Establishing a New Level of Certified ROMA Professionals

CAP Convention – Austin, TX
August 31, 2016
Workshop overview

• The ROMA National Peer to Peer (NPtP) Training and Certification Project identified a need for additional certification opportunities.
  - Primarily for local agency staff who work to assure implementation of all of the full ROMA Cycle.
  - These staff, who want to be a resource for their agency, deserve the best chance to succeed in acquiring a national certification.

• A new path to national certification - “ROMA Implementers.”

• Report on pilot projects in WA, VA, WV, GA, MA.
Motivation

IM 138
Organizational Standards
Organizational Standards

Identifying Agency Capacity in three broad theme areas:

- **Maximum Feasible Participation**
  - Consumer Input and Involvement
  - Community Engagement
  - Community Assessment

- **Vision and Direction**
  - Organizational Leadership
  - Board Governance
  - Strategic Planning

- **Operations and Accountability**
  - Human Resource Management
  - Financial Operations and Oversight
  - Data and Analysis
CATEGORY FOUR: Organizational Leadership

- Community Action leadership is exemplified at all levels across the organization and starts with a mission that clarifies Community Action’s work on poverty. A well-functioning board, and a focused chief executive officer (CEO)/executive director, well-trained and dedicated staff, and volunteers giving of themselves to help others will establish Community Action as the cornerstone and leverage point to address poverty across the community. Ensuring strong leadership both for today and into the future is critical.

- This category addresses the foundational elements of mission as well as the implementation of the Network’s model of good performance management (ROMA). It ensures CAAs have taken steps to plan thoughtfully for today’s work and tomorrow’s leadership.
Standard 4.3

- The organization’s Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (ROMA) cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation).
Implementing the Full ROMA Cycle

The Results Oriented Management and Accountability Cycle

**Assessment**
Community needs and resources, agency data

**Evaluation**
Analyze data, compare with benchmarks

**Planning**
Use agency mission statement and assessment data to identify results and strategies

**Achievement of Results**
Observe and report progress

**Implementation**
Services and strategies produce results
Guidance

- This Standard is intended to demonstrate the Eligible Entity’s use of all of the phases of the ROMA Cycle in its work.
- The documentation for this integration can be found in its Community Assessment, Strategic Plan, and agency reports (to external entities and to its board).
- It is not intended to be a complex or burdensome description of use, but an affirmation that the agency engaged in thoughtful assessment of needs, planning to meet those needs, implementation of programs and services designed to meet those needs, collection of data, and an analysis of this data.
- Please provide a brief narrative describing your agency’s use of each step of the ROMA Cycle using elements of your Community Assessment and/or Strategic Plan to do so.
<table>
<thead>
<tr>
<th>Related to area /</th>
<th>Community Assessment</th>
<th>Strategic Plan</th>
<th>Agency Reports</th>
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<tbody>
<tr>
<td><strong>Assessment</strong></td>
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### Results Oriented Management and Accountability (ROMA) IMPLEMENTATION CHECKLIST

<table>
<thead>
<tr>
<th>ROMA Cycle</th>
<th>ROMA Action Item</th>
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<tbody>
<tr>
<td>Assessment</td>
<td>Review/revise current MISSION statement</td>
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<tr>
<td></td>
<td>Review last community NEEDS assessment to determine priority needs</td>
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<tr>
<td></td>
<td>- Ensure that needs identified are properly labeled as family, agency, and community needs</td>
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<td></td>
<td>Evaluate the available resources in your community to address any service gaps or find collaborators</td>
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<td></td>
<td>Evaluate current program services and determine effectiveness to meet needs (based on recent program performance)</td>
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<td></td>
<td>For the top 3-5 needs identified in your most recent community needs assessment, begin to develop a logic model for each. Fill in as you complete the ROMA action items</td>
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<tr>
<td>Planning</td>
<td>Based on needs and program evaluation, identified during the assessment process, plan your measurable OUTCOMES to be achieved to meet the needs that are linked to the 6 NPI’s</td>
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<td></td>
<td>Identify SERVICES and strategies to achieve outcome(s)</td>
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<td></td>
<td>Determine your projected success rates for each outcome indicator</td>
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<td></td>
<td>Develop a system to track services and outcomes. Determine what documentation will be collected to measure each outcome, staff responsible and how often data will be collected. (MEASUREMENT TOOL, DATA PROCESSES, and FREQUENCY)</td>
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<tr>
<td></td>
<td>Create or update agency Strategic and Community Action Plans to include outcomes, strategies and data collection information</td>
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<tr>
<td>Implementation</td>
<td>Implement revised Community Action Plan</td>
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<td></td>
<td>Determine frequency to monitor implementation of plan</td>
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<td>Determine the frequency for evaluating progress and report results to board</td>
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<tr>
<td>Achievement Results</td>
<td>Measure your actual RESULTS for each outcome</td>
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<tr>
<td></td>
<td>Submit CSB/GIS report data to the State Office, assuring accuracy and timeliness of submission</td>
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<tr>
<td>Evaluation</td>
<td>Analyze data; compare with performance targets/projected success rates determined during the planning phase</td>
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<td></td>
<td>Review the demographics of the population served. Identify if they have received single services, multiple services, or bundled services. Consider the connections among people, services, and outcomes</td>
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<td>Make recommendations to the Board regarding action to be taken based on analysis</td>
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<td>Adjust performance goals as needed as evidenced by actual performance. Continue strategies that achieve desired performance goals. Revise or discontinue strategies that do not achieve desired performance</td>
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<tr>
<td>Reassessment</td>
<td>Review all data from community and agency</td>
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<tr>
<td></td>
<td>Reevaluate the community needs assessment process, make changes (if needed) to ensure that later assessments follow the ROMA framework and guidelines</td>
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<tr>
<td>Planning</td>
<td>Update Community Action Plan</td>
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2015 Developed in Partnership with the Oklahoma Department of Commerce and the National Association for State Community Service Programs ROMA Next Generation Center of Excellence; adapted to guide discussion about implementation of the full ROMA Cycle.
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<td>Based on needs and program evaluation, identified during the assessment process, plan your measurable <strong>OUTCOMES</strong> to be achieved to meet the needs that are linked to the 6 NPI’s.</td>
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<td>Identify <strong>SERVICES</strong> and strategies to achieve outcome(s).</td>
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<td>Determine <strong>OUTCOME INDICATORS</strong></td>
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<td>Determine your projected success rates for each outcome indicator.</td>
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4.3 mentions NCRTs

- In addition, the organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.
Guidance/document for 4.3

- A Nationally Certified ROMA Trainer (NCRT) is to be accessed by each Eligible Entity during the course of the ROMA Cycle. This can be done through a conference call, in person consultation or training, etc. at some point during the cycle. Again, the documentation of this interaction is not meant to be burdensome, but a brief narrative describing the type of interaction with the Certified ROMA Trainer.
<table>
<thead>
<tr>
<th>Name of Certified ROMA Trainer</th>
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<tbody>
<tr>
<td>Relationship of Trainer to CAA (On staff, consultant, State Association, Other)</td>
<td></td>
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<tr>
<td>Type of Interaction (in person or by phone/web meeting)</td>
<td></td>
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<tr>
<td>Date(s) of Interaction</td>
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<tr>
<td>Brief Description of Interaction</td>
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</table>
Not all local agencies had “access”

- Worked with NCRTs (local agencies, Associations, State offices) to assess capacities and processes.
- Asked NCRTs to do a thoughtful self assessment both about their own abilities to provide guidance in all the phases of the ROMA Cycle and about their role in their own agency.
  - Is it in the agency’s interest to give you release from regular job duties to provide assistance to another agency?
  - Is there an amount of time that seems reasonable?
  - What would it “cost” to have you released from regular job duties?
- Talked to Executive Director to find out what s/he thinks about NCRTs providing assistance to another agency.
- Found many different ways that were being used to respond to network requests for assistance (beyond the provision of Introduction to ROMA training session).
What is the success rate of NPtP?

Success rates run from 99% to 15%

- Depends on the supports provided at the local level.
  - Primary challenge is setting up practice sessions in Phase III
- Also depends on the work demands on the candidate.
  - Even when sessions are organized, some candidates cannot participate
- Finally, depends on actual interest in being a Trainer
  - Some candidates say they just done want to (can’t) do training
Remember 4.3?

- In addition, the organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.
Competencies

• Demonstrates knowledge of basic Introduction to ROMA curriculum key principles and practices
  • Content Knowledge includes key points related to the full ROMA Cycle
  • Is able to construct a scale
  • Is able to construct logic model with all elements matching
  • Is able to analyze logic models

• Demonstrates experience in working in a CAA or other level of the CAA network with implementation of ROMA a part of the job duties

• Demonstrates ability to fulfill job duties related to ROMA implementation effectively
NCRT additionally

Demonstrates ability to provide Introduction to ROMA training in a professional and effective manner

- Presentation Sequence & Flow
- Content Presentation
- Ability to Use ROMA content in Activities or Exercises
- Responses to questions
- Acknowledges different learning styles
- Uses training materials effectively
- Uses effective group management techniques
- Projects a professional & confident manner
- Preparation
- Timeliness of event activities
- Cooperation with co-trainer
- Cooperation with master trainer
- Receives feedback
- Gives feedback to peers
Piloting new certification

Nationally Certified ROMA Implementer (NCRI)

- The ROMA Implementer will be charged with providing information at his/her own agency to further develop understanding throughout the agency related to what needs to be done to fully implement ROMA.

- The training and certification process for NCRI will assure that the individual has a deep understanding of the full ROMA Cycle, but not the additional step of delivering the Introduction to ROMA Training.

- It is for the person who does not want to be a trainer or to do traditional classroom style training to groups.

- It is for the person who works one-on-one or in small groups with agency staff to look more closely at the processes and practices in place and help identify how they can be improved for results.
Who was recruited?

- To be eligible to apply to become an NCRI, the individual must have professional experience in service in the Community Action network for at least one year. This experience would involve ROMA implementation as a part of job duties.
- We approached candidates who are in Phase III
4 Phases – modified for NCRI

Phase I -- Complete e-course – 6 modules of on-line training (*non graded*) with specific focus which includes a body of knowledge, principles and practices that have been vetted by the field

Phase II -- Attend “Introduction to ROMA” training held by NCRT/Master Trainer (1 day) and participate in discussion about the basic principles and practices of ROMA

Phase III -- Work with Study Circle to create portfolio documenting activities, experience, skills

Submit portfolio for review by ROMA Master Trainer

Phase IV -- Response to on-line exam (*graded*)

Demonstrate ability to build logic models with different levels of need
Portfolio Development – Demonstrate application at each of the points of the cycle

The Results Oriented Management and Accountability Cycle

- **Assessment**
  - Community needs and resources, agency data

- **Evaluation**
  - Analyze data, compare with benchmarks

- **Planning**
  - Use agency mission statement and assessment data to identify results and strategies

- **Achievement of Results**
  - Observe and report progress

- **Implementation**
  - Services and strategies produce results
Developing the portfolio

- Building on the checklist previously developed, we created a list of “prompts” to identify the kinds of things that the candidate should be writing about.
Refined what we were looking for

• The team developing the prompts were experts in assessment and strategic planning. So some of the initial prompts were too “in depth” and detailed.
  • Worked with groups of NCRTs in April and May to eliminate some questions and some areas of discussion
  • Began to clarify what was needed “Beyond the Basics”
• Identified Practice Behaviors from the learning objectives of the Introduction to ROMA curriculum.
First cohort – Washington State

• 36 Candidates enrolled in January 2016
• The process took longer than we expected:
  • Phase 1 (on-line course) completed by mid February,
  • Phase 2 (one day in person session) - end of February
  • Portfolio development March, April, May
    • one section every other week
    • Extension into June for some and into July for others
  • Exams during June, July and a few in August
• 29 new NCRIs representing 20 agencies and the state office
  • 14 were done in 5 months, 9 in 6 months, 6 additional time
A few “study circle” webinars

- At first to get feedback from the candidates about what they were experiencing.

**Feedback:**

- Couldn’t always find the basic documents or know how the document was created.
  - When was last assessment conducted? Who was involved?
- If a ROMA Practice was not found, the candidate didn’t know how to talk about it.
  - Acknowledge it wasn’t done? Suggest how it could be done differently?
- Candidates attached documents rather than citing from them.
  - Difficult for reviewers.
Second Cohort – Virginia

- 39 enrolled in March
- Phase I – completed by end of April
- Phase 2 – early in May
- Phase 3 – June and July
  - Study circles June 3, July 8, July 29
  - In person discussion at VA conference in June
  - Portfolio due date Aug 5
    - 25 submitted on time, 6 a week later (31 total), 8 not submitted
- Portfolios are in review stage
  - 11 have passed two reviews
  - 7 have passed one review,
  - 13 with two scores need additional follow up
- Phase 4 by end of August.
What we learned

- The first portfolios included a combination of responses to the actual prompt questions that we provided and other presentations of information.

- Reviewers reported that it was easier to find competencies when the prompts were followed.
Attachments

• In a few cases, documents were submitted as answers to prompts.
  • There was limited reflection by the candidate to point out or identify specific examples of the principles.
    • When we talked to candidates, they said they felt that the completed document included all of the key elements. Which may be the case, but it is up to the candidate to cite the places where the documents show each of the elements. We are not assessing the documents but rather the candidate's ability to identify the elements.
  • The reviewers did not feel it was useful to read the documents instead of the portfolio entries.
  • They felt it did not demonstrate that the candidate was able to find the examples.
Analysis and suggestions

• The portfolios that were strongest included analysis and suggestions for changes as they reviewed their agencies and their programs.

• Reviewers appreciated when candidates provided specific ideas. Not just “we need to improve our system” but “we need to improve our system of observing and tracking the multiple services given to an individual or family. I think this could be done by ….”

• In the cases where candidate provided a summary or “overall” comment document, we found a lot of reflection and analysis in those documents.
Specifics

- Another area of strength was when candidates provided specific examples. Such as:
  - They identified family level needs as differentiated from community level needs (in the assessments).
  - They used examples from a particular program to show outcomes, targeting, or other specific information.
  - This showed real understanding of the concepts.
Revised Prompts

To give greater guidance
Revised prompts

• Decreased the “in depth” items, and identified which prompts are to provide context.
• Added the direction: “provide examples” (throughout)
• Added prompts for “reflection” in each section – identification of strengths and suggestions for change
• Added an “Overall” section
• Reinforced the concept that we are looking for what the candidate knows, not how well the agency is using the ROMA principles and practices.
Revised Prompts – Request for reflection

- Now we are asking that full documents not be included, but rather that specific examples are cited in the portfolio.
- We have added prompts in each assignment that asks for reflection to stimulate responses about strengths and suggestions.
- A separate section has been added to prompt an “overall” response at the end of the portfolio.
Revised Prompts – Give Examples

- We included this direction: “give examples” throughout the activities.

For example:

- it is NOT helpful to the reviewer for the candidate to say “the CNA included identification of family and community level needs.”

- It IS helpful to say “the family level needs identified in the CNA include inability to secure affordable housing, lack of health care coverage for the adults in the family and adult’s who lack high school diploma.” Or to say “our CNA identified the lack of living wage employment opportunity as a top need” and to clearly indicate the level of need is community.
Revised Prompts – Examples

What happens if there are NO examples in the documents you are reviewing?

- For instance, your CNA identifies “housing” and “employment opportunities” as the top two needs. You know these are not stated with the level of needs explicit. Therefore you do not have an example of the different levels of need to cite in the portfolio.

- In this case, please suggest a need statement that clarifies the level of need (as on the prior slide)
  - You will see this direction throughout “what is or could be” so if you do not find something, you can suggest what it could be.
  - In this way you demonstrate your understanding and skill even if you do not find it in the documents.
Revised Prompts -- Context

- We worded some of the prompts to be clearer about what competency we were looking for.
- Some prompts are “context” for the actual demonstration of competencies.
  - EX: The first questions in Assessment – about when the CNA was done and who was involved.
  - EX: Several prompts are about the Board involvement in the phase of the ROMA Cycle being addressed.
  - EX: There are several places where the “tracking” system is mentioned: who does it, how often is information reviewed and shared, with whom is it shared.
More feedback from pilots
Special circumstances

- State office staff
  - Approach the portfolio differently
- Staff with less than a year experience
  - Some went well, some are still working through the prompts
- Medical leave or other changes in circumstance
Third Cohort - Georgia

- All were NCRT candidates who wanted to change their path
- Weekly webinars with Association Training Director, 2 Master Trainers, and several NCRTs (5 active in GA) acting as Mentors to the candidates.
- Each week a section of the portfolio is submitted to a mentor for comments
- They began on July 11 and project to have portfolios ready for submission by early September
Third Cohort - Georgia

- **What worked**
  - Regular webinars to get an overview and ask questions
  - Recording the webinars and sending them out to the participants
  - The mentor process – it helped them know what direction to go in their responses
Feedback from Participants

- This process reinforced what I already knew, but gave a different perspective.
- Now I think I can also better explain ROMA to others.
- Including all parts of the ROMA Cycle into all areas of the agency made studying more intense in the time to complete the portfolio.
- Reviewing the ROMA Cycle, gathering the documents, and thinking through them — proved to be a lot of information, work, and time. It was more than what was anticipated.
- The weekly conference calls helped to consider what should be in the portfolio.
- Feedback from peers who had already completed a section was helpful.
- It was a challenge to work 40 hours and take the time that this required. You think you have a grasp and then you realize you forget something.
- There is a huge difference from presenting the information and taking your agency [information] and implementing it or thinking about how you are going to implement it.
- Every [ROMA] trainer should take this course.
- I liked being forced to go through agency documents and see that it may not match, and facing that. Being honest with it.
- Helped me to see where my strengths are too.
- It helped to have someone else in the agency to work on the portfolio with.
Recommendations from GA

• Create a strong cohort at the Phase 2 face to face training. This produced better interaction on the phone calls and engagement in the entire process.

• Do phone calls every other week. The weekly turn around felt really intense for the group.

• Make sure the facilitators of the calls clearly understand the portfolio prompts so they can answer questions.

• Portfolio development expected to be completed within 3 months after their one day training to complete the process. This creates urgency (this process can easily be put on the back burner). Sticking to deadlines is important, but can be hard to enforce with this.

• Create a web-based project management location - A place for everyone to ask questions outside of the webinar time, a place to communicate, download or upload information.

• Have a local leadership team who does weekly calls - get feedback on candidate progress and portfolio details.
Evaluation Processes

Portfolio and exam
Process for ANCRT to review the portfolios

- Each portfolio is read and reviewed by at least two different people
- The reviewers participate in several calls to discuss what they are finding
- Scores of the practice behaviors identified in the document are based on this scale
  - Missing = 0
  - Incomplete = 1
  - Demonstrated = 2
  - Exceeded = 3

- The scores for the practice behaviors are averaged, with the expectation of a “2” for each phase and the overview, so a total of 12 points.
  - Portfolios reaching 10 points or more will be considered “passing”.
  - Candidates who do not achieve that score will be contacted by reviewers for follow up – for clarification, additional explanation or examples to support competence.
Exam information

- The exam is a mixture of short answer questions and multiple choice.
- There are 67 questions on the exam, which is on-line format. These are arranged in 6 segments that can be done independently.
  - Time for exam is ranging between 1.5 and 3 hours.
- As part of the exam, candidates will be asked to create and analyze family level logic models.
- 85% correct responses will be considered passing. Follow up will be done with candidates who do not achieve this score. Re-testing is possible.
Establish timeline for portfolios and exam

- Portfolio submission date: ______
  - They will be accepted earlier
  - There will be a 4 week review period

- Exam – two weeks following portfolio submission

Proposed:
  - Have a test review conference call
  - And/or an exam review sheet
Specific Practice Behaviors

Cycle Phases: Assessment and Planning
1 – Assessment – Identify Community Needs and Resources, Agency Data

- Defines what is meant by a community to be assessed.
- Provides examples of qualitative and quantitative data.
- Provides examples of resource identification.
- Provides examples of family, agency, and community level need statements.
- Explains the importance of gathering data from multiple and varied sources.
- Identifies techniques for the analysis and prioritization of assessment data.
2 – Planning – Use Agency Mission Statement and Assessment Data to Identify Results and Strategies

- Identifies how the mission statement is (or can be) used in the planning process.
- Provides examples of outcomes that are (or are not) connected to the identified need
  - including identifying connections related to the same level of need.
- Provides examples services/strategies which will address the identified need and produce the proposed outcome.
- Provides examples of (or explains how) how the agency must make planning decisions about services
  - (e.g.: Maintain, strengthen, abandon)
Planning notes from the pilots

- Many of the Strategic Plans that were reviewed included only agency level outcomes and activities
- They were not connected to the CNA findings
  - Candidates indicated that the *Community Action Plan* is where responses to the CNA are found
- We added directions to consider how the Strategic Plan could
  - set the broad outcome areas, as identified by the Board, without being too detailed.
  - identify what other document would contain action steps to connect with the CNA finding.
3 – Implementation of the Plan – Services and Strategies Produce Results

- Provides examples of how the information from the ROMA (Carter) Questions is used (or could be used) to support the implementation of the plan.
- Provides examples of indicators and how they are (or could be) used to guide implementation.
Prompts -- Implementation

• What seems to be most successful in this phase of the ROMA Cycle is when the candidate *selects a single program or service* to follow as a way to focus on the key concepts related to implementation.
  • When you do this, remember that you should also come back and think beyond the single program.
  • You will want to discuss how/if your agency tracks multiple services for single outcome or for multiple outcomes.
    • Can you say that the outcomes are the result of several of the services the agency (or its partners) provide?
Implementation – Connections in action

- Implementation is about frequency, intensity, duration and quality of service.
  - *You will see some context questions in this section.*
- It is also about how services are connected to outcomes and the identified needs.
- Be thinking about the connections you see (or you DON’T see)
- Is there a clear statement about how a service that the agency will provide is going to help individuals and families achieve an outcome? About how the service meets a need identified in the Community Needs Assessment?
Implementation – using the Carter Questions

- The Carter Questions help to identify
  - how many are being served,
  - who they are,
  - what services they are being given and
  - what is expected to happen to them.
- Consider **where** you would find that information.
- Give examples in each of these areas.
Identifying Indicators

• The issue of identifying *performance calculations* was addressed differently by candidates.

• To get greater consistency consider these important ROMA concepts:
  • Identifying targets for service and outcome achievement will allow analysis of the data once the actuals are collected and compared.
  • These numbers are found in indicator statements.
  • Or they could be found as a part of proposal or application.

• Some elements of indicators may be in the Community Action Plan. They may not appear to be in the same formula, and may not include a percent of success – but they should be identified as the raw data for performance measurements/calculation.
Identifying Indicators

- There are two primary performance calculations that are included in the basic understanding of ROMA:
  - relationship between those served and those achieving an outcome,
  - relationship between targets and actuals.
- Directions are included in the prompts to use the formulas on pages 58 (to identify the indicator), 66 (to calculate percent) and 72 (to compare targets and actuals) – using real numbers as examples.

- If you do not find indicators, make sure you provide suggestions or examples about what indicators could be. (using the program you selected to talk about for this prompt)
Pilots also happening

- MA
- WV
- OK

Coming soon to
- MO
- IL

By end of year we expect process to be ready for “roll out”
- TX – January, 2017
- TN – February, 2017
For more information

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National Peer to Peer ROMA Training and Certification Project
www.roma-nptp.org
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www.ANCRT.org