

Equipping Staff Through Robust Orientation & Training

November 12, 2020



*A Deep Dive into the Organizational Standards
Webinar Series*

Human Capacity & Community Transformation

Center of Excellence

National Community Action Partnership





The only thing that endures over time is the law of the farm: I must prepare the ground, put in the seed, cultivate it, weed it, water it, and then gradually nurture growth and development to full maturity.

Stephen R. Covey, contemporary author and consultant, from Principle-Centered Leadership.

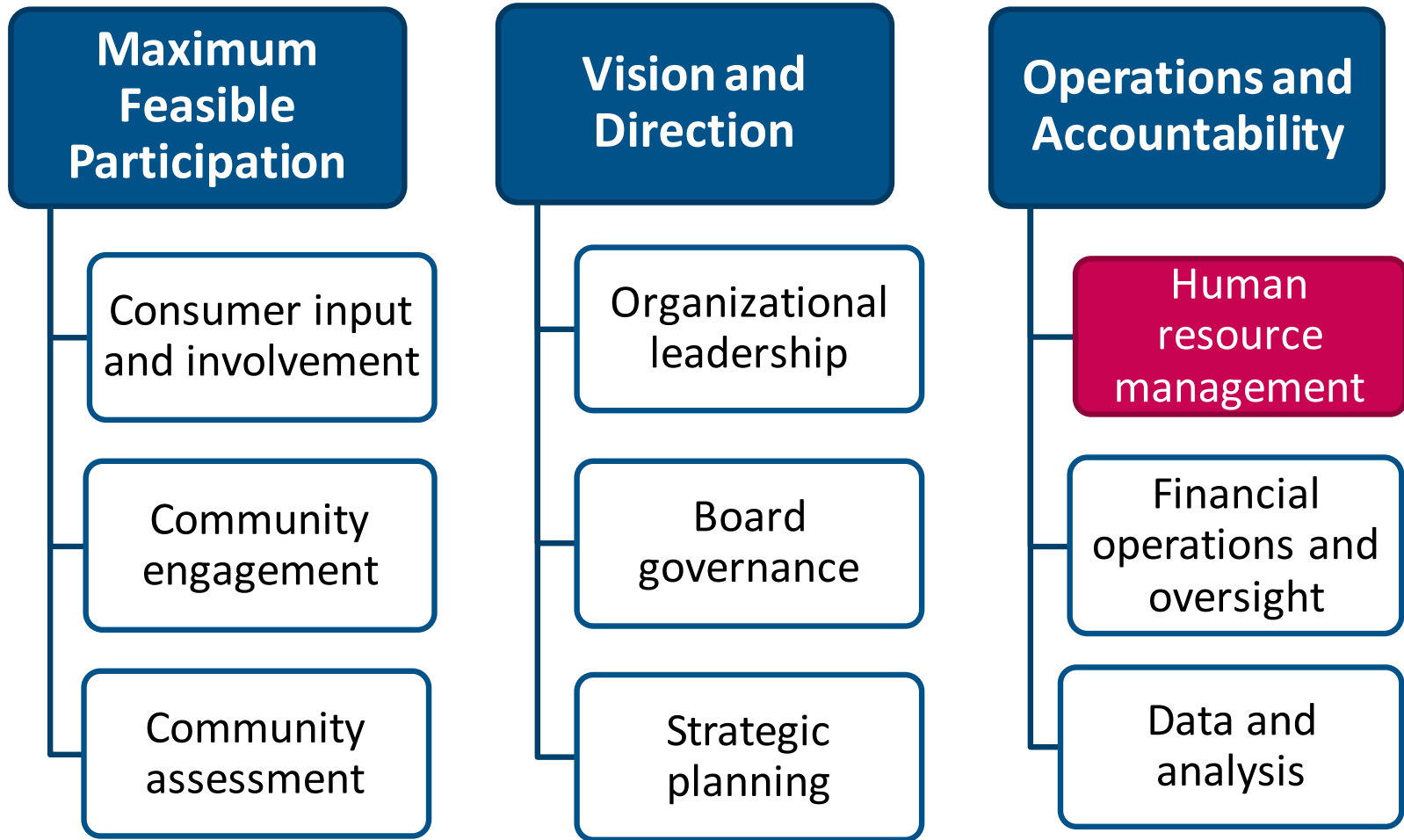
Agenda

Equipping Staff through Robust Orientation & Training

- The Continuum of “Meeting” to “Exceeding”
- CSBG Organizational Standards 7.8 & 7.9
 - Interpretation and documentation
- Moving Toward Excellence
- Using ROMA & CQI for Proactive Training Assessment & Planning
- Connecting to the Strategic Plan
- Leadership Development & Community Action Certifications

CSBG Organizational Standards

Organized into three thematic groups



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



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.



Continuum: Meeting to Exceeding



- Every organization can move up this continuum, but you can't improve what you don't **measure**.
- Continuous Improvement is both a **commitment** and a **process** for improving everything you do to achieve excellence

Standard 7.8

Non-Profit CAA's: All staff participate in a new employee orientation within 60 days of hire.

Public CAA's: The department follows local government policies for new employee orientation.

7.8 Definition and Intent

- Ensures smooth transition from hiring process to onboarding and training for **all staff** into the organization and Network
- Serves as first connection of employees to mission/vision
- Drives employee productivity and results, manages expectations, and increases talent retention
- No curriculum requirements
- May be met through individual or group orientation
- Date of hire = first day employee works at organization

7.8 Definition and Intent

- Examples of *possible* orientation content (remember, there are no required topics):
 - Mission and history of Community Action
 - Time and effort reporting
 - ROMA
 - Data collection & reporting processes
 - Job description and performance expectations
 - Education and training
 - Tools and resources
 - Personnel policies/employee handbook

7.8 Guidance on Documentation

- Physical or electronic copy of personnel policies/employee handbook
- Orientation packet or materials
- Documentation of attendance from HR/personnel files
 - Sign-in sheet
 - Acknowledgement form

Connecting Orientation & Training

- Ongoing staff training should build on the foundation started through orientation.
- **Orientation (7.8)** provides the basics and foundational knowledge of the organization and job functions.
- **Training (7.9)** begins to build staff capacity and engages staff in professional development – benefiting both the staff person and the organization.

Standard 7.9

Non-Profit CAA's: The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.

Public CAA's: The department conducts or makes available staff development/training (including ROMA) on an ongoing basis.

7.9 Definition and Intent

- Network of CAAs aligned to results and accountability
 - ROMA or comparable system (if used and approved by State)
- Ensures best use of people potential
- Improves quality and efficacy of the Network's talent
- Targeted, efficient use of T&TA funds
- No specific requirements for training topics
- No specific requirements for delivery methods

7.9 Definition and Intent

- Examples of training and/or development *delivery methods* via third party or the agency:
 - In-house
 - Community-based
 - Conference
 - Online
 - Goal development
 - Coaching

7.9 Guidance on Documentation

Examples of documentation that demonstrates achievement of Org Standard 7.9:

- Training or Professional Development Plans
- Documentation of agency trainings
 - Presentations and other materials provided
 - Evaluations
 - Attendee lists
- Documentation of attendance at offsite training events/conferences
 - Certificate of Participation
 - Presentations and other materials provided
- HR/personnel files

From “meeting” to “exceeding”

3 Best Practices

Opportunity!

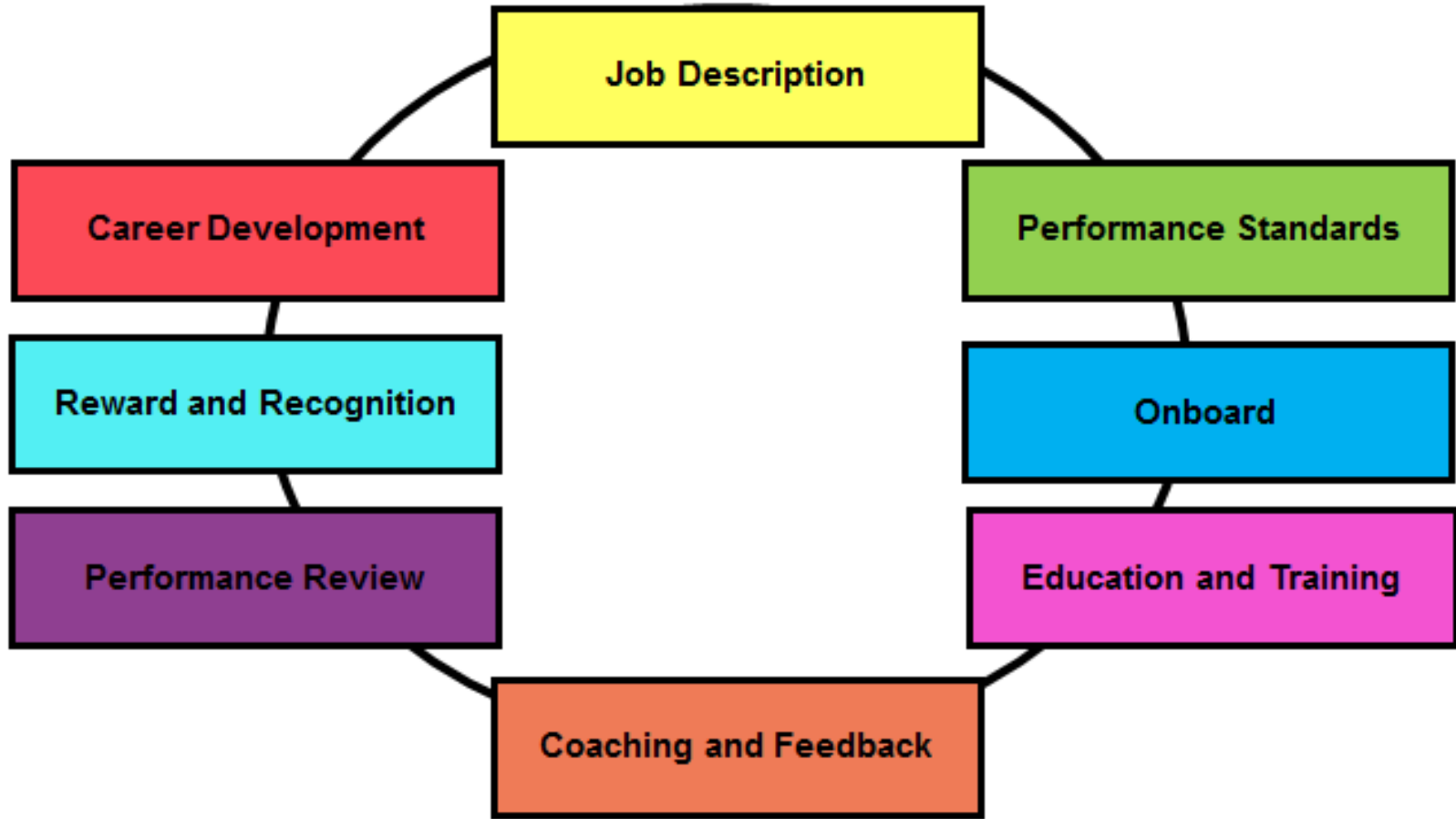
- Because the Organizational Standards are flexible, you have **WIDE DISCRETION** to choose the path to excellence that is best for your staff, your agency and community!



Meeting to Exceeding: Effective HR Management

- Design performance management as a ***process*** instead of the performance appraisal as an ***event*** – connecting with organization-wide training
- Customize training opportunities to development areas identified in *individual* performance evaluations
- Establish a system of coaching and mentoring vs. managing and discipline

Successful transitions and improvement over the course of a year; and then throughout a career



Standard of Excellence

Standard of Excellence 5.4: Staff Development and Learning System The agency has formally adopted and systematically deploys an agency-wide staff skill and professional development policy or plan. It includes provisions for assessing employee needs for future training and evaluating the sufficiency of and improving offered training. New and current staff orientations cover agency mission/vision and history, as well as the mission/vision, values, history, Promise of Community Action, and ROMA. The agency offers full support to appropriate staff to acquire and maintain Certified Community Action Professionals (CCAP) certification.

So, how do we do it?

- Proactive training assessment & planning
 - *Using ROMA & CQI*
- Connecting with the agency-wide strategic plan
 - *Building agency and staff capacity to do the work*
- A comprehensive system tied to performance appraisals, leadership development opportunities, and Community Action Certifications
 - *Creating career pathways for staff*

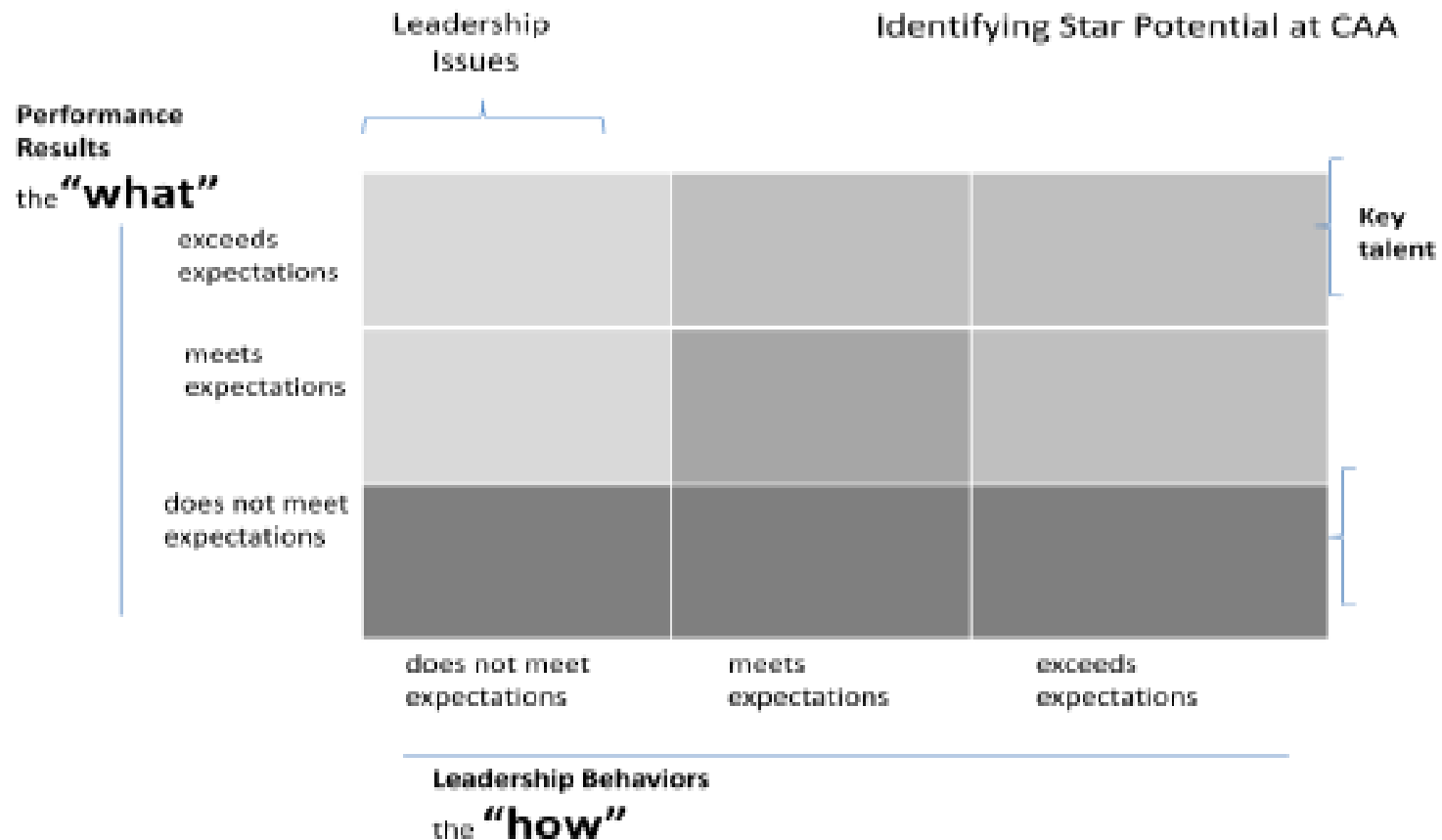
Training Assessment & Planning



Connecting to the Strategic Plan

- The agency's Strategic Plan provides guidance and direction for all areas of the organization – even staff training.
- Building staff capacity is also necessary to be able to carry out the Plan effectively.
- What gaps in knowledge, skills, or abilities may be obstacles to achieving objectives with your agency's plan?

Evaluate Individuals and the Program



A Comprehensive System

- A comprehensive organization-wide approach will be more effective than ad hoc orientation, training, and development by program or supervisor. Consider the following “inputs” -
 - Training needs assessments
 - Individual Development Plans
 - Performance Evaluations
 - Staff feedback
 - Strategic Plan

Leadership Development

Leadership Development focuses attention on the skills required for senior management positions, and includes:

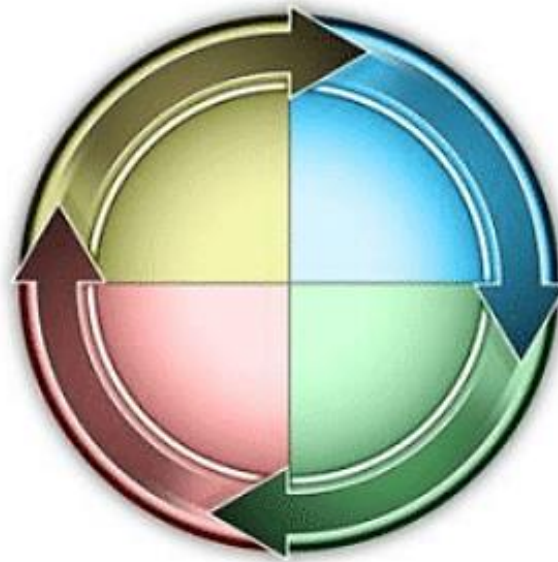
- An **educational system** that supports managers to develop their skills
- A **proactive means to cultivate talent** through planned development activities

Leadership Development Cycle

Make Commitment to Leadership Development

Evaluate Individuals and the Program

Identify & Develop Individual Talent



Assess the Present Work and People Needs

Assess the Future Work and People Needs

Establish a Leadership Development Program



*Resource Credit: Batter Up!
Building Your Leadership Bench*

Assess the Present Work and People Needs

- **Why?** (we're all getting older!)
- **The Benefits** (we have some great staff who appear to have strong leadership potential)
- **The Message** (we value the people who work here, and we want to encourage their professional growth)
- **The Impact** (we have a number of staff who are ready to take on new challenges and opportunities)
- **The Costs** (we need to invest in education, training, mentoring, and other strategies to develop new leaders among us)

Assess the Future Work and People Needs

- Where do we want to be as an agency in X years?
 - New programs? Service delivery strategies?
Partnerships? Advocacy efforts?
- What skills and talents do we need to get there?
 - IT and data skills? Process management?
Communication skills?
- What skills and talents do we need when we get there?
 - Personnel management? Program evaluation?
Performance improvement?

Professional Development

Organizational

Connections

- People

Culture

- Motivation

Organizational
Learning

- Knowledge

Personal

Professional Development Opportunities

Certifications

- Nationally Certified ROMA Trainer/Implementer
- Certified Community Action Professional (CCAP)
- Pathways to Excellence Peer Reviewer/Implementer

Trifecta of Community Action Leadership Development



Why?

NCRT

Outcomes

Data and
Analysis

ROMA Cycle

CCAP

History

Experience

Leadership &
Management

Peer Reviewer

Organizational
Development

Agency
Performance

Systems
Thinking

Events for Community Action Leadership Development

- Management & Leadership Training Conference - February
- Community Action Partnership Convention-August
- NCAF Conference-March
- CAPLAW Conference-June
- NASCSP Conference-March and September
- NHSA

Community Action Partnership Tools

Batter Up! Building Your Leadership Bench

- *Community Action Partnership*
- *Brown, Buckley, Tucker*
- *Webinar recordings posted*

www.communityactionpartnership.com

- *Resources/Toolkits and Webinars*
- *National Training Center/Toolkits and Webinars*

www.csbgta.org

- *Resource Bank*



CSBG ORGANIZATIONAL STANDARDS

A Brief History...



What are the CSBG Organizational Standards?

The **CSBG Organizational Standards** are a comprehensive set of standards developed with input from the entire CSBG Network through a three-year multi phase process led by the Center of Excellence. The Organizational Standards were announced in January 2015 with the OCS release of **IM 138, State Establishment of Organizational Standards for CSBG Eligible Entities**, directing States to establish organizational standards by fiscal year 2016.

The Organizational Standards are organized in three thematic groups comprising nine categories and totals of 58 standards for private, nonprofit entities and 50 for public entities. The purpose of the organizational standards is to ensure that all agencies have appropriate organizational capacity, in both critical financial and administrative areas, as well as areas of unique importance to the mission of the Community Action network.

<https://communityactionpartnership.com/organizational-standards/>

T/A Guides Toolkits and Webinars for Each of the Nine Categories

- Additional Guidance
 - Definition
 - Compliance
 - Document
- Beyond Compliance
- Resources
- Assessment Scales



PREPARE YOUR AGENCY FOR A POST-COVID FUTURE

**WEBINAR
SERIES**



A Deep Dive into the
Organizational Standards



- **Recording Available**: Risk Management (4.6)
- **Recording Available**: Effective Governance (5.5, 5.7, & 5.8)
- **Recording Available**: Board's Role in Setting the Mission (4.1)
- **Recording Available**: Strategic Plan Progress & Scorecards (6.5 & 9.3)
- **November 12th**: Staff Orientation & Training (7.8 & 7.9)

[https://communityactionpartnership.com/
events/category/webinars/](https://communityactionpartnership.com/events/category/webinars/)

Standards of Excellence Webpage



The Community Action Partnership's Standards of Excellence are based on the Malcolm Baldrige National Quality Award and specifically adapted for the Community Action Network to define the very best practices for agencies.

Pathways to Excellence is the Partnership's organizational capacity building initiative using the **35 Standards of Excellence**. Local Community Action Agencies participate in Pathways as a team. Over a twelve month period, agency teams complete an online eCourse on the Standards of Excellence, attend a one-day in-person training session, conduct a comprehensive self-study process and report, participate in monthly support webinars and/or conference calls, and receive a detailed peer review report from a team of Pathways-trained experts with at least five years of management experience.

The Standards for Excellence set out a list of critical benchmarks of excellence in seven categories:

1. Organizational Leadership
2. Strategic Planning and Direction
3. Customer, Constituent, and Partner Focus
4. Measurement, Analysis, and Performance Management
5. Human Resource Focus
6. Organizational Process Management
7. Organizational Results

<https://communityactionpartnership.com/pathways-to-excellence/>



Human Capacity & Community Transformation

Center of Excellence



COMMUNITY ACTION PARTNERSHIP

Visit the HCCT Webpage!

<https://communityactionpartnership.com/hcct/>

Recordings and Slides from this series will be posted here.



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