



Using 2022 Performance to Inform 2023 Goals: Moving Towards Excellence

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The Promise of Community Action



Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community and we are dedicated to helping people help themselves and each other.



Land Acknowledgement



Every community owes its existence and vitality to generations from around the world who contributed their hopes, dreams, and energy to making the history that led to this moment. Some were brought here against their will, some were drawn to leave their distant homes in hope of a better life, and some have lived on this land for more generations than can be counted.

- Go to <https://native-land.ca/> and enter your address in the search box on the left of the screen
- **Offer your land acknowledgement in the chat**
 - “This meeting is being held on the traditional lands of the _____ People, and I pay my respect to elders both past and present, who have stewarded this land throughout the generations.”



Agenda



What does Organizational Performance mean for your agency?

Domains of Performance & Tools for Assessing Performance

Using Performance to Inform the Future

Pathways to Excellence



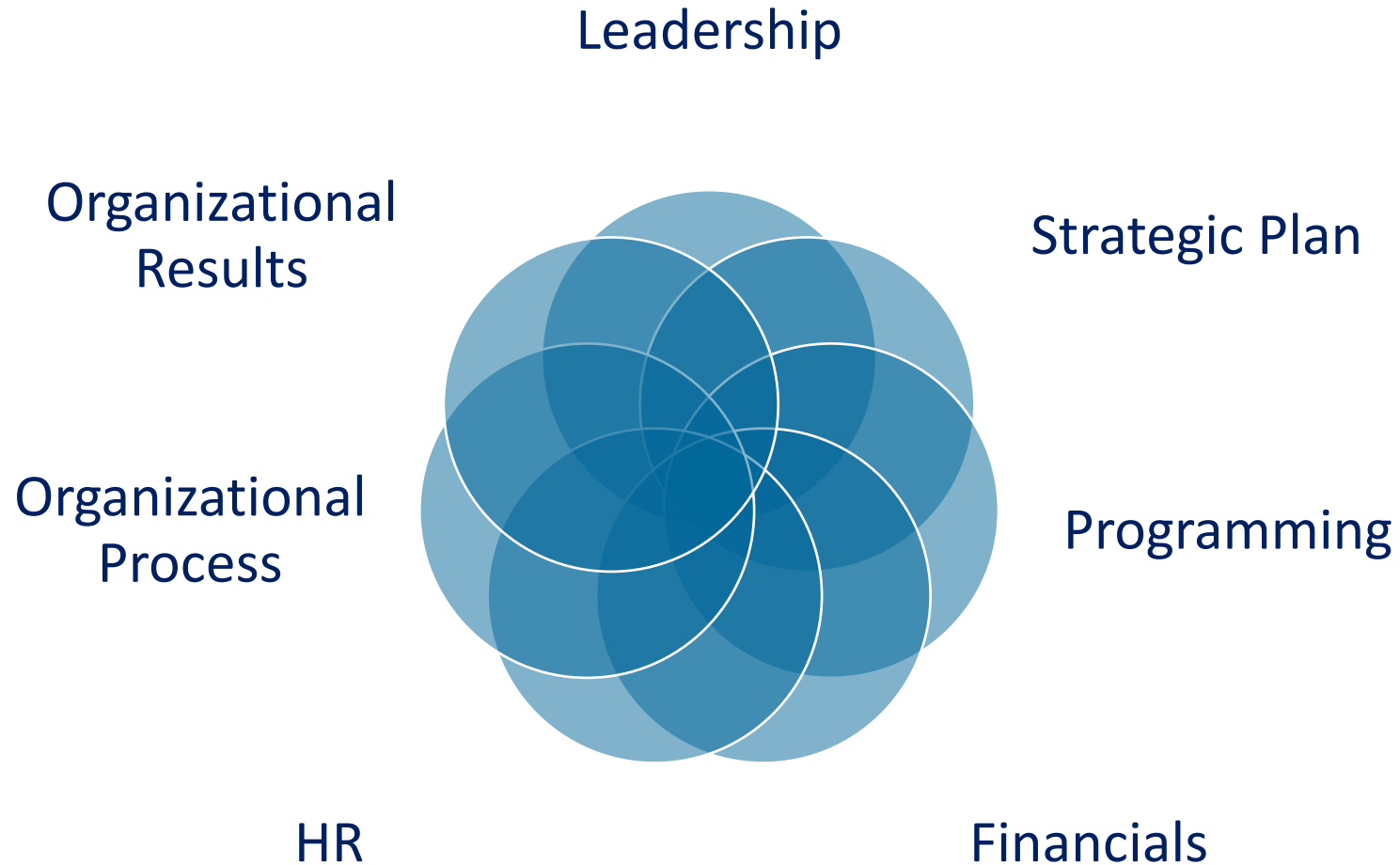
Defining Organizational Performance



- What does Organizational Performance mean to your organization?
- What goes into “good” Organizational Performance for your Organization?
- How does your organization assess its organizational performance?



Organizational Performance Domains



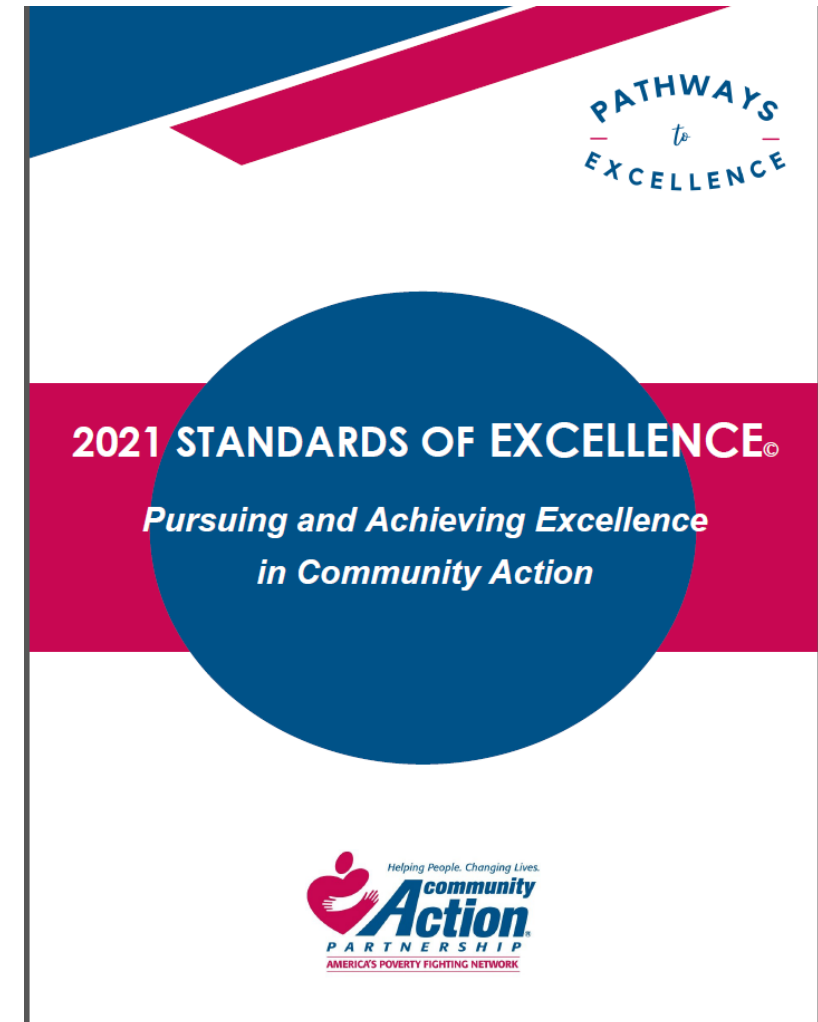
What Are the Community Action Standards of Excellence?



The **Community Action Standards of Excellence** represent 35 of the very best practices of the very best Community Action Agencies.

They represent **optimal, real-world** administrative and operational benchmarks that **every agency can strive for.**

The Standards for Excellence are based on the **Malcolm Baldrige Criteria** for Performance Excellence, and are *tailored to the language and operations of the CAA Network and revised every two years*



The Standards of Excellence

- Seven Categories -

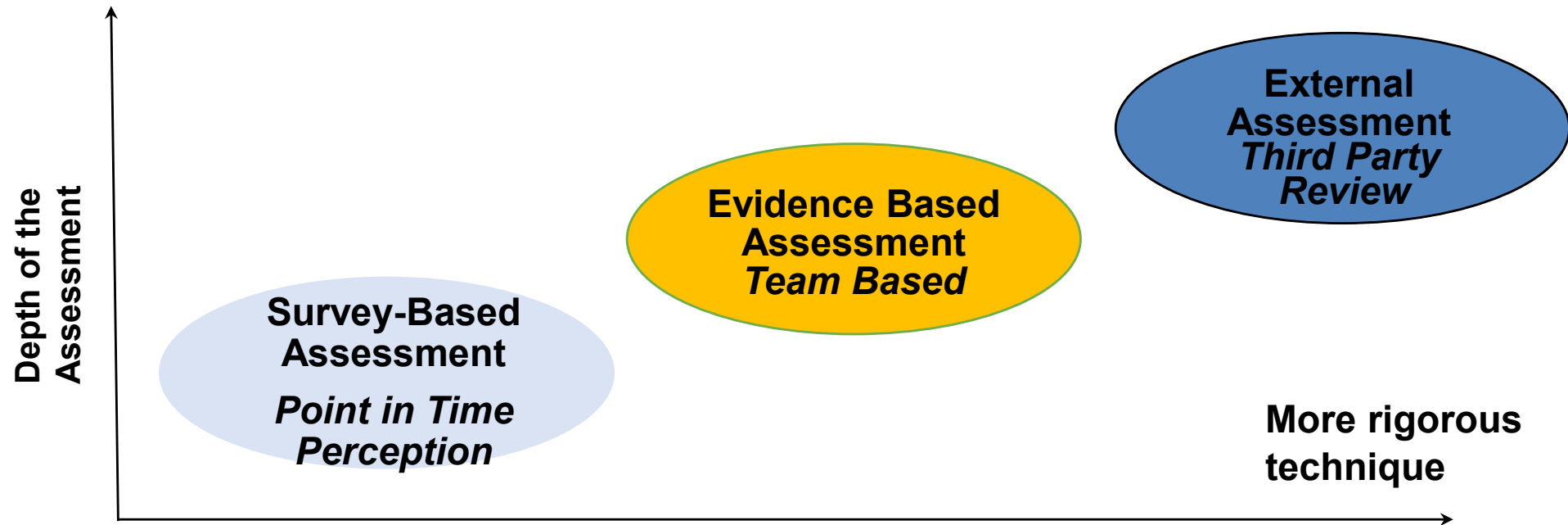


1. Organizational Leadership
2. Strategic Planning and Direction
3. Customer, Constituent, and Partner Focus
4. Measurement, Analysis, and Performance Management
5. Human Resource Focus
6. Organizational Process Management
7. Organizational Results



Organizational Assessment

- Organizational Assessment is a systematic process of reviewing an organization to gain insight into its functioning and performance.
- Remember the excellence concept: **You can't improve what you don't measure**

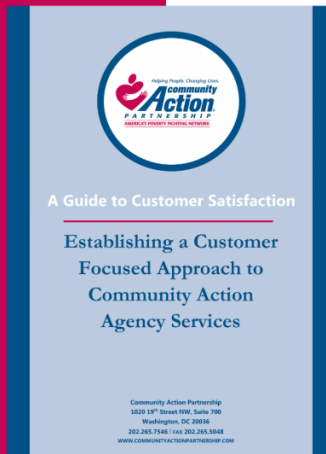


Assessment for a Purpose

- Assessment of prior performance is ultimately about documenting and using information for the future:
 - Continuous Quality Improvement
 - Integrate lessons learned into agency practices
 - Align plans/resources to reach agency goals
 - Setting realistic targets



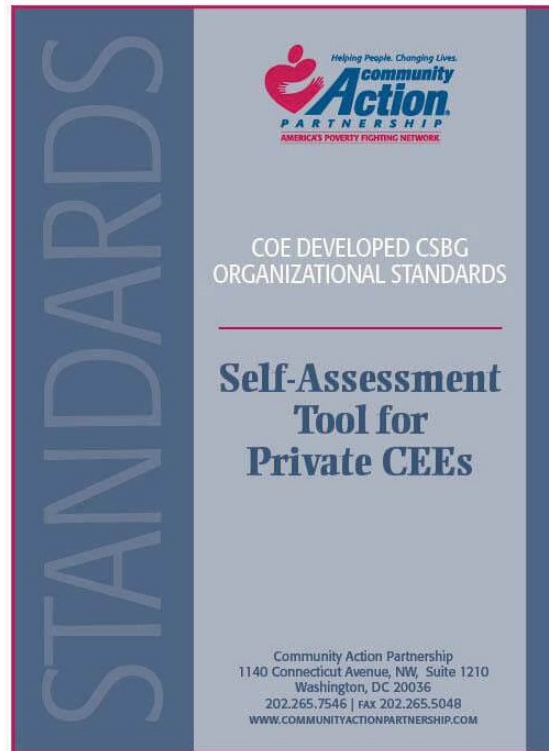
NCAP Organizational Assessment Tools



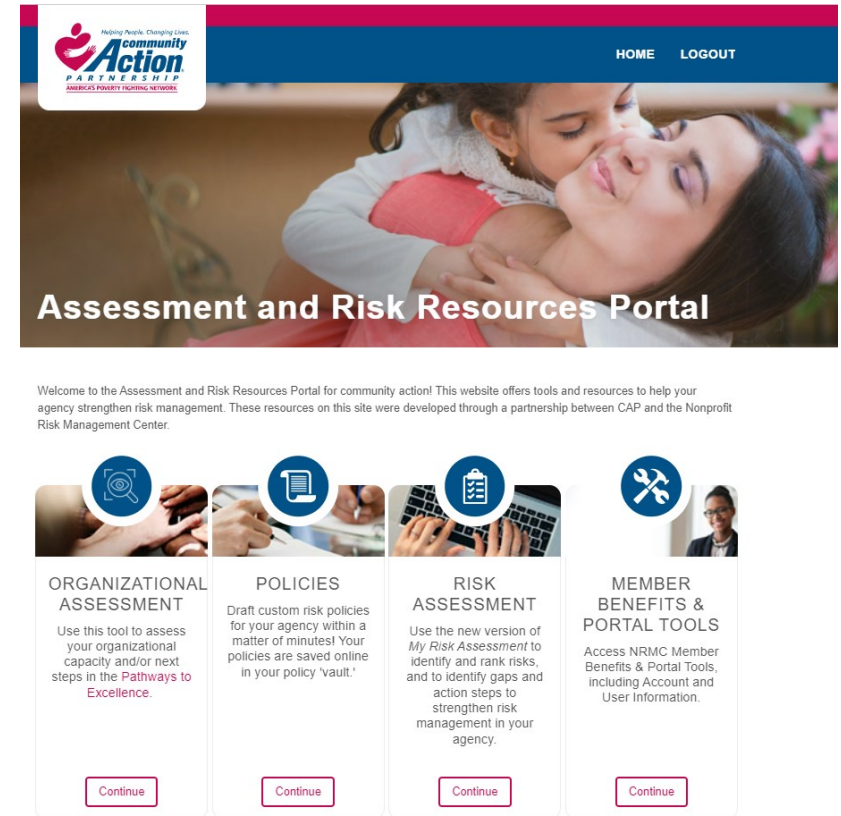
ESTABLISHING A CUSTOMER FOCUSED APPROACH TO COMMUNITY ACTION AGENCIES

A Guide to Customer Satisfaction

<https://communityactionpartnership.com/?s=Customer+satisfaction>



https://communityactionpartnership.com/publication_toolkit/organizational-standards-self-assessment-tool-for-private-cees/



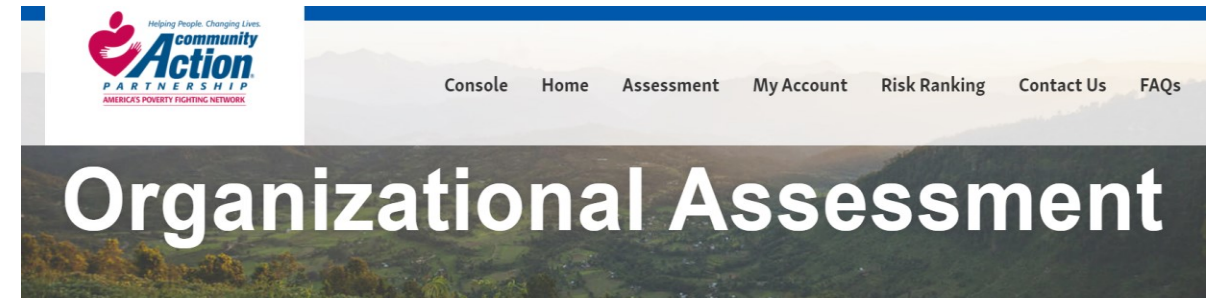
<https://portal.nonprofitrisk.org/cap/>



Introducing the New Organizational Assessment Tool



- Designed for use by Community Action Agencies, based on the Community Action Standards of Excellence
- Gathers staff perceptions of deployment of agency strategy
- Incorporated in the Risk Assessment Portal with the Nonprofit Risk Management Center



Organizational Assessment

This assessment can be used by your organization to gain insight into the perceptions of staff and leadership into key areas of organizational operation and strategy. This insight can help focus improvement and communication efforts into the most critical areas as identified by key organizational personnel. Key personnel will vary by agency, but should include a representative sample of your organization including leadership and program staff. This tool may be used as part of the Organizational Assessment required in [Pathways to Excellence](#), or by agencies seeking to gain a better understanding of how organizational strategy is deployed and perceived.

www.nonprofitrisk.org/CAP

Using Past Performance to Inform Future Action



- What are the agency's goals for the upcoming period?
 - Sources: Strategic Plan; Funder Goals; Operational Goals
 - How will we measure these goals?
- What has been our past performance in relation to those goals?
 - What impacted the prior performance?
 - What do we expect to impact our performance in this period?



What drives performance?



Approach



Deployment



Results

Did our performance succeed/fail because of our planning, our policies or our expectations?

Did our performance succeed/fail because of how we did things? Did we do things systematically or did we follow ad hoc processes?

Did our performance succeed/fail because of how we defined/measured success? How did we compare to the past? Were there external factors that had an impact on our results? Were those external factors foreseeable?

Stretch Goals vs Unrealistic Goals



Pathways to Excellence Overview



*Pathways to Excellence empowers CAAs in their pursuit of excellence through an intentional process of assessment, planning, and capacity building to institutionalize known best-in-class practices from the Community Action network and outlined in the **35 Standards of Excellence**.*



Learn about the Standards of Excellence



Complete a Rigorous Self Study to Assess and Document your Agency Commitment to Excellence



Receive comprehensive feedback from Community Action Peer Experts on how to improve your implementation of Excellence



Implement & Institutionalize the Standards of Excellence



Receive recognition as a Community Action Agency of Excellence



Ultimate Achievement The Award for Excellence in Community Action



Pathways to Excellence Tiered Approach



Bronze	Silver	Gold	Platinum
<ul style="list-style-type: none"> • Complete & Submit a Board Resolution to formalize the CAA's Commitment to Excellence • Develop 5-page Organizational Profile • Convene Agency Excellence Team • Complete the Standards of Excellence eCourse 	<ul style="list-style-type: none"> • Complete Online Organizational Assessment • Attend Pathways Implementer Certification Training • Complete an abbreviated self-study on 2-3 categories of the Standards of Excellence • Receive feedback report from Peer Reviewers 	<ul style="list-style-type: none"> • Attend Training on the Self-Study Process • Participate in Technical Assistance Web Meetings • Submit Self-Study and receive Feedback Report from expert Peer Reviewers 	<ul style="list-style-type: none"> • Submit Award Application • Complete full Self-Study for Award Review • Site visit and scoring of Self-Study by Award Reviewers • Pending Results, Achieve the Highest Honor in Community Action

Enrollment Process

- Complete the Enrollment Form:
<https://www.surveymonkey.com/r/PathwaysEnrollment>
- To complete the enrollment form, you will need:
 - Basic agency information including service area, number of FTEs, and annual budget;
 - Agency strategic plan;
 - Most recent 990 form*; and
 - Board Resolution*;
- Partnership staff will confirm receipt of your materials; review for completeness and generate an invoice.



Excellence Commission



Community Action Experts oversee the administration of the Award for Excellence and the Pathways to Excellence program.

- Biz Steinberg - San Luis Obispo, CA
- Paul Dole, CCAP - KCEOC, KY
- Andrew Bates, CCAP - Louisville Metro Office of Performance Improvement, KY
- Stephanie Kasprzak - Monroe County Opportunity Program, MI
- Liz Kuoppola, CCAP - Mahube-Otwa Community Action Partnership, MN
- Mary Lockhart-White - Community Action Partnership of Lake County, IL
- Jaime Longoria - Hidalgo County Community Service Agency, TX
- Bill Powell - South Plains Community Action Agency, TX



More Information: Partnership Website

The screenshot displays the website's navigation structure. At the top, a maroon bar contains links for "CAA Positions", "Donate", "Press Room", and "Subscribe". Below this, a blue navigation bar includes the logo, "Home", "About Us", "Membership", "Find Your CAA", "Events", "Programs/Initiatives", "Tools & Resources", and a search icon. A large yellow arrow points from the "Events" menu item to a "Click here" box on a background image of hands stacked together. Below the navigation, three content cards are featured:

- Fighting Poverty**: Accompanied by a circular icon of a hand holding a heart. The text states: "The US Census Bureau estimates that 16% of the population lives in poverty. We work to end poverty across the country."
- Community Action Network**: Accompanied by a circular icon of three people. The text states: "We have over a thousand agencies in local communities, as well as state associations and national partners."
- Tools and Resources**: Accompanied by a circular icon of a wrench. The text states: "Find all of our Training and Technical Assistance webinars, toolkits, useful information and other resources."

Standards of Excellence Webpage



CAA Careers Press Room Subscribe

Home About Us Membership Find Your CAA Events Programs/Initiatives Tools & Resources Search

PATHWAYS TO EXCELLENCE

America's communities need and deserve excellent Community Action Agencies. Every organization can improve, and should continuously strive to increase efficiency, effectiveness, and to exceed expectations. The **Pathways to Excellence** program empowers CAAs in their pursuit of excellence through an intentional process of assessment, planning, and capacity building to institutionalize known best-in-class practices from the Community Action network and outlined in the **35 Standards of Excellence**.

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. They represent the very best practices for agencies as implemented by top-performing CAAs across our national network.

The Standards of 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

Click [here](#) for the full Community Action Standards of Excellence. [Click here](#) to learn about subscribing to the 2022 Standards of Excellence eCourse.

[Click Here for eCourse!](#)

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

2021 Standards of Excellence

<https://communityactionpartnership.com/wp-content/uploads/2022/01/2021-Standards-of-Excellence-with-Pathways-Branding-Rev-Dec-21-Final.pdf>



PATHWAYS
to
EXCELLENCE

2021 STANDARDS OF EXCELLENCE[®]

*Pursuing and Achieving Excellence
in Community Action*



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