



## Office of Community Services Community Services Block Grant Training and Technical Assistance Tracking Form

### Why is OCS collecting this information?

The Training and Technical Assistance (TTA) Tracking Form is a direct outcome of the Community Services Block Grant (CSBG) TTA Needs Assessment Survey. This form is a tool designed to collect information from the CSBG TTA providers describing the need, type of TTA intervention<sup>1</sup> provided, and what changed as a result of the TTA. It measures where targeted TTA is delivered within the CSBG Network in alignment with project objectives. Detailing specific activities and focus areas, the form acts as a strategic guide, directing the Office of Community Services' (OCS) efforts for impactful TTA and bridging the gap between identified needs and interventions provided by CSBG TTA providers.

### What will OCS do with this information?

The information submitted will be utilized by OCS to measure if the TTA provided aligns with the priority areas identified in the CSBG TTA Needs Assessment Survey.<sup>2</sup> The information will be used to identify successful interventions, duration of the intervention, the type of agencies/organizations receiving TTA, as well other data trend analyses. The information will also be used to inform future funding opportunities.

### What is Targeted TTA?

Targeted TTA is a tailored intervention providing support to respond to a need or problem. These interventions are thoughtfully designed to enhance knowledge, increase capacity, promote equity, and enhance effectiveness. Targeted TTA is distinguished by its clear intention to produce tangible and enhanced outcomes through customized interventions that address the diverse and specific needs of the CSBG Network or the TTA recipient. Targeted TTA is not a sporadic engagement (e.g., general telephone calls, emails, or questions); rather, it involves sustained efforts such as consultations, webinars, and podcasts. These activities are carefully planned and executed, aiming to achieve lasting positive impact through well-organized interventions. *See Appendix for examples of targeted TTA.*

### What information should be included?

Organizations receiving CSBG funding under a cooperative agreement or contract are considered CSBG TTA providers and must complete the CSBG TTA Tracking Form when using CSBG funding to provide targeted TTA to the CSBG Network (states, territories, directly-funded tribes and tribal organizations, CSBG-eligible entities, and state associations). TTA to be captured in this form includes both TTA referred by OCS and TTA self-referred by a state, tribe, territory state association, or CSBG eligible entity.

### How to Complete and Submit the Form

The CSBG TTA provider receiving funding under a cooperative agreement or contract issued by OCS will review each section and input a response or select from the dropdown for each occurrence of TTA. Each instance of targeted TTA will require a separate form. The form(s) must be submitted every 90 days (aligning with the quarters within the period of performance). The completed form(s) must be uploaded as a Grant Note in GrantSolutions.

Quarterly Due Dates			
December 31	March 31	June 30	September 30

<sup>1</sup> An intervention, in the context of this form, signifies engaging in purposeful and focused action or set of activities designed to address specific needs and challenges within the Network. These interventions aim to provide TTA where needed, ensuring targeted TTA aligns with project objectives to achieve outcomes that bring about the most significant positive impact.

<sup>2</sup> CSBG-DCL-2022-47 TTA Needs Assessment Summary Report and Dashboard FY 2022

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to assess the effectiveness of its TTA service offerings and for continued improvements to its TTA planning for CSBG-funded grant recipients of OCS discretionary awards. Public reporting burden for this collection of information is estimated to average 45 minutes per grantee, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This collection of information is required to retain a benefit related to training and technical assistance (42 USC 9913). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0558 and the expiration date is 11/30/2026. If you have any comments on this collection of information, please contact [CSBGStates@acf.hhs.gov](mailto:CSBGStates@acf.hhs.gov).

# OCS CSBG TTA TRACKING FORM

## CSBG TTA PROVIDER

1. CSBG TTA Provider Organization Name: \_\_\_\_\_
2. CSBG TTA Provider POC Name (for follow-ups about the information provided in this form): \_\_\_\_\_
3. CSBG TTA Provider POC Email Address: \_\_\_\_\_
4. CSBG TTA Provider Entity:

## DETAILS ON TTA PROVIDED TO THE CSBG NETWORK

1. Quarterly Submission Timeframe:
2. Date(s) TTA Provided: From: \_\_\_\_\_ To: \_\_\_\_\_
3. TTA Reporting Period: \_\_\_\_\_
4. Approximate Number of Hours of TTA Provided: \_\_\_\_\_
5. Referral Type:
6. Frequency of TTA Provided:  One-time  Recurring  
If recurring, what is the frequency of TTA (how often)? \_\_\_\_\_
7. CSBG Organization Name: \_\_\_\_\_
8. CSBG Organization Type:
9. CSBG Recipient POC Name (for follow-ups about the TTA provided): \_\_\_\_\_
10. CSBG Recipient POC Email Address: \_\_\_\_\_
11. CSBG Recipient State (2-letter abbreviation): \_\_\_\_\_ CSBG Recipient Region:
12. TTA was provided for the following primary CSBG role(s) in carrying out the CSBG Program:  
  
 Other: \_\_\_\_\_
13. Delivery Method (select all that apply):  Training Module  e-Guide  Consultation (e.g., Zoom/Teams Video Meetings/In-person/Telephone)  Onsite Training  Case Study  Training Video  Webinar  Podcast  Other: \_\_\_\_\_
14. TTA Priority Area(s) (as outlined on the [CSBG Needs Assessment Dashboard](#) (select all that apply)):
  - **The Basics:**
    - Orientation for New CSBG Employees
    - Other: \_\_\_\_\_
  - **Data Collection and Analysis:**
    - Data Storytelling and Messaging  Collection, Analysis, and Sharing of Data
    - Other: \_\_\_\_\_
  - **Service Models, Strategies, and Partnerships:**
    - Developing Effective Community Needs Assessment  Developing, Implementing, and Evaluating Services
    - Developing and Sustaining Strategic Partnerships to Leverage Funds  Identifying and Implementing Innovative Approaches  Identifying, Implementing, and Sharing Best Practices  Developing and Implementing Training Activities for CSBG Staff  Identifying and Implementing Strategies to Improve Coordination  Ensuring and Advancing Equity
    - Serving Underserved Areas  Customer Engagement
    - Other: \_\_\_\_\_

- **Mandatory CSBG Requirements:**

- Mandatory CSBG Requirements  Organizational Standards  Accountability Measures  Developing and Implementing CSBG State Plan  Developing the CSBG Annual Report  Setting Realistic Goals and Targets
- Other: \_\_\_\_\_

- **Monitoring:**

- Preparing for a Federal Monitoring Review  Best Practices for States when Conducting Monitoring Visits
- Eligible Entity/CAA Preparation for a State Monitoring Visit
- Other: \_\_\_\_\_

- **Financial Oversight and Administration:**

- Overcoming Obstacles in Distributing CSBG Funding  Financial Management and Accountability
- Other: \_\_\_\_\_

- **Organizational Capacity and Performance:**

- Assessing Organizational Capacity  Developing and Implementing Processes Relating to Corrective Action
- Monitoring and Evaluating the Progress of Eligible Entities with Technical Assistance Plans  Assessing Organizational Culture  Measuring the Effectiveness of TTA  Understanding and Implementing the Concepts of Performance Management
- Other: \_\_\_\_\_

- **Governance & Tripartite Board:**

- Developing Comprehensive and Effective State CSBG Policies and Procedures  Tripartite Board
- Other: \_\_\_\_\_

- **Workforce Management:**

- Workforce Diversity, Equity, and Inclusion  Strategies for Recruiting, Selecting, and Onboarding Staff
- Strategies for Reducing Turnover, Retaining Staff, and Succession Planning
- Other: \_\_\_\_\_

- **Disaster/Crisis Response & Relief:**

- Developing a Disaster/Crisis Response Strategy
- Other: \_\_\_\_\_

- **Legal Consultation:**

- Legal Consultation Relating to Fiscal Challenges  Legal Consultation Relating to Organizational Challenges
- Legal Consultation Relating to Incorporating Organizational Standards
- Other: \_\_\_\_\_

- **Any area not listed above:**

**15. Provide a brief narrative describing TTA provided:**

**16. Provide a narrative detailing the identified outcome(s) and impact as a result of TTA provided: What conditions changed?**

## APPENDIX

### Descriptions of Targeted TTA

Targeted TTA may include, but is not limited to:

- *Targeted TTA for Successful State-level Oversight and Administrative Operations of CSBG:* A targeted intervention to provide assistance with drafting policies and procedures. This tangible capacity-building intervention lays the foundation upon which the state will be able to advance equity through compliance with the tripartite board structure, conduct legislative and public hearings, implement statewide service delivery standards and models, and create a culture of accountability for required data collection and reporting. This TTA focuses on strengthening the state's ability meet federal mandates for receipt of CSBG funding.
- *Targeted TTA for Performance Management Alignment (States):* A targeted intervention extended to a CSBG state or territory that can showcase measurable outcomes that fulfill CSBG administration requirements via *one-on-one* sessions (e.g., aiding a state with data collection from an eligible entity) or *collectively* across the Network (e.g., conducting a webinar on SmartForm completion).
- *Targeted TTA for Legal (Eligible Entities):* A targeted intervention provided to an eligible entity that can demonstrate a measurable outcome that has led to the promotion or enactment of a promising legal practice or policy for an eligible entity (e.g., guidance from the TTA provider led to an issuance of a policy or procedure that safeguards an eligible entity and is sustainable); enhanced knowledge of management principles, education, or training (e.g., a webinar was held and a pre/post survey confirms that the webinar lead to increased knowledge), and improving organizational stability and capacity building (e.g., training on succession planning for eligible entities). Targeted TTA should be driven by the objectives in the cooperative agreement or contract and be focused on the outcomes tied to the objective rather than simply an output which would be captured in a project work plan.
- *Targeted TTA for Financial Oversight and Administration:* A targeted intervention that focuses on enhancing the knowledge and capacity of organizations to successfully manage and distribute CSBG funding. It addresses overcoming obstacles in distributing funds, ensuring financial management and accountability, and supporting other relevant financial concerns.
- *Targeted TTA for Monitoring:* A targeted intervention that aims to help organizations prepare for federal monitoring reviews and state-conducted monitoring visits. It provides guidance on best practices for states when conducting monitoring visits, as well as aiding eligible entities and CAAs in their preparation for state monitoring visits.
- *Targeted TTA for Organizational Capacity and Performance:* A targeted intervention designed to improve the overall capacity and performance of an organization. It covers assessing organizational capacity, developing and implementing corrective action processes, monitoring and evaluating the progress of eligible entities with technical assistance plans, assessing organizational culture, measuring the effectiveness of TTA, understanding and implementing performance management concepts, and addressing other organizational development concerns.