

# UNDERSTANDING REPORTING REQUIREMENTS AND COLLECTING DATA

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March 30, 2016



# Agenda

- Background on reporting
  - Why is it important?
  - Process and timeline
- Forms and data elements
  - Form A
  - Form B
  - Form E
- Resources and support
- Questions

# Why is Reporting Important?

- Program-level monitoring and analysis
  - Identifies commonalities among high-performing projects
  - Informs future funding decisions
- Grantee-level monitoring
  - Keeps program specialists informed about grantee accomplishments and challenges
  - Helps program specialists identify grantee support needs

# Timeline

| Reporting Period        | Reporting System Opens  | Report Due Date        |
|-------------------------|-------------------------|------------------------|
| September 30 – March 31 | April 1 <sup>st</sup>   | April 30 <sup>th</sup> |
| April 1 – September 29  | October 1 <sup>st</sup> | Oct. 30 <sup>th</sup>  |

- First reporting period for FY 2015 grantees:  
September 30, 2015 – March 31<sup>st</sup> 2016
- Online system opens: April 1, 2016
- Reports due: April 30, 2016

# Overview of Forms

- Cover Page
- Form A: Performance Measures
- Form B: Program Indicators
- Form E: Activity Based Expenditures

**Form A:**

**PERFORMANCE MEASURES**

# Columns

| Appendix C: Performance Progress Report Form<br>PERFORMANCE MEASURES SF-PPR FORM A                      |  |                                   |   |  |                       |   |
|---|--|-----------------------------------|---|--|-----------------------|---|
| 1. Federal Agency and Organization Element to Which Report is Submitted<br>Office of Community Services |  |                                   | 2. Federal Grant or Other Identifying Number Assigned by Federal Agency           |  | 3a. DUNS -<br>3b. EIN | 4. Reporting Period<br>End Date<br>09/30/2005 |
| A. Performance Measures   |  |                                   |   |  |                       |   |
| (1)<br>Indicator Number   | (2)<br>Objective/Goal                      | (3)<br>Indicator                  | (4)<br>Baseline   | (5)<br>Project Target  | (6)<br>Actual To Date | (7)<br>Explanation                            |
| A-01-B  | Create new businesses to employ low-income | Total # of new businesses created |  |  | <input type="text"/>  | <input type="text"/>                          |

## Reference:

1. Indicator Number
2. Objective/Goal
3. Indicator

## Confirm:

4. Baseline
5. Project Target

## Complete:

6. Actual to Date (cumulative)
7. Explanation

# Column 2: Objectives/Goals

- Create new businesses to employ low-income individuals
- Expand existing businesses to employ low-income individuals
- Create positions to employ low-income individuals
- Create full-time positions with benefits
- Employ low-income individuals in positions created
- Create full-time positions with opportunity for advancement
- Help low-income people retain new jobs
- Leverage additional funds to increase project success
- Generate revenue through CED-created businesses

# Column 3: Indicators

| Indicator Number | Objective / Goal   | Indicator  |
|------------------|--|--|
| A-01-B           | Create new businesses to employ low-income individuals                             | Total number of businesses created                               |
| A-02-B           |  | How many of those businesses were created at least 12 months ago |
| A-03-B           |  | How many of those businesses lasted at least 12 months           |

# Column 4: Baseline

- Data from your last semi-annual PPR
- Prepopulated based on previous report field entry
- Cannot be edited
- Will be all zeroes for your first report

# Column 5: Project Target

| Indicator Number | Objective / Goal  | Indicator   | Project Target |
|------------------|---|---|----------------|
| A-01-B           | Create new businesses to employ low-income individuals      | Total number of new businesses created  |                |
| A-04-B           | Expand existing businesses to employ low-income individuals | Total number of businesses expanded   |                |
| A-06-J           | Create positions to employ low-income individuals           | Total # of full-time positions created  |                |
| A-13-E           | Prepare low-income individuals for employment               | Total number of low-income individuals trained in skills for the jobs created |                |
| A-25-F           | Leverage additional funds to increase project success       | How many total dollars has your project leveraged?                            |                |

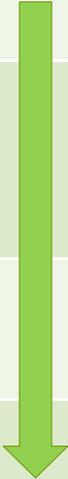


# Column 6: Actual to Date

- Four indicator categories:
  - Businesses
  - Positions
  - Employees
  - Funding
- Cumulative from the beginning of the grant

# Column 6: Actual to Date

## Businesses & Positions

| Indicator Number | Objective / Goal   | Indicator  | Actual to Date  |
|------------------|--|--|---|
| A-01-B           | Create new businesses to employ low-income individuals                     | Total number of new businesses created                                 | <b>Cumulative over the course of your grant</b><br> |
| A-04-B           | Expand existing businesses to employ low-income individuals                | Total number of businesses expanded                                    |   |
| A-00-J<br>New!   | Create positions to employ all individuals (low-income and non-low-income) | Total # of full-time positions created (low-income and non-low-income) |   |
| A-05-J           | Create positions to employ low-income individuals                          | Total number of part-time positions created                            |   |
| A-06-J           | Create positions to employ low-income individuals                          | Total # of full-time positions created                                 |   |

# Column 6: Actual to Date

## Positions with Benefits

### A-06-J: Total FT positions created

A-09-J  
health  
benefits

A-10-J  
sick leave

A-11-J  
retirement  
benefits

A-12-J  
profit sharing

# Column 6: Actual to Date

## Employees

| Indicator Number | Objective / Goal                              | Indicator  | Actual to Date |
|------------------|---|--|----------------|
| A-13-E           | Prepare low-income individuals for employment | Total # of low-income individuals trained in skills for the jobs created |                |
| A-14-E           |   | # of those low-income individuals trained who were TANF recipients       |                |

# Column 6: Actual to Date

## Employees

| Indicator Number | Objective / Goal  | Indicator   | Actual to Date |
|------------------|---|---|----------------|
| A-15-E           | Employ low-income individuals in positions created          | Total # of low-income individuals, including TANF recipients, employed in the full-time positions created             |                |
| A-16-E           |   | # of those low-income individuals employed who were TANF recipients   |                |
| A-17-E           | Create full-time positions with opportunity for advancement | Average STARTING wage of all low-income individuals, including TANF recipients, placed in full-time positions created |                |
| A-18-E           |   | Average STARTING wage of TANF recipients placed in full-time positions created  |                |
| A-19-E           |   | # of individuals in full-time positions created who received job promotions   |                |
| A-20-E           |   | # of individuals in full-time positions created who received pay raises   |                |

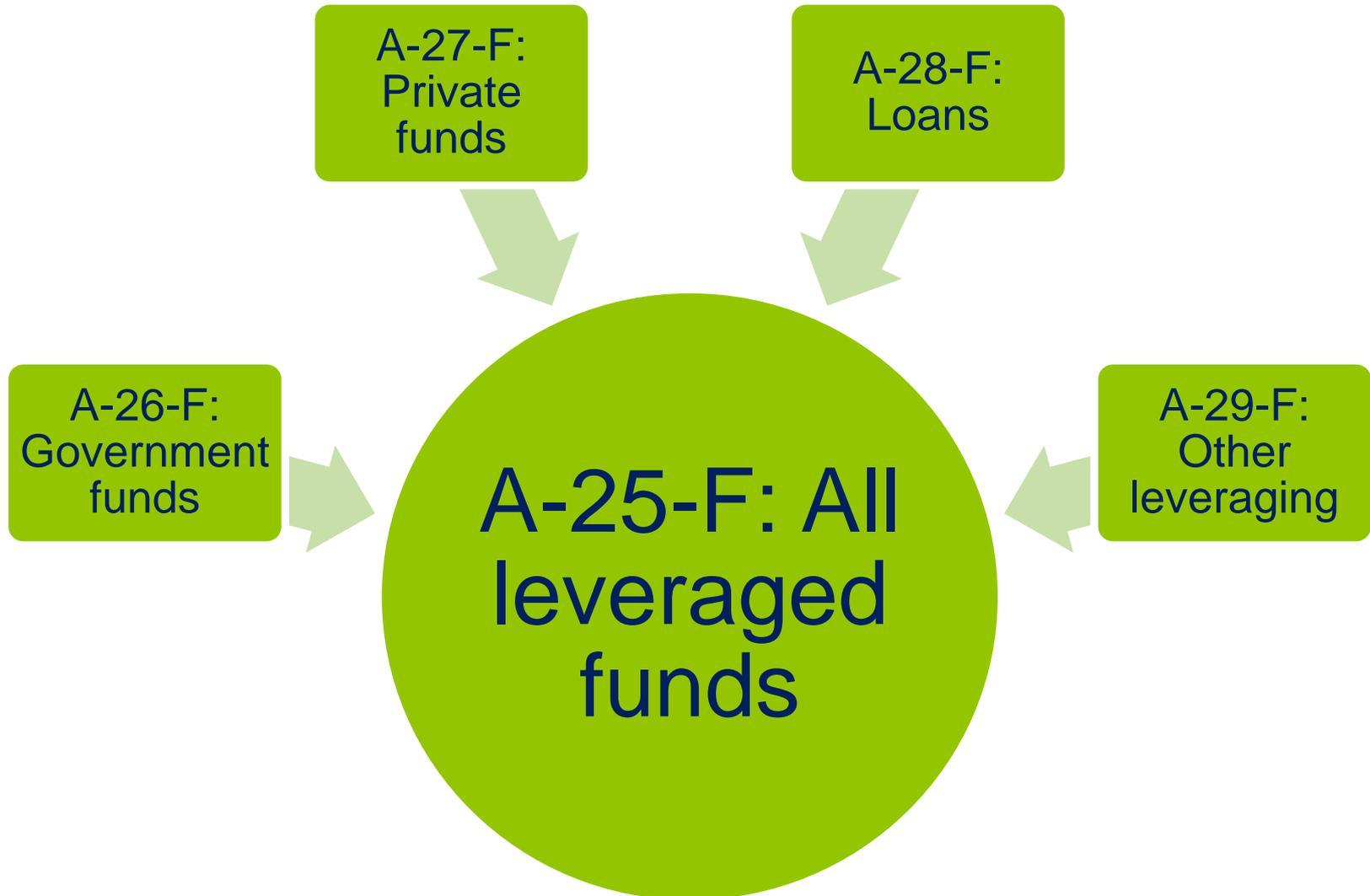
# Column 6: Actual to Date

## Funding (Leveraging & Program Income)

| Indicator Number | Objective / Goal                                      | Indicator  | Actual to Date  |
|------------------|---|--|---|
| A-25-F           | Leverage additional funds to increase project success | How many total dollars has your project leveraged?                   |  |
| A-26-F           |   | How many dollars has your project leveraged from government funds?   |   |
| A-27-F           |   | How many dollars has your project leveraged from the private sector? |   |
| A-28-F           |   | How many dollars has your project leveraged from loans?              |   |
| A-29-F           |   | How many dollars has your project leveraged from other sources?      |   |
| A-30-F           | Generate revenue through CED-created businesses       | How much program income has your CED project generated?              |   |

# Column 6: Actual to Date

## Leveraging



# Column 6: Actual to Date

## Business and Position Longevity Measures

| Indicator Number | Objective / Goal                                       | Indicator   | Actual to Date |
|------------------|--|---|----------------|
| A-02-B           | Create new businesses to employ low-income individuals | # of new businesses that were created AT LEAST 12 months ago  |                |
| A-03-B           |  | # of new businesses created at least 12 months ago that have been or were operational in the community for AT LEAST 12 consecutive months |                |
| A-07-J           | Create positions to employ low-income individuals      | # of those full-time positions that were created AT LEAST six months ago  |                |
| A-08-J           |  | # of full-time positions created that have been or were operational in the community for AT LEAST six consecutive months                  |                |

# Column 6: Actual to Date

## Business Longevity Measures

**A-01-B**

**All businesses ever created**

**A-02-B**

**All businesses created AT  
LEAST 12 months ago**

**A-03-B**

**Businesses  
that lasted  
AT LEAST  
12  
mos**

# Column 6: Actual to Date

## Position Longevity Measures

**A-06-J**

**All full-time positions ever created**

**A-07-J**

**All full-time positions  
created AT LEAST six  
months ago**

**A-08-J**

**Full-time positions  
that lasted  
AT LEAST  
6 mos**

# Column 6: Actual to Date

## Employee Longevity Measures

| Indicator Number | Objective / Goal                            | Indicator  | Actual to Date |
|------------------|---|--|----------------|
| A-21-E           | Help low-income individuals retain new jobs | Total # of low-income individuals who were hired into a CED-created full-time position AT LEAST six months ago |                |
| A-22-E           |   | Total # of low-income individuals who retained their full-time jobs for AT LEAST six consecutive months        |                |
| A-23-E           |   | # of TANF recipients who were hired into a CED-created full-time position AT LEAST six months ago              |                |
| A-24-E           |   | # of TANF recipients who retained their full-time jobs for AT LEAST six consecutive months                     |                |

# Column 6: Actual to Date

## Employee Retention

**A-15-E:** All low-income individuals ever hired

- Includes **A-16-E:** All TANF recipients ever hired

**A-21-E:** Low-income individuals hired 6+ mos ago

- Includes **A-23-E:** TANF recipients hired 6+ months ago

**A-22-E:** Low-income individuals retain job 6+ mos

- Includes **A-24-E:** TANF recipients retain jobs 6+ months

# Column 7: Explanation

- For all questions you answered zero, you must enter *one* of the following:
  - **“NA” for not applicable** – this indicator is not relevant to your program;
  - **“DNA” for data not available** – the indicator is relevant, but you do not have this information; *or*
  - A short explanation of why your program currently has zero for indicators that are applicable and you track, but are just at zero. For example, “No jobs were created because construction hasn’t been completed yet.”

**Form B:**

**QUALITATIVE MEASURES**

# Form B: Columns

| Appendix C: Performance Progress Report Form<br>PROGRAM INDICATOR SF-PPR FORM B                                |   |   |                                  |
|--|---|---|----------------------------------|
| <u>1. Federal Agency and Organization Element to Which Report is Submitted</u><br>Office of Community Services |   | <u>2. Federal Grant or Other Identifying Number Assigned by Federal Agency</u><br>90E |                                  |
|  |   | <u>3a. DUNS -</u>   | <u>4. Reporting Period</u>       |
|  |   | <u>3b. EIN</u>  | <u>End Date</u><br>09/30/2005    |
| <b>B. Program Indicators</b>   |   |   |                                  |
| <u>(1)</u><br><u>Activity Number or Label</u>  | <u>(2)</u><br><u>Activity Description</u> | <u>(3)</u>  | <u>(4)</u><br><u>Explanation</u> |
| <u>Project Description</u>   |   |   |                                  |
| <u>*A-01</u>   | Project Strategy                          |   | <b>Not cumulative!</b>           |

## Reference:

1. Activity Number
2. Activity Description

## Ignore:

3. Blank!

## Complete:

4. Explanation

# Form B: Parts A-D

- **Part A: Project Information (A-01 through A-08)**
  - Required fields
  - Complete only in first report, prepopulated in subsequent
- **Part B: Accomplishments**
  - Broken into 13 different indicators
- **Part C: Challenges**
  - Broken into same 13 indicators as Part B
- **Part D: Changes (D-01 through D-12)**
  - E.g., planned services, planned timeline, budget, etc.

**Form E:**  
**ACTIVITY-BASED**  
**EXPENDITURES**

# Activity-Based Expenditures

| Appendix C: Performance Progress Report Form<br>ACTIVITY BASED EXPENDITURES SF-PPR-E                           |                             |  |                         |                                     |   |
|--|-----------------------------|--|-------------------------|-------------------------------------|---|
| <b>1. Federal Agency and Organization Element to Which Report is Submitted</b><br>Office of Community Services |                             | <b>2. Federal Grant or Other Identifying Number Assigned by Federal Agency</b><br>90E1 |                         | <b>3a. DUNS -</b><br><b>3b. EIN</b> | <b>4. Reporting Period End Date</b><br>09/30/2005 |
| E. Activity Based Expenditures   |                             |  |                         |                                     |   |
| (1)<br>Activity Number or Label  | (2)<br>Activity Description | (3)<br>Total Estimated Expenditures  | (4)<br>Funding Expended | Delete                              |   |
| E-1  |                             | \$0  | \$0                     | <input type="checkbox"/>            |   |
| <b>Total:</b>  |                             | \$0  | \$0                     |                                     |   |

Add E. Activity Based Expenditures:

## Reference:

1. Activity number or label

## Complete:

2. Activity description  
3. Total estimated expenditures  
4. Funding expended

More information:

**SUPPORT AND RESOURCES**

# Resources and Technical Assistance

- Conference Flash Drive
- Ongoing support through [OCSRegistrar@icfi.com](mailto:OCSRegistrar@icfi.com)
- PPR Information Page:  
<http://www.acf.hhs.gov/programs/ocs/resource/ce-d-ppr-information-page>