



National Community Action Partnership

2025 Standards of Excellence

**Pursuing and Achieving Excellence in
Community Action**



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EXCELLENCE OVERVIEW

What are the Standards of Excellence?

The Standards of Excellence describe thirty-five best-in-class organizational practices from Community Action Agencies (CAAs). The Standards of Excellence are aligned with the Baldrige Excellence Framework designed to improve “the performance, resilience, and long-term success of U.S. businesses and other organizations.” The Standards of Excellence provide a framework for designing, implementing, assessing, and improving agency systems. The Standards provide a basis for asking – and answering – the question, “What does an excellent Community Action Agency look like?” The Standards of Excellence, based on the Malcolm Baldrige National Quality Award criteria, were adapted to ensure alignment with the Community Action Network mission and approaches. The Standards of Excellence are updated biannually, with broad input from the Community Action Network, to ensure continued alignment with current Community Action-specific approaches.

It must be emphasized that *compliance is not excellence*; it is the starting point for excellence. The Standards of Excellence should not be confused with the CSBG Organizational Standards. The CSBG Organizational Standards are mandated for the CSBG Network and represent the minimal organizational performance baselines that all CAAs have the capacity to meet.

An excellent Community Action Agency, however, sets and strives to meet the highest operational objectives because of a shared belief that internal and external stakeholders deserve nothing less. Agencies of excellence are mission driven, performance focused, customer centric, and data informed. These agencies adopt systematic approaches to the implementation of organization-wide policies and procedures, engagement with stakeholders, and continuous quality improvement (CQI) as pillars of excellence.

The Standards of Excellence framework includes six process-based categories (Categories 1 – 6) and one category focusing on results (Category 7).

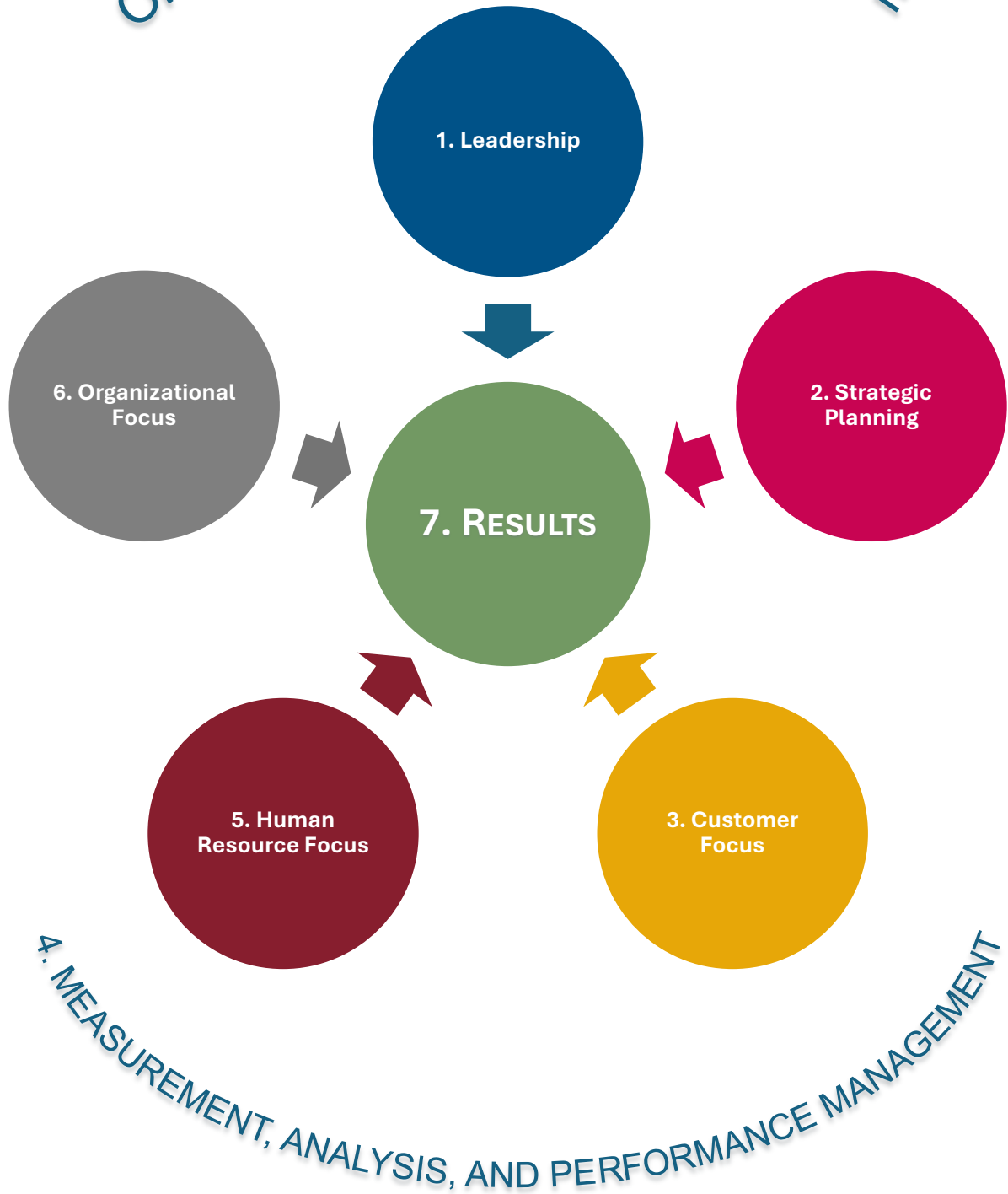
Categories 1-3: These categories focus on organizational drivers that determine organizational mission, purpose, and direction.

Category 4: This category focuses on agency performance management, including how data and information are aggregated, analyzed, shared, and used to measure progress, inform agency operations, and support Continuous Quality Improvement over time. Performance management is the foundation of Excellence.

Categories 5-6: These categories focus on the efficiency and effectiveness of an organization’s people, policies, and processes.

Category 7: Excellence is not possible without results. This category focuses on measuring performance trends, results, and improvements over time to determine whether an organization is progressing toward fulfilling its mission and achieving its intended outcomes and results.

ORGANIZATIONAL EXCELLENCE



What is the Baldrige Framework for Performance Excellence?

The Baldrige Excellence Framework is a management and leadership framework structured around seven key categories—Leadership, Strategy, Customers, Measurement, Analysis, and Knowledge Management, Workforce, Operations, and Results—and promotes a systematic approach to organizational effectiveness and sustainability.

The Baldrige Core Values for Nonprofits are:



What is the Pathways to Excellence Program?

The Pathways to Excellence Program helps Community Action Agencies (CAAs) assess their practices, identify opportunities for improvement, and embrace a culture of continuous quality improvement. The Pathways to Excellence Program offers a tiered approach that both guides CAAs in strengthening their operations and recognizes agencies that implement best-in-class practices aligned with the Standards of Excellence. By participating in Pathways to Excellence, CAAs not only strengthen their own organizations but also help identify, share, and advance best practices that prepare the Community Action network to face the future with confidence.

Agencies may enter the program at the level that best fits their capacity and goals – some agencies progress sequentially through the tiers, while others begin at a higher level. Agencies who meet tier requirements may apply to the Excellence Commission for formal recognition of their achievement; note that enrollment does not guarantee tier recognition.

- **Bronze Tier:** This tier focuses on building team cohesion, increasing knowledge of the Standards of Excellence through an eCourse, and increasing institutional knowledge through the development of an Organizational Profile.
- **Silver and Gold Tiers:** These tiers are cohort-based learning experiences that include NCAP-led training, peer sharing, and access to curated resources to support the assessment, documentation, and implementation of Standards of Excellence.

Agencies enrolled in these tiers analyze their approaches to and deployment of Standards of Excellence practices through a structured self-study process. Self-studies are reviewed by a team of qualified Community Action peer reviewers to assess the degree to which the agency's practices align with the Standards of Excellence and offer in-depth feedback to help participating CAAs strengthen their approach. This feedback provides each agency a road map for continuing its journey to implementing best-in-class practices and organizational excellence, regardless of whether a tier is achieved.

- **Silver Tier** Excellence Teams prepare an abbreviated self-study consisting of two (2) or three (3) self-selected Standards of Excellence Categories along with their associated results. To achieve Silver Tier recognition, at least 25% of the assessed Standards must be met or exceeded.
- **Gold Tier** Excellence Teams prepare a full self-study of all seven Standards of Excellence Categories. To achieve Gold Tier recognition, at least 50% of the Standards must be met or exceeded.
- **Platinum Tier: The Award for Excellence in Community Action** is an independent, self-driven tier for CAAs prepared to demonstrate systematic excellence in all 35 Standards of Excellence. Platinum Tier agencies complete a full self-study which is validated through an on-site review. The review team submits a report to the Excellence Commission, who have the responsibility and privilege of determining when to confer the Award for Excellence in Community Action. *(Although it is not required, CAAs are strongly encouraged to go through one or more of the Pathways to Excellence tiers before enrolling in the Platinum Tier.)*

What is the Excellence Commission?

The Excellence Commission consists of nine to twelve members appointed by the NCAP Board Chair, with representation from the NCAP National Board of Directors, Certified Community Action Professionals (CCAPs), Excellence Tier achievers, Peer Reviewers, and other Network system experts. The Commission is responsible for oversight and support of Pathways to Excellence, including approving updates to the Standards of Excellence. It also oversees the administration and the integrity of the Award for Excellence, including the selection of Award reviewers, serves as a Panel of Judges, and recommends Award for Excellence in Community Action recipients.

USING THE STANDARDS OF EXCELLENCE FOR SELF-STUDY AND PERFORMANCE IMPROVEMENT

A basic tenet of quality is that you cannot improve what you do not first measure. The Pathways to Excellence program provides a comprehensive, systematic framework and methodology for benchmarking and improving organizational performance.

Whether used for a Silver Tier abbreviated self-study or a comprehensive Gold or Platinum tier self-study, the Standards provide a Community Action-based framework to assess, measure (benchmark), and document an agency's operational approaches to achieving its mission.

Beyond engagement in the Pathways to Excellence program, the Standards of Excellence can be used as part of a CAA's Continuous Quality Improvement (CQI) practices and as benchmarks for other internal assessments and evaluations. Any worthwhile approach to quality and improvement begins with some type of organizational self-study or analysis.

The Pathways to Excellence Program's assessment methodology, peer review, and feedback report are powerful tools that allow you to measure how you are doing compared to the Standards of Excellence. Using a third-party peer expert review process, a completed Pathways self-study and feedback report helps a CAA answer these questions:

- Based on the self-study results, what opportunities for improvement have been identified?
- What organizational priorities will drive development of a unique pathway to excellence?
- What is the action plan and timeline for implementation and reassessment?

Using a 10-Step Agencywide Self-Study Process

Although it is a highly flexible process, below are 10 steps that an organization might follow to complete a Standards of Excellence-based self-study:

1. Establish/engage an excellence leadership team
2. Charter the excellence leadership team
3. Conduct an overview/orientation for agency staff, board, and other volunteers
4. Adopt a communication plan for the process
5. Ground the team: complete the Organizational Profile and mini-Self-Assessment
6. Begin the self-study process: start gathering response data
7. Draft initial self-study category and Standard responses
8. Conduct independent reviews of the report draft: solicit comments on clarity
9. Reach final team consensus on self-study report contents
10. Compile/review/edit/submit final self-study report

Additional Information

You can learn more about the Pathways to Excellence program including the detailed set of Standards, how to enroll, available templates and tools, and other information at <https://communityactionpartnership.com/pathways-to-excellence/>

For additional information and questions, please contact the Organizational Capacity Building team:

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CATEGORY 1: ORGANIZATIONAL LEADERSHIP

This category examines the CAA's leadership system, and how senior leaders guide the agency.

It examines how your agency is governed, and how senior leaders support the achievement of the organization's mission, values, direction, and overall performance.

It examines how your leadership system sustains the agency, promotes community advocacy, focuses on addressing poverty, and achieves low-income involvement.

STANDARDS

- 1.1. Leadership Focus
- 1.2. Mission statement, Code of Ethics, Promise of Community Action
- 1.3. Board Structure/Function
- 1.4. External Advisory Group Roles/Action
- 1.5. Maximum Feasible Low-Income Involvement
- 1.6. Community Advocacy

1.1 Leadership Focus

A highly visible, effective, and proactive leadership system is in place that clearly articulates the agency's mission, vision, values, and performance goals both within the agency and to external partners, stakeholders, and community constituents. Both Board and staff leadership are actively and continuously engaged in the agency's near- and long-term sustainability. This includes succession planning, ethics, and overall agency progress and success in achieving its mission and goals, particularly in addressing the impacts of poverty on individuals and families as well as barriers to attaining economic security.

Both Board and staff leadership show commitment to the vision and values of Community Action at all levels of the organization and recognize this connection to overall organizational effectiveness. Through a formal, agency-wide performance management system (such as using a scorecard instrument or equivalent), senior staff and the Board systematically review agency performance in achieving agency goals, strategies, operational benchmarks, and CSBG Organizational Standards. They use this information to make improvements in agency programs and service delivery, agency systems, and community initiatives. Leadership structure and practices encourage integration of programs and services across the agency. *(Links to Standard 2.4, Standard 4.3, and Standard 7.1)*

1.2 Mission Statement, Code of Ethics, Community Action Promise

The CAA's Mission and strategic plan focus on proactively addressing the causes, conditions, and effects of poverty and the Board has systematically reviewed and/or revised the agency mission over time.

The agency Board has formally adopted the: (1) Agency Mission/Vision, (2) Community Action Code of Ethics or an agency Code of Ethics, and (3) Promise of Community Action. These are prominently displayed throughout the organization and are integral to the agency's message to the community and its day-to-day business operations.

The agency and Board are proactive in ensuring ethical behavior in all agency business practices, services, and transactions. These ethical standards are included in formal agencywide training and new employee orientation. *(Links to Standard 1.1)*

1.3 Board Structure/Function

The Board membership is knowledgeable about and actively involved in reviewing agency progress, performance, and results. It meets all legal and regulatory membership requirements; fills vacancies promptly; and utilizes systems which ensure the engagement and empowerment of people with low incomes.

The Board systematically self-evaluates and optimizes Board performance as part of understanding its role; has a formal and effective committee structure that addresses executive, financial, and

performance management functions; and utilizes its committee structure and by-laws to engage fully in all aspects of the organization's mission, strategic direction, and assessment of its success in combating causes and conditions of poverty and increasing social and economic mobility.

The agency systematically offers and evaluates Board member training needs on topics directly related to their duties, so that the Board can more knowledgeably and efficiently carry out their governance responsibilities. *(Links to Standard 4.3, Standard 1.5, and Standard 7.1)*

1.4 External Advisory Group Roles/Action

External advisory groups, task forces, or other community structures, are formally adopted or designated by the Board to augment the "voice of community members with low incomes" and people with lived experience and serve to enhance communication and better inform the Board about low-income constituent issues and needs. These groups actively and systematically represent their constituencies through recommendations to the Board (Standard 1.5) on issues that directly impact new program initiatives, identifying agency advocacy issues, and/or the delivery of services, or organizational operations. *(Links to Standard 1.5)*

Note: *For CAAs operating Head Start programs, because the agency's Head Start Policy Council is legislatively required, it does not qualify as an "external advisory group" for achieving this Standard. For agencies not operating Head Start, the local Head Start Policy Council could serve to achieve this Standard if fully engaged by the agency as described by the Standard.*

1.5 Maximum Feasible Low-Income Involvement

Over the past three years, the Board has formally adopted, acted upon, and supported issues specifically identified by or recommended by low-income representatives. Low-income representatives may serve on the agency Board, participate via the Community Needs Assessment (CNA), engage in external advisory groups, or participate in other low-income community groups as designated by Board in Standard 1.4. *(Links to Standard 1.4)*

1.6 Community Advocacy

The agency demonstrates proactive advocacy activities and results by identifying and acting on unmet needs, systemic changes, gaps in services, lack of funding, or other barriers to those in need as defined or identified in Standard 1.5. The agency broadly disseminates the results of its community needs assessment to build awareness of poverty-related issues. The Board, executive director, and senior agency leadership demonstrate, through a variety of examples, proactive advocacy by actively engaging legislative, regulatory, and/or community institutions and focusing on the needs and areas of concern of the low-income community. The agency documents, tracks, and reports (Standard 7.5) measurable impacts addressing the advocacy issues identified and targeted by Board action in Standard 1.5. *(Links to Standard 1.5 and Standard 7.5)*

Award for Excellence Recipients

United Planning Organization (Washington, DC)

CAPSLO (San Luis Obispo, California)

KCEOC (Barbourville, Kentucky)

SEK-CAP (Girard, Kansas)

Community Action Council (Lexington, Kentucky)

SHARE (Greenville, South Carolina)

LIFT Community Action Agency, Inc (Hugo, Oklahoma)

Maui Economic Opportunity (Wailuku, Hawaii)

Community Action Council of South Texas (Rio Grande City, Texas)

Fayette County Community Action Agency (Uniontown, Pennsylvania)

Community Action Partnership Riverside County (Riverside, California)



CATEGORY 2: STRATEGIC PLANNING AND DIRECTION

This category examines how your agency sets strategic direction, develops action plans and strategies, updates these plans, and utilizes them as integrated living documents that guide the agency. It stresses customer input and emphasizes the need for specific implementation strategies and performance measures that are used by the staff and Board to track progress and success over time.

STANDARDS

- 2.1 Strategic Plan and Deployment
- 2.2 Plan Development & Updates
- 2.3 Mobilizing New Resources, New Programs, New Partnerships
- 2.4 Strategic Measures of Success

2.1 Strategic Plan and Deployment

The agency Board has formally adopted and actively uses an agency-wide strategic plan. The plan serves as a framework for an agency-wide performance management system (such as using a scorecard instrument or equivalent) to track the progress and overall success of all agency resources and services. It is systematically used throughout the agency as a guide to implementing and tracking goals and strategies. The plan incorporates the agency's mission/vision and articulates its focus on both poverty reduction via family, agency, and community goals that integrate a local/national theory of change. The plan includes specific strategies, outcome measures, and metrics that form the foundation of agency-wide performance management that drive all agency action. *(Links to Standard 7.1 and Standard 4.3)*

2.2 Plan Development/Updates

A systematic and structured process and pre-set timetable is in place to keep the strategic plan current and up to date and ensure community and customer/partner/stakeholder input in identifying critical needs. The Board is provided semi-annual updates on strategic plan outcomes and progress. As part of plan development/updates, the agency systematically assesses causes and conditions of poverty, constituent needs, and available resources to eliminate poverty using current published data and information, community surveys, and stakeholder input. The strategic plan is current and under its pre-set timetable, the agency systematically updates its plan to keep it relevant via community and customer input in identifying necessary changes and critical needs. *(Links to Standard 2.1 and Standard 2.4)*

2.3 Mobilizing New Resources/New Programs/New Partnerships

2.3 a: The agency diversifies its resource base by mobilizing substantial additional non-CSBG federal, state, private, local, and in-kind investment dollars for every CSBG dollar it receives to support stated strategic goals/strategies. Metrics are in place for developing and tracking new sources of funding over time. (This is specific to the planned diversification of resources.)

2.3 b: The agency develops new or innovative programs, services, and partnerships in response to its community needs assessment and as identified in its strategic plan via a goal or specific strategy. There is a specific strategic plan goal for resource development related to new/innovative programming that is tracked over time. (This is specific to the planning and developing of innovative / new programs.) *(Links to Standard 4.3 and Standard 7.6)*

2.4 Strategic Measures of Success

The agency's strategic goals/strategies have specific performance measures and metrics that are systematically tracked over time by senior leadership and the Board to assess the agency's progress and success. An agency-wide performance management system (such as using a scorecard instrument or equivalent) is utilized by the staff and Board to track and report overall agency progress

and success trends over time, including family, agency, and community goals and outcomes, as well as the CSBG Organizational Standards. All agency projects (see definition under Standard 6.6) are linked to and support one or more of the agency's strategic goals/strategies, or one or more of the CSBG Organizational Standards. (*Links to Standard 4.3, Standard 5.2, Standard 6.6, and Standard 7.1*)



CATEGORY 3: CUSTOMER FOCUS

This category examines how your agency seeks to understand the voices of customers, constituents, and partners in the community. It stresses relationships as an integral part of an overall listening and learning strategy, and examines how your organization builds relationships with customers, partners, and other stakeholders.

STANDARDS

- 3.1 Customer, Constituent, Community Knowledge
- 3.2 Customer, Constituent Feedback System
- 3.3 Internal Improvement
- 3.4 Partnership System

3.1 Customer/Constituent/Community Knowledge

The agency formally identifies, designates, and targets its key external customers using four or more categories including: (1) People with Low Income, (2) Partners/Stakeholders, (3) Investor/Funding sources, and (4) Community. A formal, agency-wide policy is in place that systematically guides the collection, tracking and reporting of all external customer/stakeholder data and feedback. *(Links to Standard 3.2 and Standard 4.3)*

3.2 Customer/Constituent Feedback System

Under an agency-wide policy and process, the agency has adopted a customer satisfaction survey instrument(s) and systematically collects, assesses, and acts upon customer/constituent feedback from its targeted customers about the agency's programs and services. Customer satisfaction data is reported semi-annually to the Board. The agency systematically tracks and produces formal reports using trends and comparative customer/constituent feedback data that provide evidence of a high degree of satisfaction shown among customers with low income, community residents, and other stakeholders, including funding sources and customer groups designated in Standard 3.1. *(Links to Standard 3.1, Standard 4.3, and Standard 7.2)*

3.3 Internal Improvement

The agency has formally identified and designated its internal customers to include (at a minimum) Staff, Board members, and volunteers. The agency has adopted a formal policy and deploys a systematic methodology to solicit, track and report internal customer feedback about the efficiency and effectiveness of internal operations, procedures, and work environments as part of the agency performance management system. Staff are provided with training to support an agency-wide commitment to customer satisfaction. *(Links to Standard 4.3, Standard 5.3, and Standard 7.3)*

3.4 Partnership System

The strategic plan includes a partnering goal with strategies and measures that are tracked over time as part of the agency's performance management system. An inventory of existing partnerships, the purpose of each, and proposed benefits to the agency is maintained for tracking, evaluating, and reporting each partnership's results or contributions. *(Links to Standard 2.1 and Standard 7.4)*

CATEGORY 4: MEASUREMENT, ANALYSIS, AND PERFORMANCE MANAGEMENT

This category examines your agency's information and performance measurement systems and how you select, gather, and manage data, information, and knowledge assets.

It examines how your agency uses technology to collect and safeguard data; how data analysis is used to manage and improve performance; and how you ensure the alignment of strategic and operational goals with day-to-day operations.

Data, knowledge, and performance management; trended performance data; and the use of that data to drive systematic improvements over time are foundational to organizational excellence.

STANDARDS

- 4.1 Information System Technology
- 4.2 Information and Knowledge Management
- 4.3 Performance Management Trends and Improvement Systems

4.1 Information System Technology

The agency has formally adopted a comprehensive, integrated, highly effective and highly secure management information system policy to collect, track, and report on all agency programs, services, and administrative processes. It responds quickly to external changes and needs of the agency, its staff, customers, and stakeholders.

It systematically assesses system security against unauthorized access, ransomware and other threats and has the ability to track and report program/services provided to each individual served by the agency. It has the ability to produce unduplicated counts of individuals served. *(Links to Standard 4.2 and Standard 4.3)*

4.2 Information and Knowledge Management

Under the formal agency MIS Policy, the agency's information management system ensures that staff have ready, reliable, accurate and secure information for decision making and for improving their effectiveness, including the ability to monitor progress and results of the organization's overall strategic and operational goals/strategy metrics as well as specific programs and services administered by the agency. Staff follow procedures to obtain and maintain current contact information for customers. *(Links to Standard 4.3)*

4.3 Performance Management Trends and Improvement Systems

A formal system integrating strategic, operational, financial, administrative, and other performance related data and results information is aggregated into a comprehensive agency- wide performance management system (such as using a scorecard instrument or equivalent). The agency systematically manages and shares with the Board agency-wide performance and improvement data, multi-year trends and results to track and improve agency performance over time.

The system serves five roles: (1) monitor and analyze administrative and program processes, including administrative and financial risk assessments; (2) track agency strategies and operational program performance measures; (3) ensure agency progress and improvement trends over time; (4) systematically track overall agency outcomes, results, and success trends over time, including client outcomes; and (5) link financial and program data using both manual and automated methods in measuring agency progress, success and integrity. *(Links to Standards 7.1 - 7.7; Standards 1.1, 1.5; Standards 2.1, 2.4; Standards 3.1, 3.2, and 3.3; and Standards 6.1, 6.4)*

CATEGORY 5: HUMAN RESOURCE FOCUS

This category examines how your agency's staff learning and work systems enable all employees to develop and utilize their full potential and align with your organization's overall mission, strategies, and action plans.

It also examines how your agency maintains a work environment that is healthy, safe, and supportive of personal and organizational growth.

STANDARDS

- 5.1 Policies, Procedures, and Personnel Systems
- 5.2 Employee Performance Management
- 5.3 Employee Engagement, Participation, Well-Being
- 5.4 Staff Development and Learning System
- 5.5 Recruitment System of Staff with Low Incomes

5.1 Policies, Procedures, and Personnel Systems

A Board adopted personnel policy/manual/handbook is in place and is reviewed annually by the Board and modified as needed. It supports the agency's mission, vision, and goals. All personnel procedures including staff recruitment/selection and employee records are mission-aligned, up-to-date, and compliant with employment-related federal and state laws. Agency salary levels, including documentation on area living-wage benchmarks, are analyzed and documented, and a plan is in place with provisions for career growth pathways to attain a living wage over time for all employees.

5.2 Employee Performance Management

The agency annually conducts formal and systematic staff evaluations and includes provisions for staff response. Job descriptions are current and clearly linked to and support the agency's stated strategic goals, strategies, and performance measures. Staff evaluation criteria are directly linked to the implementation and success of the agency's stated goals and strategies and two-way feedback about performance goals and employee progress is systematically applied. *(Links to Standard 2.4 and Standard 5.1)*

5.3 Employee Engagement/Participation/Well-Being

Employees at every level of the agency, as measured by internal staff surveys, express a strong sense of well-being, and are fully engaged and actively participate in the operations of the agency. Proper communication channels are in place to engage employees in the field, at the office workplace, or working remotely.

Staff have the equipment and supplies necessary to achieve excellence in their jobs, and the agency work environment is safe, secure, and supportive of employee well-being. *(Links to Standard 3.3 and Standard 7.3)*

5.4 Staff Development and Learning System

The agency has formally adopted and systematically deploys an agency-wide staff skill and professional development policy or plan. It includes provisions for assessing employee needs for future training and evaluating the sufficiency of and improving offered training.

New and current staff orientations cover agency mission/vision and history, strategic plan goals, Promise of Community Action, agency ethics policy, and concepts related to agency performance management, including planning/accountability cycles (such as ROMA) and an agencywide performance management system (such as using a current agency performance scorecard instrument or equivalent).

The agency offers full support to appropriate staff to acquire and maintain Certified Community Action Professional (CCAP) certification and other pertinent, professional certifications. *(Links to Standard 7.3)*

5.5 Recruitment System of Staff with Low Incomes

The agency's HR Policy demonstrates proactive recruitment and hiring of people with lived experience, including incorporating specific procedures and methodologies for actively dispersing, promoting, and embedding employment, hiring, and career pathway opportunity information among low-income populations, partners, affinity groups, and other targeted populations. (*Links to Standard 5.1*)



CATEGORY 6: ORGANIZATIONAL PROCESS MANAGEMENT

This category examines the efficiency and effectiveness of your agency's key administrative support and program/service delivery processes.

Systematic approaches to emergency preparedness and communications are other key agency activities examined in this category.

It also evaluates your organization's management of these processes in relation to the overall achievement of agency results and success.

STANDARDS

- 6.1 Financial Systems
- 6.2 Infrastructure & Emergency Preparedness
- 6.3 Purchasing & Procurement
- 6.4 Communications & Public Relations
- 6.5 Integrated Service Delivery System
- 6.6 Project Management

6.1 Financial Systems

A Board-adopted Financial Management Policy/Manual is in place and is reviewed annually by the Board and modified as needed. It is systematically deployed and integrated across all programs and services and includes provisions for an annual financial and administrative risk assessment, analysis, and report to the Board on overall agency integrity. The Board is provided systematic training on their roles and responsibilities related to financial oversight, including the interpretation of financial reports and the agency audit. An annual, agency-wide budget is adopted by the Board and is systematically reviewed during the year.

The financial management system is integrated into the agency's performance management system to effectively track and report all budget related management. The financial system is user-driven, integrated with program data, and provides quick and easy access to financial information to all levels of the agency. It is utilized in conjunction with program data as an effective tool for tracking performance and agency-wide improvement efforts. (*Links to Standard 1.3, Standard 4.3, and Standard 7.6*)

6.2 Infrastructure & Emergency Preparedness

A formal Infrastructure/Emergency Preparedness System with agency-wide disaster/emergency action procedures is adopted by the Board. The policy clearly includes Emergency Procedures, a Disaster Plan, and Continuity of Operations Plan that is communicated to all staff. It supports a safe, clean/sanitary, and effective workplace with regular systematic inspections/maintenance and upkeep services that follow a periodic, pre-set schedule.

6.3 Purchasing/Procurement

A formal, written procurement system including provisions for property/equipment disposal and meeting all appropriate legal and contractual requirements is in place. It uses technology effectively and incorporates a current and regularly updated list of goods and services suppliers and follows all federal requirements on solicitation of bids.

6.4 Communications/Public Relations

The agency has formally adopted an agency-wide communication plan or policy deploying multiple methods such as periodic press releases, newsletters, media events, reports, social media, and other means of conveying positive agency news about its programs, activities, and overall success. The agency displays the Community Action logo in its communications and brands itself as a Community Action Agency. The agency systematically collects, tracks and reports data measuring the effectiveness of the plan's impact including awareness levels and the public perception of the agency and its services. (*Links to Standard 4.3 and Standard 7.1*)

6.5 Integrated Service Delivery System

The agency deploys an integrated service delivery system that effectively and efficiently integrates five elements (Intake, Eligibility, Assessment, Case Management, and Follow-Up) or equivalent components across all programs and services. The agency's unified service delivery system uses a core set of common data elements, is formally designated for use across all programs and services and uses automated, manual or combined methods to ensure that customers are well-served, have expectations met, and end results support overall agency success and outcomes.

6.6 Project Management

A formal, agency-wide project management policy and process is in place incorporating eight core elements. Under the policy, the agency systematically manages all projects and initiatives in a coherent manner to ensure close integration/linkage with agency goals/strategies and program specific activities.

The policy addresses the following eight core elements:

1. Project performance is systematically managed to meet/exceed project goals and objectives.
2. All projects include measurable (ROMA) projected outcomes and objectives linked to broader agency strategies.
3. Project staff regularly reviews and improves projects based on customer feedback.
4. Project implementation/progress is systematically assessed, tracked, and reported to agency leadership.
5. Project budgets are systematically monitored and not exceeded.
6. Project staff attend appropriate and necessary training.
7. Project-related facilities meet or exceed building codes.
8. A final status report is produced assessing a project's success and contribution to overall agency goals/strategies. (Links to Standard 2.4)

CATEGORY 7: ORGANIZATIONAL RESULTS

This category examines your agency's performance trends, results, and improvements over time in critical organizational, stakeholder, and community focused areas.

The integration of Results-Oriented Management and Accountability – ROMA – practices into everyday agency operations is stressed.

Category 7 focuses on how the agency's systematic performance management approaches support the attainment of outcomes by internal and external stakeholders and promote and sustain organizational improvement over time.

Evidence of these results is often presented using trended data visualizations, e.g., charts and graphs, or by citing specific performance measurement tools, such as agencywide scorecards.

STANDARDS

- 7.1 Overall Agency Outcomes
- 7.2 External Customer Results
- 7.3 Internal Customer and Human Resource Results
- 7.4 Partner Stakeholder Results
- 7.5 Advocacy Results
- 7.6 Financial Accountability and Health
- 7.7 Definitive or Noteworthy Community Recognition and Innovation

7.1 Overall Agency Outcomes

The agency documents overall agency success demonstrating strategic and operational results and outcome trends that are tracked and reported systematically over time. The agency shows positive performance results in key organizational, program, or service areas and can show efficiency in delivery of these aspects across the agency. Multi-year outcomes are reported to the Board and community using trended data and metrics documenting the agency's overall success in addressing poverty by moving individuals and families toward achieving self-sufficiency. Overall agency results and outcome trends are clearly linked to the agency's mission/vision and goals, are connected with the three national ROMA goals, and utilized as part of the organization's marketing strategies to communicate agency success. *(Links to Standard 1.1; Standard 2.4; Standard 4.3; and Standard 6.4)*

7.2 External Customer Results

The agency systematically collects, tracks, and reports trended data over time that demonstrates high feedback/satisfaction results information from external customer groups in four categories: (1) people with low-income, (2) partners/stakeholders, (3) funders/investors, and (4) community stakeholders or other customer segments defined by the agency in Standard 3.1. The agency tracks and reports trended feedback, and satisfaction results over time to the Board and uses this information as part of its performance management and improvement strategies to improve or modify its operations to better meet customer expectations and achieve overall agency successes and outcomes. *(Links to Standard 3.1; Standard 3.2; and Standard 4.3)*

7.3 Internal Customer/Human Resource Results

The agency systematically collects, tracks, and reports internal customer (Standard 3.3) satisfaction/well-being and belonging data over time to the Board. Additionally, other trended data on staff, Board and volunteer feedback, staff turnover, exit/grievance data, and skill development/learning are collected and reported. Using internal customer feedback and analysis, the agency uses this information as part of its performance management and improvement strategies to improve or modify its internal administrative, operations, and work processes. *(Links to Standard 3.3; Standard 4.3; and Standard 5.4)*

7.4 Partner/Stakeholder Results

The agency systematically assesses, tracks, and reports current partnerships' impact/benefits over time. It identifies opportunities to expand local relationships that support the organization's strategic and operational goals. The agency annually collects, analyzes, tracks, and reports tangible results of partnerships and uses them to improve current relationships or establish new ones. *(Links to Standard 1.5, Standard 3.4, and Standard 4.3)*

7.5 Advocacy Results

The agency can show proactive advocacy by staff and Board members that demonstrate results in making societal contributions over time, such as energy savings, increased affordable housing, improved assets/income, etc. The agency documents the progress and success of its community advocacy efforts, including results and outcomes related to advocacy issues identified in Standard 1.5 and its community needs assessment. *(Links to Standard 1.6)*

7.6 Financial Accountability and Health

The agency documents and reports its overall financial health to the Board using multi-year data trends/metrics such as resource growth/reserve ratios, liquidity, days cash on hand, cost efficiencies ratios, sound audits, budget management, or exemplary risk assessment results. The agency documents its good standing with current funding sources and required accreditation entities and demonstrates high integrity in its annual financial and operational risk assessment reports to the Board. Financial data trends show improvement over time with the past three annual audits showing no unresolved questioned costs or material findings. Recent external evaluations are evidence of the agency's improvement strategies. *(Links to Standard 4.3 and Standard 6.1)*

7.7 Definitive or Noteworthy Community Recognition and Innovation

The agency demonstrates a consistent record of innovation, and tracks/reports to the Board its national, state and community recognition for its achievements and commitment to its mission, vision, and operations. *(Links to 4.3 Performance Management and Improvement System)*

Appendix

2025 Standards of Excellence Revision History – Effective October 2025

- References to the use of a “scorecard instrument” in Standards 1.2, 1.2, 2.1, 2.4, 4.3, and 5.4 were revised to “such as using a scorecard instrument or equivalent.”
- Standard 1.2 – Revised to add “or agency version of Code of Ethics” and “innovative strategies.”
- Standard 2.3 – Revised to focus on two (2) requirements: resource diversification and innovative/new programs.
- Standard 6.2 – Revised to include “continuity of operations” as a requirement.



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