



## 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 capture insights from CSBG TTA providers. It measures where targeted TTA is delivered within the CSBG Network, aligning with cooperative agreements, contracts, and project objectives. Detailing the 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 the priorities areas identified in the CSBG TTA Needs Assessment Survey.<sup>1</sup>

### What is Targeted TTA?

Targeted TTA is precisely tailored interventions. These interventions are thoughtfully designed to enhance knowledge, increase capacity, and enhance effectiveness throughout the CSBG Network. Targeted TTA is distinguished by its clear intention to produce tangible and enhanced outcomes through customized approaches that addresses the specific needs of the CSBG Network or the TTA recipient. This tailored assistance is directly aligned with the comprehensive CSBG TTA Needs Assessment Survey categories, ensuring that the interventions precisely match the identified needs. Targeted TTA is not a sporadic engagement; rather, it involves sustained efforts such as consultations, webinars, podcasts, and presentations on data-driven topics during a state or regional conference. These activities are strategically implemented with the overarching goal of creating sustainable impacts. *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 TTA referred by OCS or 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. 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 Grant Solutions.

Quarterly Due Dates			
December 31	March 31	June 30	September 30

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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 .5 hours 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 ☐ 1:1 Consultation (e.g., Zoom or Teams Video Meetings) ☐ On-site Training ☐ Presentation on a Data-Driven Topic During a State or Regional Conference ☐ Case Study ☐ Training Video ☐ Webinar ☐ Podcast ☐ Other: \_\_\_\_\_
14. TTA 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 ☐ 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:**

- ☐ Strategies for Recruiting, Selecting, and Onboarding Staff
- ☐ Strategies for Reducing Turnover, Retaining Staff, and Succession Planning
- ☐ Other: \_\_\_\_\_

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

- ☐ Developing a Disaster or 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:**

## APPENDIX

### Descriptions of Targeted TTA

Targeted TTA includes, but is not limited to:

- *Targeted TTA for Successful State-level Oversight and Administrative Operations of CSBG:* A targeted service to provide assistance with drafting policies and procedures. This tangible capacity-building service lays the foundation 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 to meet federal mandates for receipt of CSBG funding.
- *Targeted TTA for Performance Management Alignment (States or Territories):* A targeted service 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 service 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- or post- survey 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 plan.
- *Targeted TTA for Financial Oversight and Administration:* A targeted service 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 service 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 community action agencies in their preparation for state monitoring visits.
- *Targeted TTA for Organizational Capacity and Performance:* A targeted service is 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.