

REPORT ON CHARTER MEETING
OF NATIONAL ROMA PEER TO PEER ADVISORY COUNCIL

Our Goal for the first meeting was to begin dialogue regarding several topics. These topics fell into three areas:

Overall issues:

- ways to promote and expand the CAA Network's adoption of outcomes management and accountability
- issues and barriers that impede full implementation of IM 49 and ROMA as a revitalization of CAAs
- responses to issues that various states and regions may have

National ROMA Peer to Peer project:

- the status of the current Peer to Peer training project
- directions for further expansion of the National Peer to Peer Train the Trainer program
- specialized curriculum modules and related ROMA products

Training, in general:

- ways to support trainers and the collaborative efforts of state CSBG agencies and State CAA Associations
- “Best Practices Models” to guide future training

TUESDAY July 20, 2004

The meeting opened with a Welcome from John Wilson, Executive Director of the Community Action Association of Pennsylvania, grantee for the National ROMA Peer to Peer Train the Trainer project.



John provided a background: the initial idea for the national project began in Pennsylvania in 1997 with the Virtual Outcomes College (VOC). VOC was developed by the Community Action Association of Pennsylvania in response to an OCS request to provide tools to facilitate a change in the CSBG/CAA network culture. CAAP set out to educate, to build capacity, and to increase the effectiveness of the network through basic training and introduction to ROMA. We also wanted to support the capacity of the network to be responsive to political climate, and to provide a new approach to justify allocation of resources to our work.

While accountability is not a new concept, much of the work being done was not specifically geared to the Community Action network. We felt that the network needed to have expert consultation for the initial introduction to the ROMA concepts, so we brought in expertise from outside the network, with the recognition of the value of management and accountability work being done in other disciplines. We needed to adapt the best quality information available about management for results to fit our own culture, and to identify ways our culture needed to change to meet the new demands of “the times.”

However, we knew that the network would not be able to sustain the costs of external consultants, so we conceived of a “Peer to Peer” model, where we would train individuals in the network to become trainers in their own states.

The ROMA curriculum was developed with The Center for Applied Management Practices, to standardize our way of talking about concepts, to establish a common language and set of tools. And the training the Peer Trainers participated in was like an apprenticeship – where they are familiarized with the curriculum, exposed to Master Trainers delivering the material and provided with opportunities to practice delivering the curriculum with the guidance of the Master Trainers.

When we began thinking about this process, we wanted to stimulate the development of in-house expertise in every state. We saw the first role of the Peer Trainers was to inject this new knowledge base into the CAA culture. And then to disseminate the “vision” of how ROMA could be used to revitalize CAAs and refocus the network.

The Advisory Council represents various segments of the CAA network:

National Organizations, State CSBG offices, State Community Action Associations,
Local Community Action Agencies and Private Consultants.

(Some of the members are certified ROMA trainers.)

The Advisory Committee members introduced themselves:



James Norman (NY), Glen Kamber (ROMA Clearinghouse),



Chris Reis (OH),



Susan Eckerle (MO),

Judy Mason (NCAP)



David MacDonald (CT)

Vaughn Clark (OK), Jamie Reed (PA), Jane Conroy (VA), Dan Jordan (WA),



Kip Bomar (KY), Shirley Tafoya (CO),



Michelle Pulce (IL),



Francie Mathes (MN),

Fred Richmond (NPtP)



Harry Adrian (PA), Janet Carl (IA)



Jim Masters (CA),

Ramsey Alwin (NASCSP)



and Jenae Bjelland (OR).

Not present for this meeting were: Diane Cooper-Currier (NY), Lorraine Daniels (GA), Zack Hamlett (NC), Jane Killen (LA), and Richard Schlimm (WI).



Barbara Mooney, Training Director, CAAP, then moved the group into an activity.

She asked the Council Members to **identify the results of the ROMA training** in each member's sphere of influence. Members were asked to think of the following questions:

What has changed or is in the process of changing? What has happened?

Are we better off? What barriers have been overcome?

What do you think you/your state is doing particularly well?

This exercise credited ROMA training with the following:

1) An increase in self-awareness among local CAAs regarding the nature and purpose of Community Action Agencies. At many levels throughout the nation, we are better able to answer the questions: Who are we? Who do we want to be?

2) An increased ability and desire to form partnerships between state CSBG offices and state Community Action Associations.

3) An increased ability to identify and document outcomes that are achieved as a result of CAAs services and programs.

4) An increased ability to report on outcomes, including those that are achieved through other funding coming into the CAA (not just CSBG) and also those that are

achieved through partnerships with other service providers, policy makers and community groups.

It also cautioned that ROMA training produces short term results if it is not followed by other actions. Training helps increase understanding and the knowledge base of those attending, and may provide participants with some skills and basic tools (logic model, scales, matrices) that they can learn to use in the training session. However, without additional action, based on the training as a catalyst, the above cited “results” would not have been accomplished. (*for more [impact ideas](#), see attached Advisory Council remarks*)

Dr. Margaret Washnitzer addressed the Council Members, and brought some information about the current and projected status of CSBG and other matters that may have impact on the



CAA network.

After the group had asked Dr. Washnitzer several questions, a lively **general discussion** followed. Some questions that were raised:

What is the value (and the responsibility) of the anti-poverty “designation” of CSBG eligible entities?

Are we about moving people out of poverty? Or moving them to greater self-sufficiency? (how do these two statements differ, and does this difference effect the way we do business?)

How do we shift our focus from better (increased quantity) services that meet an immediate client or community need, to better integration of a variety of services that help people and communities meet their long term goals? Do more services actually keep people dependent?

What is the perception of CAA services? (re: article from Wall Street Journal) How do we see ourselves? Who are we? Who do we want to be?

How do we acknowledge the long term process that we are engaged in? Yearly record keeping does not allow us to track much of the actual work being done, and yet these annual “snap shots” are the core of all current reporting systems. The long term progress over many years may be lost if we do not set out to capture this data over time.

Another activity asked Council Members to identify topic areas that are needed to provide additional understanding, knowledge, skills and tools, needed as the next step for the Peer Trainers. **Topic ideas were shared with the group.** These included:

- Training for CAA Board Members
- Return On Investment
- Strategic Thinking
- Integration
- Implementation
- Assessment and quality assurance

(for more [topic ideas](#), see attached Advisory Council remarks)

The Council broke into small groups (3 or 4 to a group), and each group took a topic.

Each group was asked to fully consider one of the topics. Some guiding questions were:

- Discuss what has already worked to address the topic area.
- How can we strengthen these efforts?
- What has not worked? Or not even been tried?
- What tools and/or curriculum are needed to make address the topic?
- How important is this topic?

Small groups reported out and their ideas were discussed. A summary of the discussions follows.

Board Training:



Need identified for standardized, multi-medial training with key ROMA concepts

Establish built-in follow up/feedback loop with boards

Develop an approved/recommended expert consultant list

Communication with board chair – CSBG monitoring and other reports

- Communication with board members – quarterly CSBG reports, ROMA info

More clearly define board responsibilities

- Assure that they understand that their responsibilities include a supervisory relationship over the ED (for example, that they understand their role in annual performance reviews for EDs); assure boards have assistance when hiring new ED

Identify agencies where Planning Committees of Boards have taken over ROMA implementation responsibilities. How can we help them? How can we support their work? How can we assure that they understand the true nature of ROMA?

Provide tools to Boards so they understand how to review agencies' services and reports.

Provide tools for development of resources, strategies, management, and fiscal oversight



Implementation:

There is a need for customized training – demonstrate the benefits of using ROMA for different level staff positions. This would include different strategies for different level staff:

- EDs, managers, line staff, board members, teckies – create teams

Some agencies are CAAs but others are CSBG eligible entities. What are the differences?

Create a follow up system that will ensure training ideas are put into practice.

Share Best Practices – identify well articulated outcome models in use; post to network:

- What does the hamburger look like?

Find a Champion to help with culture changes – someone who sees the big picture: that we are

- Change Agents not service providers

Need a system for long term tracking of outcomes

Need increased focus on community and agency outcomes

Identify “Stages of implementation” – establishing benchmarks/scales

- Include agency self assessments

- Identify questions agencies can ask

- Identify common barriers

Use “Systems Model” standards. Help CAAs think of themselves as a “system.”

Bring people together, talk about big picture issues:

- Increase ability to talk about implementation (what is it?)

Encourage all State Plans to incorporate strategic mapping, strategic thinking, ROMA language

- Develop performance standards using logic models and defining outcomes

- Increase focus on mandatory national standards that incorporate ROMA principles.

Help agencies decide what they need to do less of.

Increase marketing support.



The integrated group -- Integration and Strategic Thinking



First we need Vision. Then we need to think about some of these questions:

What is the end result?

Can we describe the system?

The car may be a Honda or a Ford, but it is a car not a toaster.

Why do we do what we do?

How do we create community development systems?

What is the hook for new thinking?

People must be engaged: first they must see the gaps and then will be able to work on how to fill the gaps.

Get them to report first, not necessarily talk about changing behavior or focus. "Talk the talk" first. Then "walk the walk."

Do we feed the front (engine) or the rear (caboose)?

The floor is killing us. Can we use peer pressure to bring up the bottom?

Use the carrot and the stick. Say "It's the law." Then provide supportive feedback to the early disciples and incentives to low performers.

Identify three levels (innovators, acceptors and laggards): work with those who want to make a change, (want to learn, try out new ideas) and they will give feed back to the rest.

How do we report, what tools are being used? At what levels?

Give boards tools – like how to hire and evaluate EDs (how to develop and use job descriptions)

What strategic thinking/planning tools are out there? How can they be adapted to CAAs?

Learn how to ask "so what?" in a meaningful way.

Assessment and Quality Assurance:



How can we assess the effectiveness of ROMA training?

How far are we reaching into the networks?

How many trainings were conducted. What kind of staff have been trained.

What is the extent of training being provided to non-CAA staff (those affiliated in some way such as counties, united ways, etc.—and those who are not affiliated)

This is different than assessing the ROMA implementation. Which we also need to do.

There is a different set of questions:

Were logic models, scales, matrices used at the agency?

Were they used in grants, state plans, strategic planning?

Are ROMA principles being used to move service delivery from silos to common services?

How do you identify “Quality CAAs”?

Use a Self Assessment.

Use Peer Reviews

One way is by looking at the CAAs data. However, there are Quality data management issues:

Comparability – are agencies integrating data (not just categorical), based on clients not on services

Under reporting – are all the efforts of the agency being reported, not just CSBG

Issues for data collection personnel:

Are there designated MIS staff? How are they trained? Do they understand the data needs of ROMA implementation? Do they review the accuracy/reliability of the data? Do job descriptions reflect these duties?

We need to address the issues of duplicate reporting to multiple funding sources – decrease structural barriers that effect management and operations, reduce reporting burden to agencies with multiple funding sources

Other personnel issues include professional development, job descriptions, evaluations of staff that include evaluating outcome production.

Develop greater relationships between state CSBG offices and State associations – establish ways to create Peer Training networks, and other TA needs for local CAAs

Increase the involvement of local CAAs in the National Community Action Partnership Award of Excellence – see [attached info](#) from Judy Mason

Return On Investment



We need to identify audience(s) for ROI info: CAAs, funding sources, decision/policy makers, public, local/state/federal government

An important step will be to increase awareness of the implications for ROI

Then to create tools for training and implementation

The hard part will be to help agencies establish values, use defensible data, and define standards.

What are the numbers based on?

How do you establish “cost” or initial investment?

What activities are included in the costs?

Do you include services from partners or other providers that added value to the outcome?

We could create “cheat sheets” for data needs and potential sources of defensible data.

Also we could collect models, “best practices” that have been done.

At the end of the day, Council members were asked to think of **one more area: What else (besides new training curriculum) could help implementation/transformation and what support is needed for trainers?** What have you not been able to do, but think you could with curriculum support? Council members jotted down some ideas, and were asked to think about this over night for the second day of the meeting.

WEDNESDAY July 21, 2004

The second day of the Advisory Council meeting opened with a **presentation of a Multi-Media Board Training CD** that was developed by the Community Action Association of Pennsylvania. Discussion followed the presentation, regarding how the CD may be used by trainers in the field. Some comments on the use of the CD included:

This is the kind of tool that trainers have been asking for as it is a brief introduction to ROMA.

This material is focused on “training” but we need more motivation.

The video clips on the CD, because they show actual Board members, will keep Board members interested in the material.

The fact that the CD is broken up into segments will make it versatile. A short segment could be used at a board meeting, or several segments could be used at a longer meeting as a part of a board retreat or strategic planning session.

Comments on the distribution of the CD included:

Distribution of the CD could be done through the certified ROMA trainers, the state CSBG offices and/or the CAA association offices.

Probably a combination of these would work best to reach all local CAAs.

The CD should be accompanied by a manual to explain how to use it, so local CAA directors could use the product with their own board members.

The meeting continued with a recap of previous day's input:

Who are we? CAAs are increasing self-awareness of who we are and who we want to be. There is an increase in understanding of the mission of CAAs and how it should be used to drive all other activities and services.

Who are our partners? CAAs need to be better able to participate in partnerships, and better able to evaluate the results of the partnerships.

What are our outcomes? CAAs have been better able to identify family outcomes, but need more assistance in identification, observation, documentation and reporting of agency and community outcomes.

How do we use the data? Once we increase the quality of data being reported on the national level (thus on local, state and regional levels, too), what will we do with the data? What does the data tell us?

There was also an identification of several **common themes:**

-- There is a "Cultural change" happening in the CAAs of the 21st Century

-- Identify champions! Motivation is needed.

It is important to reach Boards (more training, more involvement, etc.)

There is a need to engage staff all levels

-- There is a need for increased cooperation between state CSBG offices and state CAA association offices, as they assist (prod, poke, reward, etc.) local CAAs

-- Strengthen the dual roles of certified ROMA peer to peer trainers:

Use training for: information sharing, awareness building, development of common language and common understanding, and skill building

Use technical assistance for follow up and implementation

Advisory council members felt trainers needed additional support to act as catalysts in the network. Some thought that some agencies needed more technical assistance than training. Others cited a need for more support, more involvement of CSBG and Association offices, funding for provision of training, new material, and more interaction between/among trainers. ((for more "[trainer needs](#)" ideas, see attached Advisory Council remarks)

Identification of "Next Steps"

- Distribute videos of interviews with two local CAAs (one in Lancaster, PA and one in Virginia) that were filmed as motivational pieces for board members. The Lancaster, PA segment has been edited to about 30 minutes. The Virginia segment is not focused – but provides a look at a clear outcome (home ownership, safe housing) for one program.
- Distribute a draft of the Multi Media Board CD and manual
- Develop additional tools and products for distribution through the Peer to Peer training network, (which distribution should occur in collaboration with the state CSBG and state CAA Association offices).
- Establish a Continuing Education session for certified trainers, to provide them with new tools and products.

APPENDICES: Advisory Council input on three major questions:

What has happened as a result of ROMA Training?

What topics are needed to add to the basic ROMA training?

What supports do trainers need to move ROMA implementation forward?

WHAT HAS HAPPENED AS A RESULT OF ROMA TRAINING?

IMPACT:

Increased collaboration:

State CSBG offices and CA Associations have partnered to provide trainings

Working together ///

Together we can better identify and address capacity building needs.

ROMA task force and/or work groups been developed ///

Scope of Training:

All local agencies have been trained – EDs, program coordinators, case managers

Regional training focused on writing outcomes and indicators – EDs and planners

ROMA 101 being presented to managers and all staff

All agencies received training, cross section of staff

Middle management has clearer understanding of ROMA – beyond reporting, compliance

Regional trainings, conferences

Everyone thinking about results in some way

Local peer to peer system works – affordable, relevant and reliable

Beginning to engage boards

Increased focus on broad strategic thinking and management

Discussions about vision, mission, strategic planning and managing for results.

Using outcome based strategic plans//

Using logic models as part of work plans for CSBG award ///

Established and implemented standard statewide outcomes

Local CAAs focus on outcomes instead of “bean counting”

Look toward impact of services

Implementing outcome thinking into management philosophy

Accept the idea: Manage for results (about 2/3 of CAAs)

Training has increased the number of CAAs using outcomes (talking about it, somewhat reluctantly implementing, completely embracing in all aspects)

Using ROMA

Integrating ROMA

Reexamine job descriptions, include big picture language

Increased ability to measure and report

Better quality data –

Better identification of outcomes for reporting (using outcomes catalogue, frameworks, FACS report or other)

Greater understanding of the need to report on all activities, not just CSBG

Aware that assessment will be on the outcomes produced (better reporting)

Using ROMA for PR

Better able to communicate the value of CAA activities

Better able to secure support

Discussion about outcomes, marketing, PR

Increased network identity

The Big Picture

Greater Awareness of possibilities

Greater Self Awareness

Refocusing on the mission /

Revitalization /

Redefining mission

Move away from emergency services to assist clients become self sufficient

Wake people up, change status quo – rethink how we are doing business

Rethink Client Focus

Final note:

Training produces short term outcomes, new knowledge gained but not necessarily put to use.

Need systematic follow up to track implementation and impact

WHAT TOPICS ARE NEEDED TO ADD TO THE BASIC ROMA TRAINING?

Training materials for **Boards** //////////

Return on Investment materials (ROI) ////

More tools to identify, observe, document and report Community Outcomes //

Curriculum for Head Start

Implementation ///

How to use ROMA for management

For planning

Using data for management

Increase follow up to be sure we are using what we learned

Paint a national picture; increase the aggregate outcomes

Increase sharing of implementation successes

Integration ///

Integration of services

Integration of ROMA throughout the agency

Cross pollination

Assessment tools – how successful is training? (as training and as catalyst for change)

How is ROMA being implemented?//

What is status of implementation?

What is the quality of implementation?

Quality assurance teams for local CAAs

Peer reviews

Best practices

Increased collaboration and cooperation between State CSBG and state CAA association////

Agree on outcomes

Build capacity of local CAAs

Support training

Support TA for implementation ///

Provide administrative and management support to trainers in the field ////

Use trainers to get the pulse of the nation

Sub groups of trainers as consultants

^ \$ to support TA

Develop strategic planning workbook for agencies to use for long term planning //

Include strategic planning concepts in state plans

Promote strategic **thinking**

Provide inspiration

Revitalization //

Anti poverty work, not serving the poor

Develop strategies re: How to help the states that are behind

Repeat training so everyone gets it

Refresher course to restate it

Build training system to assure all states have it (require it).

Give all CAAs a ROMA manual.

Increase local agency participation

Different levels for different staff

Assist in developing materials for public relations (PR) and Marketing

WHAT SUPPORTS DO TRAINERS NEED TO MOVE ROMA IMPLEMENTATION FORWARD?

General Project needs:

A national “Training facilitator” – to assist trainers make connections for training

More regular contact – among VOC trainers and with other trainers

- Refresher course

- More interaction re: what is happening in the field

Best practice info

- Re: implementation

- Re: training models

More trainers

- More trainers who are able to provide technical assistance (TA)

- More support for TA

More credibility, recognition from National so that trainers are respected locally

More resources to support training //

- \$ to support trainers

- \$ to support participants of training

- \$ to support follow up to training

- Have identified pool of \$

More interaction with state CSBG and Association offices //

More emphasis by state office on need for implementation and revitalization ///

Vision (both trainers with Vision and participants with Vision)

Time (away from regular work schedules) ///

Establishment of training fee schedule that takes into account preparation and travel

- Establishment of costs that include participant materials, food, site, etc.

Curriculum needs:

Need assistance with conversion of training materials into different media

- (power point, etc.)

Tools to engage boards

Tools to stimulate dialogue about strategic planning

Tools to provide training to inspire

Teaching materials for community and agency outcomes

Appendix – 2005 Award for Excellence Guidelines

Note: these guidelines are still in draft form. I will send you the link for them as soon as they are posted.