Leveraging Internal Feedback for Organizational Excellence

June 10, 2025

National Community Action Partnership
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(202) 265-7546
www.communityactionpartnership.com



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.

What We'll Cover

- Excellence in Community Action
- Who Are Your Internal Customers?
- Feedback Mechanisms and Considerations
- Embedding Feedback in Performance Systems
- Analyzing and Acting on Feedback
- Building a Feedback Culture
- Resources

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PATHWAYS TO EXCELLENCE

Communities Need and Deserve Excellent Community Action Agencies



Every organization can improve, and should continuously strive to increase efficiency, effectiveness, and to exceed expectations.

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Community Action Standards of Excellence

The **2023 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

The Baldrige Criteria have been tailored to the language and operations of the CAA Network and revised every two years.

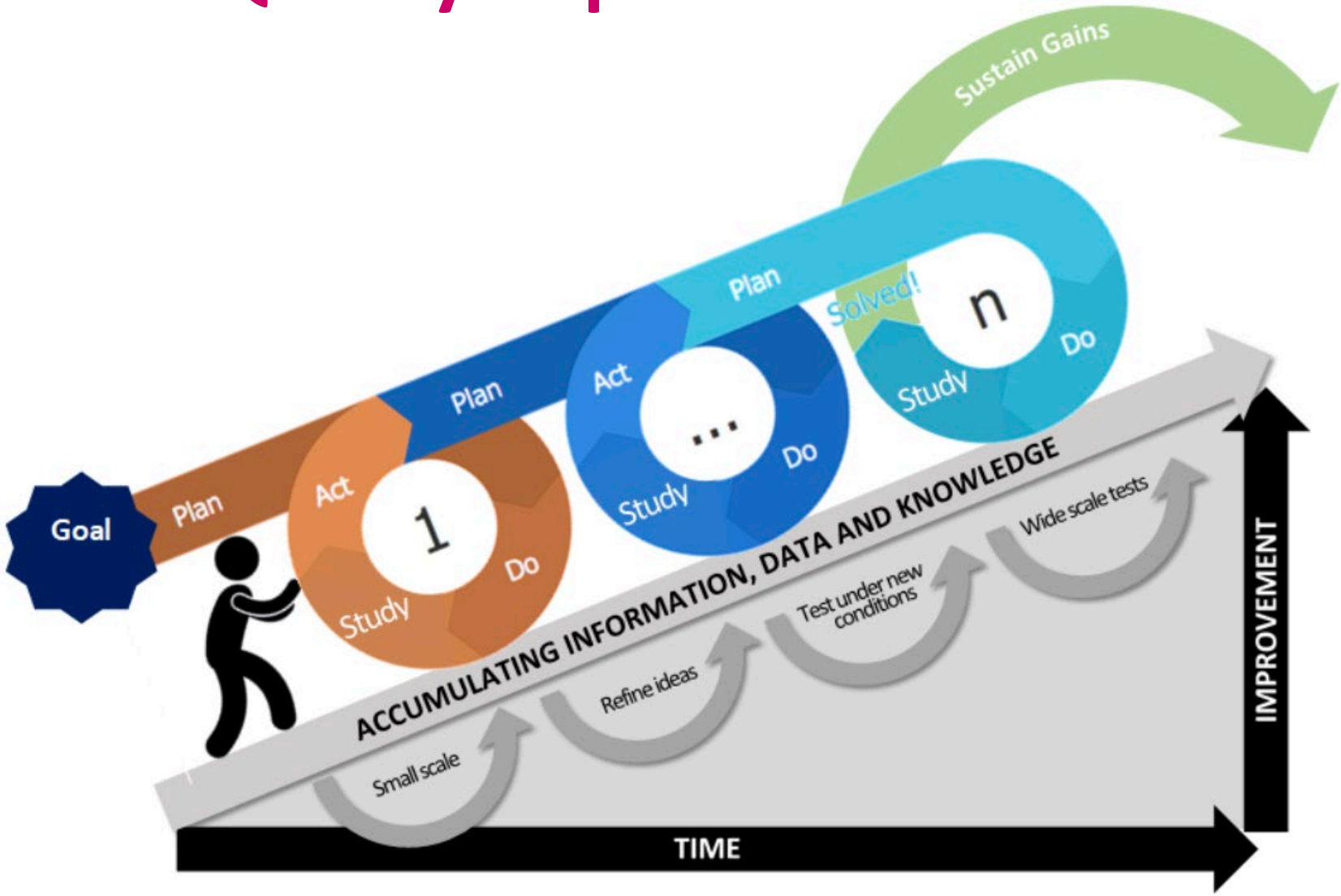


The Standards of Excellence
-Seven Categories-

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

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Excellence is not possible without a culture of Continuous Quality Improvement





Excellence is not possible without a focus on Customers.

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Key customers defined by Standards of Excellence

External Customers:

- People with Low Income
- Partners/Stakeholders
- Investors/Funding sources
- Community



Insight into service quality, community impact, and unmet needs

Internal Customers:

- Staff
- Board Members
- Volunteers



Insight into how the agency operates, internal strengths, and challenges

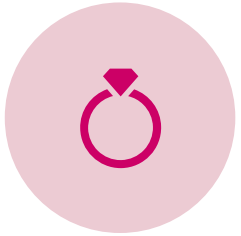
Internal Customers Have Unique Perspective and Insight



MORALE



RETENTION



ENGAGEMENT



CULTURE



PERFORMANCE



FUNCTION

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What do we need to know from our internal customers?

Methods for Listening & Understanding

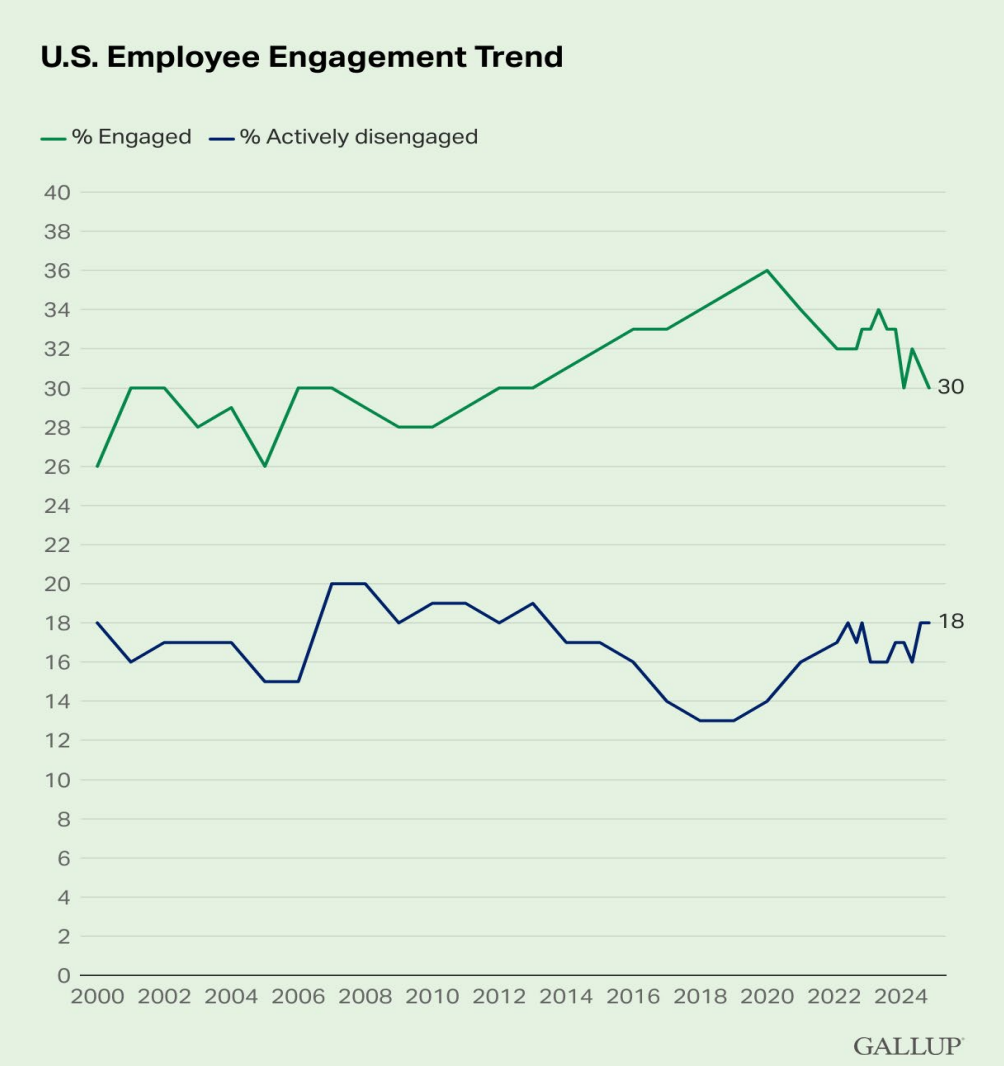


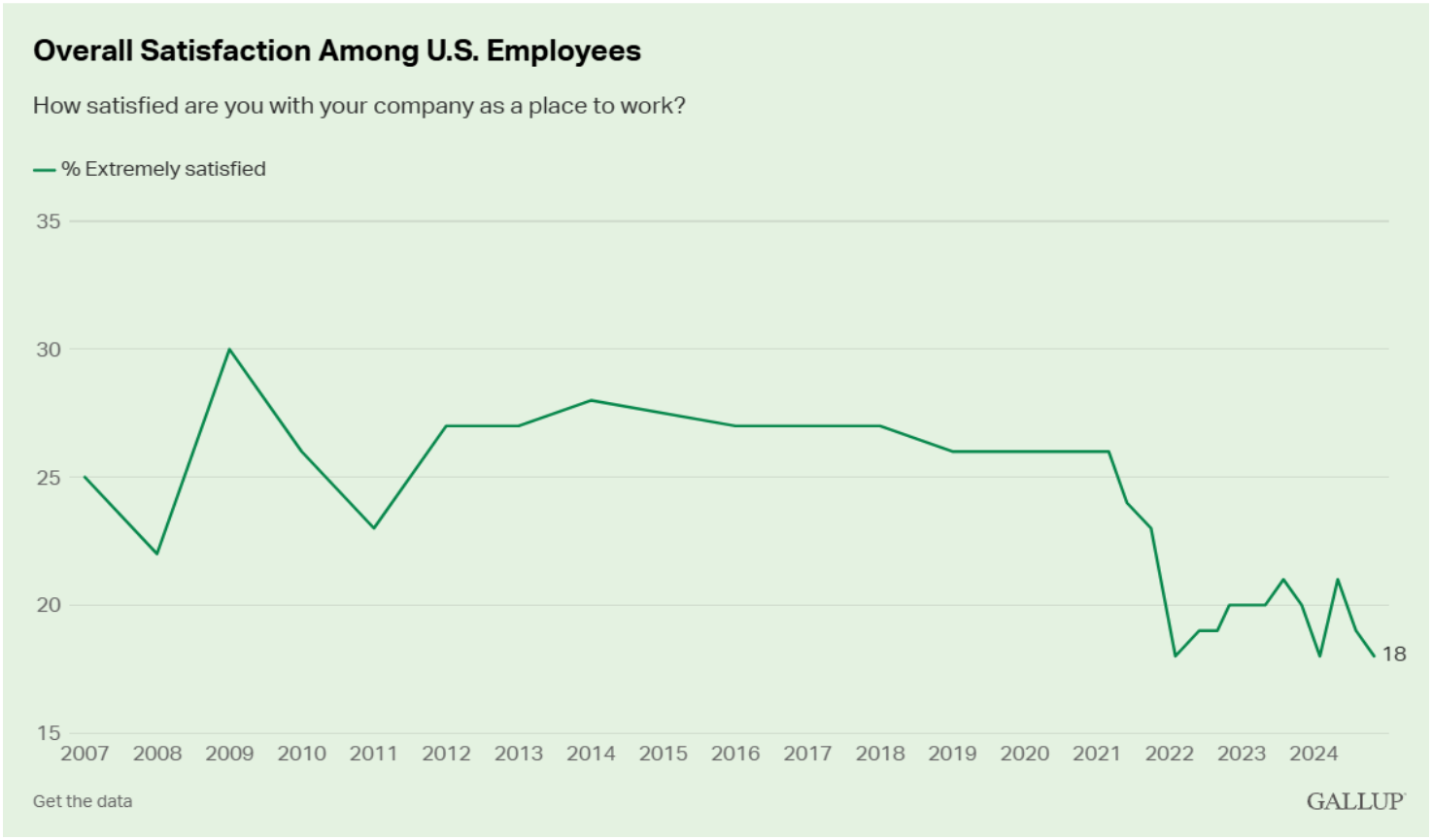
Align methods and questions to the Customer Group

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Employee Satisfaction / Engagement Surveys

- Engaged employees have higher wellbeing, better retention, lower absenteeism and higher productivity (Gallup Q^{12} Meta-Analysis, 2024)





Dos & Don’ts of Customer Surveys

Do

- Start with the end in mind
- Keep surveys short
- Use different tools for different customer segments (i.e., people served; funders; partners; staff; volunteers)
- Ask questions to allow for segmenting
- Regularly review and amend as needed
- Consider timing

Don’t

- Ask double-barreled or leading questions
- Use jargon or complex language
- Ask demographic questions first
- Change the scale
- Overcomplicate the process

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Board Assessment

- Excellent Boards take time to consider how they are performing in key areas such as governance, recruitment, leadership, fulfilling the mission, ethical practices, etc.

- Many tools to help boards complete this type of assessment!
  - Dalhousie University Self-Assessment Questionnaire
  - McKinsey & Company Nonprofit Board Self Assessment
  - Can build your own

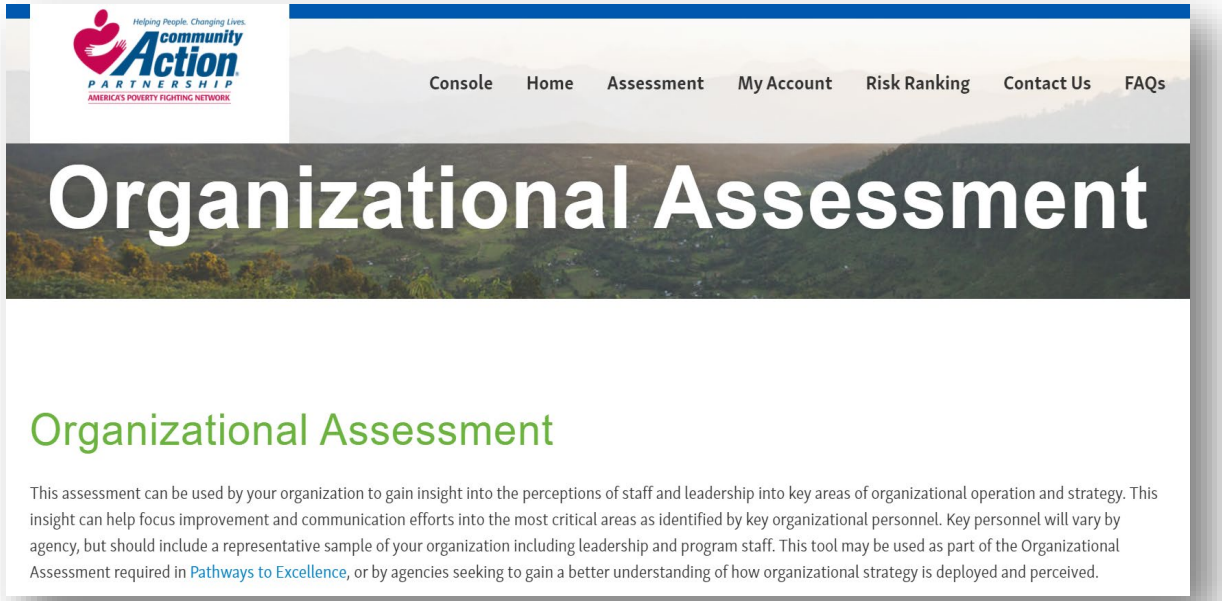
- Assessment of the Board's training needs is another key component

- Opportunity to assess satisfaction with board service too!

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NCAP's 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
- Identify & prioritize opportunities for improvement in processes, approaches, and deployments



www.nonprofitrisk.org/CAP

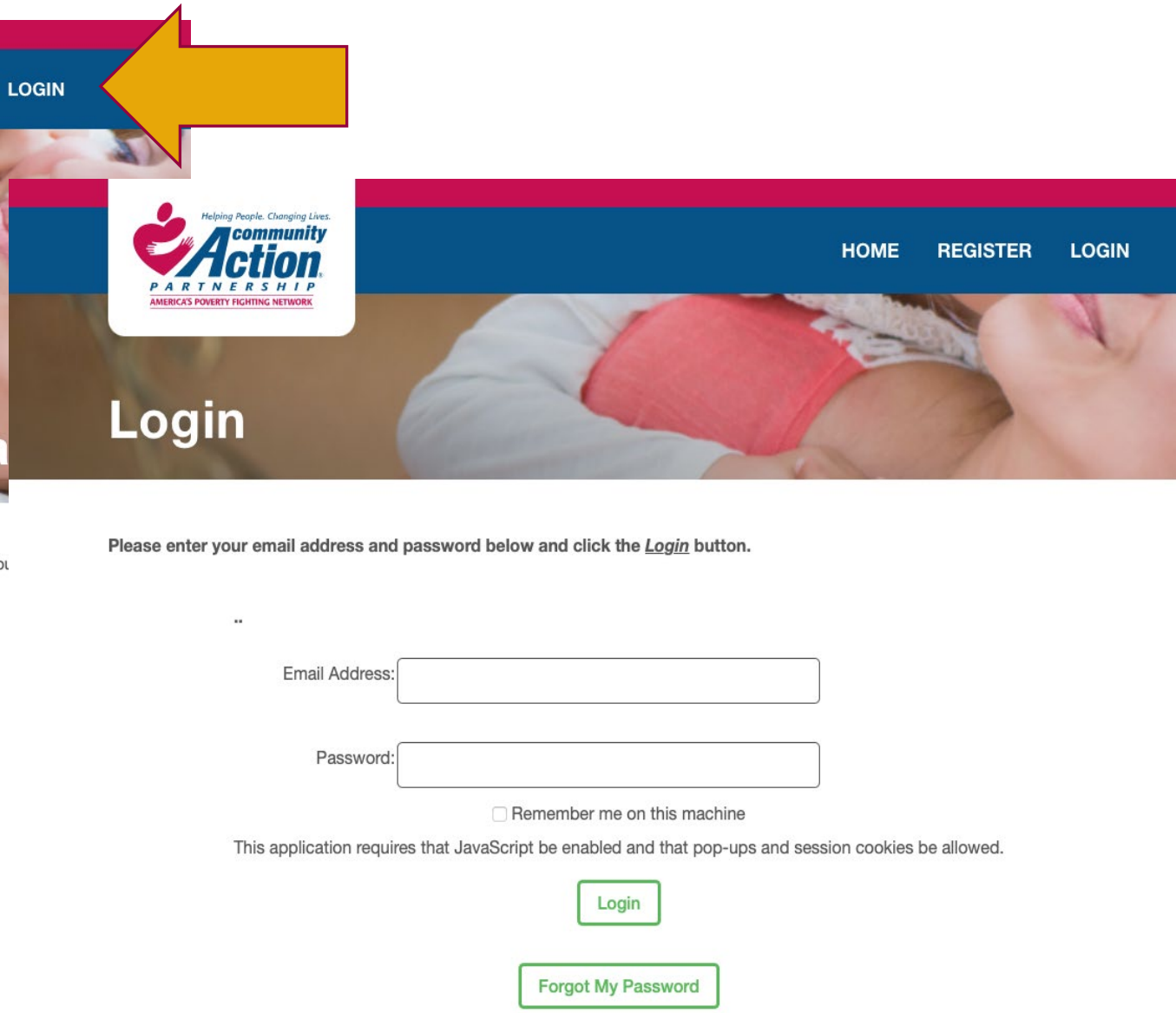
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Log In to the Portal



Welcome to the Assessment and Risk Resources Portal for community action! This website offers tools and resources to help you agency strengthen risk management. These resources on this site were developed through a partnership between CAP and the Nonprofit Risk Management Center.

www.nonprofitrisk.org/CAP



NRMC Pathways Mini Assessment

Assessment and Risk Resources Portal

Welcome to the Assessment and Risk Resources Portal for community action! This website offers tools and resources to help your agency strengthen risk management. These resources on this site were developed through a partnership between CAP and the Nonprofit Risk Management Center.



ORGANIZATIONAL ASSESSMENT

Use this tool to assess your organizational capacity and/or next steps in the Pathways to Excellence.

Learn More



POLICIES

Draft custom risk policies for your agency within a matter of minutes! Your policies are saved online in your policy 'vault.'

Learn More



RISK ASSESSMENT

Use the new version of *My Risk Assessment* to identify and rank risks, and to identify gaps and action steps to strengthen risk management in your agency.

Learn More

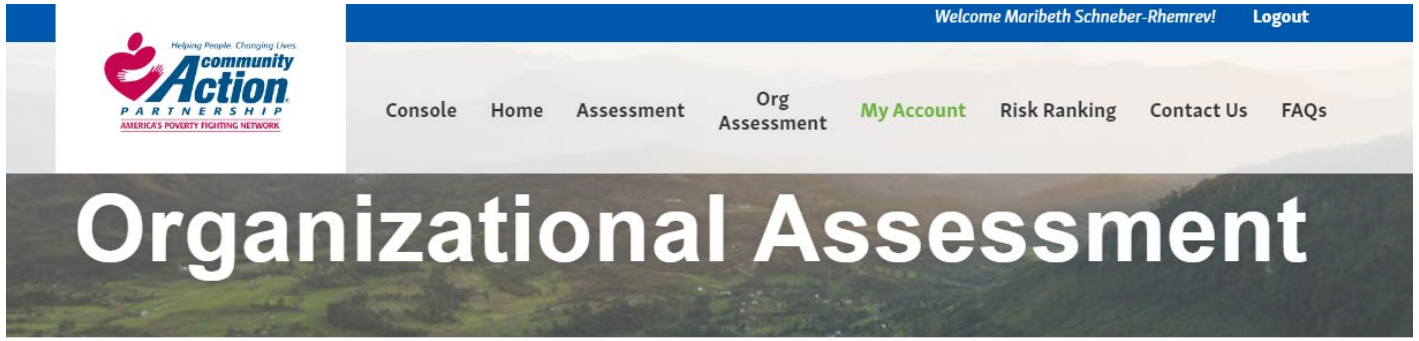


MEMBER BENEFITS & PORTAL TOOLS

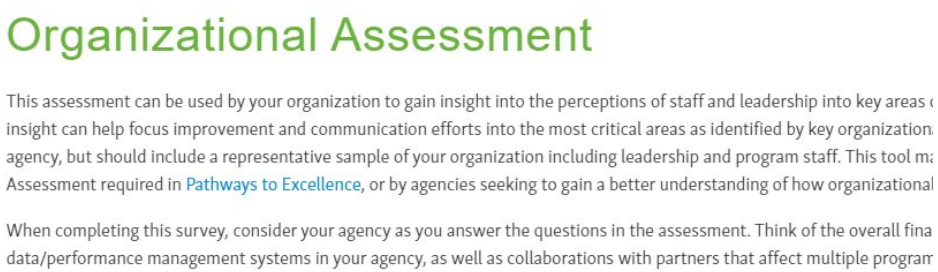
Access NRMC Member Benefits & Portal Tools, including Account and User Information.

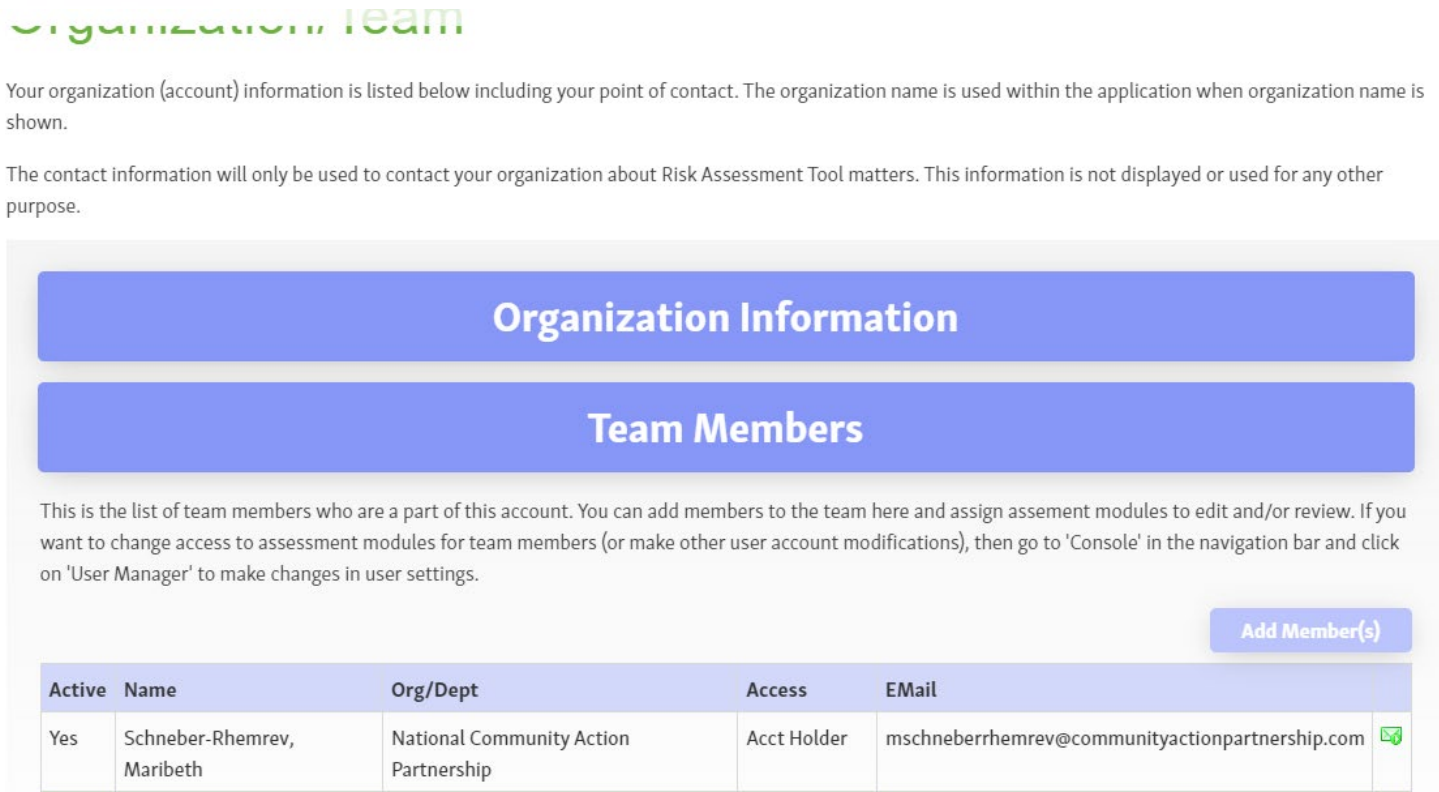
Learn More

Add New Users



- Select “My Account”
- “Add Member”





Take the Survey

Is your agency completing this survey as part of Pathways to Excellence?

- ○ Yes
- ◉ No

Please select your position:

- ◉ Board
- ○ Senior Leadership
- ○ Program Leadership
- ○ Agency Administration & Operations
- ○ Program Staff & Support
- ○ Volunteer
- ○ Other - Please Specify

✖ CATEGORY 1: Leadership

Category 1 examines how your agency's senior leaders address mission, values, direction, and performance expectations while focusing on customers/stakeholders, as well as empowerment of staff, innovation, and learning within the organization. It also examines how your organization addresses community advocacy and low-income constituency involvement.

	Strongly Disagree	Disagree	Agree Some What	Agree	Strongly Agree
Our organization's mission/vision (what it is trying to accomplish) is well understood by staff at every level.	○	○	◉	○	○
Our senior (top) leaders communicate our organization's values to guide us.	○	○	◉	○	○
Our senior leaders create a work environment that helps me do my job.	○	○	○	○	◉
Our organization's leaders share information about the organization.	○	○	◉	○	○
Our senior leaders encourage learning that will help me advance in my career.	○	○	◉	○	○
Our organization makes it clear what our top priorities are, and what's most important.	○	○	◉	○	○
I feel engaged with my organization.	○	○	○	◉	○
My organization regularly asks what I think.	○	○	◉	○	○
Our Board and senior leaders actively advocate on behalf of the agency and those we serve.	○	○	◉	○	○
Total Points	0	0	35	7	10
Category 1 Total	**52**				

Leadership Comments

Please enter any comments you wish to further clarify your rating for this category

Update this Category Now

View Team Results



REVIEW AGENCY AGGREGATE RESULTS

View Organizational Assessment results for your agency.

Continue

Organizational Assessment

This assessment can be used by your organization to gain insight into the perceptions of staff and leadership into key areas of organizatio insight can help focus improvement and communication efforts into the most critical areas as identified by key organizational personnel. agency, but should include a representative sample of your organization including leadership and program staff. This tool may be used as Assessment required in Pathways to Excellence, or by agencies seeking to gain a better understanding of how organizational strategy is d

When completing this survey, consider your agency as you answer the questions in the assessment. Think of the overall financial, human data/performance management systems in your agency, as well as collaborations with partners that affect multiple programs and the ove

During the assessment:

- Category 1 will be visible at the start.
- The assessment can be started and stopped at any time.
- Use the **"Update"** button to save responses. Your answers will be saved, and you will be returned to the top of the page to either con submit your answers.
- Use the "**Save My Assessment**" button at the top or bottom of the page after all the questions for the category have been completec
- Click on the category title to expand the text and view all questions for that category.
- Use the scale provided to indicate your response to the statement regarding your agency from strongly agree to strongly disagree. Yo your ***initial perception*** of your organization's health, strength, and capacity—do not labor over your answers.
- Use the comments section if you would like to provide more clarity on why you chose a particular response.
- This survey is anonymous.

Survey Version: Version 2

Once you have completed your answers, click on the See Team Results button.

See Team Results | View Team Report

PATHWAYS TO EXCELLENCE

Team Aggregate Results

The organizational assessment is meant to provide feedback about your staff's current perception of the agency's health, strength, and capacity related to the **Community Action Standards of Excellence.** It is not intended to assess individual staff, but aggregate agency-wide scores covering all levels of the agency. It is a starting point leading to a more in-depth approach.

+ CATEGORY 1: LEADERSHIP
+ CATEGORY 2: STRATEGIC PLANNING
+ CATEGORY 3: CUSTOMER FOCUS
+ CATEGORY 4: MEASUREMENT, ANALYSIS, AND KNOWLEDGE MANAGEMENT
+ CATEGORY 5: HUMAN RESOURCE FOCUS
+ CATEGORY 6: PROCESS MANAGEMENT
+ CATEGORY 7: RESULTS/OUTCOMES

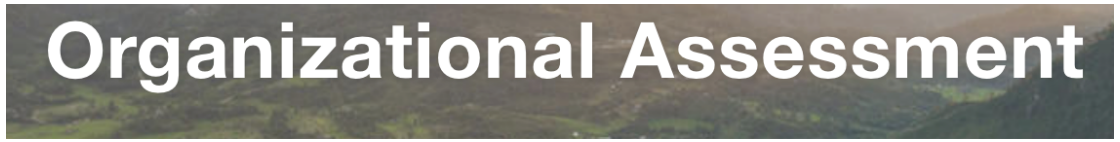
View Team Report

CATEGORY 1: Leadership

Category 1 examines how your agency's senior leaders address mission, values, direction, and performance expectations while focusing on customers/stakeholders, as well as empowerment of staff, innovation, and learning within the organization. It also examines how your organization addresses community advocacy and low-income constituency involvement.	1 Strongly Disagree	3 Disagree	5 Agree Some What	7 Agree	10 Strongly Agree
Our organization's mission/vision (what it is trying to accomplish) is well understood by staff at every level.	0	0	5	0	0
Our senior (top) leaders communicate our organization's values to guide us.	0	0	5	0	0
Our senior leaders create a work environment that helps me do my job.	0	0	0	0	10
Our organization's leaders share information about the organization.	0	0	5	0	0
Our senior leaders encourage learning that will help me advance in my career.	0	0	5	0	0
Our organization makes it clear what our top priorities are, and what's most important.	0	0	5	0	0
I feel engaged with my organization.	0	0	0	7	0
My organization regularly asks what I think.	0	0	5	0	0
Our Board and senior leaders actively advocate on behalf of the agency and those we serve.	0	0	5	0	0
Total Points	0	0	35	7	10
Aggregate Score (%)	52 of 90 (58%)				
Number Of Category Respondents	1 of 3				
COMMENTS:					

Get Recommendations!

Organizational Assessment



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.

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The team results reflect the combined total points for each area based on all responses completed by each individual, who will remain anonymous in the survey results. For example, if five team members complete the survey then the maximum score—where all staff strongly agree with the question—under an individual question in a category would be 50 points (5 people selecting strongly agree for 10 points each).

The team totals section provides a dashboard view of the total points of all question responses by category as well as your agency's overall score. Based on national scoring methodology, agencies scoring above 60% of available points have some perception of excellence within the agency. A true "agency of excellence" would well exceed 60% in each of the seven categories. Keep in mind this is only a point-in-time perception, not a true assessment. It is important not to stress over the specific score, but allow the results to provide a benchmark for where the agency is in each category, or help to prioritize categories of focus.

Please note that you may need to disable your pop-up blocker in order to see the results. Click here for directions on disabling your pop-up blocker. Some areas of this site open a new tab or window in your web browser to show results.

Click here to return back to the organizational assessment.

Survey Version: Version 2

There were 1 of 6 users participating.

View Team Report

Embed Your Methods Into Existing Structures To Make them Systematic



Annual Board Self-Assessment/ Evaluations



Annual Staff Satisfaction/ Engagement Survey



Annual Volunteer Survey



Employee Advisory Groups



Employee Evaluations



Stay and Exit Interviews

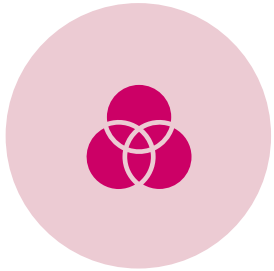
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From Insight to Action: How to Analyze Feedback

After you have aggregated the data (sorted into categories) then you can:



COUNT



COMPARE



EXAMINE TRENDS

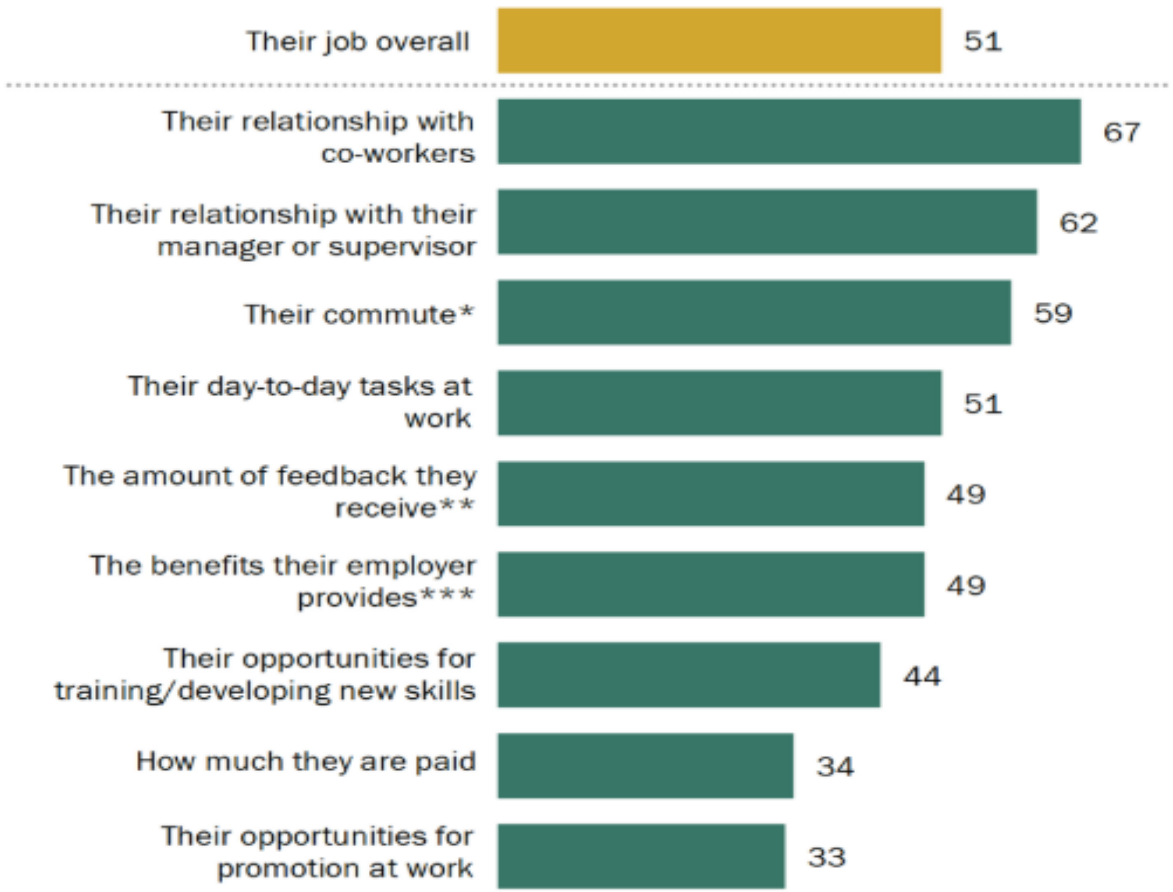


ANALYZE THEMES

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About half of workers are highly satisfied with their job overall, but views of specific aspects of their job vary considerably

% of employed adults saying they are extremely or very satisfied with ...

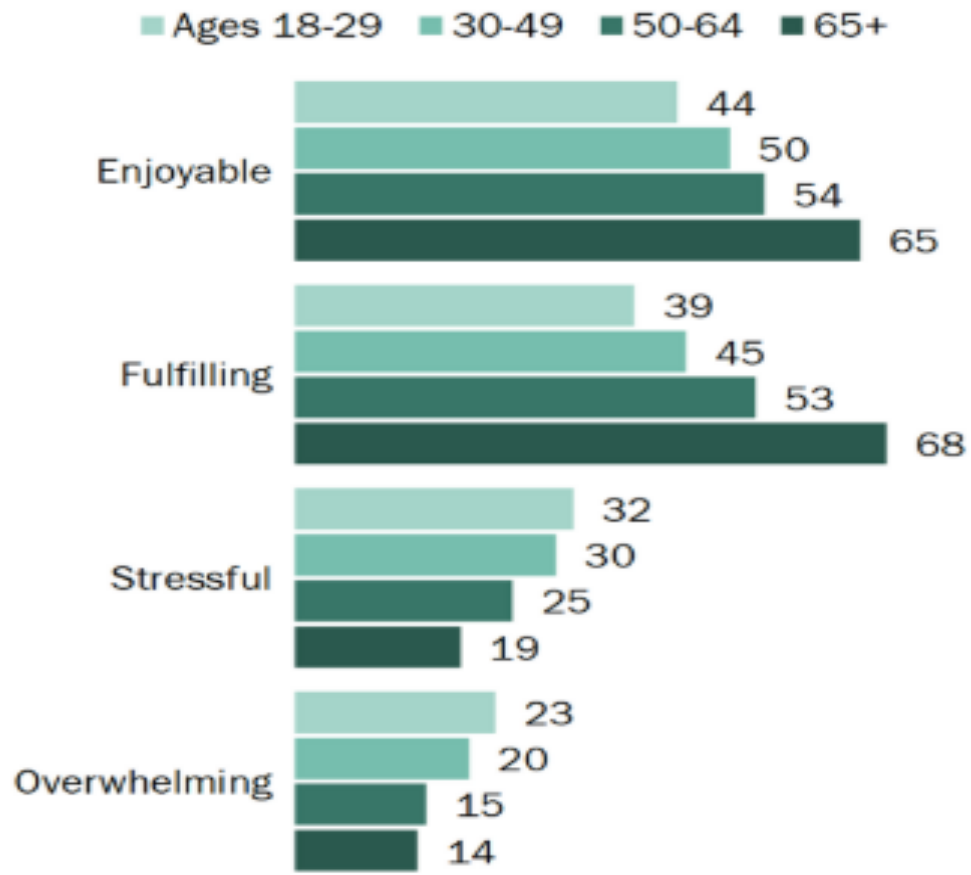


*Excluding those who said they don't have a commute.
**Full question wording asked about receiving feedback from their manager or supervisor on how they're doing their job.
***Full question wording included "such as health insurance and paid time off."
Note: Based on workers who are not self-employed.
Source: Survey of U.S. workers conducted Feb. 6-12, 2023.
"How Americans View Their Jobs"

PEW RESEARCH CENTER

Workers 65 and older are the most likely to find their job enjoyable or fulfilling, least likely to say it's stressful

% of employed adults saying they find their job to be ____ all or most of the time



Note: Based on workers who are not self-employed.
Source: Survey of U.S. workers conducted Feb. 6-12, 2023.
"How Americans View Their Jobs"

PEW RESEARCH CENTER

Making Meaning

Who will make meaning of the data and decide what to do?

- Influences approach to analysis and final product of analysis

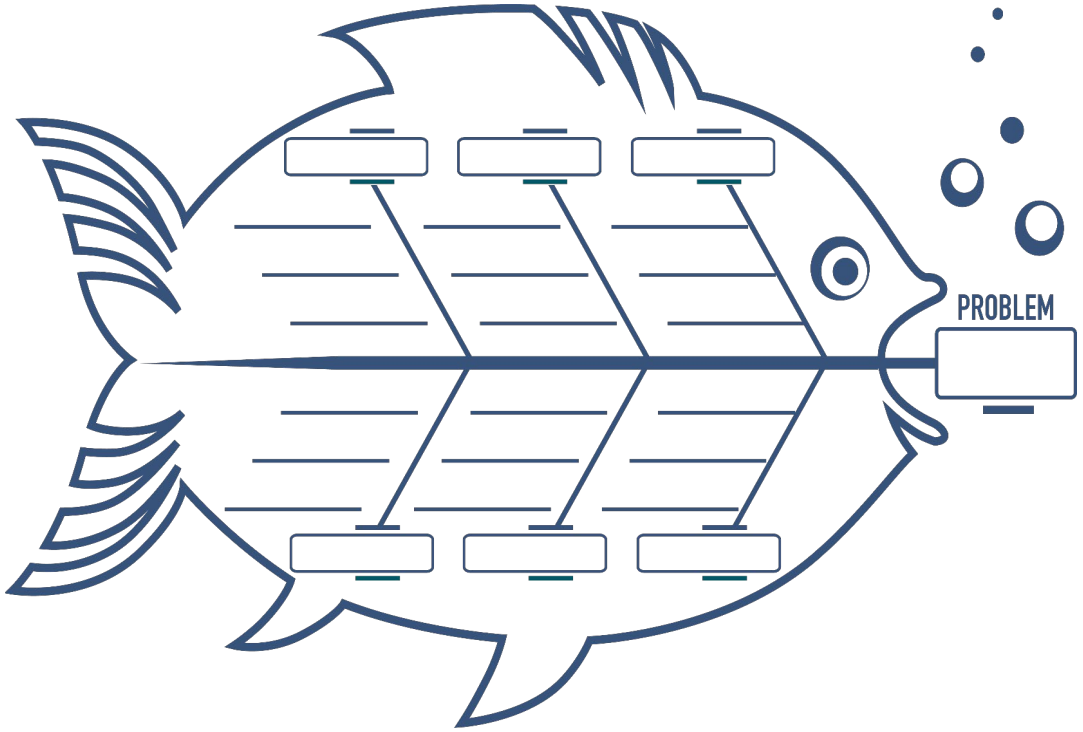
Can use a tiered system:

- Collect Quantitative Data
- Analyze; formulate questions
- Collect Qualitative Data
- Analyze; identify key takeaways
- Final report to Board/Leadership for action

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Identify Root Causes

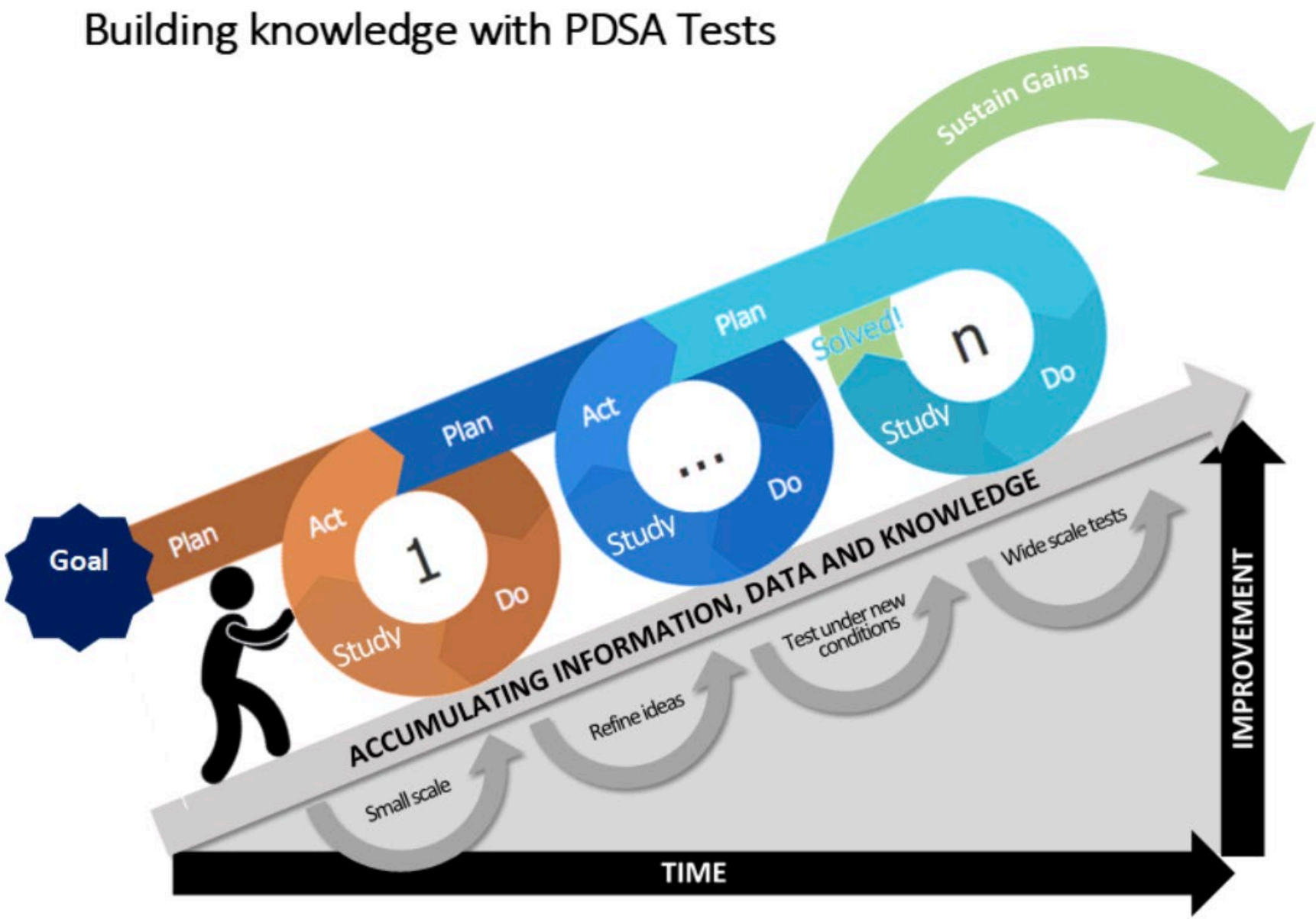
- Use “5 Whys”
- Use a Fishbone Diagram
- Conduct Pareto Analysis





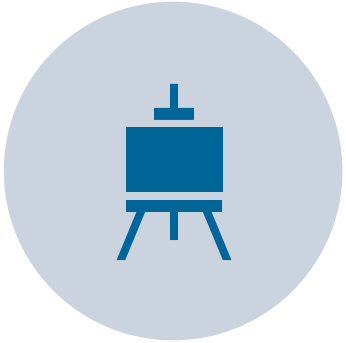
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Now What?
Taking Action



Taking Action…. How?

- First and foremost, ***get clear on the problem you are working to solve and what is driving the problem.*** Only after you understand your problem can you work on solutions:



CO-DESIGN WITH CUSTOMERS



LOOK FOR BEST PRACTICES



PROTOTYPE AND PILOT

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Managing Performance

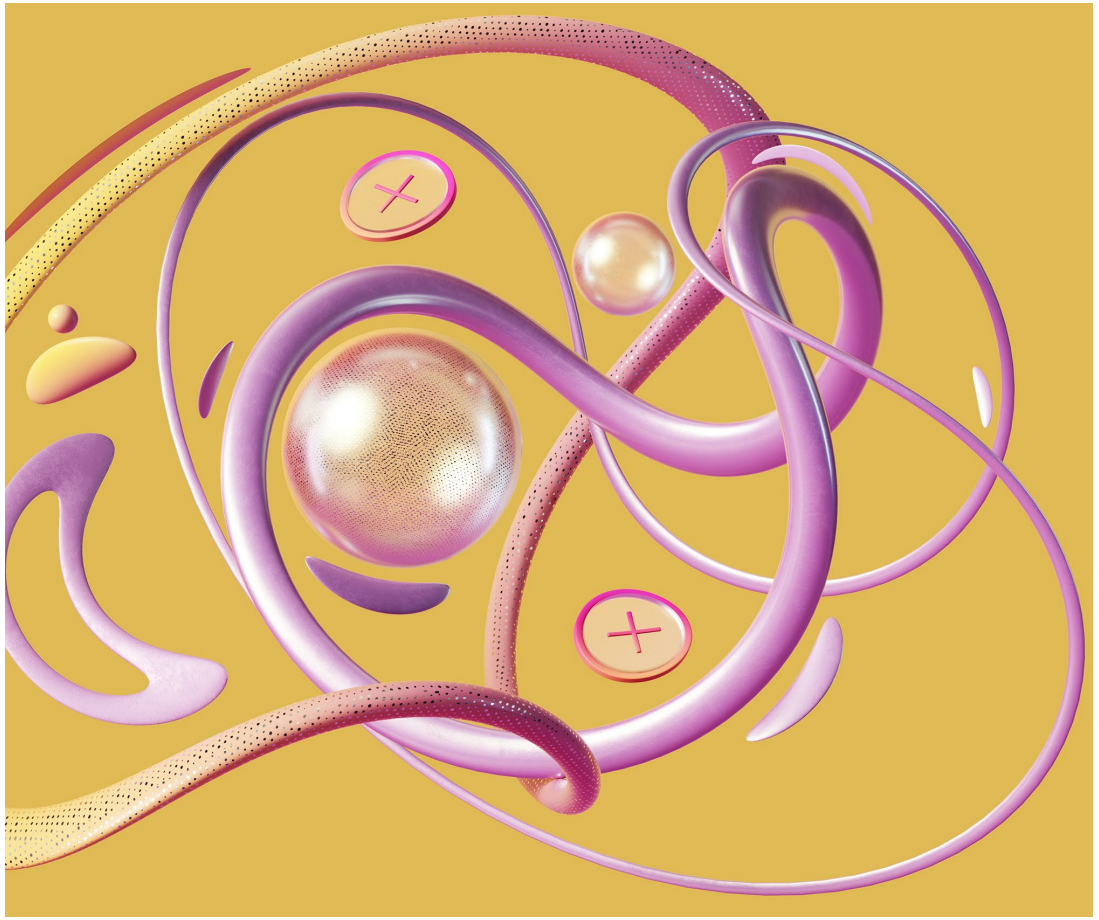
Assign clear **actions, owners, deadlines, and metrics**

Embed into agency performance management systems

- Quarterly review of progress
- Dashboards
- Supervisor/employee coaching plans
- Board workplans

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Be Sure to Close the Loop!



- Share results
- Explain actions (or non-actions)
- Recognize contributors
- Invite ongoing feedback

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Culture of Listening & Action: Not Just Collection



Build Systematic Approaches



Model Open Communication



Create Space for Co-Creation



Celebrate Constructive Input



Make Listening Part of the Job



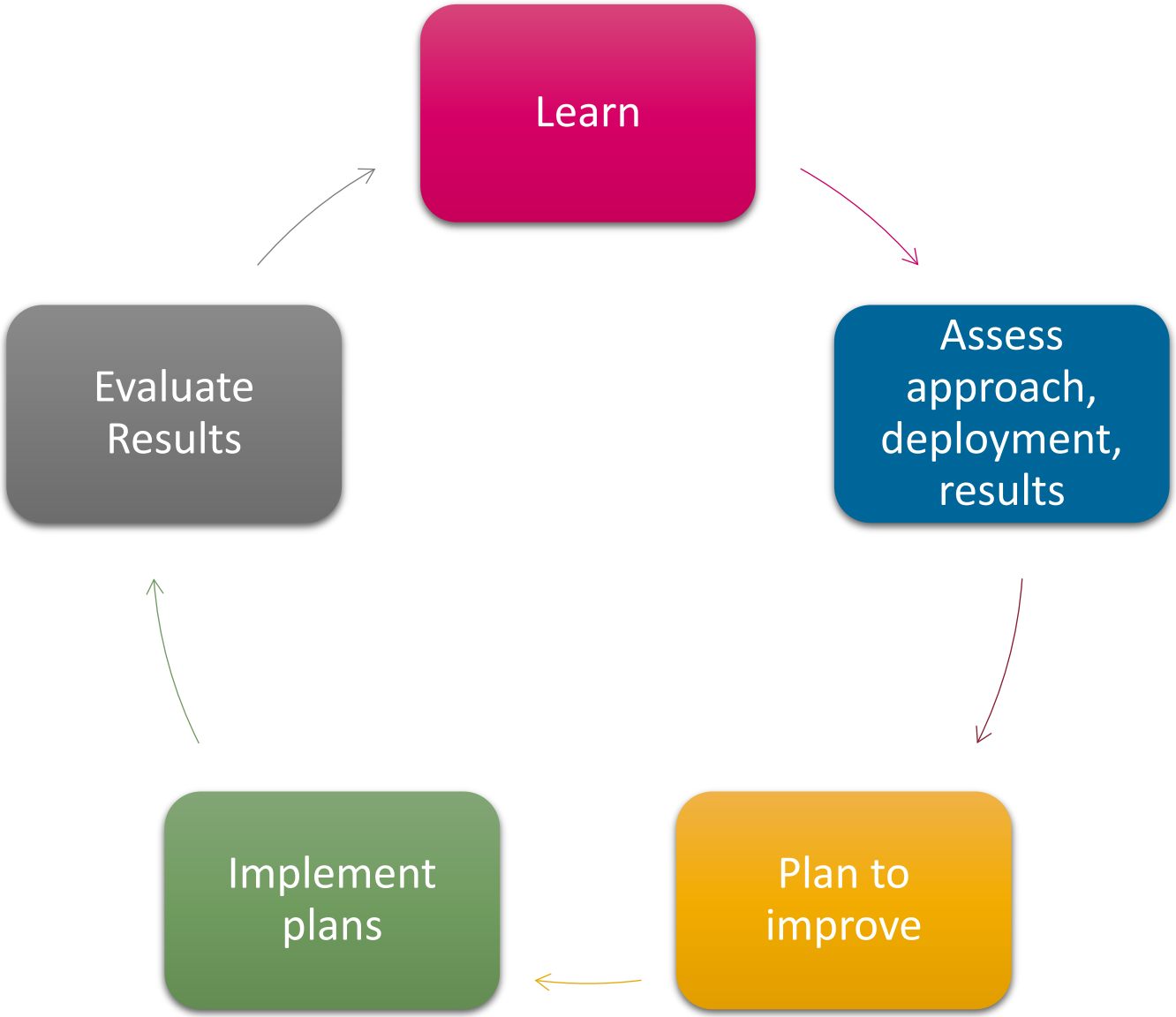
Embed Practice Into Culture

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Pathways To Excellence Overview

The Excellence Journey



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Pathways to Excellence Overview

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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**

At-A-Glance

	BRONZE 2023	SILVER 2023	GOLD 2023	2025 WINNER
General Timeframe for Completion:	**3 – 6 Months**	**6 – 12 Months**	**12 – 18 Months**	**24 Months**
Submit an Enrollment Package				
Enrollment Fee	$850 – Flat Fee	$1,850 - $5,000 (based on agency total revenue)	$3,000 - $7,250 (based on agency total revenue)	$6,000 - $15,000 (based on agency total revenue)
Board-Adopted Resolution to Pursue Excellence	Required (before recognition)	Required if not on file	Required if not on file	Recommended, not required.
Name of your Agency's Excellence Point of Contact	Required	Required	Required	Required
Most Recent IRS 990		Required if not on file	Required if not on file	Required
Build an Excellence Foundation				
Formation of Agency Excellence Team	Required	Required	Required	
Excellence Team Meetings (including kick-off and close out meetings w/NCAP)	Required	Required	Required	
Standards e-Course Completion by Team	Required	Required	Required	
Cohort meetings		Up to 3 Required	Up to 4 Required	
Advanced Pathways Training for Staff		1 Implementer Required	1 Peer Reviewer Required	
Self-Study Training			Required of Agency Excellence Team	
Assess Organizational Excellence	**Required**	**Required**	**Required**	**Required**
Agency Profile	Required	Required	Required	Required
Mini Organizational Assessment		Required	Required	
Self-Study		Abbreviated (2 -3 Categories)	Complete (All 7 Categories)	Complete (All 7 Categories)
Required for Achievement Recognition	NCAP Member in Good Standing	Meet/Exceed 25% of Standards & NCAP Member in Good Standing	Meet/Exceed 50% of Standards & NCAP Member in Good Standing	Meet/Exceed 100% of Standards & NCAP Member in Good Standing

Let's Get Started!

Learn more about the Standards of Excellence

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

Enroll in Pathways to Excellence

- Bronze Enrollments accepted throughout the year
- Silver & Gold Fall Cohort Enrollment Deadline is July 18

Participate in Excellence Implementer Training

- Fall 2025

Become a Peer Reviewer

- Fall 2025

NCAP'S 2025 ANNUAL CONVENTION

Detroit, MI | Aug. 27–29 (Pre-Con: Aug. 25–26)

NCAP's Annual Convention provides Community Action Agencies and other human services providers with timely information, training, and resources to maximize efficiency and impact. Don't miss this opportunity to share and learn amongst your peers, receive the latest network updates, and access proven strategies to move families and communities forward.

- 70 Workshops
- Board Governance
- Head Start Town Hall
- Weatherization Track
- Rural Caucus
- Management & Leadership Sessions
- Pre-Con: New Executive Director's Institute
- Pre-Con: Community Action Data Convening
- Pre-Con: WAP Energy Summit





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AMERICA'S POVERTY FIGHTING NETWORK



Detroit, Michigan

August 26, 2025

Join Us For National Community Action Partnership's

New Executive Directors Institute

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