are reduced or eliminated through assistance from community action as measured by one or more of the following:

A. Obtained pre-employment skills/competencies required for employment and received training program certificate or diploma.
B. Completed ABE/GED and received certificate or diploma.
C. Completed post-secondary education program and obtained certificate or diploma.
D. Enrolled children in before or after school programs, in order to gain or maintain employment.
E. Obtained care for child or other dependant in order to gain or maintain employment.
F. Obtained access to reliable transportation and/or driver's license in order to gain or maintain employment.
G. Obtained health care services for themselves or a family member in support of family stability needed to gain or retain employment.
H. Obtained safe and affordable housing in support of family stability needed to gain or retain employment.
I. Obtained food assistance in support of family stability needed to gain or retain employment.

Which Agencies?

Local community action agencies that provide services to unemployed or underemployed ("working poor") participants in order to promote family stability that enables the family to gain or retain employment and improve income status should report the results of these activities under the various subsections of National Performance Indicator 1.2. These supporting services often make the difference between success and failure in low-income family's efforts to complete job training or education in preparation for employment, or retain a job once it is acquired.

Which Programs or Activities?

Outcomes of activities may be counted and reported for this indicator if they are viewed by the agency and program participants as:

- Helping "stabilize" families as they prepare for or retain employment. These include such outcomes as: finding safe and affordable housing for a family at risk of becoming homeless or in a housing crisis, which enables the adult to participate in employment or employment preparation activities; providing timely access to health care for children before they become too sick to attend school and potentially jeopardize the job of a parent that needs to care for them at home; and providing food/nutrition supplements to a family to enable the working parent to function on the job.

- Increasing the employability of participants, such as the achievement of educational degrees, diplomas or certifications.

- Supporting the logistical needs of working participants, such as the acquisition of safe and affordable transportation or securing repairs to an automobile that is the only transportation available to a working parent, and acquisition of child care or other dependent care services.

Outcomes to be reported under this performance indicator may be achieved as part of "free standing" activities within an agency or in the context of a case-managed, service-coordinated initiative designed to **promote self-sufficiency** or support family stability needed to gain or retain employment.

Programs and funding sources that support community action outcomes to be reported under this performance indicator include, but are not limited to:

- Community Services Block Grant (CSBG)
- Social Services Block Grant (SSBG)
- Community Development Block Grant (CDBG)
- Head Start
- Child care and Development Block Grant
- Medicaid
- Temporary Assistance to Needy Families (TANF)

- Section 8 Housing
- Section 202 Rental Housing Subsidy
- Workforce Investment Act
- Childhood Immunization
- Community Health Centers
- Health Services Block Grant
- Substance Abuse and Mental Health Services Block Grants
- Healthy Start/State Children's Health Insurance Programs (SCHIP)
- Adult Basic Education
- State and local, public or private initiatives focused on employment barriers

What to Report?

Agencies should report outcomes resulting from: 1) programs and activities that they administer and/or 2) successful referrals of participants to "partnering" service providers in the community. A "successful" referral is one where it has been verified that the individual received the referral and got a response or service as appropriate. In other words, a participant who is referred to a Head Start program outside the agency would be reported as long as the outcome of that referral is verified. Participants in employment programs outside the agency who are referred for work supports that the CAA offers would also be reported here.

The following are examples of outcomes to be reported for each of the sub-categories of National Performance Indicator 1.2:

A. Obtained pre-employment skills/competencies required for employment and received training program certificate or diploma.

Examples:

- WIA-funded community action agency program in which participants complete course work and receive certification for a specific type of job, such as computer systems design, emergency medical assistance, public safety, child care, cosmetology, physical fitness.

- A community action agency partnership with a local trade organization in which participants complete formal work apprenticeships and receive certification or licensure in that trade.

B. Completed ABE/GED and received certificate or diploma.

Examples:

- Through community action agency partnership with the local schools, participants in a case-managed self-sufficiency program supported by several federal, state, and local programs, earn a GED as part of their preparation for entering initial employment.

- Community action agency participants complete adult basic education courses in English language proficiency financed by CSBG or Refugee Resettlement Program funds to improve employment opportunities and income.

C. Completed post-secondary education program and obtained certificate or diploma.

Examples:

- Parents of children in a Head Start program earn post-secondary degrees as a result of community action support and thereby meet both ROMA targets and Head Start economic empowerment goals.

- Participants in community action agency coordinated service self-sufficiency programs earn post-secondary education degrees as a result of financial planning, student loan and Federal grant assistance from the agency and TANF-supported child care or transportation subsidies.

D. Enrolled children in before or after school programs, in order to gain or maintain employment.

Examples:

- School aged children of TANF-funded programs participate in early morning or late afternoon educational enrichment, developmental, or recreational activities of the local school district as a result of formal partnerships between the community action agency and the school system;

- Using a combination of WIA, TANF, CSBG and state economic development funds, children of employment program participants are placed in late night or early morning child care programs to accommodate off-hours shift work or training.

E. Obtained care for child or other dependant in order to gain or maintain employment.

Examples:

- Working participants in employment programs enroll eligible children in Head Start and/or child care;
- Working participants with children that become ill and cannot attend child care or school and that receive child care or Head Start from agency program designed to serve that purpose;
- Working participants in employment programs achieve appropriate placement for mentally or physically disabled children as a result of community action referral and/or partnership with other service providers;
- Working participants in employment programs achieve appropriate in-home or congregate care for a dependent aging parent provided by the agency, or as a result of referral or partnership with another service provider.

F. Obtained access to reliable transportation and/or driver's license in order to gain or maintain employment.

Examples:

- Participants in community action TANF-funded welfare to work programs receive public transportation tokens or subsidies;
- Participants in community action programs receive assistance to purchase and maintain an automobile;
- Participants in community action programs receive free or reduced-cost employer-sponsored van or bus transportation as a result of community action and employer partnership.

G. Obtained health care services for themselves or a family member in order to support family stability needed to gain or retain employment.

Examples:

- Working-poor community action agency participants with no public or private health insurance who receive medical attention for themselves and their family through an agency-maintained health clinic or facility, thus enabling them to attend work without excessive absences related to health issues and enable children to participate in school/child care;

- Community action agency participants who are helped to qualify for, and access Federal, state or local health care insurance coverage for themselves and their family members thus enabling them to attend work or work preparation activities without excessive absences related to health issues and enable children to participate in school/child care.

- Community action agency participants who receive timely and affordable mental health or substance abuse treatment as a result of agency agreements/partnerships with appropriate facilities or individual providers thus enabling them to attend work or work preparation activities without excessive absences related to health issues and enable children to participate in school/child care.

H. Obtained safe and affordable housing in order to achieve greater family stability in support of gaining or retaining employment.

Examples:

- Community action agency participants whose housing situation becomes safer, more stabilized, and thus enables adult family members to be documented for employment purposes as a result of agency assistance.

- Community action agency participants whose housing situation becomes safer, more stabilized, and thus enables adult family members to attend work or work preparation activities as a result of agency assistance.

- Community action agency participants whose housing location improves in relation to employment and/or employment opportunities as a result of agency assistance.

I. Obtained food assistance in order to achieve greater family stability in support of gaining or retaining employment.

Examples:

- Working poor individuals and families receive food distributed by the agency to supplement their nutritional needs and promote greater family stability, which is needed to gain or retain employment.

- A working family loses food stamp benefits when their income exceeds the food stamp requirement by $20.00. The family receives food assistance from the agency in order to maintain employment.

Goal 1 – Low Income People Become More Self-Sufficient

National Performance Indicator 1.3 – Economic Asset Enhancement and Utilization

The number and percentage of low-income households that achieve an increase in financial assets and/or financial skills as a result of community action assistance, and the aggregated amount of those assets and resources for all participants achieving the outcome, as measured by one or more of the following:

A. Enhancement –

1. ***Number and percent of participants in tax preparation programs who identify any type of Federal or State tax credit and the aggregated dollar amount of credits***
2. ***Number and percentage that obtained court-ordered child support payments and the expected annual aggregated dollar amount of payments.***
3. ***Number and percentage enrolled in telephone lifeline and/or energy discounts with the assistance of the agency and the expected aggregated dollar amount of savings.***

B. Utilization –

1. ***Number and percent demonstrating ability to complete and maintain a budget for over 90 days.***
2. ***Number and percent opening an Individual Development Account (IDA) or other savings account and increased savings, and the aggregated amount of savings.***
3. ***Of participants in a community action asset development program (IDA and others):***
   - ***a. Number and percent capitalizing a small business due to accumulated savings.***
   - ***b. Number and percent pursuing post-secondary education due to savings.***
   - ***c. Number and percent purchasing a home due to accumulated savings.***

As described in detail in section 1.1 above, the percent to be reported is the number who achieved the outcome divided by the number *expected to achieve the outcome within the reporting period.* In many cases, the number "expected" to achieve the outcome can be found in grants or contracts for funding of the particular asset development programs or activities.

Which Agencies?

Local agencies that help participants increase financial assets and/or their ability to manage and utilize resources should report outcomes under Performance Indicator 1.3.

Which Programs or Activities?

Among the community action programs or activities that generate financial assets income and maximize its use that should be reported under this performance indicator are:

- Agency instructional or counseling activities that result in greater access of low-income participants to Federal, state, or local tax benefits or credits for which they are eligible;

- Agency assistance to participants that results in their receiving court-ordered child support;

- Agency programs that help participants and their families manage household income and resources, including instruction in household budgeting, consumer education, and the use of financial services within the community;

- Agency programs that result in participant accumulation of economic resources over time and that enable them to invest in major life-improving activities, such as the creation of a small business, the pursuit of higher education or home ownership.

Among the most common funding sources that support activities with outcomes to be reported under this performance indicator are:

- Community Services Block Grant (CSBG)
- Child Support Enforcement
- Small Business Administration
- Individual Development Accounts (IDA)
- Housing and Urban Development (HUD) and State Housing Programs
- Private grants/donations for financial literacy education or IDA match funding

Among the kinds of tax credits or non-employment benefits that can be counted and reported are:

- Earned Income Tax Credit (EITC)
- Child Tax Credits
- Child Support and Child Support Enforcement Payments

<u>What to Report?</u>

Agencies should report outcomes in any subcategory of this performance indicator that relates to their programs and activities.

For the six subcategories of this indicator (three related to enhancing non-employment income, three related to better utilization of assets), two counts are requested:

1. The number of participants who achieve the outcome within the reporting period; and

2. The percentage this number represents of all those individuals who were part of an agency effort to help participants increase non-employment assets and utilize them more effectively *who were expected to achieve the outcome within the reporting period.*

Goal 2: The Conditions in Which Low-Income People Live are Improved

Introduction to the New Community Measures

The national measures and reports on Goal 2 are a response to the shared desire of the network and the Congressional oversight committees to emphasize the goal of community improvement as distinct from, as well as a support to, the goal of helping low-income people become more self-sufficient.

This set of measures collects outcomes on successful CAA projects that build "community assets," including not only material improvements, like affordable homes and safe streets, but even changes in public policy that will reduce the causes of poverty and revitalize the low-income community.

National Performance Indicator 2.1 Community Improvement and Revitalization

Increase in, or safeguarding of threatened opportunities and community resources or services for low-income people in the community as a result of community action projects/ initiatives or advocacy with other public and private agencies, as measured by one or more of the following:

A. Accessible "living wage" jobs created or saved from reduction or elimination in the community.
B. Safe and affordable housing units created in the community.
C. Safe and affordable housing units in the community preserved or improved through construction, weatherization or rehabilitation achieved by community action activity or advocacy.
D. Accessible and affordable health care services/facilities for low-income people created or saved from reduction or elimination.
E. Accessible safe and affordable child care or child development placement opportunities for low-income families created or saved from reduction or elimination.
F. Accessible before school and after school program placement opportunities for low-income families created or saved from reduction or elimination.
G. Accessible new or expanded transportation resources, or those that are saved from reduction or elimination, that are available to low-income people, including public or private transportation.
H. Accessible or increased educational and training placement opportunities or those that are saved from reduction or elimination, that are available for low-income people in the community, including vocational, literacy, and life skill training, ABE/GED, and post-secondary education.

This indicator ask for two types of information for each project – the number of successful *projects* that fit under the measure, and an indicator of the scale or impact of each, i.e. the number of community members who will benefit yearly from the new "opportunities" that the community improvement offers upon its completion.

The criterion for determining whether something is a result to be included under these indicators is whether the facilities, services, policy changes, infrastructure, housing, jobs, etc. were developed with significant investments by the CAA. "Significant" means the agency has invested personnel, funding, or facilities at a significant, sustained level of participation relative to the project size; in other words, any other partners in the initiative should have no hesitation in identifying the CAA involvement as a major factor in the success.

Geographic Boundaries of "Community"

Community Action typically deals with its service area and also with a larger community. In general, the projects reported here should be those that make a lasting change **in** the low-income community; of course, some of those may involve making a lasting linkage between the community at large and the low-income community. Agencies should provide some narrative for projects not physically located in their low-income community.

- The changes reported could affect all the community's members regardless of income or only a specific population, but they should help reduce or prevent poverty;
- Some projects listed as examples involve securing resources near, but not necessarily in, the low-income community. If the benefits return to the community and its low-income residents, report the project.

Net Gains Only

Because the project should **add** to the lasting resources of the community, please do not include resources that the agency secured by being selected as the preferred provider/grantee if the funding was designated for the same general community and the only issue was which agency could best manage it. The results of those projects belong in the individual, family, and leveraging measures.

Projects in Progress

Agencies may find it helpful to collect data on community projects that are progressing as planned. However, for national reporting, this information will only be reported once the project is completed.

"Opportunities"

We have coined this term for a measure that provides a sense of the scale of the project and that we can aggregate across many kinds of initiatives. Each separate Goal 2 community result is **one** project that, when complete, is designed to benefit a certain number of community members per year. That number is typically a planned target, like the number of individual students using an after school facility during the school year, the number of families the agency's new clinic will serve in a year, the number of

electricity customers expected to enroll in the discount won by the CAA-led coalition intervening in a rate case. It is not the actual usage nor is it the actual number of identified CAA participants using the facility. Those figures would be measured under Goals 1 or 6.

In summary, to make the report of "opportunities" similar nationwide, the **planned-per-year number of participants** should be reported. There will only be one year in which an agency reports a completed project and the number that it is projected to serve. After that year, if the agency is involved in its continuing operation, its effects will appear when individuals or families counted for Goals 1 and 6 enjoy its benefits.

"Saved" or "Safeguarded" Resources

We realize agencies have to make significant investments in fighting to keep threatened community assets they won in the first place. Therefore, a community "success" can be reported for **significant investment** by the agency in saving a program or policy that is threatened with reduction or elimination. Examples would be:

- A utility discount won by the CAA's intervention five years earlier is about to end but, by extensive education efforts and expert testimony by the agency's director and its attorneys, the PUC extends the regulation for 10 years;

- The new police chief is about to pull out the foot patrols that the CAA Board won a decade earlier and that cut the neighborhood crime rate in half. A scholarly paper that a professor and students from the local law school develop with CAA support is used by the agency Board to preserve the foot patrols.

Please do not report each year of an on-going, unchallenged community asset. In general, when in doubt about how to report, provide as much narrative as possible about the project, the type of opportunities, and how you arrived at the total reported. Your ideas about improving this measure are also welcome when you send in the first year's reports.

Which Agencies

Community action agencies that **expand or safeguard the availability** of community resources and opportunities to low-income people, through their own community development activities, partnerships, or as a result of advocacy, should report outcomes under National Performance Indicator 2.1.

Which Programs or Activities?

Outcomes reported for this performance indicator involve both the number of projects/initiatives agencies are involved in *and also* their capacity in terms of potential utilization and benefit to the community The projects reported here include the creation, expansion, or maintenance of community services, facilities, and economic opportunities for low-income people. Benefits that would have been realized by the

community even without the involvement of Community Action should not be listed under this measure. Examples of community action agency activities that generate community infrastructure building outcomes are:

- Agency advocacy with a municipal transportation authority for new or expanded bus service from low-income neighborhoods to geographic "centers" of employment or commerce.

- Agency partnership with the local housing authority and/or commercial banking institutions.

- Agency advocacy with local government results in a county or city ordinance requiring local builders to "dedicate" 10% of all new construction of rental units to moderate or low-income renters, resulting in the creation of 130 new housing opportunities for low-income families.

- Agency partnership with one or more institutions of higher education in the community results in the creation of "off campus," subsidized college-level courses within a community center in a low-income neighborhood.

- An agency partners with a hospital to establish evening and weekend health services within a neighborhood community center.

- Agency participation in a community economic development partnership results in the relocation of a business to the area.

Among the funding sources that support community action outcomes under Performance Indicator 2.1 are:

- Community Services Block Grant (both advocacy and programs)
- Community Development Block Grant
- EZ/EC
- Housing and Urban Development and Home Investment Partnerships Program (HOME)
- Community Health Centers Program
- U.S. Department of Agriculture
- Workforce Investment Act
- Weatherization
- Transportation Programs
- Private Funding

What to Report?

A. Number of accessible "living wage" jobs created or safeguarded in the community.

As with Performance Indicator 1.1, the definition of "living wage" will be determined in the context of state or local economic conditions. What is being measured and reported in this subcategory is the creation or retention of jobs in the community over a one-year period that pay sufficient wages and benefits to reduce or eliminate dependence of families on public or private benefit programs and services.

Examples:

- As a result of community action agency advocacy and partnerships, tax incentives are created to keep an existing business in the community, with 400 "living wage" jobs, from relocating to a different community (job retention). (Report as: 1 project/initiative and 400 new opportunities.)

- A community action agency micro business initiative funded by the Small Business Administration and state economic development funds results in the formation of six new businesses in the community with a total of 45 "living wage" jobs. (Report as: 1 project/initiative and 45 new opportunities.)

B. Number of safe and affordable housing units created in the community.

Safe and affordable housing is defined as the agency deems it appropriate, considering community conditions.

Example:

- Through a community action agency partnership with the local housing authority and several financial institutions, the agency builds a senior living center for low-income aging individuals, thereby increasing the stock of affordable housing in the community by 40 units. (Report as: 1 project/initiative and 40 new opportunities.)

C. Number of safe and affordable housing units preserved or improved through construction, weatherization or rehabilitation.

The purpose of this measure is to capture projects that make housing affordable, rather than just a service count of all projects.

Examples:

- The community action agency weatherizes 70 existing housing units of low-income families utilizing weatherization funds as well as additional funds. (Report as: 1 project/initiative and 70 new opportunities.)

D. Number of accessible and affordable health care services/facilities for low-income people created or safeguarded from reduction or elimination.

Examples:

- Through community action advocacy with the municipal authority, a primary health care clinic is built in a low-income neighborhood with the capacity to conduct 5,000 outpatient examinations/visits per year. (Report as: 1 project/initiative and 5,000 new opportunities.)

- The community action agency negotiates agreements with two faith-based substance abuse treatment providers to expand by 50 the number of treatment slots available to community low-income participants. (Report as: 1 project/initiative and 50 new opportunities.)

E. Number of safe and affordable child care or child development placement opportunities for low-income families created or safeguarded from reduction or elimination.

An example of a child care or child development program or activity that produces outcomes to be reported is:

- The community action agency negotiates with a major local employer who hires many graduates of the CAA programs to establish an "on site" child care program with an ongoing capacity to serve 30 children of participants in an agency employment program. (Report as: 1 project/initiative and 30 new opportunities.)

F. Number of before school and after school program placement opportunities for low-income families created or safeguarded from reduction or elimination.

Examples:

- The community action agency successfully advocates for the expansion of after school recreational opportunities to include 200 additional youth, at the middle and high schools serving low-income neighborhood. (Report as: 1 project/initiative and 200 new opportunities.)

- The community action agency uses Substance Abuse Prevention funds to create an after-school mentoring program that has the capacity to serve 50 youth in a low-income neighborhood community center. (Report as: 1 project/initiative and 50 new opportunities.)

G. Number of accessible new or expanded transportation resources, or those that are saved from reduction or elimination, that are available to low-income people, including public or private transportation.

Examples:

- A rural community action agency contracts with the local Area Agency on Aging to utilize three agency vans with a total of 36 seats to transport low-income workers to and from employment on a regular basis, when the vans are not being used for senior services. (Report as: 1 project/initiative and 36 new opportunities.)

- As a result of community action agency advocacy with a local transportation authority, two new bus routes serving low-income neighborhoods are established that can transport up to 600 low-income workers to and from centers of employment. (Report as: 2 projects/initiatives and 600 new opportunities.)

- A community action agency uses a combination of CSBG, Department of Transportation, and private funds to contract with a local high school auto mechanics training program to increase by 30 cars a year the number of available and affordable cars for community low-income families. (Report as: 1 project/initiative and 30 new opportunities.)

H. Number of increased educational and training placement opportunities or those that are saved from reduction or elimination, that are available for low-income people in the community, including vocational, literacy, and life skill training, ABE/GED, and post-secondary education.

Examples:

- During the reporting period, a community action agency receives state certification and funding to provide vocational training in commercial transportation to 100 low-income participants per year. (Report as: 1 project/initiative and 100 new opportunities.)

- In partnership with the local school system, a community action agency creates six new evening courses in English language proficiency taught by school system personnel in an agency facility. Each course can enroll up to 15 students and the six courses are offered in the Fall and Spring of each year. Report 6 courses x 15 students x 2 seasons = 180 new educational placement opportunities. (Report as: 6 projects/initiatives and 180 new opportunities.)

Goal 2: The Conditions in Which Low-Income People Live are Improved

National Performance Indicator 2.2 -- Community Quality of Life and Assets

The quality of life and assets in low-income neighborhoods are improved by community action initiative or advocacy, as measured by one or more of the following:

A. Increases in community assets as a result of a change in law, regulation or policy, which results in improvements in quality of life and assets;
B. Increase in the availability or preservation of community facilities;
C. Increase in the availability or preservation of community services to improve public health and safety;
D. Increase in the availability or preservation of commercial services within low-income neighborhoods; and
E. Increase or preservation of neighborhood quality-of-life resources.

Which Agencies?

Community action agencies that increase the presence and availability of community services and commercial enterprise within low-income communities, or that increase the value of neighborhood residences through rehabilitation, should report outcomes that support this performance indicator. Outcomes may be a result of community action agency advocacy, program initiative, or partnership with local government, business, financial institutions, or other community organizations.

Which Programs or Activities?

A broad range of community action activities could generate outcomes to be reported under this performance measure. Among the most common activities are:

- Community action agency advocacy for new or expanded public services and facilities in low-income neighborhoods that result in new construction or renovation of such facilities as neighborhood centers, recreational facilities, schools, or libraries.

- Agency participation in community economic development initiatives involving local governments, the business community, and other public and private organizations aimed at increasing commercial and business investment and enterprise in low-income neighborhoods.

- Agency partnerships with other public and private organizations that promote the creation of micro-business opportunities for low-income people in their communities.
- A rural community action agency assists the community in developing a safe drinking water system project.

Examples of funding sources for community action programs that produce results to be reported under this national performance indicator are:

- Community Services Block Grant (CSBG)
- Community Development Block Grant (CDBG)
- U.S. Department of Agriculture (USDA)
- EZ/EC
- Small Business Administration Loans and Grants
- Substance Abuse Prevention Grants
- State or locally-sponsored community development and economic opportunity initiatives
- Private foundation funding for youth and/or community development
- In-kind legal or other expert assistance with advocacy

What to Report

A. Increases in community assets as a result of a change in law, regulation or policy, which results in improvements in quality of life and assets.

Example:

Agency advocacy with local government results in a county or city ordinance requiring local builders to dedicate 10% of all new construction of rental units to moderate or low-income renters. Report one project and a reasonable estimate of the number of new affordable units that may be added to the community's housing stock each year after this is implemented.

B. Increase in the availability or preservation of community services facilities.

Community services facilities may include but are not limited to: schools, community technology centers, libraries, and youth or community centers. Increasing availability or preservation may be accomplished through new construction, renovation, or expanded hours and programming.

Examples:

- A youth recreation center that can accommodate 150 people at the same time and will have varied programming is built in a low-income neighborhood by the local government as a result of community action advocacy. Report one new facility and the planned number of individuals who will use it in the course of a year.

- A community action agency, in partnership with the local library authorities, create foreign language book and tape programs in neighborhoods with high concentrations of residents whose primary language is not English. Report one new service and the number expected to utilize it per year.

C. Increase in the availability or preservation of community services to improve public health and safety.

Community services to improve public health and safety may include but are not limited to: street lights, telephone systems, enhanced policing, neighborhood watch, installation of sidewalks, waste removal, or pest extermination.

Example:

- A community action agency advocates successfully for the creation or expansion of police "foot patrols" in low-income neighborhoods where 900 families live. Report one "improved public health and safety" initiative and 900 opportunities.

D. Increase in the availability or preservation of commercial services within low-income neighborhoods.

Commercial services may include but are not limited to: grocery stores, financial institutions, restaurants, or other business enterprises.

Examples:

- A community action agency negotiates with a national grocery store chain to locate one of its stores (or continue to operate an existing store) in a low-income neighborhood. Report one new business facility and the number of families expected to use it annually.

- A community action agency partners with a local banking institution to locate branches in two neighborhood centers and thereby increase the availability of traditional financial services (i.e. checking accounts, home mortgages, personal loans, business loans, personal savings accounts) in a low-income neighborhood. Report two expanded services and the number of individuals who typically utilize those locations.

E. Increase or preservation of neighborhood quality-of-life resources.

Quality-of-life resources may include but are not limited to new or improved public spaces for arts and recreation.

Examples:

- A community action agency helps renovate an existing closed school building and convert it into a neighborhood arts center. Report one "quality of life improvement" project and the expected unduplicated number of annual users.

- A community action agency helps residents of six neighborhoods maintain permanent neighborhood "crews" to remove weeds and trash from vacant lots in

order to provide and maintain a safe environment for children to play. Report six "quality of life improvement" projects.

Goal 3: Low-Income People Own a Stake in Their Community

National Performance Indicator 3.1 – Civic Investment

The number of volunteer hours donated to Community Action.

Which Agencies

Every community action agency that utilizes the assistance of volunteers from the community, and indeed encourages and promotes volunteer participation, should report an outcome for this performance indicator.

The current CSBG/IS Survey collects this information and most already report the number of hours volunteered by local residents. Please report the number found in Part I: Section F, Subsection IV (g) of the CSBG/IS Survey here.

Which Programs or Activities

Agencies should count hours of volunteer time for **all** of their programs and activities, including those funded by CSBG, being sure to include hours of volunteered time for programs and activities that have, as part of their purpose, increased participation in program design or operation.

Examples of the most common programs that encourage participants to help with program design and operation are CSBG and Head Start.

Community action agencies should count the time volunteers spend helping with all programs and activities within the agency:

- Serving on advisory and governing boards or committees;
- Assisting with program activities and logistics; and
- Participating in advocacy to meet agency and community goals.

What to Report

If a local community action agency currently reports hours volunteered by community residents for all activities and programs within the agency as part of their annual CSBG statistical report, copy that number for this national performance indicator.

If, however, an agency currently counts and reports only those hours volunteered to CSBG-funded activities, the agency may copy that number for this national performance

indicator, but should work to count and report time volunteered for all agency programs and activities.

Goal 3: Low-Income People Own a Stake in Their Community

National Performance Indicator 3.2 – Community Empowerment through Maximum Feasible Participation

The number of low-income people mobilized as a direct result of community action initiative to engage in activities that support and promote their own well-being and that of their community as measured by one or more of the following:

A. Number of low-income people participating in formal community organizations, government, boards or councils that provide input to decision-making and policy setting through community action efforts.
B. Number of low-income people acquiring businesses in their community as a result of community action assistance.
C. Number of low-income people purchasing their own homes in their community as a result of community action assistance.
D. Number of low-income people engaged in non-governance community activities or groups created or supported by community action.

Which Agencies

Community action agencies that help residents of low-income neighborhoods become connected and involved in the well-being and improvement of their community should report outcomes under this performance indicator.

Which Programs or Activities?

Among the results from activities that reflect civic investment that may be reported under this performance indicator are:

- Participation on a community action agency tripartite governing board;
- Participation on Head Start governing boards or advisory committees;
- Election to public housing governing boards;
- Service on neighborhood recreational, youth, or service center advisory or governing boards;
- Service on public or private civic improvement or service advisory committees, such as a citizens' advisory board to a community mental health center;
- Election to PTA office or Title I Parent Council at a neighborhood school; and/or
- Purchasing a home in the low-income neighborhood.

Funding sources within community action agencies that support the kinds of activities for which results are being measured include:

- Community Services Block Grant (CSBG)

- Head Start
- Public Housing Authority programs
- Individual Development Account programs
- Small Business Administration Grants
- Federal, state, or local home ownership initiatives that include mortgage or other types of financial assistance

What to Report?

A. Number of low-income people participating in formal community organizations, government, boards or councils that provide input to decision-making and policy setting through community action efforts.

Examples:

- Eight representatives of the low-income community served by the agency are elected to the tripartite governing board. Report 8 low-income people.

- In the agency's Head Start program, a total of 48 parents serve on various governing or advisory boards and committees for the program. Report 48 low-income people.

- As a result of agency encouragement, 2 participants seek and achieve membership on their local school Title I Parent Council, and an additional 6 serve on the governing boards of their housing authority. Report 8 low-income people.

B. Number of low-income people acquiring businesses in their community.

Examples:

- An agency partnership with a local financial institution to make secured micro business loans to low-income participants in an agency's self-sufficiency initiative results in the creation of six new small businesses in the community owned by 13 low-income residents. Report 13 low-income people.

- As a result of an agency Individual Development Account (IDA) initiative, 35 participants achieved sufficient savings during the reporting period to start a small business in the low-income neighborhood. Report 35 low-income people.

C. Number of low-income people purchasing homes in their community.

Examples:

- As a result of an Individual Development Account (IDA) initiative, 16 participants achieved sufficient savings during the reporting period to make a down payment on owning their first home. Report 16 low-income people.

- As a result of an agency partnership with the local housing authority, and with a grant from the U.S. Department of Housing and Urban Development, 25 participants gained ownership of their public housing units. Report 25 low-income people.

D. Number of low-income people engaged in community groups created or supported by community action.

Example:

- A community action agency encourages the creation of neighborhood improvement committees in five neighborhoods, involving a total of 60 low-income members, and provides office space, supplies and telephone lines for the first two months of their operations. Report 60 low-income members.

Goal 4: Partnerships among Supporters and Providers of Service to Low-Income People are Achieved

National Performance Indicator 4.1 – Expanding Opportunities through Community-Wide Partnerships

The number of organizations, both public and private, community action actively works with to expand resources and opportunities in order to achieve family and community outcomes.

Which Agencies

It is anticipated that ***all*** community action agencies work with other public and private organizations to expand service opportunities for individuals or families, or to achieve community improvement outcomes.

Which Programs or Activities?

Community action agencies should count and report the number of organizations with which they work ***in relation to all of the programs and services they administer***, not just those funded through the Community Services Block Grant.

Examples of organizational relationships to be reported include:

- ***Formal*** arrangements, such as memoranda of understanding or service contracts, between a community action agency and one or more public or private service providers to coordinate referral and exchange of program participants;

- ***Financial agreements*** between a community action agency and one or more business entities or financial institutions, to promote individual or community economic development and/or infrastructure investment;

- ***Informal*** working relationships with public or private agencies, organizations, or individual service providers that expand service opportunities for low-income individuals and families, including routine service referrals and follow up contacts; and/or

- ***Alliances*** between a community action agency and one or more public or private organizations that advocate for expanded services or community opportunities for low-income people.

What to Report?

Community action agencies should count and report the ***number of organizations*** they relate to, ***not the number of individual service referrals*** they share with these organizations. Please also report how many of these partnerships were with faith-based organizations.

Examples:

- A community action agency with a job training and employment initiative supported by CSBG, TANF, and WIA funds has a formal agreement with the local employment authority, the Chamber of Commerce, and three large employers to train and place 400 program participants in initial jobs during the reporting period. Count and report 5 organizations (1 employment authority + 1 Chamber of Commerce + 3 employers = 5 organizations). Do not report 400 participants under this performance measure. Count and report if any of the 5 organizations were faith-based.

- A community action agency-coordinated service initiative, designed to help working participants retain employment, routinely refers participants to 15 public and private local health care, housing, educational, and employment service providers. Count and report the 15 organizations to which community action participants are referred. Count and report if any of those 15 were faith-based organizations.

- Four faith-based groups provide food for the food bank on alternating months. Report 4 partnerships and 4 faith-based partners.

Goal 5: Agencies Increase Their Capacity to Achieve Results

National Performance Indicator 5.1 – Broadening the Resource Base

The number of dollars mobilized by community action, including amounts and percentages from:

A. Community Services Block Grant (CSBG)
B. Non-CSBG Federal Programs
C. State Programs
D. Local Public Funding
E. Private Sources (including foundations and individual contributors, goods and services donated)
F. Value (at Federal minimum wage) of volunteer time

Which Agencies?

All community action agencies should report funding information.

Which Programs or Activities?

Agencies should report funding for ***all*** programs and activities, from ***all sources*** of financial support, ***not just the Community Services Block Grant!***

What to Report?

The CSBG statistical report currently asks local community action agencies to report resources from all funding sources. In addition, the annual ROMA reporting format asks agencies to report a variety of funding outcomes under Goal 5, including the total dollars mobilized by the agency (direct measure 5a) and the total dollars mobilized by the agency as compared with CSBG dollars (5b).

Information collected for both the statistical and ROMA reports may also be used to report financial data under this performance indicator. Agencies that do not file complete funding information, especially those that count and report only CSBG funding, should move quickly to capture and report the total resources that support all agency programs and activities.

Under "***Value of volunteer time***," agencies that measure and report volunteer hours may calculate and report an estimated "floor" value of time volunteered by multiplying the total hours by the prevailing Federal minimum wage. For this calculation, use the volunteer hours reported in item 3.1. The only difference is that this item asks you to calculate the value of volunteer hours.

Goal 6: Low-Income People, Especially Vulnerable Populations, Achieve Their Potential by Strengthening Family and Other Supportive Systems

National Performance Indicator 6.1 – Independent Living

The number of vulnerable individuals receiving services from community action that maintain an independent living situation as a result of those services:

A. Senior Citizens; and
B. Individuals with Disabilities

Which Agencies?

Community action agencies with programs or activities that help senior citizens and individuals with disabilities continue to live safe and functional lives outside of an assisted care or nursing home facility should report information for this performance indicator.

Which Programs or Activities?

Activities that contribute to successful independent living among seniors and individuals with disabilities to be counted and reported for this performance indicator may be provided on an on-going basis, episodically, or in response to an emergency. They may be provided as "stand alone" services, or as part of a coordinated service strategy.

Among the most common activities conducted by community action agencies that help senior citizens and individuals with disabilities maintain independent living situations to be reported are:

- In-home assistance, including Meals on Wheels, visiting nurses, allied health professionals or social workers, respite care for family members or others;
- Congregate meals, recreational or social activities;
- Community participation and contribution (i.e. foster grandparent programs, educational mentoring);
- Transportation services, including van or bus service, car maintenance and repair;
- Legal aid and benefits assistance/counseling;
- Home management assistance, including cleaning services, property maintenance, and financial counseling;
- Housing rehabilitation, renovation, weatherization, or energy assistance;

- Medical care, including mental health treatment, family counseling;
- Physical exercise and rehabilitation assistance;
- Medications monitoring and management; and
- Supplementary food distribution and nutrition counseling.

Among the funding sources for community action that support programs resulting in sustained independent living among seniors are:

- Community Services Block Grant (CSBG)
- Social Services Block Grant (SSBG)
- Medicaid, Medicare and other public medical insurance/coverage programs (Federal, state, or local)
- Federal food and nutrition programs, including Meals on Wheels, Supplemental Food Assistance, Surplus Food
- Federal, state, and local mental health and substance abuse treatment programs
- Weatherization
- LIHEAP
- Community Health Centers Program
- Area Agencies on Aging programs and services, including transportation assistance
- Supplemental Security Income
- Americans with Disabilities Act (ADA)

What to Report?

Agencies are asked to report the number of senior citizens and individuals with disabilities who continue to live independently (not institutionalized) during the reporting period as a result of receiving one or more services from community action or from partnering organizations. **Report the number of seniors or individuals with disabilities, not the number of times they experience interventions or receive services.**

Please note: If you track outcomes for individuals who you consider to be "vulnerable populations," you may want to report these on a blank line as an Additional Indicator. Please clearly define in the narrative section why you believe these individuals should be considered "vulnerable populations." Some examples of what might go in a blank row under indicator 6.1 include: those who have a disabling condition (perhaps short term) but are not considered disabled, those facing substance abuse issues who are not considered disabled, those with short-term Mental Health issues, and participants with limited English language proficiency.

Goal 6: Low-Income People, Especially Vulnerable Populations, Achieve Their Potential by Strengthening Family and Other Supportive Systems

National Performance Indicator 6.2 – Emergency Assistance

The number of low-income individuals or families served by community action that sought emergency assistance and the percentage of those households for which assistance was provided, including such services as:

A. Food
B. Emergency Payments to Vendors, including Fuel and Energy Bills and Rent/Mortgage payments
C. Temporary Shelter
D. Emergency Medical Care
E. Protection from Violence
F. Legal Assistance
G. Transportation
H. Disaster Relief
I. Clothing

Which Agencies?

Agencies that meet the emergency needs of low-income individuals and families through the provision of services and resources should report outcomes for this performance indicator. This includes agencies that offer language translation assistance.

Which Programs or Activities?

Agencies should report those services and resources that are provided to meet immediate, short-term needs of low-income individuals and families.

Among the services and resources that should be counted and reported for this indicator are:

- Emergency vendor payments, such as fuel or utility assistance, rent/mortgage payments;
- Food distribution, including pantries, soup kitchens, food cupboards;
- Shelter for the homeless or those in need as a result of a natural disaster;
- Emergency medical care, including mental health and drug abuse crisis intervention;
- Emergency transportation services;
- Emergency clothing distribution; and

- Emergency legal assistance, including family protection from domestic or other forms of violence, or incarceration.

It is important to note that many of the types of services or financial supports that could be reported for this indicator are similar to those listed and reported for National Performance Indicator 1.2 – Employment Supports. The difference between the two indicators is the context, or purpose, for which these services and resources are provided. If, for example, transportation assistance were provided to a family on a routine basis, such as bus tokens, in order to help them obtain or retain employment, such assistance would be reported under Performance Indicator 1.2. If the same kind of transportation assistance were provided to a family because they needed immediate or "emergency" help only, and the assistance was not provided in any other context than responding to immediate need, then that type of assistance would be reported under this indicator. This service could be a result of a short-term need or an unexpected situation (car repair, illness, release from institution, natural disaster, etc.).

If the service is a result of a chronic situation and it provides support to maintain a family, the service should be included as an Additional Indicator on a blank line under 6.3 (see below). An example of such a situation would be securing subsidized housing for a family when there is no self-sufficiency outcome expected. Another example would be routine use of food pantries by low income families when there is no self-sufficiency outcome expected. Another would be securing health care for adult family members when there is no self-sufficiency outcome expected.

Among the most common sources of funding or resources for the emergency services and resources to be reported for this performance indicator are:

- Community Services Block Grant (CSBG)
- Social Services Block Grant (SSBG)
- Community Development Block Grant (CDBG)
- U.S. Department of Housing and Urban Development Homeless Assistance programs
- U.S. Department of Health and Human Services Family Violence Prevention and Services programs
- Community Health Centers program
- Mental Health Treatment Block Grant -- Community Mental Health Centers programs
- Substance Abuse Treatment Block Grant
- U.S. Department of Agriculture Surplus Food and Supplemental Food Assistance
- LIHEAP
- Federal Emergency Management Assistance (FEMA)
- State and local crisis intervention, disaster relief programs
- National, regional, state or local charities, including faith-based organizations

What to Report?

A. Food

There are many ways in which community action agencies distribute emergency food and account for that distribution, including: 1) the number of food "packages," "bags," cartons, or meals distributed; 2) the overall weight of food distributed; 3) an unduplicated count of the number of individuals or families receiving food assistance; or 4) the number of "times" individuals or families receive food.

In addition to diversity in the way agencies measure and report their food distribution activities, there is also great variation in the degree to which agencies determine the context, or reasons, why individuals and families seek this type of assistance.

In most cases, agencies that have food distribution programs do not assess the reasons why individuals or families seek food assistance other than an overall assumption that the recipients do not have adequate resources to purchase food that meets immediate nutritional needs ("We feed the hungry!").

Because of the diversity of purpose, methods, and accounting among community action food distribution efforts, agencies are asked to describe their food distribution in **one** of the following four categories. States are asked to aggregate and report food distribution in these categories as well. Please be sure to indicate the unit of measurement used from among these options:

1. The number of food "packages," "bags," cartons, or meals distributed; **or**
2. The overall weight of food distributed; **or**
3. An unduplicated count of the number of households (individuals or families) receiving food assistance; **or**
4. The overall numbers of "times" an agency distributes food to households (individuals or families).

B. Emergency Payments to Vendors, including Fuel and Energy Bills and Rent/Mortgage Payments

Community action agencies should aggregate and report the number of **households** for which vendor payments have been made by the agency to meet the emergency needs of those households, in the following four categories:

- Emergency fuel or utility payments funded by LIHEAP or other public and private funding sources;

- Emergency rent or mortgage assistance;

- Emergency medical care; or

- Emergency car or home repair (i.e. structural, appliance, heating system, electrical system, plumbing, sewage).

Again, agencies are asked to report the **number of households** receiving such assistance, **not the total number of payments** made, or the total dollar amount of such payments, nor the number of units of service they received. While it is understood that households may receive more than one type of payment and that such households will be counted more than once when that occurs, it is not expected that households who receive multiple payments in the same category will be counted more than once in that category.

C. Temporary Shelter

Agencies are asked to report the number of **households** (individuals or families) that receive temporary shelter assistance from community action in two categories:

- The number of homeless households receiving temporary shelter; and

- The number of households experiencing emergency situations, such as fires or natural disasters that obtain temporary shelter.

D. Emergency Medical Care

Agencies are asked to report the number of **households** for which emergency medical care has been provided as a result of community action assistance (service or referral).

Examples of such care include:

- Emergency medical care at a community action agency clinic or health facility for injuries that have resulted from an accident or natural disaster; or

- Emergency medical care provided by a health care provider or facility in the community as a result of referral and/or payment from community action.

E. Protection from Violence

Agencies are asked to report the number of **households** (individuals and families) that receive community action assistance in securing emergency protection for adults and/or children from real or potential sources of physical and emotional abuse.

Examples of such assistance include, but are not limited to:

- Assistance in obtaining emergency restraining orders or other form of legal protections against physical and emotional abuse and other forms of violence within families or within the community;

- Emergency shelter for abused adults and their children, either sponsored by the community action agency or as a result of referral or financial support for such services;

- Assistance in obtaining emergency child protective interventions, court orders, or placements.

F. Legal Assistance

Agencies are asked to report the number of **households** that receive emergency legal assistance from the agency, either directly or as a result of partnerships with, or referral to, other organizations within the community.

Examples of emergency legal assistance from community action include, but are not limited to:

- Households that receive emergency immigration assistance or representation by the agency or a partnering organization;

- Households that receive emergency legal and financial management assistance when a family member is at risk of incarceration for failure to meet court-ordered or other financial obligations; or

- Households that receive emergency legal assistance and intervention when they are at risk of imminent eviction from their place of residence, foreclosure, interruption in essential utility service, or suspension of life-sustaining services or resource supports.

G. Transportation

Agencies are asked to report the number of **households** (individuals and families) that receive **emergency transportation** assistance provided either directly by community action or through partnership with or referral to, other service providers.

Emergency transportation assistance includes, but is not limited to, those situations in which households receive bus tokens, taxi vouchers, a loaned automobile, van service, or some other form of transportation to meet immediate and temporary needs caused by the loss of existing transportation due to accident, mechanical failure, theft, or natural disaster.

H. Disaster Relief

Agencies should report the number of **households** (individuals and families) that receive disaster relief assistance directly from community action, in partnership with other organizations in the community, or through referral to other organizations.

Community action disaster relief could include, but is not limited to, those situations in which households receive services and resources to meet needs resulting from natural or man-made disasters, such as fire, flooding, extreme weather, or acts of terrorism.

Forms of relief may include temporary shelter, clothing, toiletry or other personal items, medical care, food, emergency cash, loans and other financial aid, or relocation assistance.

In addition to reporting the number of households that receive immediate disaster relief from community action, agencies should report the number of households that benefit from longer-term agency assistance, such as rebuilding homes or businesses, community facilities, or service systems.

I. Clothing

Just as with food distributions, there are many ways in which community action agencies distribute clothing to needy individuals and account for that distribution, including: 1) the number of "bags" of clothing distributed, 2) an unduplicated count of the number of individuals or families receiving clothing assistance; or 3) the number of "times" individuals or families receive clothing. For the purposes of this reporting, we would prefer to know the **number of households** receiving such assistance, **not the** number of units of service they received.

Goal 6: Low-Income People, Especially Vulnerable Populations, Achieve Their Potential by Strengthening Family and Other Supportive Systems

National Performance Indicator 6.3 – Child and Family Development

The number and percentage of all infants, children, youth, parents, and other adults participating in developmental or enrichment programs that achieve program goals, as measured by one or more of the following:

A. Infants and Children –

1. ***Infants and children obtain age appropriate immunizations, medical and dental care.***
2. ***Infant and child health and physical development are improved as a result of adequate nutrition.***
3. ***Children participate in pre-school activities to develop school readiness skills.***
4. ***Children who participate in pre-school activities are developmentally ready to enter Kindergarten or 1st Grade.***

B. Youth –

1. ***Youth improve physical health and development.***
2. ***Youth improve social/emotional development.***
3. ***Youth avoid risk-taking behavior for a defined period of time.***
4. ***Youth have reduced involvement with criminal justice system.***
5. ***Youth increase academic, athletic or social skills for school success by participating in before or "after" school programs.***

C. Parents and Other Adults –

1. ***Parents and other adults learn and exhibit improved parenting skills.***
2. ***Parents and other adults learn and exhibit improved family functioning skills.***

Which Agencies?

Agencies that work to improve child, youth, and/or family development and functioning should report outcomes for this performance indicator.

Which Programs or Activities?

Among the more common community action agency programs and activities that would produce child, youth, and parent development or functioning outcomes to be reported under this performance indicator are:

A. Infants and Children

1. Head Start (including Early Head Start);
2. State-funded pre-school child development programs;
3. CSBG-funded child development/child care programs;
4. TANF-funded child care programs;
5. Social Services Block Grant supported child care/development programs;
6. Employer-based child care/child development programs serving the children of agency employment program participants;
7. Pre-school enrichment or developmental programs operated by "partnering" organizations within the community to which children of agency program participants are referred and served, including faith-based organizations;
8. Agency clinic or other early childhood health screen and immunization services provided directly or through referral; and
9. Agency early childhood nutrition programs, including those focused on food distribution or supplementation, nutrition instruction and other parental skill building.

B. Youth

1. Before and after school recreational or enrichment programs for school-aged youth;
2. Mentoring programs for at-risk youth;
3. Youth counseling and peer support group activities;
4. Family counseling;
5. Substance abuse prevention programs;
6. Teen pregnancy and STD prevention programs;
7. Educational skill enhancement programs;
8. after-school and summer youth employment training and placement programs;
9. Food and nutrition assistance and instructional programs; and
10. Anger management and conflict resolution instruction.

C. Parents and Other Adults

1. Parenting skill enhancement programs;
2. Family functioning skill enhancement programs, including focus on communications, conflict resolution, supportive relationship building, responsibility sharing, promotion of healthy marriages;
3. Family counseling;
4. Mental health and substance abuse treatment; and
5. Family/domestic violence prevention, intervention, and remediation programs.

What to Report?

Number and Percentage

Agencies are asked to report two numbers for each of the subcategories of this indicator: 1) the number of children, youth, parents, or other adults who achieved the outcome; and 2) the percentage those successful children, youth, parents or other adults represent in relation to all who were *expected to achieve the outcome* during the reporting period.

Examples:

- A community action agency administered health clinic is funded to screen and inoculate all pre-school children of low-income families participating in agency employment training and placement programs. Of the 400 children eligible, and thereby "expected," to receive inoculations during the reporting period, only 300 are inoculated. Under the first "Infants & Children" subcategory, "Infants & children obtain age appropriate immunizations, medical and dental care," report 300 children, or 75% received age appropriate immunizations.

- With CSBG and Federal substance abuse prevention funding, a community action agency sponsors an after school basketball league in partnership with the local YMCA. The league recruits 100 low-income youth to participate. The program expects 60% percent of the youth to attend and participate in half of the games or more during the league season as a benchmark for increasing their athletic and social skills, and staying involved in healthy developmental activities. Over the course of the league season, 40 youth attend and participate in half the games or more. Under the fifth "Youth" subcategory, "Youth increase academic, athletic or social skills for school success by participating in before or after school programs, report 40 youth, or 66% achieved the outcome (40 of 60 "expected" to meet the participation outcome).

"Achieve Program Goals"

Because of the diversity of programs, activities, and outcomes that are to be reported for this performance indicator, the outcome of "achieve program goals" will be defined and measured in a number of ways.

The two most common ways agencies will determine whether children, youth, parents, and other adults "achieve program goals" are: 1) Standardized program goals and achievement levels; and 2) Agency and program-specific goals and achievement levels.

1. Standardized Program Goals and Achievement Levels

   For some Federal, state, or local programs, both public and private, program goals and performance levels are defined by program authorities and are contained in funding agreements with the community action agency.

   Examples:

   - Childhood immunization programs define age-appropriate guidelines for inoculating children to prevent a variety of diseases. Similarly, school systems often require certain immunizations as a condition for enrollment. As such, there is an "expectation" that all children meeting the guidelines for immunization should be served. If a community action agency receives funds to conduct childhood health screens, including inoculation of all eligible children served, the public health expectation is universal inoculation, and the performance of the agency can be measured by the degree to which it achieves that end.

   - Head Start has established a number of child health, developmental, and school readiness objectives and outcome expectations for participating children. Community action agencies with Head Start programs are asked to report the number of children that are deemed to have "achieved" health, developmental and school readiness objectives as defined by the program.

   It is understood that the numbers of children reported "achieving program goals" in Head Start, or any other child or youth development program, may have to be comprised of qualitative assessments of each child's physical growth and health indicators, developmental skill measurements, and/or educational readiness scores.

2. Agency and Program-Specific Goals and Performance Levels

   For most child, youth, and family development programs within community action agencies, program goals, expected outcomes, and the definition of what constitutes "success," or achievement of program goals, will be determined on a case-by-case basis.

Contracts, service agreements, or grant documents are good sources for identifying what constitutes "achieving program goals" for particular programs or activities. These documents most often describe: 1) What the funding is intended to accomplish; and 2) The size of the program or activity being funded, usually expressed as an anticipated number of services or resources to be provided, or individuals or families to be served. In addition, more and more funding documents now speak to both anticipated "outcomes," or "results," and a projected or "target" level of program performance, as measured by the frequency outcomes are achieved.

It is anticipated that community action agencies with child, youth, or family development programs already have ways to define what constitutes "success," and can measure and report the number of children, youth and families "achieving" program goals based upon those definitions. For all of the developmental "outcomes" in this performance indicator nationally accepted age-appropriate guidelines are available to inform agency assessments.

Examples:

A community action agency uses funds from CSBG, a teenage pregnancy prevention grant, and a substance abuse prevention grant, to establish an adolescent mentoring program for 50 girls and 50 boys focused on helping the youth achieve age-appropriate developmental reasoning and decision making skills that will help them avoid certain risk-taking behaviors. Based upon a review of prevention studies, the community action agency expected 60% of adolescents enrolled to complete the entire one-year mentoring program. The agency set as a performance target that half of those completing the program, or 30 youth, would remain "drug free" and not engage in sexual activity that could result in pregnancy both during their participation and for a minimum of six months after program completion. Twenty (20) of 30 youth achieved these outcomes. The agency would report under the "Youth" subcategory 3, "20 youth (66%) avoided risk-taking behaviors for a defined period of time."

- A community action agency utilizes a variety of funding sources to offer parenting skill enrichment courses for adult participants in all its programs. The courses are designed to help parents demonstrate improved ability to: 1) communicate with their children; 2) establish and maintain appropriate structure, boundaries, and common expectations within the family; and 3) reduce the incidence of physical or emotional abuse through better anger management and alternative approaches to parent-child conflict resolution. Based on a review of research and other literature on parenting skill training, the agency identified specific parent behaviors that would demonstrate improved functioning for each of the three areas described above. All 40 parents enrolled in the courses completed a self-assessment questionnaire listing the specific behaviors. Of the 40 parents

completing the self-assessment, 39 reported using parenting skills learned in the course. As a result, the agency could report under the "Parenting" subcategory, "39 (98%) parents learn and exhibit improved parenting skills."

A note about context and additional indicators:

6.3 Additional Indicators – Family Maintenance

In keeping with the goals and mission of Community Action, the National Performance Indicators collect specific information that focuses on **outcomes that capture movement toward poverty elimination.** With this focus, the National Performance Indicators require you to think about the context in which you are providing services in order for you to determine where your various outcomes should be reported.

We understand that family and individual maintenance activities, sometimes referred to as "safety-net services," are sometimes necessary in order to stabilize families and prepare them to begin working on self-sufficiency goals or to move people beyond a crisis or emergency service and that there are a number of outcomes that are achieved by families **who are not working to achieve a self-sufficiency outcome**.

These are outcomes that enable the family to work toward **achievement of potential.** Securing subsidized housing, routine receipt of food baskets, receipt of clothing, securing non-employment related health care in advance of illness or health emergency, are examples, as they do not indicate movement toward self-sufficiency, but rather reflect a measure of increased family strength. These do not demonstrate an increase in a family's ability to function independently, but do demonstrate an increased ability of the family to function to maintain a safe and stable household situation, with assistance, and in the context of a "supportive system." These might be services that your partner organizations actually deliver but that you coordinate through your overall efforts to move people out of poverty. These efforts may still be critical to your anti-poverty work.

However, outcomes that are the neither the result of services provided in the context of self-sufficiency efforts (Goal 1) nor emergency situations (Goal 6.2) do **not** belong under those indicators. Therefore, **you are asked to identify these family maintenance outcomes and include this information on the blank lines under indicator 6.3. These indicators should be identified and reported in the following format in the blank rows of the forms: "Family maintenance: outcome description....." This will allow us to aggregate this type of data at the national level and will help us decide whether additional indicators or instructions are needed in the future.**

Once families are stabilized, we assume you will begin to collect outcomes related to self-sufficiency and you can move these statistics under the appropriate indicators.