



# Excellence in Community Action

*It's a journey, not a destination!*

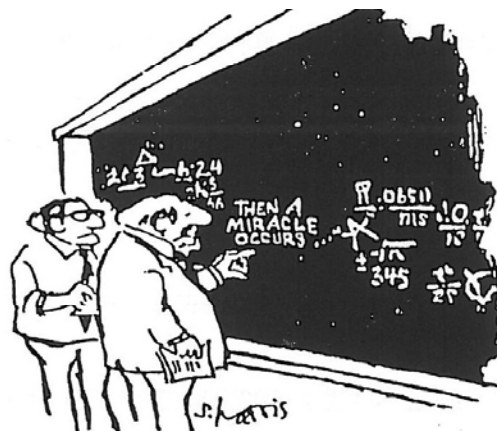
## What is Excellence?

***Compliance  
is not  
Excellence!***

## What is Excellence?

***Compliance  
is the starting point for  
Excellence!***

**But Excellence Doesn't Happen  
in a Vacuum!**



*"I think you should be more explicit here in Step Two."*

## Excellence is a Culture

- ❖ Every organization can improve
- ❖ BUT - you can't improve what you don't measure
- ❖ Continuous improvement is a commitment and a process
- ❖ Excellence is always customer-focused

## Continuum of Excellence

**From Good...**

**...to GREAT**

**The Excellence Program in  
Community Action uses the**

**Malcolm Baldrige Criteria for  
Performance Excellence**

*tailored to the language and operations  
of the CAA system*

## **Defining an Excellent Organization Core Values**

- ❖ **Visionary Leadership**
- ❖ **Customer-Driven Excellence**
- ❖ **Organizational and Personal Learning**
- ❖ **Valuing Employees and Partners**
- ❖ **Agility**
- ❖ **Focus on the Future - Sustainability**



## **Defining an Excellent Organization Core Values**

- ❖ **Managing for Innovation**
- ❖ **Management by Fact**
- ❖ **Societal Responsibility**
- ❖ **Focus on Results and Creating Value**
- ❖ **Systems Perspective**



## **Excellence Programs**

- ❖ **CCAP – Certified Community Action Professional**
- ❖ **Pathways to Excellence**
- ❖ **Award for Excellence**



## Pathways to Excellence is a Capacity-Building Initiative

- ❖ Getting Started at Getting Better – the process starts where you are today
- ❖ Diagnostic process using 34 National CAA Standards in a guided Self-Study Process
- ❖ Feedback reports identify Strengths and Opportunities for Improvement



## Pathways to Excellence

- ❖ Two ways to enter Pathways:
  - ❖ **State-based** – can start any time during the year
  - ❖ **Individual CAAs** – open enrollment period each year

## State-Based Pathways Initiative:

- ❖ State CAA Association and/or State CSBG Office set up a collaborative agreement with the Partnership for the voluntary in-state Pathways initiative;
- ❖ The Partnership conducts in-state Pathways training for the agencies choosing to enroll;
- ❖ Nine-month Self Study timetable, with technical assistance and support;
- ❖ Self-Study Reports submitted followed by a three month period for peer review and feedback reports to be issued.

## National Open Enrollment Cycle:

- ❖ A Pathways “Open Enrollment” cycle is announced annually. Open enrollment usually ends in December;
- ❖ An agency submits a Pathways to Excellence application with required forms, fees and documents;
- ❖ Agency team attends a Pathways two-day training session within a month of the end of open enrollment;
- ❖ Nine month Self-Study timeline begins after training;
- ❖ Self-Study Reports submitted followed by a three month period for peer review and feedback reports to be issued.



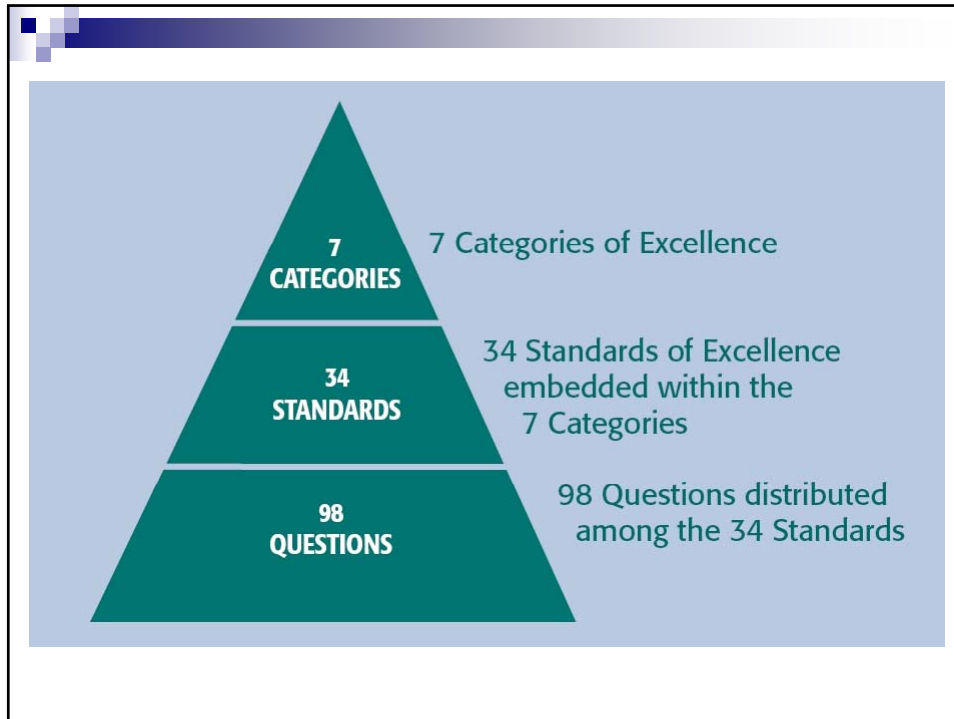
## **To recap the basics:**

- ❖ 2 day Self-Study training for your Pathways team
- ❖ 9 months to complete the Self-Study
- ❖ 3 months for the expert peer review and Feedback Report process



## **You're Not in this Alone! It Starts With Training**

Your Pathways team (5-6 people) goes through a comprehensive 2-day training on the Self-Study process and the Standards of Excellence



## **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

## The Self-Study – the heart of Pathways

- ❖ The organization responds to 98 questions organized within the 7 categories and 34 Standards of Excellence.
- ❖ The agency describes what it does and documents how well it **currently** meets each of the 34 Standards.

## Using the 10-Step Agency Wide Self-Study Process

1. Establish/engage a leadership team
2. Charter the team
3. Conduct an overview/orientation
4. Adopt a basic communication plan
5. Ground the team: complete the *Organizational Profile*
6. Conduct the self-study/gather data/document facts
7. Draft initial category responses
8. Conduct independent reviews/solicit comments on clarity
9. Reach final team consensus
10. Compile/review/edit final 55 page self-study report



## The Feedback Process & Report

- ❖ A team of trained peer reviewers studies the Self-Study in *great* depth.
- ❖ They participate in a consensus call to discuss each and every response.
- ❖ The reviewers submit written strengths and opportunities for improvement, which are folded into the written Feedback report.



## And Afterwards? Keep it Simple!

- ❖ Use the Feedback Report to identify gaps between where you are and where you want to be.
- ❖ Set priorities and next steps.
- ❖ Set a structured path to continuous improvement.
- ❖ Set measures to track agency progress.



## **Award for Excellence**

- ❖ A way to recognize and reward excellence
- ❖ 8 Award winners since 2003
- ❖ Closely follows the prestigious Malcolm Baldrige National Quality Award



## **Award for Excellence**

- ❖ **Application/Intent to Apply**
- ❖ **Organizational Self-Study**
- ❖ **Self-Study Technical Review**
- ❖ **On-site Peer Review**
- ❖ **Award Announcement**



## Award for Excellence

### Application/Intent to Apply

- ❖ Short application signed by the CAA Executive Director and Board Chair
- ❖ Most recent IRS Form 990
- ❖ Board resolution,
- ❖ Application fee,
- ❖ State CSBG office letter of support.
- ❖ The submission deadline is the second Wednesday in September.



## Award for Excellence

### Organizational Self-Study

- ❖ Using an internal leadership team, the CAA completes a rigorous “state of the agency” assessment based on the 34 Standards of Excellence.
- ❖ The Self-Study is due the first Wednesday in February.

## Award for Excellence

### Self-Study Technical Review

Peer expert teams review each Self-Study to make one of the following determinations:

- ❖ **Acceptable:** The agency meets or exceeds **all** Standards of Excellence benchmarks and is recommended for the on-site visit;
- ❖ **Not Yet Acceptable:** The agency demonstrates merit in many areas, but can benefit from a written feedback report detailing strengths and areas for improvement to permit the CAA the opportunity to continue the Award process using the feedback information as a guide.

## Award for Excellence

### On-site Peer Review

- ❖ The on-site visit clarifies and verifies details submitted in the self-study report.
- ❖ The site visit is the final basis for receipt of the Award for Excellence. A site visit is not a guarantee of a recommendation to receive the Award.



## **Award for Excellence**

### **Award Announcement**

- ❖ The Award for Excellence Commission makes final recommendations to the Partnership Board
- ❖ Agency award notifications are made by July 15
- ❖ Award presentations are made at the Partnership's National Convention



## **Award for Excellence Winners**

- ❖ Southeast Kansas Community Action Program (SEK-CAP) - Girard, Kansas
- ❖ Community Action Partnership of Riverside - Riverside, California
- ❖ Community Action Council of South Texas –Rio Grand City, Texas



## **Award for Excellence Winners**

- ❖ Fayette County Community Action Agency – Uniontown, Pennsylvania
- ❖ Community Action Council-Lexington, Kentucky
- ❖ Little Dixie Community Action Agency – Hugo, Oklahoma



## **Award for Excellence Winners**

- ❖ Maui Economic Opportunity – Kahului, Hawaii
- ❖ Sunbelt Human Advancement Resources (SHARE) – Greenville, South Carolina

## Reinventing Organizations

- ❖ What gets measured gets done.
- ❖ If you do not measure results, you cannot tell success from failure.
- ❖ If you cannot see success, you cannot reward it.
- ❖ If you cannot reward success, you are probably rewarding failure.
- ❖ If you cannot see success, you cannot learn from it.
- ❖ If you cannot recognize failure, you cannot correct it.
- ❖ If you can demonstrate results, you can win public support.

*Reinventing Government, David Osborne & Ted Gaebler, 1992*

## Questions?

**For more information....**

[www.communityactionpartnership.com](http://www.communityactionpartnership.com)

Click on Excellence

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