Organizational Standards 2.0
Category One: Consumer Input and Involvement

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Agenda

• Overview of Partnership tools and resources
• Standards 1.1 – 1.3
  – Interpretation and documentation
  – Q & A
  – Promising practices and resources
• Requests for additional T/TA resources
• Announcements and upcoming events
CSBG Organizational Standards

Organized into three thematic groups

**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
2016 COMMUNITY ACTION PARTNERSHIP ANNUAL CONVENTION
Building Resilience: The Promise and Practice of Community Action
August 30 - September 2, 2016
Austin, Texas
T/A Guides Toolkits and Webinars for Each of the Nine Categories

- Additional Guidance
  - Definition
  - Compliance
  - Document

- Beyond Compliance

- Resources

- Assessment Scales
Standard 5.2 The organization's governing board has written procedures that document a democratic selection process for low-income board members adequate to assure that they are representative of the low-income community.

A. Guidance on the Definition and Intent of the Standard

The CSBG Act states that CAA boards must have the tripartite structure noted above, including at least one-third of its membership being democratically selected representatives of the low-income community. Standard 5.2 states that CAAAs need to have written procedures for how this is done in their local organization. It is important to note that the Act states democratically selected, not elected. Once a potential board member is selected, that individual will still need to be elected and seated to the board following the CAA's bylaws and board policies.

According to IM 82 “the implicit intent of this requirement is to ensure that those who currently live in areas served by the agency are represented so that they have a strong voice in agency governance and direction and are able to convey to those they represent the presence and significance of community action in their lives.” All CAA board members have an equal voice and vote in agency governance.

IM 82 continues, “Every effort should be made by eligible entities to assure that board members representing low-income individuals and families:

- Have been selected on the basis of some form of democratic procedure either directly through election, public forum, or, if not possible, through a similar democratic process such as election to a position of responsibility in another significant service or community organization such as a school PTA, a faith-based organization leadership group, or an advisory board/governing council to another low-income service provider;
- Are truly representative of lower residents of the geographic area to be served, including racial and ethnic composition, as determined by periodic selection or reselection by the community. Being current should be based on the recent or annual demographics changes as documented in the needs/community assessment. This does not preclude extended service of low-income community representatives on boards, but does suggest that continued board

B. Guidance on Compliance and Documentation

Documentation may include the written policy itself, board policy or procedure manual, bylaws, minutes, etc.

CAs are encouraged to keep this process straightforward and not to incorporate something too complex. Examples of democratic selection procedures for low-income sector directors include:

C. Beyond Compliance Benchmarking Organizational Performance

Having true representation from the low-income community is an important element of a CAA governance structure. Working to ensure that all board committees (beyond committees that have decision-making authority which are already required to maintain the structure) have a tripartite structure can help a CAA move beyond compliance toward excellence. In addition, incorporating advisory committees that engage low-income residents can also bring additional voice to the table.

D. Resources

As with the first standard in this category, this requirement is not new. Such procedures may be written in the agency's bylaws (and under some states' CSBG laws or regulations, may be required to insert it into the CAA's bylaws), procedure manuals, or other document to meet this Standards.


Assessment Scales

- For Internal Use by CAAs Only
- Moving Beyond Compliance
- Accompanying webinars

<table>
<thead>
<tr>
<th>Standard 5.1</th>
<th>Our bylaws do not reference the tripartite structure.</th>
<th>Unsatisfactory</th>
<th>Unsatisfactory</th>
<th>Unsatisfactory</th>
<th>Unsatisfactory</th>
<th>Unsatisfactory</th>
<th>Unsatisfactory</th>
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</thead>
<tbody>
<tr>
<td>Standard 5.2</td>
<td>We do not have a written democratic selection process and the board does not have 1/3 of its membership coming from the low income community</td>
<td>Unsatisfactory</td>
<td>Unsatisfactory</td>
<td>Unsatisfactory</td>
<td>Unsatisfactory</td>
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<tr>
<td>Standard 5.3</td>
<td>It has been more than 10 years since our bylaws were reviewed by an attorney, or never reviewed by an attorney</td>
<td>Unsatisfactory</td>
<td>Unsatisfactory</td>
<td>Unsatisfactory</td>
<td>Unsatisfactory</td>
<td>Unsatisfactory</td>
<td>Unsatisfactory</td>
</tr>
</tbody>
</table>

- Brand 5.1: The organization’s governing board is structured in compliance with the CSBG Act:
  1. At least one third democratically-selected representatives of the low-income community;
  2. Chair/based local elected officials (or their representatives) and;
  3. The remaining membership from major groups and interests in the community.

- Brand 5.2: The organization’s governing board has written procedures that document a democratic selection process for low-income board members adequate to assure that they are representative of the low-income community.

- Brand 5.3: The organization’s bylaws have been reviewed by an attorney within the past 3 years.
Boards of Directors/Advisory Boards

• Handouts
• Videos

The Boards of Directors plays a unique and important role in the life of a Community Action Agency. While staff members transition, founding directors retire, and programs change, the board offers consistency in purpose, intent, and responsibility. The governing board acts as a body, not as individuals, and its members are bound by the Duties of Care, Loyalty, and Obedience, bearing legal liability for their individual actions as well as those of the corporation.
Community Action Partnership
YouTube Channel - Board Videos

COE-developed CSBG Organizational Standards - What Do Boards Need To Know?
by Community Action Partnership • 10 videos • Updated yesterday
This series of 10 videos are designed to introduce governing boards of Private (nonprofit) Community Action Agencies to the COE-developed CSBG Organizational Standards. For more information on the Organizational Standards please visit bit.ly/... more

1. Standards for Boards Introduction
   by Community Action Partnership
   11:36

2. Standards for Boards - Consumer Input and Involvement
   by Community Action Partnership
   3:56

3. Standards for Boards - Community Engagement
   by Community Action Partnership
   7:04

4. Standards for Boards - Community Assessment
   by Community Action Partnership
   6:26

5. Standards for Boards - Organizational Leadership
   by Community Action Partnership
   11:59
What Are the Community Action Standards of Excellence?

- The Community Action Standards of Excellence represent 35 of the very best practices of the very best agencies.

- They represent real-world administrative and operational benchmarks that every agency can strive for.
A Framework for Achieving Excellence in Community Action

The Community Action Standards of Excellence are distributed among seven Categories of Excellence creating a management framework.
CSBG T/TA Resource Center

- www.csbgtta.org
- Many more toolkits, webinars, and print resources
- Consultant Bank
- Training Calendar
- Discussion Forum
- Shared Calendar
Standard 1.1
The organization/department demonstrates low income individuals’ participation in its activities
1.1 Interpretation: Types of Activities

- Needs assessment
- Strategic planning
- Board and board committees
- Task forces, committees, advisory bodies, Head Start Policy Councils
- Partnerships with advocacy and grassroots organizations
- Volunteers
- Leadership development training not linked to receiving direct services
- Other examples? Questions about compliance?
1.1 Interpretation: Types of Participation

- Service on board and advisory bodies providing input, feedback, and guidance
- Providing direct services and support as volunteers
- Focus groups in needs assessment and strategic planning processes
- Participating in community meetings
- Participating as service recipients in programs most likely does not qualify
- Other examples? Questions about compliance?
1.1 Documentation

- Descriptions of advisory body, task force, and commission composition and membership
- Sign-in sheets from focus groups and community meetings
- Volunteer recruitment policy/strategy documents and participant lists
- Policy/planning documents and/or minutes that describe goals for and participation of low-income individuals
- Other examples? Questions about compliance?
1.1 Capacity Building Resources
Making Connections Initiative

Community Change: Lessons from Making Connections

Social Networks and Civic Participation in Making Connections Neighborhoods
1.1 Capacity Building Resources

Leadership Development

Community Leadership Programs (Institute of Government)

Community Empowerment Strategies (HUD)

Leadership for Policy Change (PolicyLink)
www.leadershiplearning.org/system/files/leadership-policy-change.pdf
Standard 1.2
The organization/department analyzes information collected directly from low-income individuals as part of the community assessment.
1.2 Interpretation: Types of Analysis and Collection

- Focus groups
- Surveys – qualitative and quantitative data
- Community meeting notes
- Key informant interviews
- Customer satisfaction data
- Other examples? Questions about compliance?
1.2 Documentation

• Raw data included in needs assessment – interview summaries, survey results, community meeting summaries, aggregate customer satisfaction data

• Needs assessment report sections
  – Summary analysis of causes and conditions of poverty
  – Summary analysis of individual sections
  – Description of methodology

• Meeting notes describing data analysis

• Other examples? Questions about compliance?
1.2 Capacity Building Resources

Community Toolbox (University of Kansas)
http://ctb.ku.edu/en

Collecting Data from Parents and Children for the Purposes of Evaluation: Issues for Child and Family Services in Disadvantaged Communities (Australian Institute of Family Studies)

Fostering Resident Voice and Influence (Annie E. Casey)
http://www.aecf.org/resources/fostering-resident-voice-and-influence/
Standard 1.3

The organization has a **systematic approach** for **collecting**, **analyzing**, and **reporting** customer satisfaction data to the governing board [which may be met through broader local government processes (for public agencies)]
1.3 Interpretation: Systematic Approach

• Collection of data across programs – how many programs collect customer satisfaction data? At what points are data collected (intake, after services are delivered, and after outcomes are achieved)?

• Methods of collection – surveys, focus groups,

• Structure that supports data analysis – quality improvement committee or staff person

• Tools for data collection and analysis – scorecards, dashboards

• Process for reporting – clear procedure for reporting and analysis from committee to leadership team to board

• Other examples? Questions about compliance?
1.3 Documentation

(1) Systematic Approach
• Policy and procedure document describing operations of the customer satisfaction process

(2) Collecting
• Data collection instruments (surveys, focus group questions)
• Summary data (reports, data collection schedules)
1.3 Documentation

(3) Analyzing
• Policies and procedures documents describing how data is analyzed
• Reports, scorecards, dashboards
• Written reports and recommendations

(4) Reporting...to the governing board
• Policies and procedures documents describing reporting procedures
• Written reports, scorecards, etc submitted to the board
• Board minutes indicating reporting of data

Other examples? Questions about compliance?
1.3 Capacity Building Resources


Standards Related to Category One

Standard 2.3 The organization communicates its activities and its results to the community.
Standard 2.4 The organization documents the number of volunteers and hours mobilized in support of its activities.
Standard 3.3 The organization collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the community assessment.
Standard 5.2 The organization’s governing board has written procedures that document a democratic selection process for low-income board members adequate to assure that they are representative of the low income community.
Standard 6.4 Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.
Standard 9.1 The organization has a system or systems in place to track and report client demographics and services customers receive.
Future T/TA Needs

• New guide on developing a customer satisfaction system is under development

• Other resources???
Announcements and Upcoming Events

• The next webinar in this series on Category Two: Community Engagement is on Thursday, April 6th at 2:00 PM EST

• Our Call for the Sessions for the Partnership’s Annual Convention is available on our webpage – the deadline is March 31st

• Register now for the Partnership’s Branding Summit April 26-27th in Chicago, IL. More information is available on our webpage.
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