

Performance Management for Impact

2025 NCAP Annual Convention
August 28, 2025



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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.

Communities Need and Deserve Excellent Community Action Agencies



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

Communities Deserve Excellent Community Action Agencies



Based on the [Malcolm Baldrige National Quality Award](#), 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, which are organized into 7 categories.

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

Excellence is not possible without a Systems Approach

A formal, structured method for developing, deploying, and maintaining

- **An internal framework** *including internal customers, processes / policies, communications, and infrastructure* and
- **External relationships and associations** *that engage external customers, funders, partners, businesses, and other stakeholders)*

that support the fulfillment of the agency mission.

Excellence Requires Intentionality



Excellent customer service and the achievement of agency strategic goals requires intentionality across the board.



This intentionality does not occur by magic!



It must be ingrained in organizational culture.

Organizational Culture

- Organizational culture is not a TedTalk!
 - While communications are important, creating a mission-focused culture is not a communications campaign.
 - For a CAA, fostering an organizational culture focused on the mission is critical.
 - A focus on the mission is what will allow every team member to recognize their role in creating a positive impact on the communities served.

Why Is Culture Important?

Culture shapes everything!

- Decision-making norms
- Employee engagement
- Brand perception
- Risk tolerance

When it's mismanaged, organizations don't just lose trust; they lose traction.



Source: <https://hbr.org/2025/08/to-change-company-culture-focus-on-systems-not-communication>

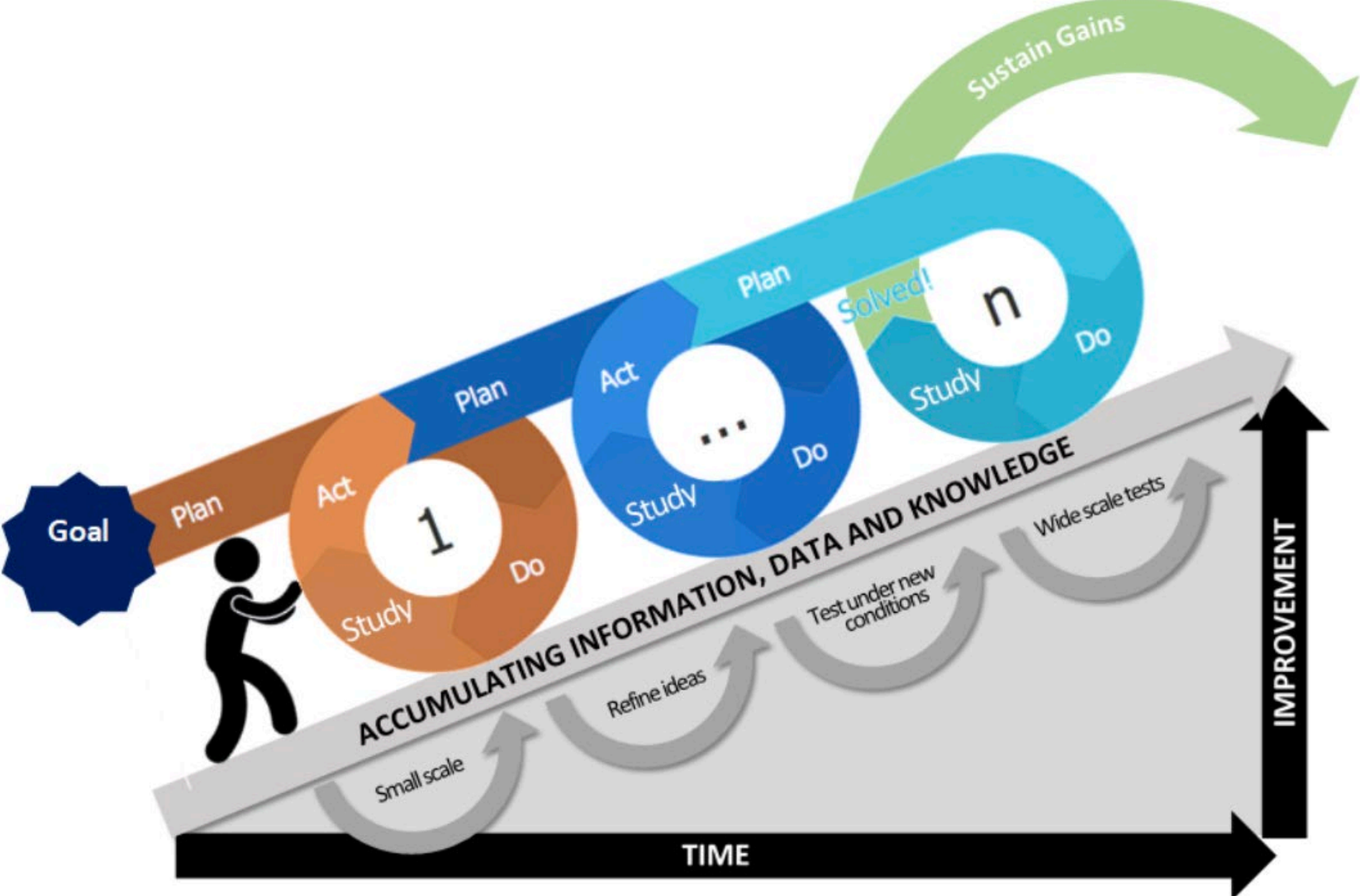
Agencywide Performance Management Requires a Systems Approach

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that support the fulfillment of **the agency mission.**

Organizational Excellence Requires a Culture of Continuous Quality Improvement



The Customer Experience Matters

- Core to the reputation and image of the agency (and the Community Action Network)
- Directly affects the ability of the CAA to fulfill its mission
- Key component of Community Assessment and strategic planning processes
- Opportunity to live our values
- Can be transformative



Community Action Fundamentals – More than Transactional Service

- CAAs are charged with not just providing transactional services to the Community – but to share power with customers to build more responsive systems, inside and outside the CAA.
- Engaging customers in building the solution is an opportunity for not just service but for a transformational experience



Who Are Our Customers?



Who Are Our Customers?

- “Social sector organizations have two types of customers.
 - The primary customer is the person whose life is changed through your work.
 - Supporting customers are volunteers, members, partners, funders, referral sources, employees, and others who also must be satisfied.”

Source: [Drucker on Being Customer-Centric](#)

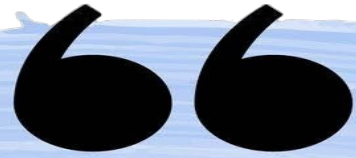
Who Are Our Customers?

Drucker continued:

- “Integrating what customers value into the institution’s plan is almost an architectural process, a structural process. It’s not too difficult to do once it’s understood. But it’s hard work.”

Source: [Drucker on Being Customer-Centric](#)

Drucker on Integration



First, think through what knowledge you need to gain. Then, listen to customers (both primary and supporting). Accept what they value as objective fact. Make sure the customer's voice is part of your *discussions* and *decisions* each and every day.



Source: [Drucker on Being Customer-Centric](#)

Analysis Capacity and Systems

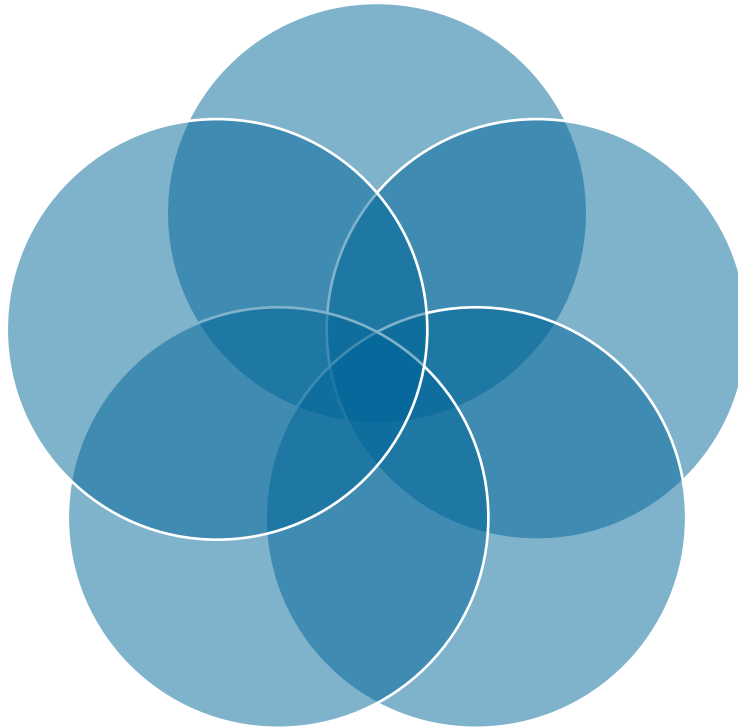
Who will do
analysis?

What
questions will
stakeholders
want to
answer?

How often
will analysis
be
conducted?

What
integrations
are needed?

What tools
are available
for analysis?



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:

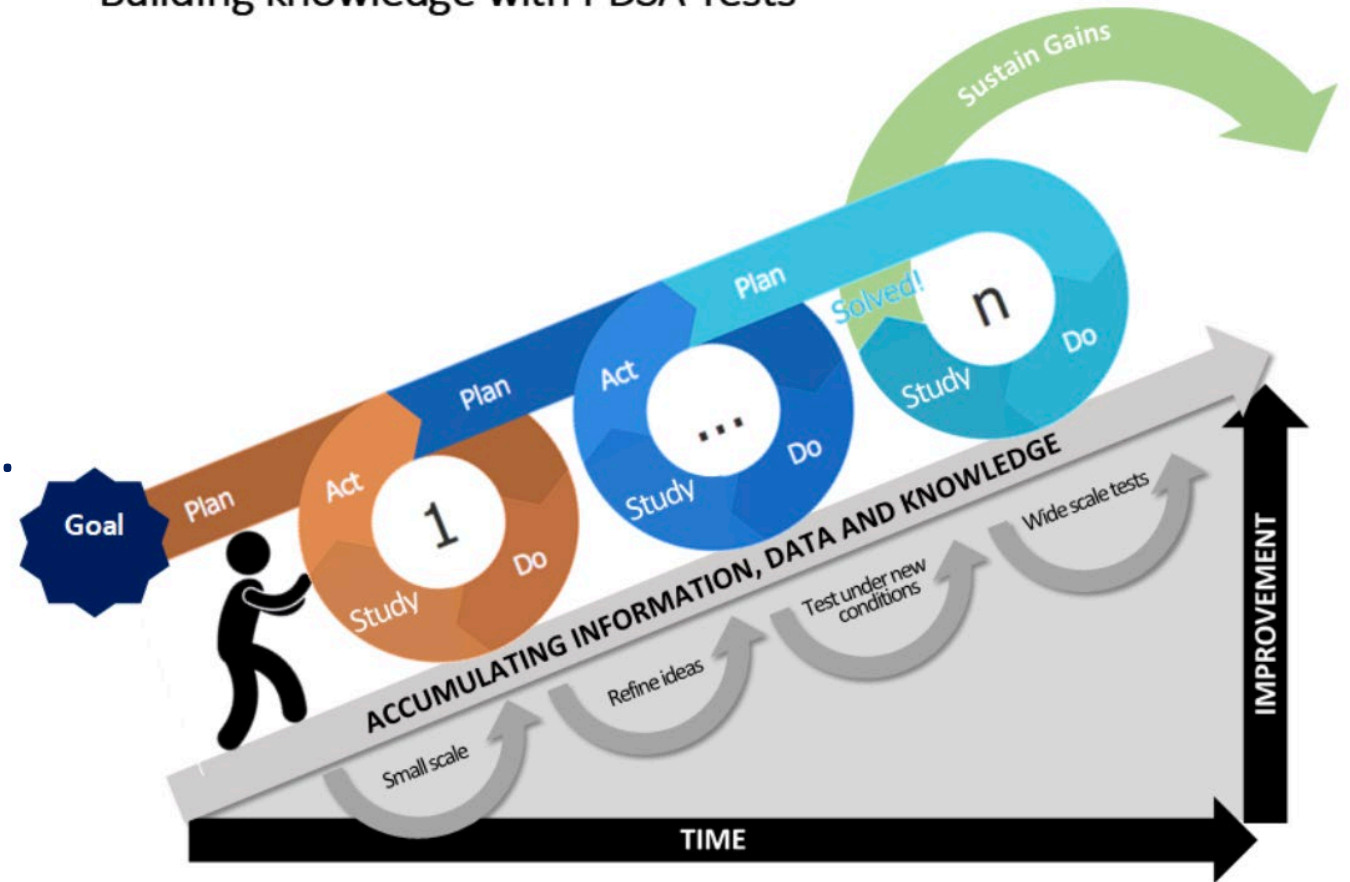
- Collect Quantitative Data
- Analyze; formulate questions
- Collect Qualitative Data
- Analyze; identify key takeaways
- Final report to Board/Leadership for action

Now What? Taking Action

“Integrating what customers value into the institution’s plan is almost an architectural process, a structural process. It’s not too difficult to do once it’s understood. But it’s hard work.”

Source: [Drucker on Being Customer-Centric](#)

Building knowledge with PDSA Tests



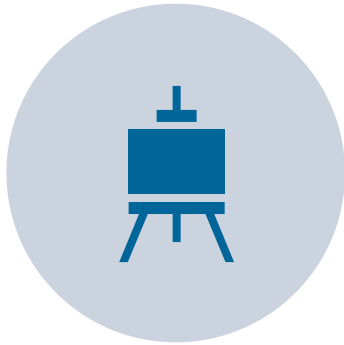
Taking Action – Who Decides?

- The team who makes sense of the data may or may not be the team who decides what to do.
 - May differ based on customer base, programs, type of feedback, etc.
 - May be Board, leadership, Advisory Group, special committees, etc.



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

Taking Action – Accountability

Action planning

RACI Charts

Tracking Metrics & Performance Indicators

Champions

RACI - Matrix

	Person A	Person B	Person C	Person D
Task 1	R			
Task 2		A		
Task 3			C	
Task 4				I

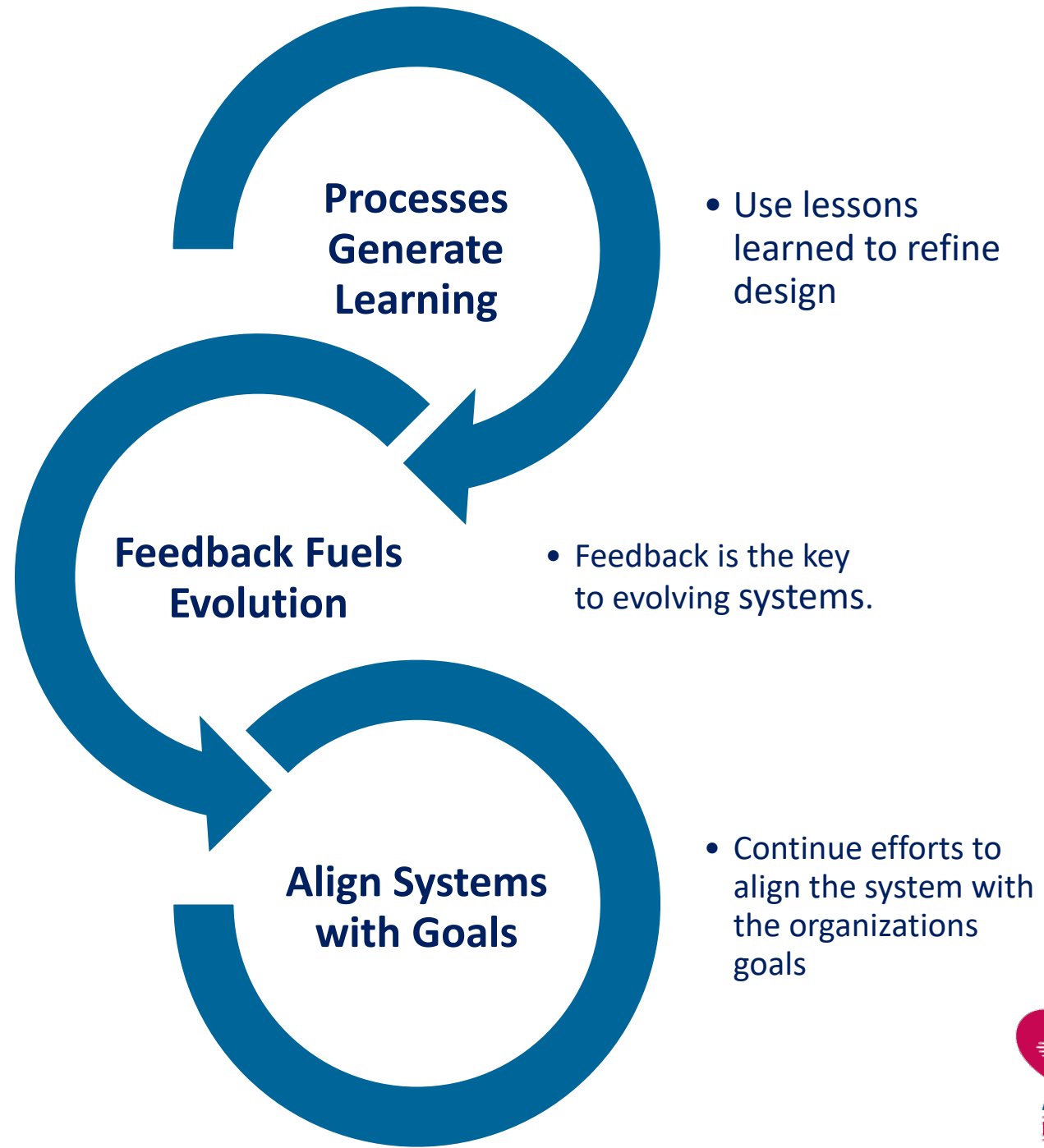
Responsible

Accountable

Consulted

Informed

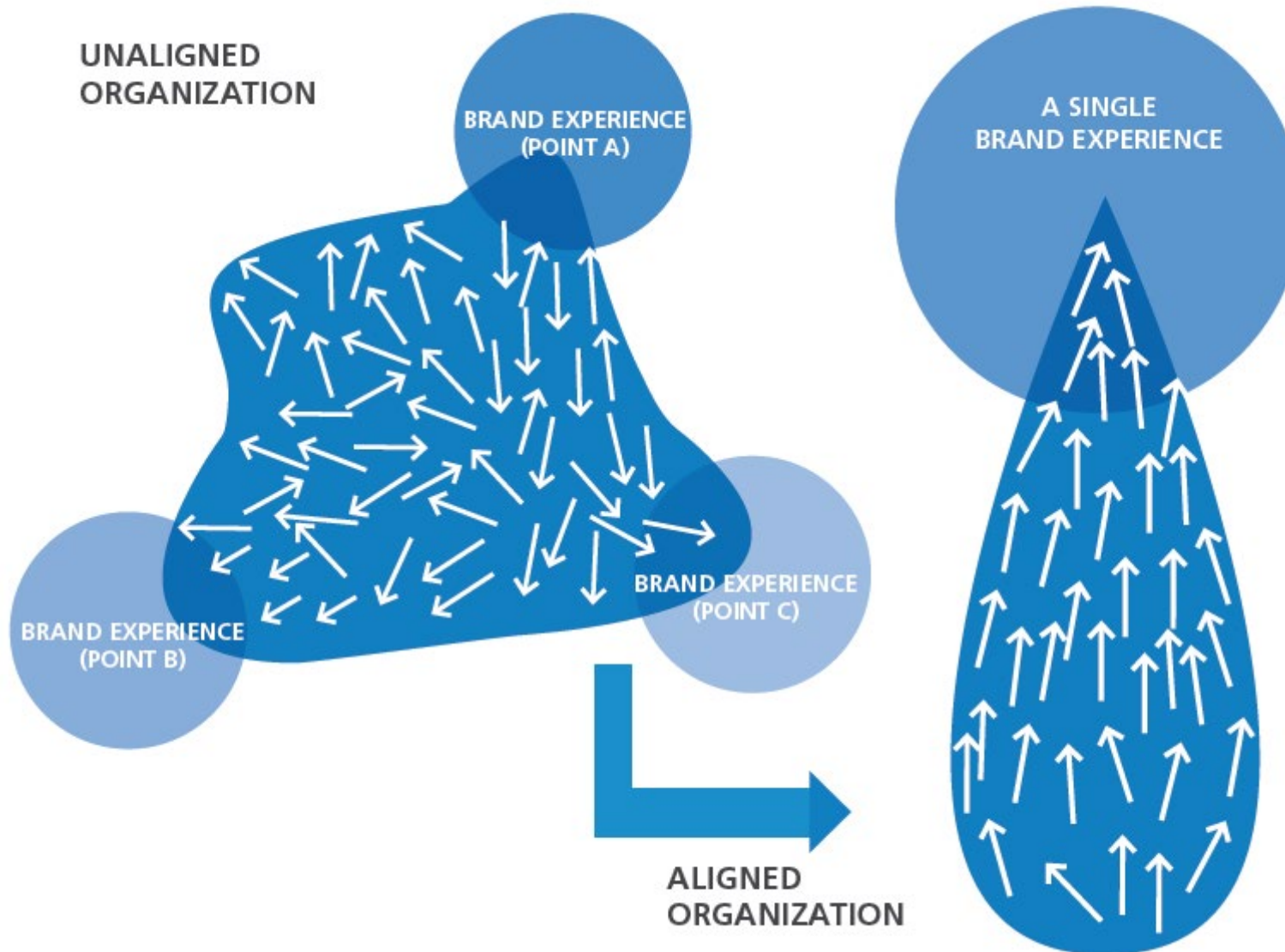
From Tracking to Systems Improvement



Building the System



Using a System to Align Processes for Impact



Source: [Tronvig – On Organizational Alignment](#)

What It Means to be “Systematic”

Goal Alignment: Aligns activities with organizational goals.

Structured, Consistent Process: Follows clear, repeatable, steps for reliable outcomes.

Agency-Wide Integration: Applied consistently across all departments for consistency

Data-Driven: Uses data to guide action and improve performance

Continuous Improvement: Regularly refines processes based on feedback and results

Documentation: Keeps detailed records for consistency and tracking.

The Big Picture: Impact Evaluation

- The systematic evaluation of an agency's social impact (through programs, initiatives, and partnerships) is core to creating a mission-oriented, customer-focused culture of excellence.
- Community Action Agencies can use a variety of tools to gain insight into their social impact. Surveys, focus groups, customer interviews, and platform-based data analytics.
- Data obtained by using any combination of tools and methods can be used:
 - **Internally** to support CQI, e.g., changes in service delivery methods; reallocation of staff, space, funding; and for communicating with internal customers
 - **Externally** to communicate outcomes with external stakeholders; to support transparency and accountability; and to build support for anti-poverty efforts.

- Adopt or amend approach(es)
- Document lessons learned
- Return to Plan mode for systematic Continuous Quality Improvement

- Idea or plan for improvement
- Goal(s) and implementation plan



- Review actions and outcomes
- Were expectations met?
- Why or why not?

- Implement plan
- Collect data to measure change

Why is CQI Important?

- Critical to the continued growth and improvement of a program/initiative.
- Identifies what's working well. *(YAY!)*
- And what's not. *(Not so YAY...)*
- Provides structure for making decisions on what interventions should be tried.
- Provides structure for making decisions on who is responsible for what and on what timeline.
- Provides a benchmark for measuring progress.
- Increases buy-in from stakeholders, including staff involved in the process.

A CQI Approach

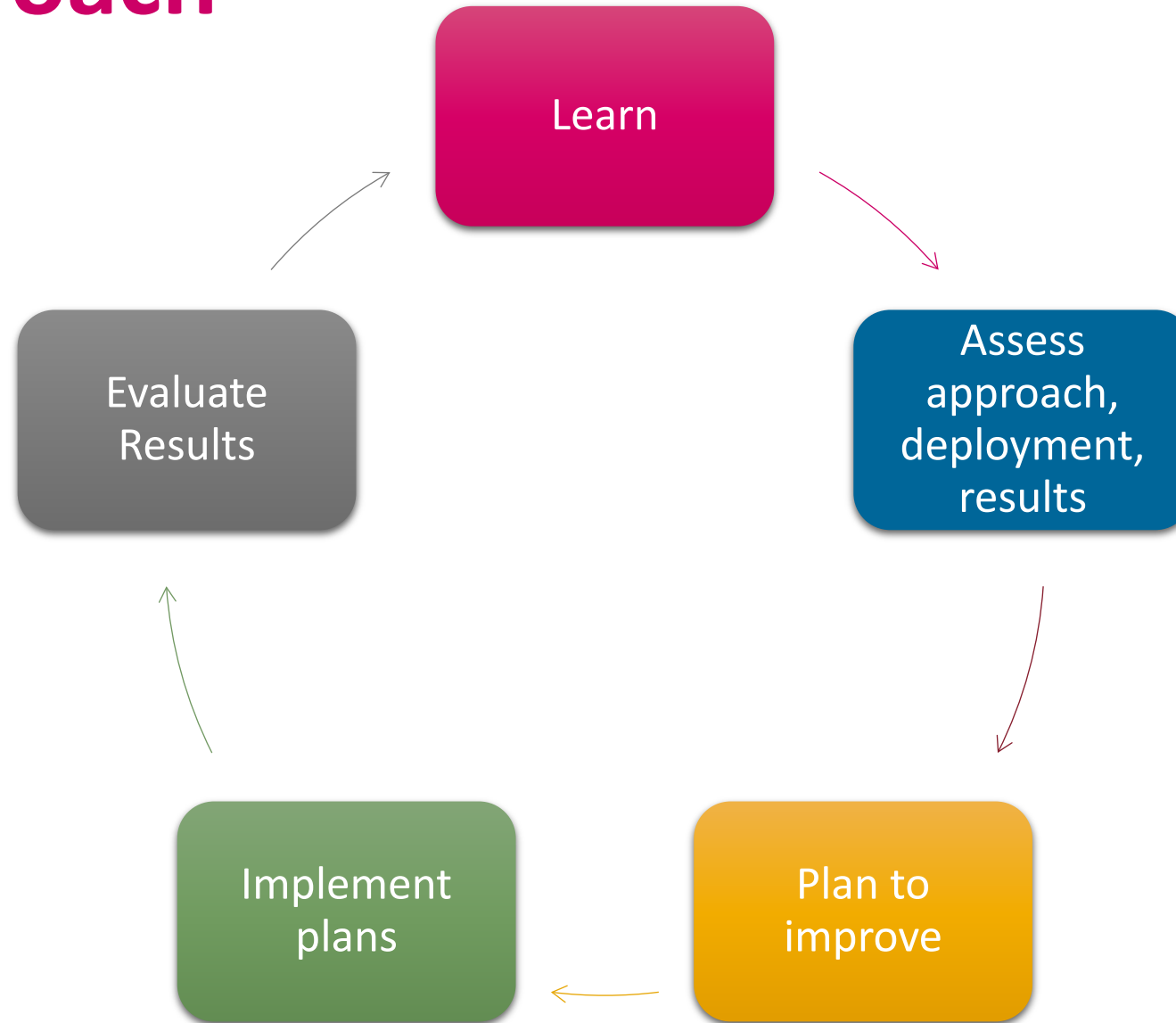


Figure 2. Key Characteristics and Benefactors of CQI

What are the key characteristics of CQI?	Who benefits from CQI, and how?
<div data-bbox="157 272 563 515">Results oriented</div> <div data-bbox="608 272 1009 515">Input from all levels of staff and stakeholders</div> <div data-bbox="157 554 563 796">Teamwork</div> <div data-bbox="608 554 1009 796">Continuous progress review</div> <div data-bbox="346 836 817 1072">Making timely adjustments to improve outcomes</div>	<div data-bbox="1256 272 1671 479">Program managers</div> <ul data-bbox="1671 272 2387 479" style="list-style-type: none"> • Program monitoring • Increased staff satisfaction • Professional development <div data-bbox="1256 501 1671 708">Staff</div> <ul data-bbox="1671 501 2387 708" style="list-style-type: none"> • Increased efficiency • Needs addressed <div data-bbox="1256 729 1671 936">Target/priority population</div> <ul data-bbox="1671 729 2387 936" style="list-style-type: none"> • Needs addressed • Sustainable programming • Barriers addressed <div data-bbox="1256 958 1671 1150">Stakeholders</div> <ul data-bbox="1671 958 2387 1150" style="list-style-type: none"> • Increased transparency and efficiency • Opportunity to learn about program impact • Increased engagement

Source: https://teenpregnancy.acf.hhs.gov/sites/default/files/resource-files/CQI%2520Tip%2520Sheet%2520Updated_02.22.21_Final.Images%5B3%5D.pdf



When Does a CQI Process Start?

- Ideally, we develop CQI processes as we are developing our approach to implementing a program or initiative.
- For existing efforts, the time was yesterday!
- We must be able to demonstrate not only our impact but also our focus on improvement.

How Do We Get Started?

- Build buy-in from leadership and staff for systematizing improvement as part of your culture.
- Be sure to provide adequate resources - meeting space, access to data, time, and timely access to decision-makers... *Did I mention time?*
- Identify the process the processes you will use.
- Implement those processes.
- Make changes bases on what you learn.
- Continue to monitor progress over time.



How might we?

- At your tables, discuss the issue below.
- Share and jot down some ideas about how and agency might build out a CQI process to address the issue.

Customer feedback survey results over the past year showed lower than desired satisfaction levels with accessing services in rural service areas.

Customer feedback survey results over the past year showed lower than desired satisfaction levels with accessing services in rural service areas.

- Who is going to make meaning of the data?
- What other data might they need?
- What questions might we ask of the data?
- Who is going to make recommendations for improvement?
- Who is going to implement these changes? (*Think: training!*)
- How will we know if we have made an impact on this issue?

Closing Thoughts...



Systems for Success: Leverage systems to ensure consistent, high-quality service that empowers our teams to meet the needs of customers.



Impact-Driven Engagement: Focus on building deep customer relationships that drive meaningful impact, aligning with our organization's mission.



Transforming Experiences: Move beyond service to create transformative customer experiences that build power and engagement.



Continuous Improvement: Leverage CQI to continuously improve our services, drive organizational learning, and center excellence.

At-A-Glance



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

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

Please complete the session feedback!



THANK YOU!