

Organizational Profile Template

Your Organizational Profile is intended to provide a succinct overview of your organization for those unfamiliar with it. Limit this section to a maximum of **five pages**. The Organizational Profile offers you the opportunity to profile the environment and circumstances in which you operate. The Organizational Profile is a consensus snapshot of your organization addressing the key influences on how you operate, and the key challenges you face. This section should be completed at the outset of your Excellence journey and updated as your progress; it will ensure that you establish and maintain an overall view and consensus of your organization shared by your key staff – a view that may be surprisingly different among staff. Note that this Organizational Profile is a required element of all levels of the Pathways program. It is an essential foundation document to assure your agency's leadership team has a shared vision of the organization and its current strategic context.

For those completing the full Pathways Self-Study (an element of the Gold and Platinum levels), the Organizational Profile will not count against the *55-page Self-Study limit*. It **will not be evaluated** or scored. You may refer (although not required) the reader to specific standards in your completed self-study where related narrative or information is presented.

Importance of Your Organizational Profile

Your Organizational Profile is important because:

- It is a summary or outline of key elements of your agency and serves as a starting point for your Excellence journey and specifically grounds the full agency Self-Study.
- It identifies potential gaps in key information and focuses you on key performance requirements and results.
- For those completing the agency Self-Study, it helps the reviewer understand what you consider important.
- It also may be used by itself as a quick assessment of your organization. If you identify topics for which conflicting, little, or no information is available, it is possible that you may need to quickly address these areas before your formal Self-Study can proceed.

Please include a one-page Organization Summary Sheet with your Organizational Profile.

The summary sheet does not count towards the Organizational Profile page limit. The one-page summary sheet should address the following:

- a. Organization Name
- b. Address
- c. Telephone
- d. Staff Contact(s) for Profile or Self-Study (including e-mail addresses)
- e. Agency Funding Level (total agency revenue)

Organizational Profile Elements (5-Page Limit)

(1) Organizational Background

Briefly describe your organization's background as a Community Action Agency.

Within your response, include answers to the following:

- What is the history (chronology/key dates) of your CAA?
- What is your agency's philosophy in addressing poverty conditions in its community? How and why has it changed over time?
- To what extent and in what manner does your CAA communicate the history of the Community Action movement, both locally and nationally, to new Board, staff, volunteers, and advisory commission members?
- How is the performance of staff guided and inspired by this history?

(2) Organizational Context

Describe your organization's business/community environment and your key relationships with constituents, customers, suppliers, stakeholders, and other partners.

Within your response, include answers to the following:

a. Organizational Environment

- List your organization's main services with a very brief description of how they are delivered to your target customers/constituents.
- What is your organizational culture? Briefly state your purpose, vision, mission, and values, as appropriate. What is your employee profile? Include educational levels, workforce and job diversity, bargaining units, use of contract employees, and special safety requirements, as appropriate.
- Briefly list or summarize your major technologies, equipment, and facilities.
- What is the regulatory environment under which your organization operates, e.g., health and safety regulations; accreditation requirements; and financial and program regulations?

b. Organizational Relationships

- List your key customer/constituent groups and/or community segments targeted for services by your agency.
- What are your most important types of suppliers (contracted deliverables essential to your agency's success) as applicable to your role and mission in the community?
- Who are your key community partners? Specifically address those partnerships that are non-financial/non-contractual and collaborative in nature.
- What are your key communication mechanisms for conveying your agency's message?

(3) **Organizational Challenges**

Describe your organization's competitive environment, your key strategic challenges, and your system for performance improvement.

Within your response, include answers to the following:

a. Competitive Environment

- Do you have competitors for the types of services/deliverables you offer? If so, who are they and how do you assess their potential challenges and competition?
- What are the principal factors that might determine your success relative to your competitors? Identify any changes taking place that might affect your competitive situation.

b. Strategic Challenges

- What are your key strategic challenges? Include operational, financial, human resource, business, and regulatory challenges, as appropriate.

c. Performance Management/Improvement System

- Summarize your key tools for agency-wide performance management, including an agency-wide scorecard. Who is responsible for tracking and reporting overall agency success over time? How do you maintain an organizational focus on performance and continuous improvement? Refer to standard 4.3 as appropriate.
- Explain how you assess and improve key administrative and service delivery processes?