CSBG Organizational Standards: What Boards Need to Know

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Shout it Out!

What do you know about the Organizational Standards?

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Agenda

Community Action Board Overview

Community Action Boards & the Organizational Standards

Board Organizational Standards

Approval, Action, and Review of Organizational Standards

Q & A

The Community Action Board

- Community Action Boards are governing bodies that set out the high-level vision, mission, strategic direction for the organization

- Boards govern the entire agency, not only CSBG* and are the legal entity responsible for the agency
  - For a private nonprofit, the governing body IS the board
  - For public agencies, governing body is local government; duties delegated to the board may differ
    - Public agency boards may be limited to only CSBG and specific oversight or advisement tasks

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Organizational Standards Overview

CSBG Organizational Standards

- Developed **BY** the Community Action network, **FOR** the network.

- Born out of the post-American Recovery and Reinvestment Act (ARRA) period, when there was a perception by some that CAAs were not high-performing.

- Developed through the Organizational Standards Center of Excellence at the Community Action Partnership, with the input of all levels of the Community Action Network, **the CSBG Organizational Standards work together to define the necessary capacities a Community Action Agency needs to be effective.**

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The National Community Action Network Theory of Change

Community Action Goals

Goal 1: Individuals and families with low incomes are stable and achieve economic security.

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.

Goal 3: People with low incomes are engaged and active in building opportunities in communities.

Services and Strategies

Employment

Education & Cognitive Development

Income, Infrastructure & Asset Building

Housing

Health/Social Behavioral Development

Civic Engagement & Community Involvement

Core Principles

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

Performance Management

How well does the network operate? ⟷ What difference does the network make?

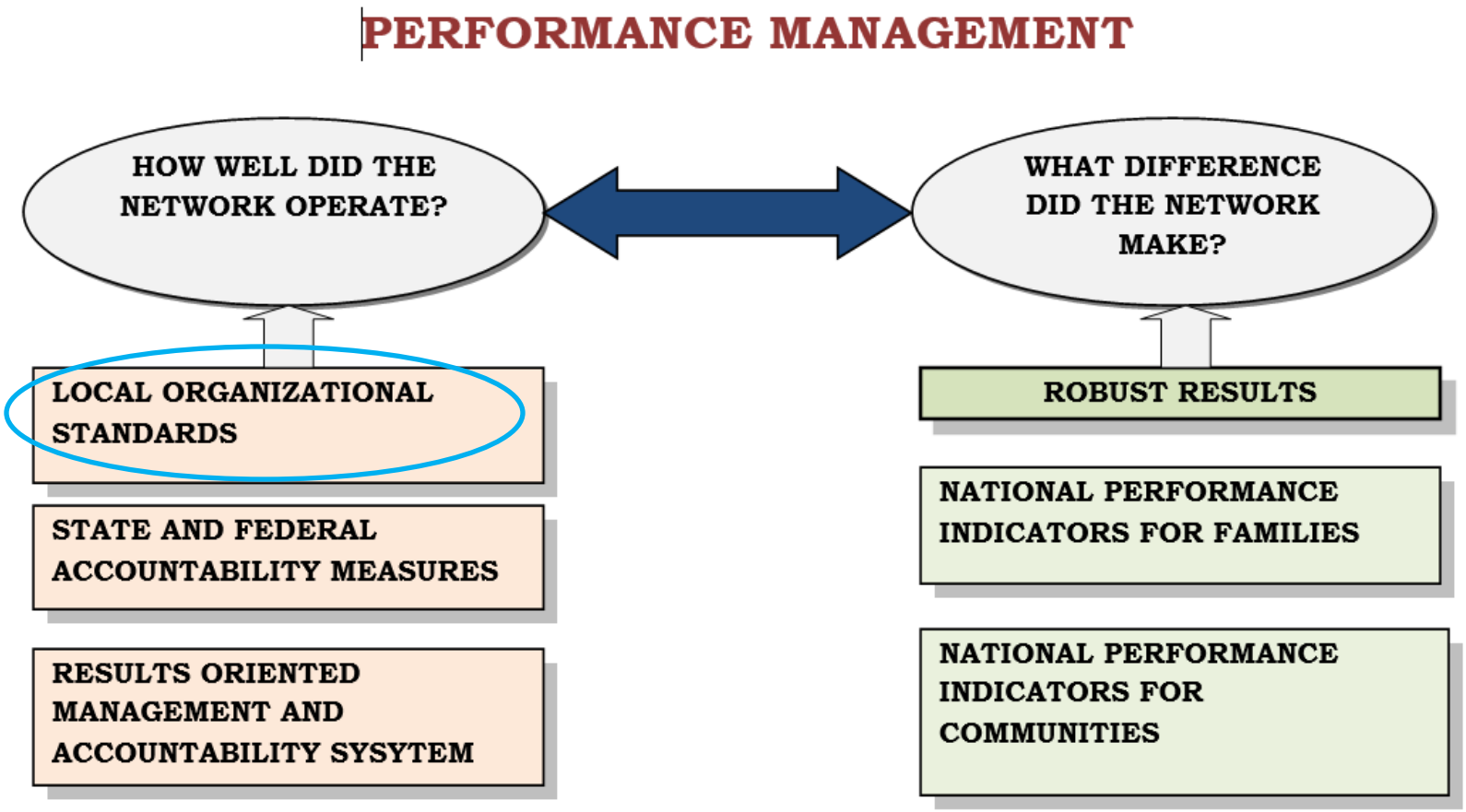
- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System

- Individual and Family National Performance Indicators
- Community National Performance Indicators

A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.

This publication was created by NASCSP in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Grant Number 90ET0451.

CSBG Performance Management Framework



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CSBG Organizational Standards

Established in CSBG IM 138:

https://www.acf.hhs.gov/sites/default/files/documents/ocs/im_138_csbg_organizational_standards_fy_2015.pdf

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

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Key Points of CSBG Organizational Standards

- Directly linked to:
  - CSBG Act
  - OMB Guidance
  - Federal Laws & Regulation
  - Good Management Practices
  - Values of Community Action

- Standards are not all created equal – those with ties to the CSBG Act or other laws have implications beyond just Standards requirements

- The Organizational Standards were implemented in Federal Fiscal Year 2016
  - Note: The CSBG Act was last reauthorized in 1998. Thus, the Organizational Standards do not appear in the CSBG Act.

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National Standards; State Administration

- CSBG is a Block Grant – meaning, the Feds provide general guidance, and then leave administration up to the States who they block grant the funding to.

- States (not the feds) are responsible for providing guidance and assessing compliance with the Organizational Standards.
  - **Implementation, guidance, and assessment of Organizational Standards will differ from state to state**
  - The Organizational Standards are intentionally broad – meant to recognize the need for each state and local CAA to be responsive to local needs
  - Specific/required documentation, processes, etc. are intentionally NOT prescribed in many cases by the Standards themselves; these requirements are set by your state.

- States are required to assess Organizational Standards on an annual basis
  - The Standards are assessed as either met or unmet (no partial credit!)
  - CSBG Organizational Standards assessments go to the presence of an item, not the quality of it

Organizational Standards Differ for Public and Private CAAs

- Although Organizational Standards apply to most* CSBG Eligible Entities, Public CAAs (typically units of Local Government) will note that some standards are slightly different or not applicable to them.
  - There are no additional Standards for public CAAs, and the differences between public CAA standards typically reflect the differences in public CAA administration.
  - Public CAAs can encounter unique challenges with Organizational Standards.

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100% is Not Always Possible

- Although agencies should strive to meet 100% of the Organizational Standards, it's not always possible.
  - Missing one standard (so long as it's not tied to a legal requirement) is not likely to result in catastrophic consequences.
    - States cannot terminate or withhold funding without cause and following the processes detailed in the CSBG Act and CSBG IM 116.
  - Missing standards will often result in a corrective action plan, technical assistance plan, or a quality improvement plan.
- However!!!
  - Consistently missing the same standard or having a pattern of noncompliance could ultimately result in termination of funding.
  - Some Standards tie to other requirements that are essential to your eligible entity status (i.e., board requirements)

Boards should pay attention to the Standards that are met/unmet and compare to prior years to look for patterns

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Balancing…

- Checking the Box
- Fully living into the intent of the Standard

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Organizational Standards are Only a Piece of the (Compliance) Picture

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The Boards Role in Organizational Standards is Multifaceted…

- Ensure the board operates in accordance with applicable CSBG Organizational Standards
- Ensure the agency adheres to the practices outlined in the Organizational Standards
- Support the agency to fulfill its mission and fully deploy the practices in the Organizational Standards
- Think not only about compliance, but what is required to advance the mission of the agency

Many Categories Intersect with Board Governance

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It’s not just the board….

- Agency staff play a critical role in supporting the board to fulfill its duties
  - Training
  - Communication
  - Information
  - Resources

DISCUSSION: HOW HAS YOUR BOARD INTERACTED WITH THE ORGANIZATIONAL STANDARDS TO DATE?

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Different Levels of Board Engagement with the Organizational Standards

Board Responsibilities

Board Approval

Board Review

Board Action

Regardless of whether the board is specifically named in a Standard, the Board is responsible for the oversight and support of the CAA.

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WHO IS RESPONSIBLE FOR THE BOARD?

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Structure & Membership

Standard 5.1 Private	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. One-third local elected officials (or their representatives); and 3. The remaining membership from major groups and interests in the community.
Standard 5.1 Public	The department's tripartite board/advisory body is structured in compliance with the CSBG Act, by either: 1. Selecting the board members as follows: • At least one third are democratically-selected representatives of the low-income community; • One-third are local elected officials (or their representatives); and • The remaining members are from major groups and interests in the community; or 2. Selecting the board through another mechanism specified by the State to assure decision-making and participation by low-income individuals in the development, planning, implementation, and evaluation of programs.
Standard 5.2 Private	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 5.2 Public	The department's tripartite board/advisory body either 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, or • Another mechanism specified by the State to assure decision-making and participation by low-income individuals in the development, planning, implementation, and evaluation of programs.

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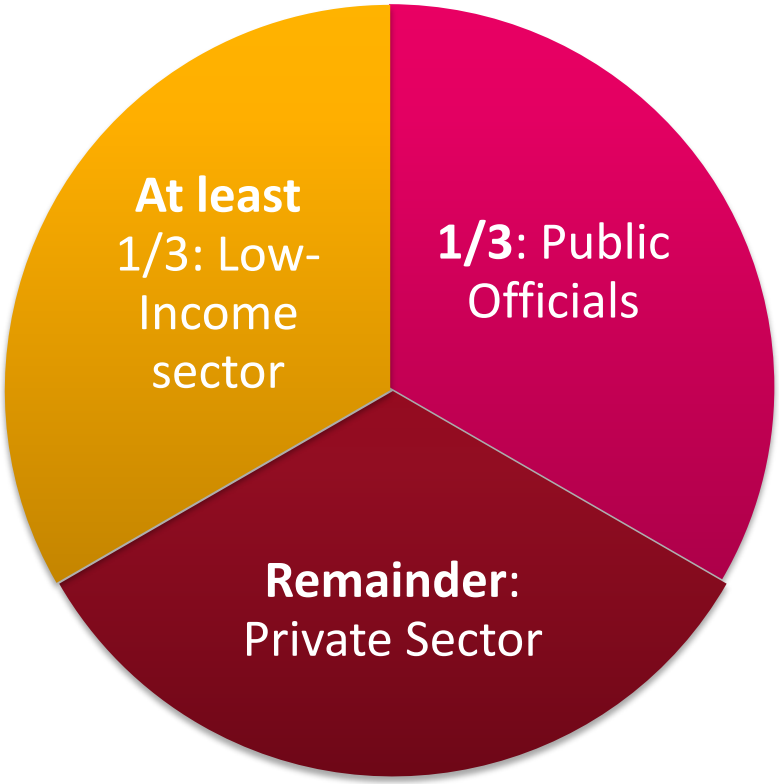
Structure & Composition

- The tripartite structure reflects the values of Community Action:
  - Centering in the voice of people with low-incomes
  - Building power and opportunity
  - Multi-sector collaboration

- Be clear on board size
  - How many members total at any given time?



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Use a Board Member Inventory/Matrix

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Propel Nonprofits Board Profile Worksheet

	Term Ends				Term Ends				Term Ends				
Categories to Consider	Board Member Name												Identified Need
Areas of Expertise/Skills													
Advocacy/Policy													
Business Analysis/Planning													
Finance													
Fundraising													
Governance													
Human Resources													
Legal													
Marketing/Communications													
Mission Specific Expertise													
Nonprofit Management													
Real Estate													
Social Enterprise													
Social Media													
Strategic Planning													
Technology													
Other:													
Other:													
Connections													
Client/Constituent													
Community Member													
Corporate													
Government													
Nonprofit													
Philanthropy													
Small Business													
Other:													
Other:													
Gender													
Male													
Female													
Transgender													
Other:													
Prefer not to say													

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Propel Nonprofits Board Profile Worksheet

Categories to Consider	Board Member Nam												Identified Need
Qualities													
Critical thinker													
Connector													
Entrepreneur													
Leadership skills													
Team Builder													
Visionary													
Other:													
Ability													
Blind or low vision													
Deaf or hard of hearing													
Developmental or other cognitive disability													
Hidden or undisclosed disability													
Medical disability													
Physical or mobility disability													
Age													
Under 18													
19-25													
26-40													
41-50													
51-65													
Over 65													
Race/Ethnicity													
African/African-American													
Asian/Pacific Islander													
Hispanic/Latinx													
Native American													
White													
Mixed race													
Other:													

Additional Comments:

https://propelnonprofits.org/resources/board-profile-worksheet/

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Let's Talk…

- **What strategies have worked in recruiting board members?**
  - Public officials?
  - People with lived experience?
  - Private sector representatives?

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Bylaws & Documentation

Standard 5.3 Private	The organization's bylaws have been reviewed by an attorney within the past 5 years.
Standard 5.3 Public	Not applicable: Review of bylaws by an attorney is outside of the purview of the department and the tripartite board/advisory body, therefore this standard does not apply to public entities.
Standard 5.4 Private	The organization documents that each governing board member has received a copy of the bylaws within the past 2 years.
Standard 5.4 Public	The department documents that each tripartite board/advisory body member has received a copy of the governing documents, within the past 2 years.
Standard 5.5 Private	The organization's governing board meets in accordance with the frequency and quorum ' requirements and fills board vacancies as set out in its bylaws.
Standard 5.5 Public	The department's tripartite board/advisory body meets in accordance with the frequency and quorum requirements and fills board vacancies as set out in its governing documents.
Standard 5.6 Private	Each governing board member has signed a conflict of interest policy within the past 2 years.
Standard 5.6 Public	Each tripartite board/advisory body member has signed a conflict of interest policy, or comparable local government document, within the past 2 years.

A quick note about bylaws…

- Bylaws are created by your board – therefore, they can be amended by your board assuming…
  - Amendments are compliant with relevant federal, state, and local requirements
  - Process for amendment is followed

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Document, Document, Document!

One of the most common reasons Organizational Standards are missed is the agency did not document that something happened in their board minutes, such as:

- Distribution of bylaws
- Board review of mission
- Updates to board on key activities such as success of strategies in the Strategic Plan

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Template Meeting Minutes and Index of Form Resolutions Resource

CAPLAW

CAA Board Meetings: Template Meeting Minutes and Index of Form Resolutions

Introduction

Community action agency (CAA) boards perform vital governance and oversight functions for their organizations. Nowhere is this more evident than at board meetings, where board members hear reports, deliberate, and make decisions that guide organizational efforts. Meetings are the main venue where board members fulfill their fiduciary duties of care and loyalty to the organization. The duty of care is a legal obligation to act diligently in service of the organization, to be informed about the issues that impact the board's oversight of the organization, and to actively participate in discussions and decision-making. The duty of loyalty requires that when engaged in board business, members place the interests of the organization above their own personal interests.

Board meeting minutes, the written record of what happens at a board meeting, serve as critical evidence of board members' exercise of their fiduciary duties, since they describe key items presented and discussed by directors at the board meeting. They also help to show that the board considered the best interests of the organization and observed its conflict of interest policy. The decisions made and official actions taken at a board meeting are reflected in written **board resolutions**, which are typically incorporated into the meeting minutes and, in some cases, also kept separately for reference purposes. Meeting minutes and resolutions are important indicators to the general public, funding sources, and federal and state regulators that a CAA has maintained compliance with applicable laws and regulations. This includes the CSBG Organizational Standards, which require CAA boards to take certain actions in their organizational leadership and governance functions. Meeting minutes and resolutions are also an important resource for the CAA board itself: a continuous, contemporaneous record of where the board has been, where it is, and where it is going.

Given the importance of these documents, CAPLAW has created this resource to help board members and the staff who work with them create effective meeting minutes and resolutions. As discussed below, minutes and resolutions vary greatly in their degree of formality and detail. We encourage you to customize the templates we have provided to reflect the way your CAA operates, focusing on the function of each document rather than its form. Remember that meeting minutes and resolutions are just two tools in your agency's toolbox for documenting compliance with the CSBG Organizational Standards and other applicable laws. Formal board action is not necessary for compliance with most of the Organizational Standards, but where it is, we hope this resource will be helpful.

2-part template:

- Board meeting minutes
- Index of board resolutions

Available on the CAPLAW website: https://resources.caplaw.org/resources/template-meeting-minutes-and-index-of-form-resolutions/

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Practice Pointers: Board Minutes

- Have more than one person taking notes / minutes to ensure all activity is captured
- Ensure those taking the minutes know key actions that need to be recorded, such as dissemination of specific documents
- Call out if there an action is tied to an Organizational Standard
  - *"Per Organizational Standard 5.4, the organization's bylaws were distributed to all board members for review and discussion"*

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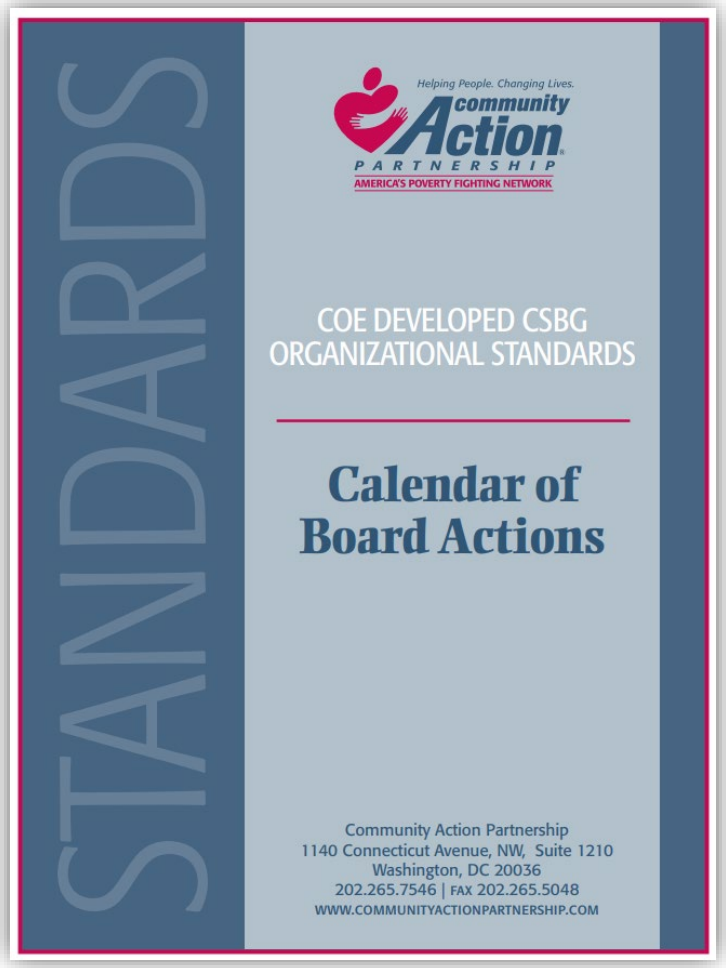
Calendar of Activities

- The Organizational Standards have several requirements for boards that happen on different time cycles– use our Calendar of Activities to help manage requirements


STANDARDS

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COE DEVELOPED CSBG ORGANIZATIONAL STANDARDS

Calendar of Board Actions

Community Action Partnership
1140 Connecticut Avenue, NW, Suite 1210
Washington, DC 20036
202.265.7546 | FAX 202.265.5048
WWW.COMMUNITYACTIONPARTNERSHIP.COM

https://communityactionpartnership.com/wp-content/uploads/2018/08/29_Schedule-for-Boards_Final-Fillable.pdf

A Few Tips…

Know your bylaws, and have them reviewed by someone with the relevant expertise as required

Ensure you are clear if there are any required actions at each board meeting (i.e., deadline for ED evaluation and compensation review)

Use your board calendar to look ahead and take required actions now

Orientation, Training, and Reports

Standard 5.7 Private	The organization has a process to provide a structured orientation for governing board members within 6 months of being seated.
Standard 5.7 Public	The department has a process to provide a structured orientation for tripartite board/advisory body members within 6 months of being seated.
Standard 5.8 Private	Governing board members have been provided with training on their duties and responsibilities within the past 2 years.
Standard 5.8 Public	Tripartite board/advisory body members have been provided with training on their duties and responsibilities within the past 2 years.
Standard 5.9 Private	The organization's governing board receives programmatic reports at each regular board meeting.
Standard 5.9 Public	The department's tripartite board/advisory body receives programmatic reports at each regular board / advisory meeting.

Board Orientation Resources

Boardsource Orientation Checklist

BOARD MEMBER
ORIENTATION CHECKLIST

This checklist is a general outline to guide the orientation of new board members. Your organization should modify it as you see fit to ensure that all new board members are provided with the information necessary to fulfill their responsibilities.

PROGRAM

- Tour facilities
- Presentation by chief executive, key staff, video, or other electronic media.
  Materials to share with board members:
  - Organization's web site address
  - Annual calendar
  - Publications and programs list

HISTORY

- Ensure that new board members understand the history of the organization. When was it founded? Why? How has it grown and developed over time?
  Materials to share with board members:
  - Brief written history or fact sheet on the organization
  - Brochures
  - Newsletters
  - Articles of incorporation
  - Note whether Directors and Officers insurance has been used in the past

GENERAL EXPECTATIONS OF BOARD MEMBERS

- Know the organization's mission, goals, policies, programs, services, strengths, and needs, as well as the larger ecosystem and its collective purpose.

STRATEGIC DIRECTION

- Review strategic plan
  Materials to share with board members:
  - Most recent strategic plan
  - Current case statement
  - Recent press clippings

GENERAL EXPECTATIONS OF BOARD MEMBERS

- Follow trends in the organization's field of interest and keep informed.

BoardSource

TEXT MAY NOT BE REPRODUCED WITHOUT WRITTEN PERMISSION.

CAPLAW Board Roles & Responsibilities

CAPLAW

Home About Resources Trainings

Training & Orientation Tool for Nonprofit CAA Boards

Governance, Training, Tripartite Board
Board of Directors, Executive Director
2017

This presentation was created in response to a need in the network for training and orientation materials that state Community Services Block Grant (CSBG) offices, state associations, and individual Community Action Agencies (CAAs) can use to educate their own boards and staff that work with the board on the board's vital role in the organization. This presentation is specifically for tripartite boards of nonprofit CAAs and acts as a guide for those training or orientating board members on the board's responsibilities.

The full presentation includes **five** main sections:

1. Brief Introductions
2. Legal Requirements Governing Tripartite Boards
3. A Few Brief Points About How a Board of Directors Operates
4. Role of the Tripartite Board
5. Key Responsibilities of the Tripartite Board
   - Mission
   - Planning
   - Engagement
   - Generating Funds
   - Performance
   - Accountability

Onboarding

BOARD MENTORS

FOLLOW UP/CHECK IN CALL FROM THE BOARD CHAIR

IF NOT COLLECTED IN AN APPLICATION, BOARD MEMBER PROFILE

All A-Board! Board Training Videos

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Programmatic Reports

Good board processes include programmatic reports that allow board members to stay abreast of program development, planning, implementation and evaluation activities and to provide input into the process.

- *This Standard is not meant to be complex and does not require reporting on all programs at every board meeting.*

Keep board reports high level and focused on the information the board needs to make good decisions

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Some Notes on Reports…

READ THEM!

Avoid the Weeds

Make expectations clear

Consider what you need to make a good decision

Give feedback

What makes a “good” programmatic report?

More than Programmatic Reports…

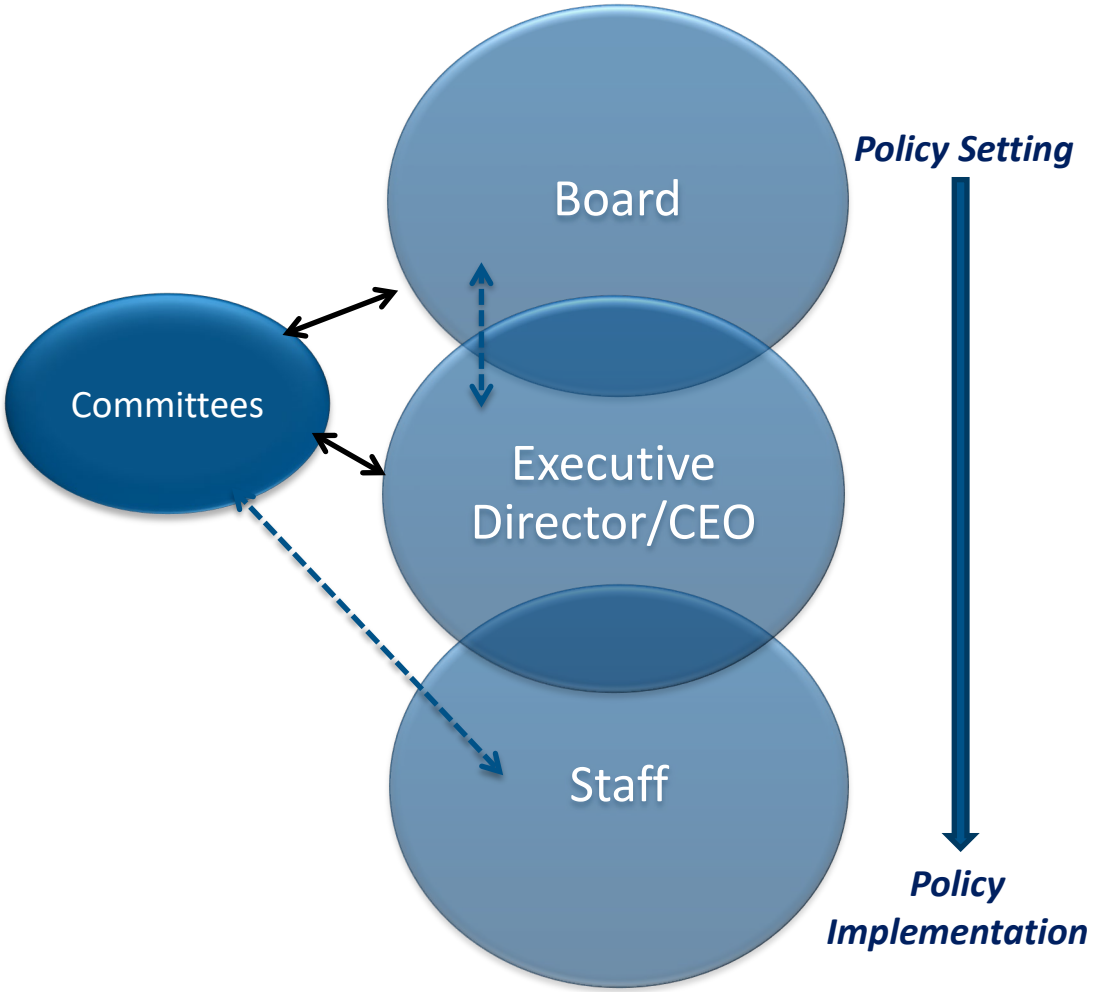
Standard 1.3 Private	The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.
Standard 1.3 Public	The department has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the tripartite board/advisory body, which may be met through broader local government processes.
Standard 4.4 Private	The governing board receives an annual update on the success of specific strategies included in the Community Action plan.
Standard 4.4 Private	The tripartite board/advisory body receives an annual update on the success of specific strategies included in the Community Action plan.
Standard 4.6 Private	An organization-wide, comprehensive risk assessment has been completed within the past 2 years and reported to the governing board.
Standard 4.6 Public	The department complies with its local government's risk assessment policies and procedures.
Standard 6.5 Private	The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.
Standard 6.5 Public	The tripartite board/advisory body has received an update(s) on progress meeting the goals of the strategic plan/comparable planning document within the past 12 months.

More than Programmatic Reports…

Standard 8.7 Private	The governing board receives financial reports at each regular meeting that include the following: 1. Organization-wide report on revenue and expenditures that compares budget to actual, categorized by program; and 2. Balance sheet/statement of financial position.
Standard 8.7 Public	The tripartite board/advisory body receives financial reports at each regular meeting, for those program(s) the body advises, as allowed by local government procedure.
Standard 9.3 Private	The organization has presented to the governing board for review or action, at least within the past 12 months, an analysis of the agency's outcomes and any operational or strategic program adjustments and improvements identified as necessary.
Standard 9.3 Public	The department has presented to the tripartite board/advisory body for review or action, at least within the past 12 months, an analysis of the agency's outcomes and any operational or strategic program adjustments and improvements identified as necessary.

Final Reflections on What the Board Needs to Know about Reports…

- Not just reporting for compliance sake
- Reports give you the insight necessary to understand what is happening in the organization to inform your decision making.



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Lots of things require approval…

Standard 3.5 Private	The governing board formally accepts the completed community assessment.
Standard 3.5 Public	The tripartite board/advisory body formally accepts the completed community assessment.
Standard 4.5 Private	The organization has a written succession plan in place for the CEO/ED, approved by the governing board, which contains procedures for covering an emergency/unplanned, short-term absence of 3 months or less, as well as outlines the process for filling a permanent vacancy.
Standard 4.5 Public	The department adheres to its local government's policies and procedures around interim appointments and processes for filling a permanent vacancy.
Standard 6.1 Private	The organization has an agency-wide strategic plan in place that has been approved by the governing board within the past 5 years.
Standard 6.1 Public	The department has a strategic plan, or comparable planning document, in place that has been reviewed and accepted by the tripartite board/advisory body within the past 5 years. If the department does not have a plan, the tripartite board/advisory body will develop the plan.
Standard 7.1 Private	The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.
Standard 7.1 Public	Not applicable: Local governmental personnel policies are outside of the purview of the department and the tripartite board/ advisory body, therefore this standard does not apply to public entities.

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Lots of things require approval…

Standard 7.5 Private	The governing board reviews and approves CEO/executive director compensation within every calendar year.
Standard 7.5 Public	The compensation of the department head is made available according to local government procedure.
Standard 7.7 Private	The organization has a whistleblower policy that has been approved by the governing board.
Standard 7.7 Public	The department provides a copy of any existing local government whistleblower policy to members of the tripartite board/advisory body at the time of orientation.
Standard 8.9 Private	The governing board annually approves an organization-wide budget.
Standard 8.9 Public	The tripartite board/advisory body has input as allowed by local governmental procedure into the CSBG budget process.
Standard 8.10 Private	The fiscal policies have been reviewed by staff within the past 2 years, updated as necessary, with changes approved by the governing board.
Standard 8.10 Public	Not applicable: The fiscal policies for local governments are outside of the purview of the department and the tripartite board/advisory body, therefore this standard does not apply to public entities.

A note about approval…

- Timelines can be deceiving for approval.
  - Approval requires the board to have the final product to review in advance. It’s not just about having the item ready for approval by the board meeting, but having the item ready for approval by the time your board packet goes out.

A few just require review…

Standard 8.6 Private	The IRS Form 990 is completed annually and made available to the governing board for review.
Standard 8.6 Public	Not applicable: The Federal tax reporting process for local governments is outside of the purview of tripartite board/advisory body therefore this standard does not apply to public entities.
Standard 8.11 Private	A written procurement policy is in place and has been reviewed by the governing board within the past 5 years.
Standard 8.11 Public	Not applicable: Local governmental procurement policies are outside of the purview of the department and the tripartite board/advisory body, therefore this standard does not apply to public entities

Several Standards Require Specific Engagement or Action…

Standard 4.1 Private	The governing board has reviewed the organization's mission statement within the past 5 years and assured that: 1. The mission addresses poverty; and 2. The organization's programs and services are in alignment with the mission.
Standard 4.1 Public	The tripartite board/advisory body has reviewed the organization's mission statement within the past 5 years and assured that: 1. The mission addresses poverty; and 2. The organization's programs and services are in alignment with the mission.
Standard 7.4 Private	The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.
Standard 7.4 Public	The department follows local government procedures for performance appraisal of the department head.
Standard 8.2 Private	All findings from the prior year's annual audit have been assessed by the organization and addressed where the governing board has deemed it appropriate.
Standard 8.2 Public	The department follows local government procedures in addressing any audit findings related to CSBG funding.

Several Standards Require Specific Engagement or Action…

Standard 8.3 Private	The organization's auditor presents the audit to the governing board.
Standard 8.3 Public	The department's tripartite board/advisory body is notified of the availability of the local government audit.
Standard 8.4 Private	The governing board formally receives and accepts the audit.
Standard 8.4 Public	The department's tripartite board/advisory body is notified of any findings related to CSBG funding.

It’s a lot. But it’s manageable!

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Compliance Isn't Enough.

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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 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 are revised every two years.

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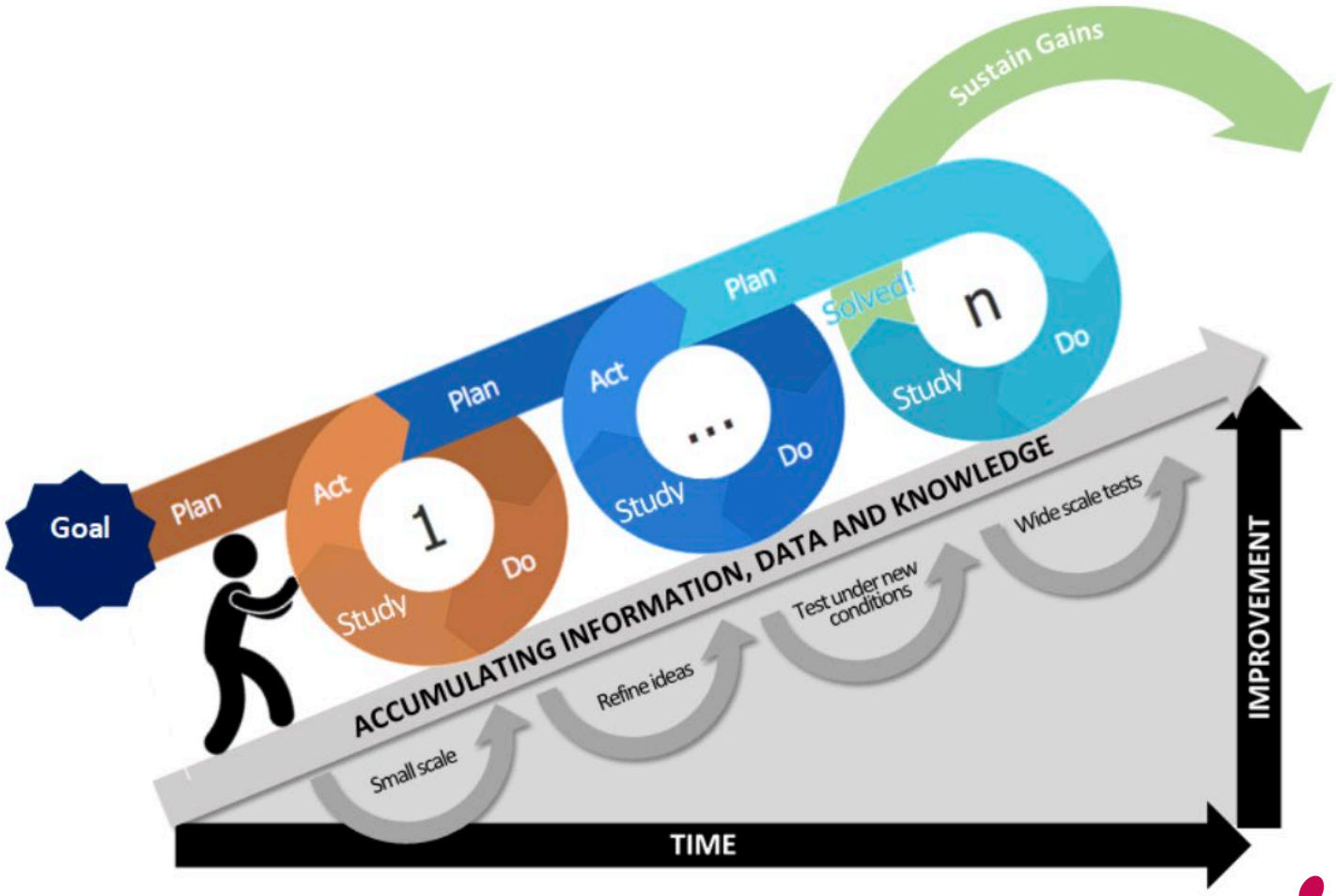
It's about more than "meeting" a set of Standards



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PATHWAYS TO EXCELLENCE

Pathways to Excellence Tiered Approach

General Timeframe for Completion:	3 – 6 Months	6 – 12 Months	12 – 18 Months	24 Months
Submit an Enrollment Package				
Enrollment Fee	Required	Required	Required	Required
Board-Adopted Resolution to Pursue Excellence	Required During Process	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	
Pathways Implementer Training		Required of 1 team member		
Self-Study Training			Required of Agency Excellence Team	
Assess Organizational Excellence	Required	Required	Required	Required
Agency Profile	Required	Required	Required	Required
Min		Required	Required	
Self		Abbreviated (2 -3 Categories)	Complete (All 7 Categories)	Complete (All 7 Categories)
Site Visit				Required
Agency Financial Investment	$850	$1,850 - $5,000	$3,000 - $7,250	$6,000 - $15,000
	Flat Fee	Based on Agency Revenue	Based on Agency Revenue	Based on Agency Revenue

Is Your Agency Ready?

- Agencies can enroll and complete the Bronze Tier year-round.
- Agencies can enroll in other tiers at any time. The next cohort of Silver and Gold Tier agencies will begin meeting in Spring 2026.

More information is available here: https://communityactionpartnership.com/pathways-to-excellence/

Questions? Comments?

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