

A BOARD'S GUIDE TO SUSTAINABILITY AND LONG-TERM IMPACT

AUGUST 28, 2025



National Community Action Partnership
1020 19th Street NW, Suite 700
Washington, DC 20036

www.communityactionpartnership.com





**What does
“Sustainability”
mean for your
organization?**



Roles of the Board

Vision, Mission & Purpose

Strategic Direction

Financial Oversight & Fundraising

Sustainability

Strategic Resource Allocation

Board Leadership & Governance

Executive Director Oversight & Support

Community Education and Engagement

Performance Management & Evaluation



Roles of the Board

Vision, Mission & Purpose

Strategic Direction

Financial Oversight & Fundraising

Sustainability

Strategic Resource Allocation

Board Leadership & Governance

Executive Director Oversight & Support

Community Education and Engagement

Performance Management & Evaluation

Sustainability Starts with Your Why

What

Every organization on the planet knows WHAT they do. These are products they sell or the services.

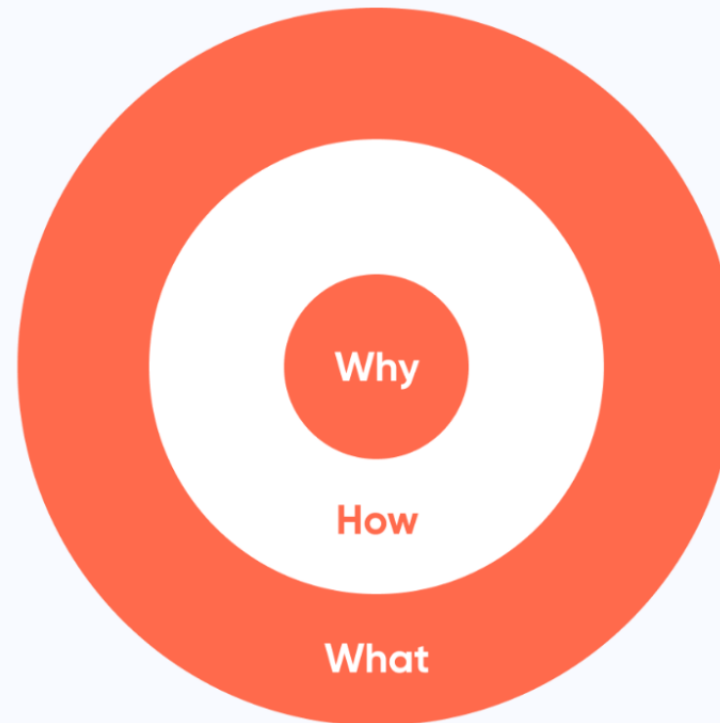
How

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

Why

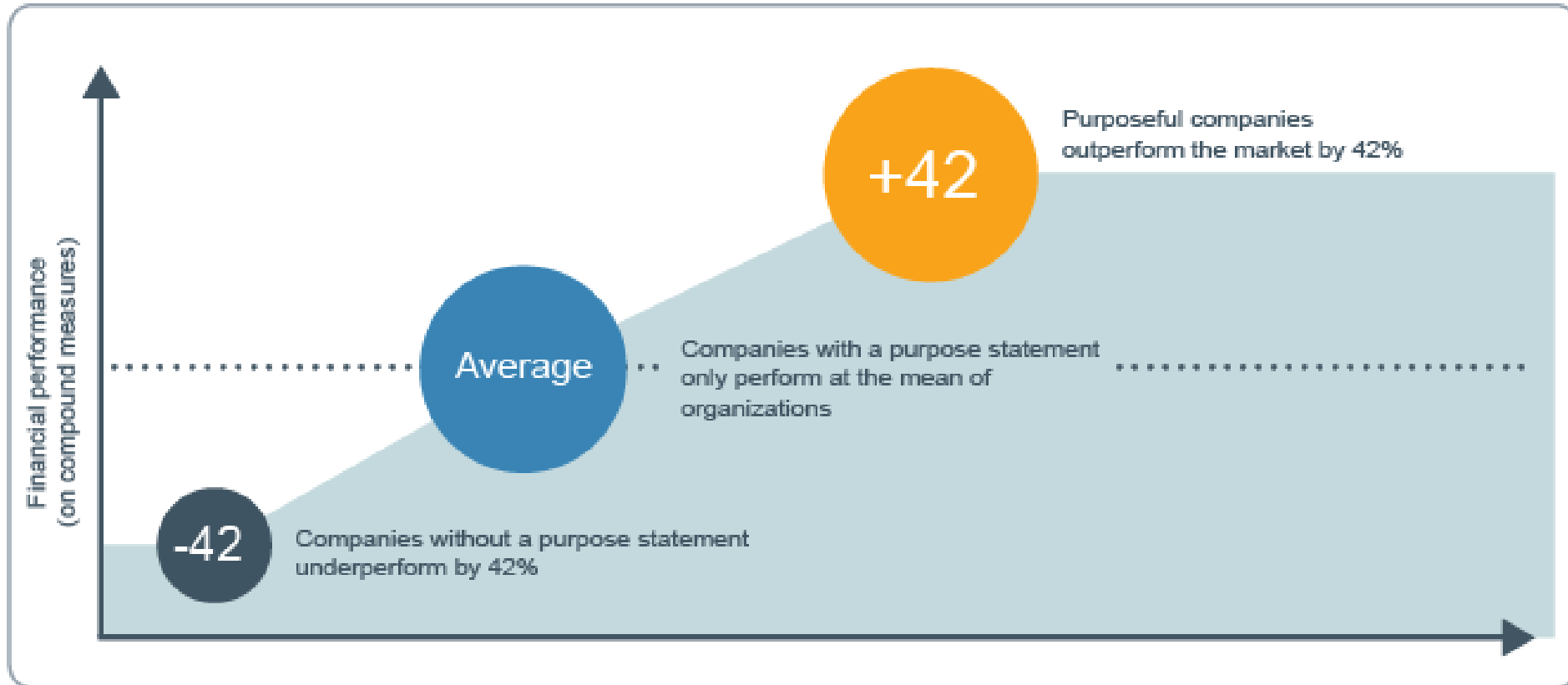
Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.

The Golden Circle



In the for-profit sector, purposeful companies outperform the market by 42%

> Impact of Purpose on Financial Performance



© Development Dimensions International, Inc., The Conference Board Inc., EYGM Limited, 2018. All rights reserved.

Source: <https://www.linkedin.com/pulse/why-do-purpose-driven-companies-better-peter-fisk/>

Boards Set the Strategic Direction of the Agency Based on Purpose & Mission



Identifying Organizational Purpose: Board Reflection Questions

Before writing, take a moment to reflect:

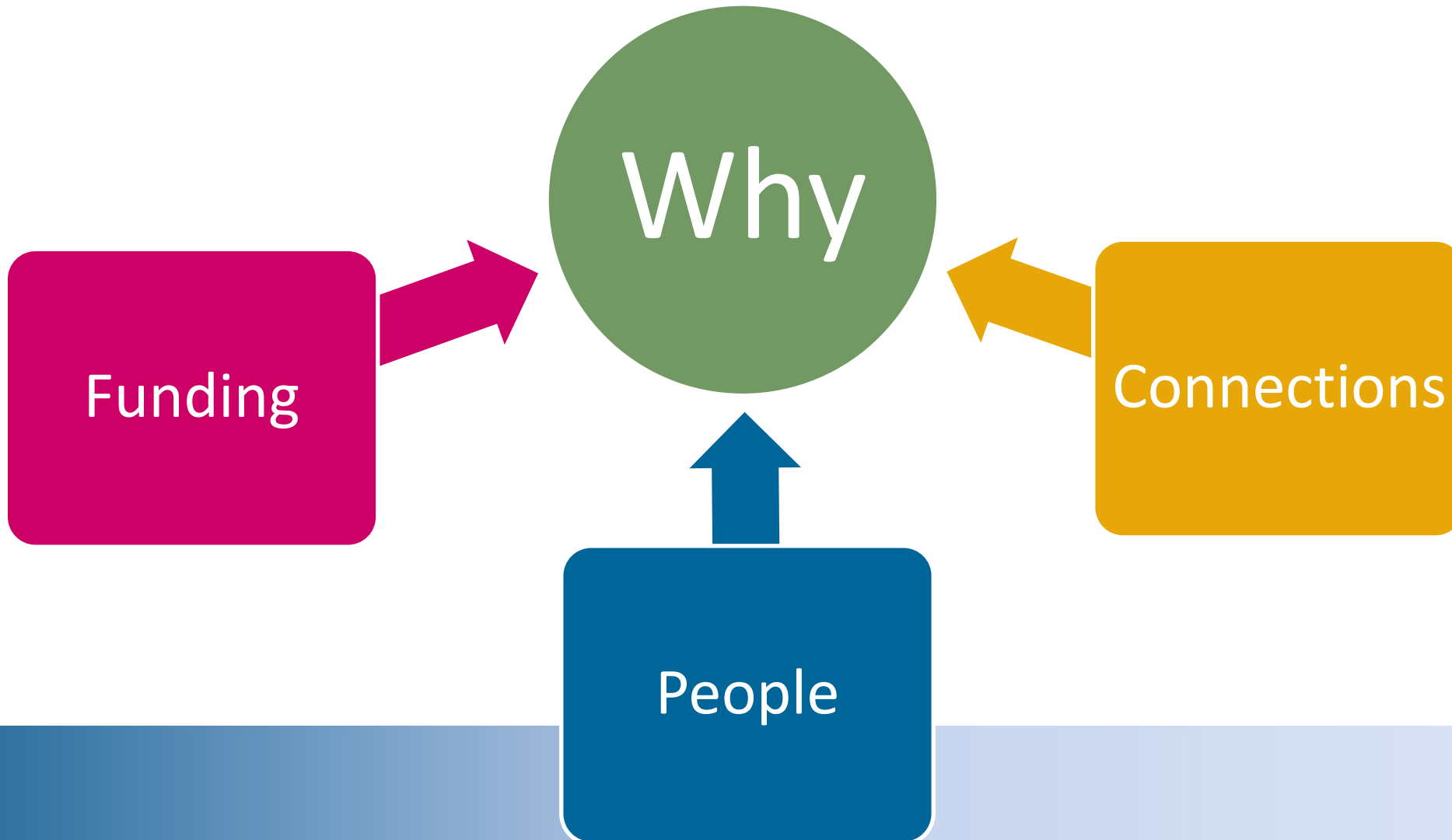
1. Why do we exist—beyond the services we provide?
2. What long-term difference are we here to make?
3. For whom do we exist—and what need are we responding to?
4. What role are we uniquely positioned to play?
5. What guiding belief drives everything we do?

Then, write one sentence that begins with: **“Our purpose is to...”**

Purpose Acts as Your First Filter for Sustainability

Once understood, all decisions can be viewed as – *how does this impact our ability to sustain the organization for the long-term?*

What Kinds of Resources Do You Need for Your Why?



A Shift in Models...

a GRANTS MANAGEMENT business model

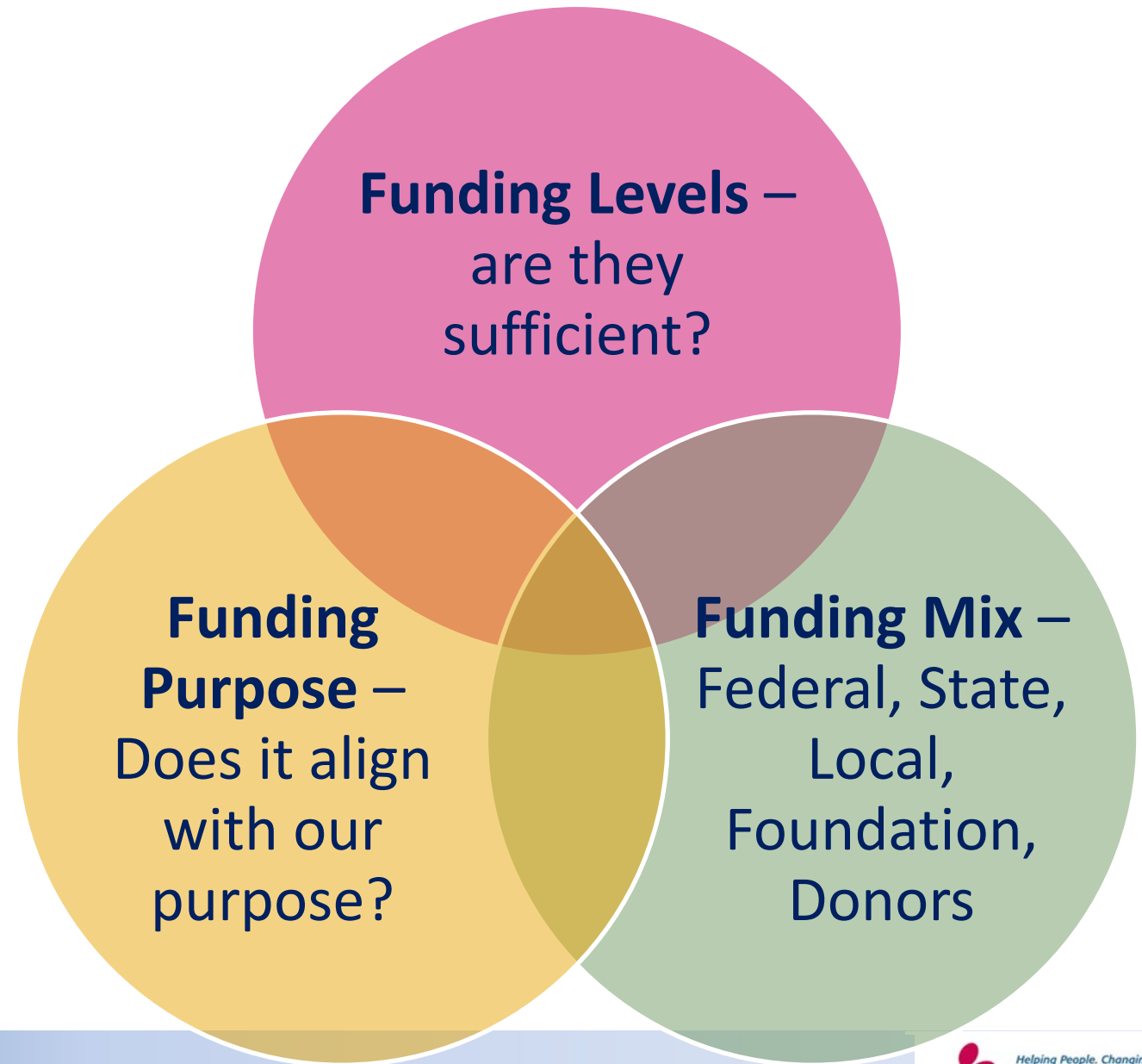


A Shift in Models...

the **COMMUNITY ACTION IMPACT** model



**Do we have the
funding we need to
deliver and sustain
our mission?**



Sample Revenue Chart

Funding Source	Origination (Federal, State, Local, etc.)	Amount (\$)	% of Overall Revenue	Payment Method (Reimbursement, Advance, Deliverable)	Stability (Low/Med/High)	Likelihood of Continuation (Secure, Uncertain, At-Risk)
CSBG	Federal	\$2,000,000	40%	Advance / Reimbursement	High	Secure
Rapid Rehousing	Federal	\$1,000,000	20%	Reimbursement	Medium	Secure
State Energy Grant	State	\$750,000	15%	Reimbursement	Medium	Uncertain
Private Grant – Financial Counseling	Foundation	\$500,000	10%	Deliverable-based	Low	At-Risk
Fee for Service – Sliding Scale Fees	Program Revenue	\$400,000	8%	Paid per service	Medium	Uncertain
Individual Donations	Private	\$350,000	7%	Lump sum	Low	Uncertain

Another Way To Review: Funding by Strategic Plan Priority/Focus

- **Strategic Priority: Advancing Economic Security and Stability**
 - CSBG
 - Head Start
 - Workforce Development
 - New Homebuyer Fund
 - LIHEAP
- **Fostering Community Voice and Leadership**
 - CSBG
 - Community Voice Foundation Grant
- **Build Organizational Capacity**
 - CSBG
 - Childcare Professional Development Grants
 - AWS Grant

**If Purpose was the
Driver of Your
Funding, How
Would it Look
Different?**



So uhhh, we have some gaps...

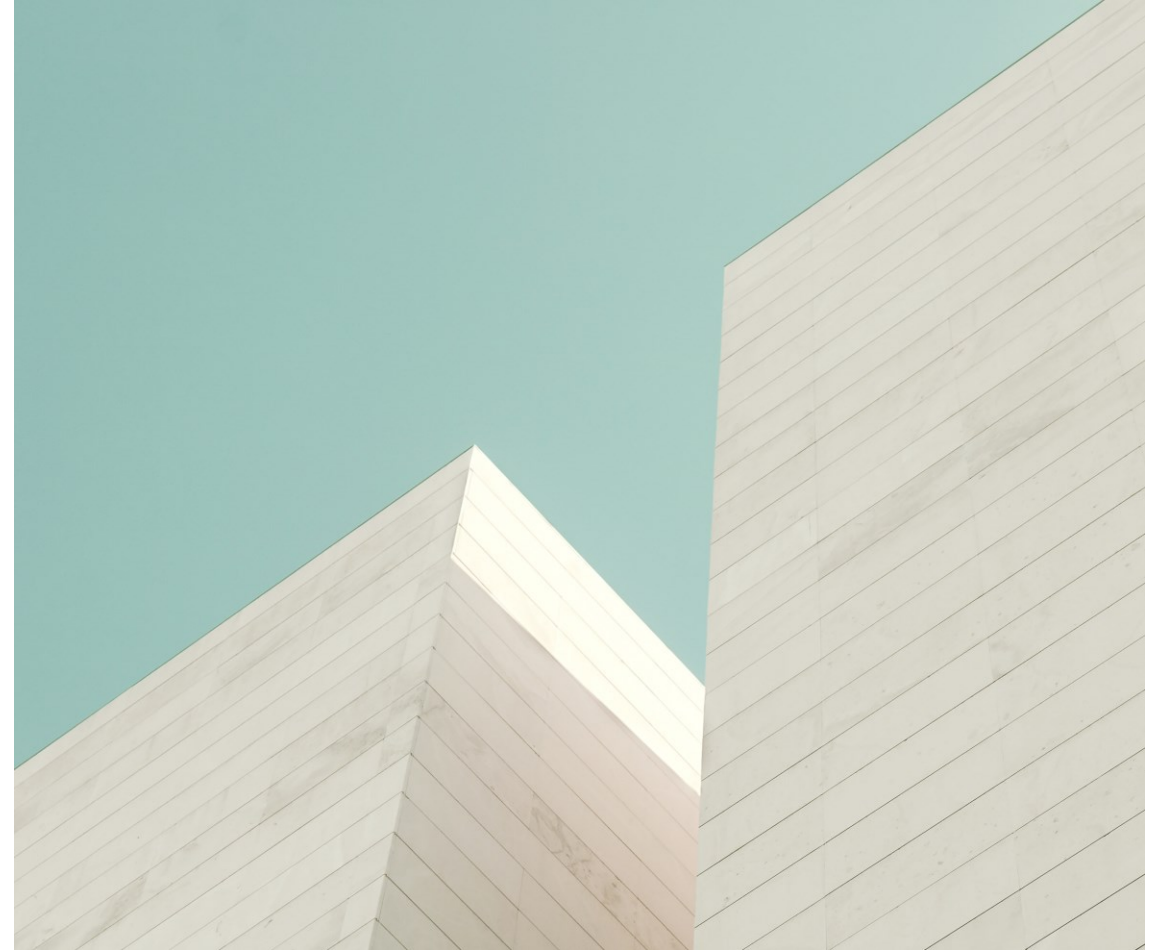
Federal Grants

State Grants

Local Grants

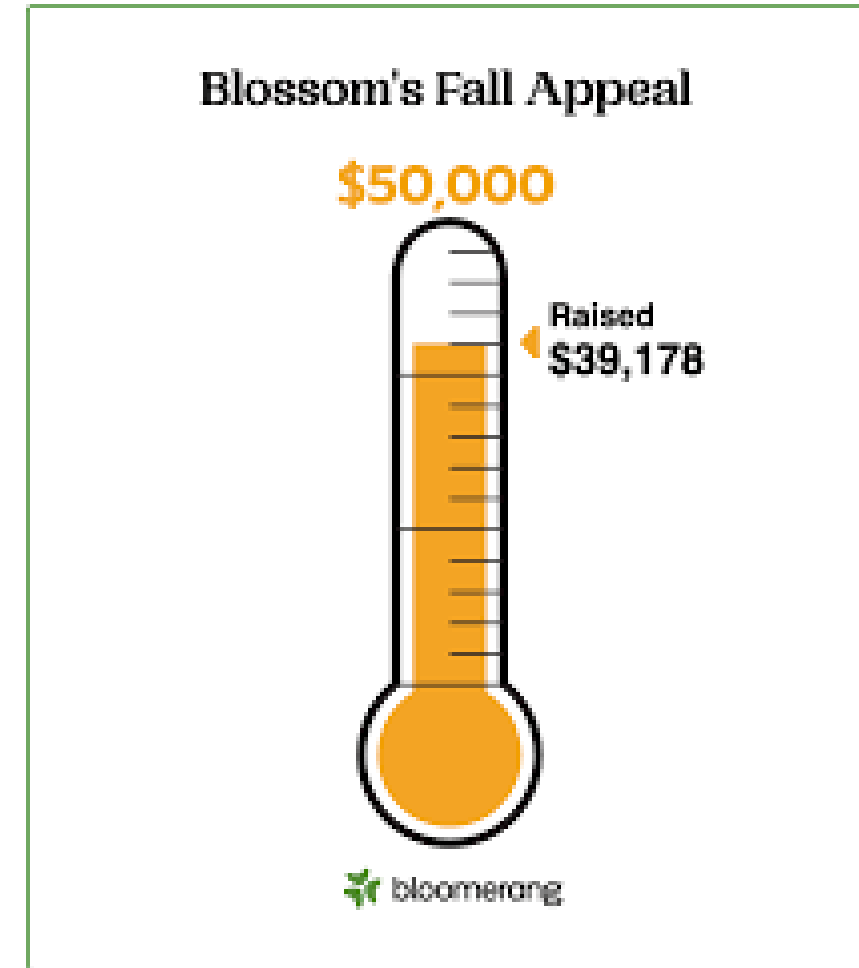
Foundations

Fundraising



Board Fundraising

- Start by centering purpose
- Consider your strategic priorities
- Get clear on responsibilities for fundraising:
 - Articulate requirements in job descriptions, recruitment processes, orientation, etc.
- Set targets – how much?
- Make personal giving requirements clear
- Training and Ongoing Support
 - Toolkits, talking points, promotional language
- Monitor and report



Grappling with Sustainability in This Moment

There are multiple possibilities to address possibilities that can help you to manage costs or cashflow and grow revenue

Cost Reduction	Revenue Growth	Cash Flow Management
Reduce overhead	Increase fundraising efforts	Secure lines of credit/financing
Postpone nonessential hiring	Apply for new grants	Liquidate assets
Staffing adjustments (e.g., reduce hours, furloughs, benefits)	Expand/develop fee-for-service programs	Negotiate extended payment terms
Merge or share services with other organizations	Build partnerships for shared funding	Request advances on funding

New FFY 2026 Risk:

Operating Without Contracts or Appropriations

- Sometimes, the organization may not receive its contract at the beginning of the FFY due to delays in federal appropriations or state or funder delays.
- A government shutdown may have impacts-May not be business as usual.
- While CAAs may be in the midst of running programs, ***operating without a contract is a significant financial risk to the organization***
 - If the contract is delayed or funding is unclear for the new FFY, your CAA may have to make the difficult choice of interrupting programming to minimize risk
 - ***Do you know how long your CAA can operate if funding is delayed?***
 - ***How are you ensuring the board is in alignment on program operations?***

NEW RESOURCE: NCAP'S SCENARIO PLANNING TOOLKIT

The Scenario Planning Toolkit equips CAAs and State Associations with curated tools and resources to navigate uncertainty.

Use the toolkit to:

- Assess and plan for key impact areas: financial, operations , programmatic, and community.
- Identify challenges, evaluate impacts, and develop strategies for changing conditions.
- Strengthen decision-making and organizational resilience by exploring multiple future scenarios.



Community Action Network Scenario Planning Toolkit

National Community Action Partnership
February 2025

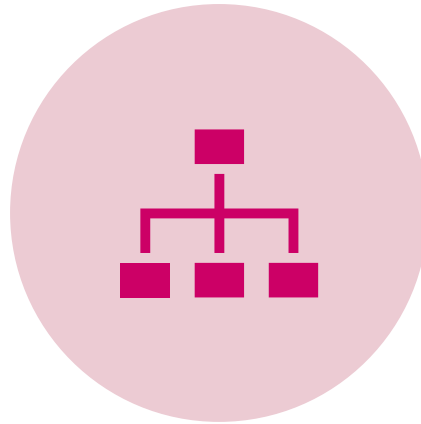
[Access the
Toolkit Here:](#)



The State of the Nonprofit Workforce



**NEARLY THREE OUT OF FOUR
NONPROFITS REPORT JOB
VACANCIES**



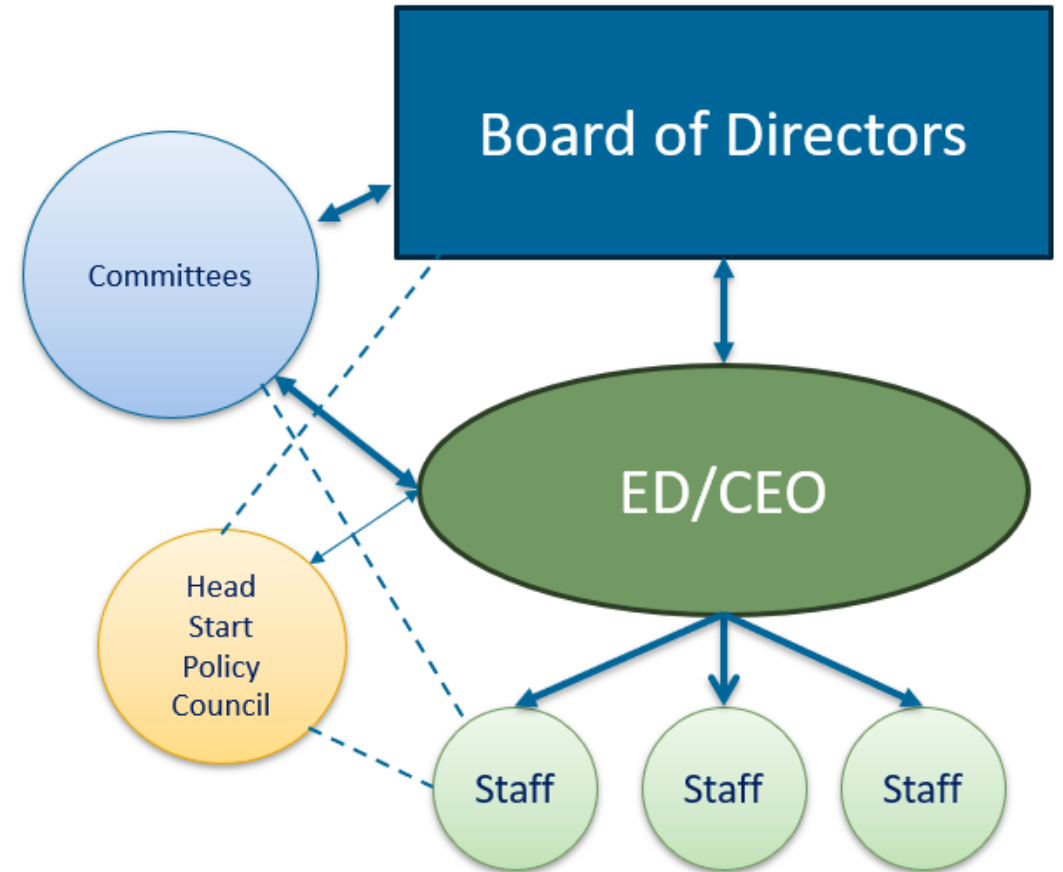
**ALMOST THREE OUT OF FOUR
NONPROFITS REPORT VACANCIES
IN THEIR PROGRAM AND SERVICE
DELIVERY POSITIONS;**



**ALMOST TWO OUT OF FIVE
NONPROFITS REPORT VACANCIES
IN ENTRY-LEVEL POSITIONS**

Source: [National Council of Nonprofits – 2023 Nonprofit Workforce Survey](#)

The Board Has **One** Employee: **The Executive Director**



The most valuable asset of the organization is its people

The board does not hire/direct internal staffing, but can support setting the tone

- Personnel Policies
 - Fair compensation, benefits
- Training, development
- Fostering a supportive culture and sense of well-being



Build the Career Pathway



Entry-Level Staff

- ROMA Training
- Data Entry



Program Analyst

- Data Review
- Process Leadership



Manager-Level Role

- CCAP
- Supervision



Assistant / Deputy
CSBG Director

- Grants Management
- Budget Authority



CSBG Director

More Than Training - Capacity

Stretch assignments

Coaching

Formal training programs such as Leadership Programs and Action learning

360 degree survey feedback and individual development plans

Job rotation / Cross Training

Internal education

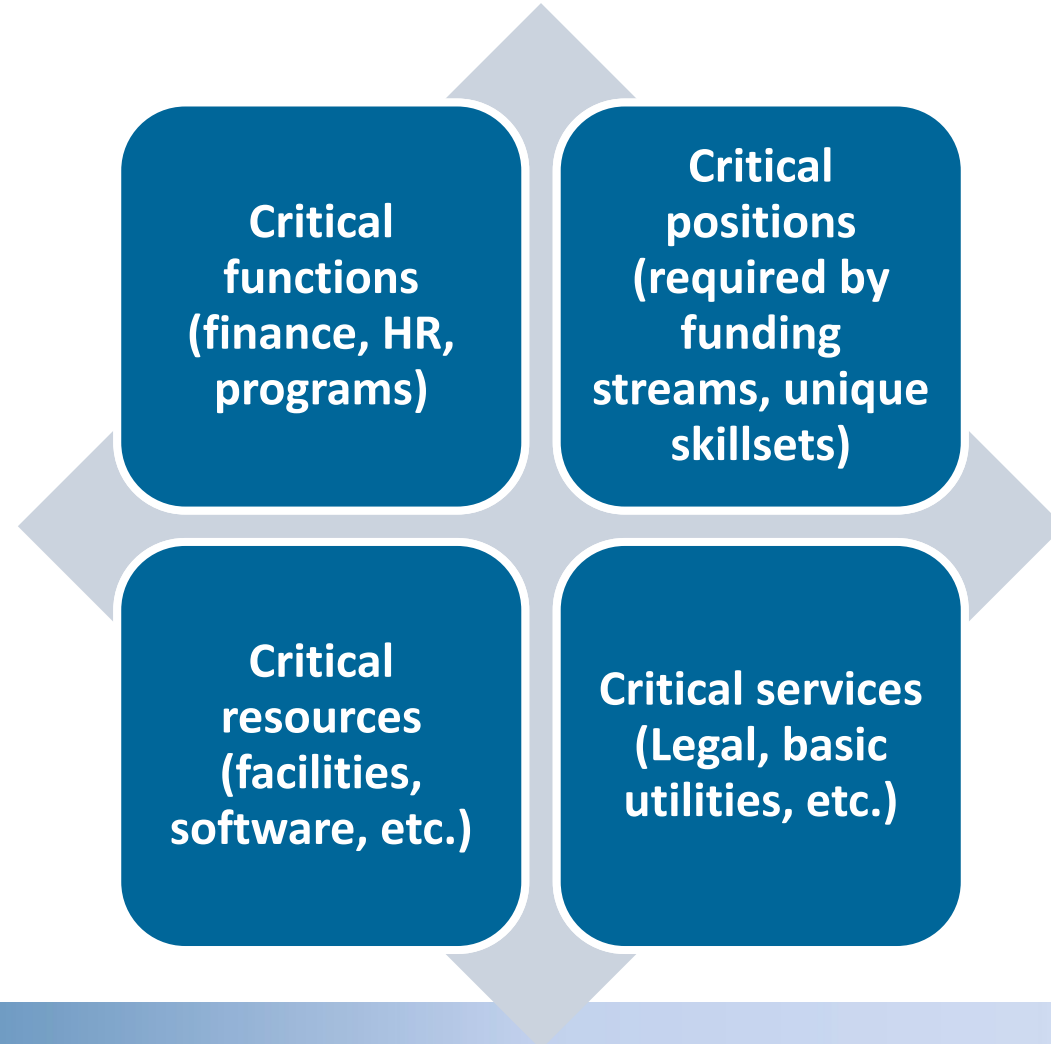
Internal networks

Exposure to peers, EDs, board members, decision makers

Increased responsibilities

External education

People Sustainability In This Moment



Tool You Can Use – McLean & Company Critical Role Identifier

McLEAN &
COMPANY

Critical Role Identifier

Use the *Critical Role Identifier* tool alongside the *Guide to Identifying Critical Roles* to help HR support key players in evaluating roles and determining which ones are most critical to the success of the organization. The purpose of the tool is to help facilitate a conversation around critical roles. It is not meant to be decisive, as each organization could have additional factors they wish to consider when identifying these roles.

Tab 2. Criteria Weighting: Document selected criteria and assign weightings.

Tab 3. Critical Role Evaluation: Document criteria statements and all roles being evaluated, and provide ratings for each role based on criteria statements.

Tab 4. Critical Role Selection and Comparison: View the results of the role evaluation and compare roles with a more detailed breakdown of scores. Make final critical role classifications.

Tab 5. List of Critical Roles: View a comprehensive list of critical roles.

Note: If the organization is using a decentralized approach to evaluate critical roles, download and distribute a copy of the *Critical Role Identifier* to key players to complete critical role identification for their group. See slide 15 of the *Guide to Identifying Critical Roles* for more information on logistical approaches.

Access Here:



Staffing

Organization
Needs from Staff
through
Uncertainty



Staff Needs
through
Uncertainty

Connections

Partners

Funders

Policy Makers

Trusted Messengers



Connections: Leveraging the Power of the Board



- Board members bring different connections, expertise, and opportunities to the organization.
- Thinking strategically about roles/opportunities
 - People with Low Incomes
 - Private
 - Public
- Passion work unlocks power!
- Ways our board members can engage/incentive structures may be different

Power Mapping Exercise



Getting Started Exercise

- Power mapping yourself
 - Step 1: Write down 3-5 institutions, organizations, or activities you're connected to (this can be a school, former employer, but also book clubs, sports leagues, etc.)
 - Step 2: Look for connections to leverage for your goals
 - Step 3: Use this to keep a BOD inventory or on the fly when an advocacy issue becomes a priority.
- Choosing one issue is a powerful way to start

Elected Officials & the Media



U.S. Senator Chris Murphy talks with Killingly Town Manager Mary Calorio and Access Community Action Agency Vice President Emma King about the organization's efforts.

Matt Grahn/Norwich Bulletin

Elected Officials

- Letters
- Emails
- Phone Calls
- Office Visits
- Briefings
- Coalition Meetings
- Site Visits
- Event Invitations

Media

- Letters to the Editor
- Press Conferences
- Social Media
- Coordinated Campaigns
- Earned Media (Rallies, report releases, etc.)

Elevate Community Action

6. Support *Communities in Action Together* -

Promote and protect Community Action

- Review NCAF's *Communities in Action Together* campaign materials
- Discuss planned engagement (e.g., op-eds, events, Congressional visits)
- Review how the CAA engages with its Representative, or why it might not
- Discuss your Representative's record of support for CSBG and other programs
- Say thank-you to your Representative if they have shown support
- Encourage board members to share Community Action's value

Board engagement

Board awareness

Relationships

COMMUNITIES IN ACTION TOGETHER

MEDIA TOOLKIT

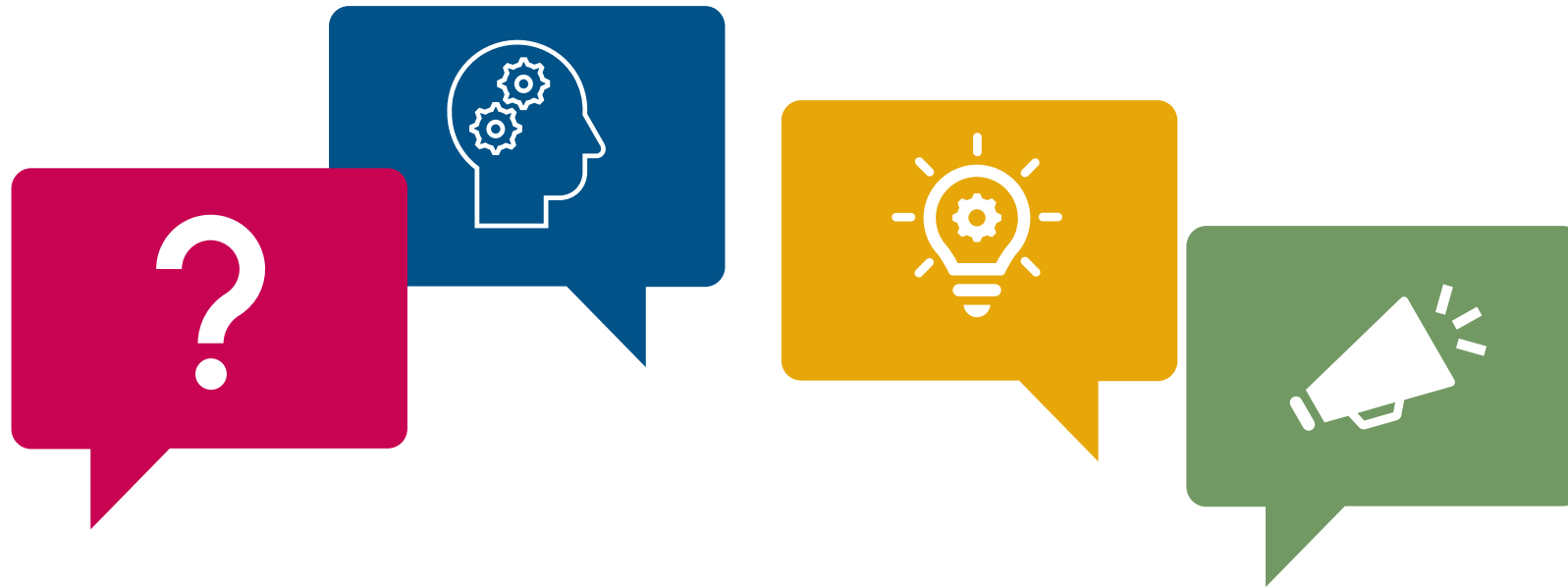


NEW Community Action ADVOCACY RESOURCE!

- Talking Points
- Letter to the Editor / Op-Ed Template
- Media Advisory Template
- Outreach Strategies
- Words to Use / Avoid
- Social Media Tip Sheet
- Social Media Messaging
- Sample Graphics



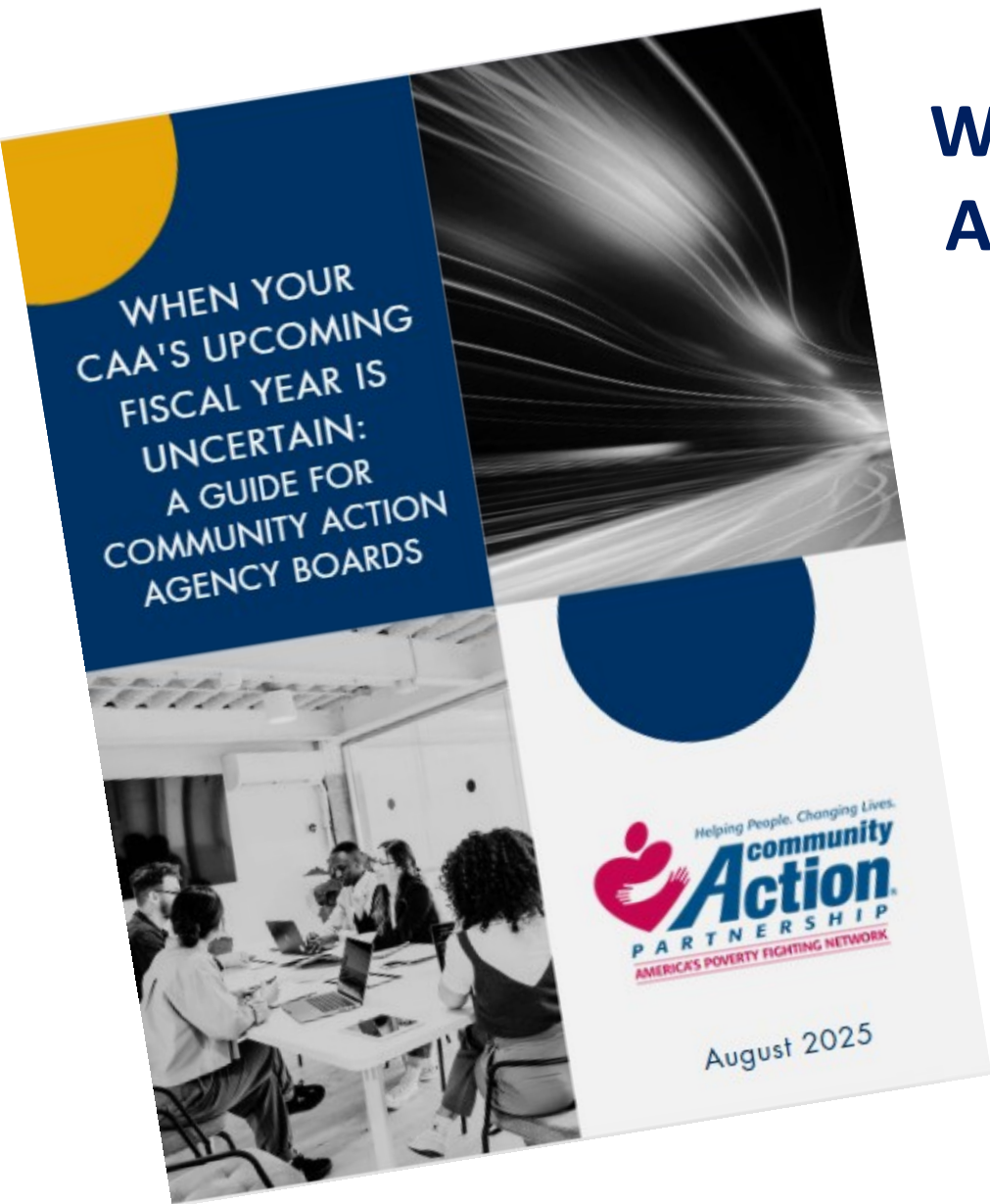
Questions & Discussion



When Your CAA's New Fiscal Year is Uncertain: A Guide for Community Action Agency Boards

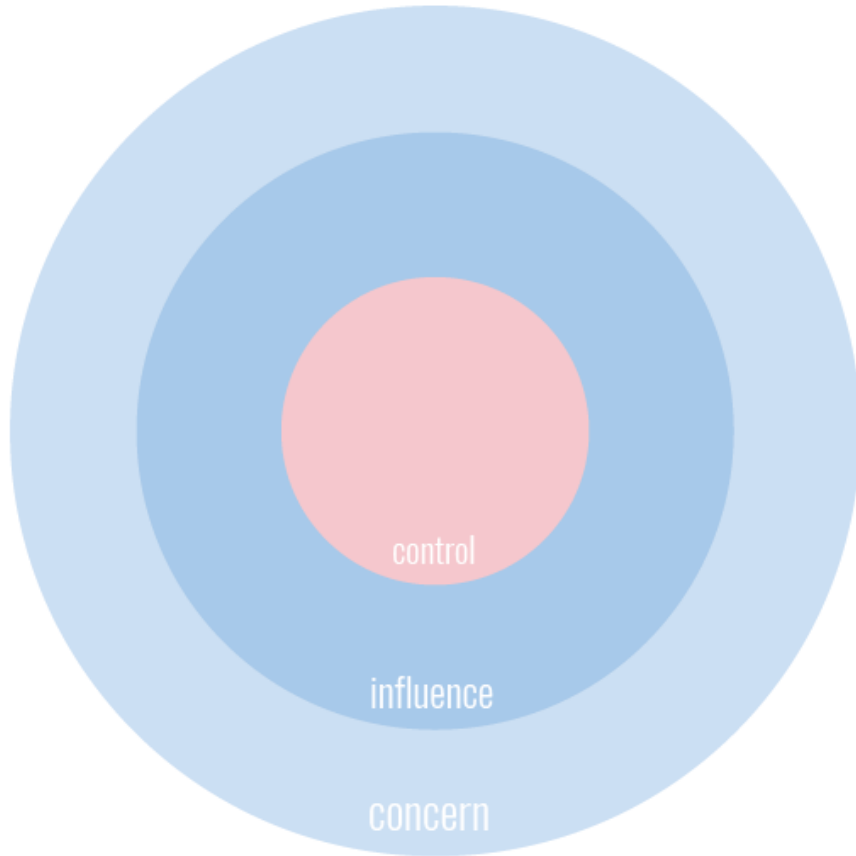
This guide helps CAA boards lead effectively through funding uncertainty at the start of a new federal fiscal year. It centers on four priorities: prepare for strategic action, understand the landscape, plan for multiple scenarios, and elevate Community Action.

[Access the Guide Here](#)



YES, You Can Manage Uncertain Times!

Step 1. Clarifying What You Control and What You Can Influence



A. From an agency point of view, what are you worried about in these uncertain times? *Note these here.*

B. From an agency point of view, where does each worry sit—in **concern**, **influence**, or **control**? *Write it on the spheres.*

C. Can you imagine moving any items from **concern** to **influence**? *Note these on the spheres.*

D. What actions can you take to address worries in your sphere of **control**, and what actions can you take to impact worries in your sphere of **influence**? *Note these here.*

[Access the Workbook Here:](#)



Sphere of Control

This area is where you have direct power and responsibility for making decisions and taking action. It includes your thoughts, actions, words, behaviors, and choices. From an agency point of view, these are the things the agency has control over changing or adjusting.

Sphere of Influence

This is where you can affect outcomes and engage with others, but you don't have direct control. From an agency point of view, these are the things where the agency does not have direct control, but you can affect outcomes and engage with others to extend your impact.

Sphere of Concern

This is the area that includes anything that interests or affects you, but it is outside your ability to influence or control. From an agency point of view, these are the things that are fully outside the agency's control or ability to influence.

Boards are Ultimately Responsible For the Financial Wellbeing of the Organization



Boards need to understand the current financial landscape and financial risks the organization faces.

[Access the Board Discussion Guide Here:](#)



NEW RESOURCE: NCAP'S SCENARIO PLANNING TOOLKIT

The Scenario Planning Toolkit equips CAAs and State Associations with curated tools and resources to navigate uncertainty.

Use the toolkit to:

- Assess and plan for key impact areas: financial, operations, programmatic, and community.
- Identify challenges, evaluate impacts, and develop strategies for changing conditions.
- Strengthen decision-making and organizational resilience by exploring multiple future scenarios.



Community Action Network Scenario Planning Toolkit

National Community Action Partnership
February 2025

[Access the
Toolkit Here:](#)





WE ARE HERE FOR YOU!

CUSTOMIZED SOLUTIONS FROM THE NATIONAL COMMUNITY ACTION PARTNERSHIP

CONSULTING

TRAINING

TOOLKITS

CONVENINGS

LEARNING COMMUNITIES



- Community Action Agencies face a variety of complex challenges and opportunities.
- NCAP provides customized training and technical assistance, eCourses, cohort facilitation, and more,
- Trust NCAP to help your organization achieve maximum impact with customized solutions.

Your success is our mission.

Email us at

csbg@communityactionpartnership.com

**We Know Community Action
Because
We Are Community Action**

