



State of Louisiana

Division of Administration
TANF Executive Office of Oversight and Evaluation

TANF Initiatives Reporting Form Directions

#TI01-05 Revised October 29, 2002

As a recipient of Temporary Assistance to Needy Families (TANF) funds, you are expected to report your on-going progress—including services performed through the use of contractors—towards meeting the stated goals and objectives of the services made available through TANF funds. You should view the completion of these reports as an opportunity to communicate your achievements in addition to alerting the TANF Office of Oversight to any variances in your plans.

Directions for Completing Form

- ✓ TANF initiative partners must complete the attached *TANF Reporting Form*. You may respond in the space provided, as a separate attachment, or electronically. Please use specifics as your responses will be used to gauge your progress/success towards meeting the stated goals and objectives.
- ✓ Report the *total expenditures for the reporting period*, which should generally include expenditures from the beginning of the month to the end of the month. This information should include all expenditures for which you may/may not have received reimbursement but have submitted an invoice (this also includes your administrative cost elements). You must also provide the total expenditures to date, which would include the expenditures from the beginning of the program year through the current reporting period. This helps us to track your progress throughout the program year and in providing updates to the legislature. It is critical that you enter accurate information.

Section I

- ✓ Enter your total service delivery (participation levels) outputs for your initiative—this will usually be your total served (i.e. enrolled and participating, receiving support services, etc.) *This is different than your measures of performance*. Remember, **outcomes** measure results, impact or effectiveness of a program. **Output** measures the number or quantity of something. Also include the end-of-year target for program participation. If you have more than one component or type of service delivery component, please be sure to list this separately. To the extent possible, the year-to-date figure should reflect an unduplicated count of actual program participation/service delivery. If this is not the case, please be sure to make a note of it on the form.

Section II.

- ✓ A description of major activities should focus on those *deliverables* or *tasks* that contribute to measurable performance, such as strategic planning meetings, completion of marketing plans/campaigns, curriculum development, staff training, stages of program implementation, program activities, etc. Partners involved with performance-based agreements should list these deliverables and task that are included as part of their plan. Please list all appropriate tasks and descriptions for the reporting period.
- ✓ Indications of performance should be measurable indications of your activities. These measures are benchmarks toward a larger program **outcome**, not your output. For example, *the percentage of clients who completed training, rather than the number of clients served, is a measure of performance*. As a general rule, **outcomes** measure results, impact or effectiveness of a program. **Output** measures the number or quantity of something. Your MOU/Scope of Work proposal indicates the measures of performance, which are designed to demonstrate the overall effectiveness/impact of your program. These measures will be captured on your monthly reports and compared to the targets you set.

- ✓ Keep in mind that deviations are not necessarily negative, but can provide an opportunity to respond to an implementation deficiency, or correct poor performance before it affects overall program success. Deviations can also provide indications of superior performance, or whether or not an initial target was set to low.

Section III.

- ✓ The approved monthly performance indicators for your initiative should be listed in this section. It is important that these indicators be listed consistently **each** reporting period. You **must** report the monthly target, and the actual performance you were able to achieve. The monthly target should reflect those already established and submitted to DOA November 1, 2002.

Calculate any deviation between the target and actual performance achieved. The deviation is calculated by dividing the actual performance by the target and subtracting 1.00 to obtain the percentage difference.

Examples:

12 (actual) divided by 10 (target) minus 1.00 = .20 or 20%
250 (actual) divided by 325 (target) minus 1.00 = -.23 or -23%
10% (actual) divided by 17% (target) minus 1.00 = -.411 or - 41.1%
\$45.45 (actual) divided by \$35.00 (target) minus 1.00 = .299 or 3%

Note: The TANF Office has employed the same means of calculating the variance as that used by Louisiana Performance and Accountability System (LaPAS).

If current performance measures are reported as a percentage, please include the actual number associated with the calculation of the percentage. An additional column has been added for that reporting purpose.

Section IV. - Section V.

- ✓ Documenting highlights and variances—including poor performance—allows TANF partners to demonstrate their awareness and capability of addressing potential problems before they affect implementation or long-term program success. This creates an opportunity for the Oversight Office to work with you to make any necessary programmatic recommendations or changes in consideration of your efforts. It also provides a record of your recognition of the problem and the necessary steps you will take to correct the situation.
- ✓ It is important to document **highlights** (small victories, things you are particularly proud of, unexpected progress) of your activities—this may be different than one of your established measures of performance or deliverables. For example, did you recruit higher than expected number of participants, receive positive media coverage or experience improved performance in an area? Keep in mind that the Oversight Office must report overall progress on TANF initiatives to the legislature on a monthly-basis, communicating programming successes is beneficial to program viability. These examples are often used in legislative reports, discussions with the media, and others to discuss the positives things that you are doing. This is your opportunity to celebrate those little things that help put meaning to what you do.

Section VI.

- ✓ Please identify any **barriers** to service delivery or implementation. The Oversight Office is committed to addressing concerns that affect performance, including recommending or implementing policy changes where appropriate. Recommendations, changes and improvements cannot be instituted without your insight.

Section VII. – See Form

- ✓ Submit completed, signed original copy to the TANF Office of Oversight and Evaluation. Electronic Copies must include signatures. ***Failure to submit the monthly report can delay reimbursement requests. TANF partners who do not submit required reports shall receive written notice of their non-compliance that will be maintained on file.***
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