TECHNICAL ASSISTANCE GUIDE

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AMERICA'S POVERTY FIGHTING NETWORK

COE DEVELOPED CSBG ORGANIZATIONAL STANDARDS

Category 2 Community Engagement

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Introduction

The purpose of this Technical Assistance Guide is to help a Community Action Agency (referred to as a CAA or an agency) review its compliance with Category Two of the Organizational Standards (2.1-2.4) that pertain to the community engagement. The first section below provides general considerations to help an agency plan the review process. The next four sections address each of the organizational standards in this category and provide resources to help an agency:

- Understand the intent and definition of the standard;
- Identify materials to document compliance with the standard;
- Benchmark and evaluate performance with regards to the standard; and
- Access supports to help with compliance and improve performance.

Community engagement is the second set of standards under the broader category, Maximum Feasible Participation. A primary objective of Community Action is to address family, agency and community goals. CAAs are called to engage the community in their work and this standard highlights how it is achieved. The war on poverty is waged most effectively by coordinated community relationships and cannot be fought by a single agency.

This Technical Assistance Guide helps an agency answer two questions: (1) Are we in compliance with the requirements of the Organizational Standards, and (2) How well did we perform in engaging the community in the agency's work? It is important to note that agencies are only required to comply with the standards and that guidance and materials for how to review performance are intended as a capacity-building resource. Additionally, there are a number of reasons that an agency should consider conducting a deeper evaluation related to the Organizational Standards for community engagement:

- Awareness of available resources in the community;
- Opportunity to strengthen community resource coordination and to decrease service duplication;
- Preparation for the next needs assessment;
- Increased opportunity for the entire community to "own a stake" in its growth/development
- More leveraging opportunities and increased return on investment (ROI)

Considerations for the Review Process

This section of the Technical Assistance Guide provides questions to help agencies think through the planning of the community engagement process. Questions to consider before starting include:

- **How is the community engagement process for Category Two connected to the overall process for assessing the Organizational Standards?** Staff involved in reviewing the standards related to community engagement should ensure their efforts are consistent with the overall process for standards assessment with regards to interpreting the standards, recording findings, managing and storing documents, and conducting any necessary follow-up activities to achieve compliance.
- **Are there opportunities to incorporate the review process into related activities?** While there is value to conducting the review as a "stand alone" process, agencies can look

for opportunities to increase efficiency by including it in already planned activities. Annual updates to the data collected for community engagement activities, board reports on existing partnerships and volunteer data, strategic planning, and development of the agency's community action plan are examples of opportunities to "fold in" the review of Category Two into related processes.

- **What is the appropriate level of effort for the review process?** Agencies should consider the costs and benefits of expending different levels of effort in assessing Category Two. If community engagement is identified as an important strategic goal or the agency is in the process of strengthening its community engagement efforts, then it should consider conducting a more extensive evaluation of its previous work related to Category Two.

- **Who should participate in the review process?** It is possible for one staff person to complete the review alone. However, the agency may consider assembling a small team to conduct a more in-depth analysis using the process suggested in this Guide. This team might include program managers, staff responsible for conducting related outreach and engagement activities, and board members.

When the staff selected to conduct the review process are ready to begin, there are several additional questions they should consider. These include:

- **How will the staff determine whether the standards are met?** Staff should always begin the review process by examining all guidance from the State CSBG Lead Agency on the interpretation of the organizational standards and the documentation required to show they are met. Even if the agency decides not to conduct the complete review process suggested in this Guide, it is strongly suggested that the staff use the five point review scale included at the end of each section to rate the organization's performance. This exercise helps ensure that there is consensus about whether the standard is met and provides a benchmark against which the agency can rate future performance.

- **How will the staff document compliance with the standards?** Staff should determine how they will record the results of the review process and organize related files and materials to document compliance. The *Review Worksheet Template* included at the end of this Guide offers one option. Staff should begin by determining whether the agency meets each of the organizational standards in Category Two using guidance from the State CSBG Lead Agency and, if conducting a full performance evaluation, how well it rates using the evaluation questions and review scale included in this Guide. Brief summaries of the findings should be recorded to document the rationale for state monitors and provide a benchmark against which to assess future performance. Staff should then list the supporting materials that document compliance (e.g. reports, web pages, and board minutes) and determine how to file the materials in a way that is easily accessible to state monitors (e.g. a document list and flash drive with scanned and uploaded files).

- **How will staff manage recommendations that result from the review process?** Standards that are determined to be unmet or that staff believe are potentially questionable should be addressed immediately with an action plan that concisely explains the problem and the specific steps that must be taken to achieve compliance. In addition, it is strongly suggested that staff should use the review process and resources in this Guide to make recommendations to the agency on how to improve its community engagement based on their findings. Even if the review process focuses on simple compliance with the standards rather than a more extensive evaluation, it is likely that staff can identify ways to strengthen

the development and implementation of the agency's community engagement process. There should be a clear "follow up" process established that details the rationale for the recommendation, specific actions to take, and who is responsible.

- **How will staff archive results from the review process?** When the review of the standards is complete, staff should archive the results with those of the other categories. A good archive will include notes on how the review was conducted, who participated, any issues or "lessons learned" that are helpful to note for future reviews, and clear instructions for how to find all documents and materials referenced in the findings. Again, even if the review process has a more limited focus on compliance, it is recommended that staff include their evaluation of each standard on the five point review scale along with brief notes explaining the rationale for the finding to help benchmark performance for future reviews.

Category 2 Standards

No CAA can meet all of a community's needs independently. Formal and informal partnerships, ongoing community planning, advocacy and engagement with all sectors of the community all work together to successfully move families out of poverty and revitalize communities.

Community Action is often the backbone organization of community efforts to address poverty and community revitalization: leveraging funds, convening key partners, adding the voice of the underrepresented, and being the central coordinator of efforts. It is not an easy role to play, but a vital one for families and communities.

Standard 2.1 **The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.**

Standard 2.2 **The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.**

Standard 2.3 **The organization communicates its activities and its results to the community.**

Standard 2.4 **The organization documents the number of volunteers and hours mobilized in support of its activities.**

There are other Standards that relate to Community Engagement that the evaluation team should consider to coordinate with work on other categories of the Organizational Standards.

These include:

Standard 1.1 **The organization demonstrates low-income individuals' participation in its activities.**

Standard 5.2 **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.**

2.1 The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.

A. Guidance on the Definition and Intent of the Standard

This standard addresses the community partnerships the agency develops and participates in to help achieve its goals. CAAs typically have many types of partnerships both formal and informal. Partnerships are considered to be mutually beneficial arrangements in which each entity contributes and receives time, effort, expertise, and/or resources. Community Action is built on the partnerships that it has across the community. While CAAs may report and talk about the breadth of the relationships they have with other stakeholders, this standard speaks to the relationships that are more formalized and address specific purposes identified by the agency and its partners. The primary purpose of this standard is to ensure that agencies (1) routinely review their partnerships to identify any weak or missing connections with key sectors of the community, and (2) participate in partnerships that are effective and aligned with their mission to reduce poverty.

Examples of partnerships include participation in community collaboratives, memorandums of understanding, interagency committees, and advisory bodies. Purposes might include issues such as community awareness campaigns about poverty-related issues, programmatic focuses such as implementing a workforce development initiative, or ongoing service delivery activities such as coordinating interagency referrals. Agencies should use their discretion in deciding which partnerships to document. Unless otherwise indicated by the State CSBG Lead Agency, it is likely not necessary to document instances of partnerships such as "one off" meetings, ongoing but minor exchanges of information, or exploratory meetings that do not lead to significant activities.

Previous guidance on the definition of and intent behind requiring agencies to engage in community partnerships come from four main sources – the Economic Opportunity Act, Community Services Block Grant, the Office of Economic Opportunity Instruction 6320-1, and Information Memorandum 49. Key language from each of those three sources that that the review team should review include:

The Economic Opportunity Act, Title II, Section 201(a) provides for basic purpose of community action agencies and programs "to stimulate a better focusing of all available local, State, private, and Federal resources upon the goal of enabling low-income families, and low-income individuals of all ages, in rural and urban areas, to attain the skills, knowledge, and motivations and secure the opportunities needed for them to become self-sufficient."

The Community Services Block Grant Act, Section 676(b)(9) that requires "[A]n assurance that the State and eligible entities in the State will, to the maximum extent possible, coordinate programs with and form partnerships with other organizations serving low-income residents of the communities and members of the groups served by the State, including religious organizations, charitable groups, and community organizations;"

The Office of Economic Opportunity Instruction 6320-1 (1970) that states "CAA(s) must develop both a long-range strategy and specific, short-range plans for using potential resources…In developing its strategy and plans, the CAA shall take into account the areas of greatest community need, the availability of resources, and its own strengths and limitations."

Information Memorandum 49 (2001) issued by the Office of Community Services, U.S. Department of Health and Human Services that states six national goals for community action that both respect the diversity of the Network and provide clear expectations of results from our efforts and specific Goal Four that states "Partnerships among supporters and providers of services to low-income people are achieved."

B. Guidance on Compliance and Documentation

The review team should always begin the process of documenting compliance with the Organizational Standards by reviewing all available guidance from the State CSBG Lead Agency on the interpretation of the standard and required documentation. The review team should also consider any State requirements for community engagement. Specific issues the review team should consider that may affect compliance with standard 2.1 include:

- **Partnerships that only cover part of the agency's service area.** Agencies should review their list of partnerships to ensure they accurately reflect activities across the entirety of their service areas. Agencies that serve multiple counties may risk under-reporting their partnerships, especially if they only focus on major projects in the primary area they serve. To address this issue, one approach agencies might consider is reporting on partnerships by county to illustrate the full range of their collaborative activities.
- **Partnerships that include incomplete or missing statements of purpose.** Agencies need to include concise but descriptive explanations of all partnerships listed to comply with the standard. Each partnership should include such a description.
- **Partnerships do not include anti-poverty organizations.** The agency must partner with other anti-poverty organizations in their service area to comply with this standard. Agencies may risk being out of compliance with the standard if they only partner with anti-poverty organizations that are located outside of their service area or if the agency's partnerships do not result in actual joint activities (e.g. an MOU to collaborate on an issue that has not resulted in any tangible actions).

Agencies need to provide three types of documentation to show compliance with standard 2.1 that include (1) a list of the agencies primary partnerships, (2) the purpose of each of those partnerships, (3) proof of partnerships with other anti-poverty organizations in their service area. Documentation might include:

- MOUs, contracts, and agreements that document the partnerships listed;
- Descriptions of the purpose of the partnerships; and
- Mission statements, links to reports of program activities, or brief written confirmation from partners that that they are anti-poverty organizations.

C. Beyond Compliance: Benchmarking Organizational Performance

It is strongly suggested that the review team use the questions and resources in this section to conduct an assessment of their agency's community engagement process. No matter what level of effort the team chooses, assigning a score for Standard 2.1 using the "Organizational Standards Evaluation Criteria" at the end of this Guide along with recording brief notes that detail recommendations for ways to improve future community engagement efforts help the agency benchmark its performance and incorporate the ROMA cycle into the process for assessing compliance with the organizational standards. In addition to the materials in the resources section below, there are several basic considerations the review team can use to guide their discussion and evaluation of the community engagement process. Questions to ask include:

- **Do the existing formal partnerships support the agency's strategies, programs, and services?** Staff can review the agency's primary partnerships to ensure that they are aligned with the mission and support its core strategies, programs, and services. Another option is to estimate how much effort each major partnership requires to assess whether the overall level of activity truly supports the most important goals and activities of the agency.
- **Does the agency engage key community stakeholders to build consensus on a shared policy agenda**? Partnerships related to service delivery activities are obviously critical to the success of CAAs. However, it is important that agencies also use their partnerships to help build a broader consensus on how the community can truly address the underlying causes of poverty. Does the agency play a key role or otherwise participate in partnerships that aim to raise overall community awareness of poverty as an important issue, advocate for additional resources to support anti-poverty work, and identify specific policy options to implement?
- **Does the agency strategically engage stakeholders who can help develop new resources (funding, professional development, other community collaborations)?** Building relationships with funders in the philanthropic, public, and private sectors is critically to the long-term stability and success of CAAs. Is the agency strategic about approaching potential funders to sit on advisory bodies, boards, and collaboratives? Does it build relationships with local universities and community colleges that might offer professional development opportunities to staff?
- **Has the agency tried to engage sectors that are not usual partners (private sector, school district, etc.…)?** It is all too easy for agencies to rely on partnerships with other organizations that have similar values and interests. However, part of building an effective anti-poverty strategy for the community as a whole requires engaging stakeholders that are not typically found "at the table" in anti-poverty efforts. Does the agency try to build relationships with diverse stakeholders outside of the neighborhoods it serves, across political boundaries, or with potential competitors for "turf"?

D. Resources

- *Collaboration Checkup: Assessing & Improving Your Community Partnerships (2012):*
  https://www.dropbox.com/s/jb47t05sip7xnsu/Collaboration%20Checkup_Final_Combined.pdf
  This publication published by the Community Action Partnership aims to help the Community Action Network improve its understanding of functioning partnerships so

CAAs can develop and sustain partnerships that have a measurable impact in local communities.

- *Partnership Tracking Tool and Resources for Collaboration (2007)*
  http://www.virtualcap.org/downloads/KS/KS_Community_Action_Inc._Partnerships_Tracking_Tool.xls
  Community Action, Inc. developed a Partnership Tracking Tool to document the types of relationships that are established by the agency with outside groups and organizations.

2.2 The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.

A. Guidance on the Definition and Intent of the Standard

CAAs routinely engage with and gather information from diverse sectors across the communities they serve. Standard 2.2 underscores the importance of making sure that the community needs the agency addresses and the goals towards which it works reflect the diverse perspectives and interests of other stakeholders. These sectors include but are not limited to:

- **Community-based organizations**—United Way, Salvation Army or other multi-services nonprofits;
- **Faith-based organizations**—Local churches, synagogues, mosques, interfaith service organizations;
- **Private Sector**—Chambers of Commerce, local business improvement districts;
- **Public Sector**—Department of social services, public health departments; and
- **Educational Institutions**—Local school boards, universities, community colleges, trade schools.

This standard helps an agency answer one of the questions posed by the Results Oriented Management and Accountability framework: What does the customer value? It is essential for an agency to understand the makeup of their community at large and how its various stakeholders perceive their needs, available resources and barriers to achieving self-sufficiency. Feedback from the different sectors identified in this standard allows agencies to paint a full picture of the family and community profiles of their customers. Additionally, the information gathering process creates an opportunity for the agency to identify new potential partners and develop new relationships.

The standard specifically requires the community needs assessment (CNA) to gather information from the five sectors identified. This would typically involve collecting information through such methods as surveys, key informant interviews, focus groups, and community forums. The "other times" mentioned by the standard might include the strategic planning process, activities the agency engages in through its various partnerships, customer satisfaction and quality improvement efforts, and advisory boards.

Previous guidance on the definition of and intent behind requiring agencies to utilize information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times comes from three main sources – the Economic Opportunity Act, Community Services Block Grant, the Office of Economic Opportunity Instruction, and Information Memorandum 49. Key language from each of those three sources that that the review team should review include:

The Economic Opportunity Act, Title II, Section 201(a) provides for basic purpose of community action agencies and programs is "to stimulate a better focusing of all available local, State, private, and Federal resources upon the goal of enabling low-income families, and low-income individuals of all ages, in rural and urban areas, to attain the skills, knowledge, and motivations and secure the opportunities needed for them to become self-sufficient."

The Community Services Block Grant Act, Section 676(b)(9) that requires "[A]n assurance that the State and eligible entities in the State will, to the maximum extent possible, coordinate programs with and form partnerships with other organizations serving low-income residents of the communities and members of the groups served by the State, including religious organizations, charitable groups, and community organizations;"

The Office of Economic Opportunity Instruction (1970) that states "CAA(s) must develop both a long-range strategy and specific, short-range plans for using potential resources…In developing its strategy and plans, the CAA shall take into account the areas of greatest community need, the availability of resources, and its own strengths and limitations."

B. Guidance on Compliance and Documentation

The review team should always begin the process of documenting compliance with the organizational standards by reviewing all available guidance from the State CSBG Lead Agency on the interpretation of the standard and required documentation. The review team should also review any State requirements for utilizing information gathered from key sectors. Specific issues the review team should consider that may affect compliance with standard 2.2 include:

- **Information is gathered from some but not all of the sectors.** An agency might only include a subset of the following sectors in their review report: community-based organizations, faith-based organizations, private sector, public sector and educational institutions. The minimum requirement is that information or feedback is gathered from all five of the sectors. If one or more of these sectors are not present in the community or refuses to participate, then the CAA needs to explain the reason for the gap or document a good faith effort to engage the sector(s).
- **Information is gathered from all of the sectors but only from part of the agency's service area.** Another potential challenge, especially for agencies that serve multiple counties or a large area, is that information may be gathered from all the required sectors in some areas but not others. Agencies should strive to document how it gathers information from each of the sectors in every county or municipality it serves, or otherwise be able to explain why certain sectors are not represented in all areas.
- **The agency gathers information from all sectors but does not document how it is utilized.** Standard 2.2 requires an agency to both gather information from all the sectors listed and be able to show how that information is used to assess needs and resources. This makes it especially important for the agency to think through how it will document the ways in which the information it gathers from different stakeholders is used to ultimately determine the needs which it addresses.

Standard 2.2 requires two types of documentation that show an agency has (1) gathered information during the community needs assessment and at other times from all five sectors listed in the

standard, and (2) used the information to assess needs and resources. Examples of potential documentation to show compliance with the standard include:

- A list of stakeholders organized by sector from which information was gathered on needs and resources during the community needs assessment with a brief summary of the data collection process;
- A list of stakeholders organized by sector from which information was gathered on needs and resources at other times with a brief summary of the data collection process (e.g. during the strategic planning process, through advisory bodies); and
- Examples of how the information gathered was used to assess needs and resources (e.g. the data collection methods and analysis section of the community needs assessment, pertinent reports on needs and resources produced by the agency and/or partnerships with stakeholders from other sectors in which it participates).

C. Beyond Compliance: Benchmarking Organizational Performance

It is important to emphasize that this standard is important as it supports the CAAs role as the facilitator of collaboration and the hub of information related to anti-poverty efforts within the community. With this in mind, an agency can assess how well it engages other sectors to gather information of community needs and resources by reviewing the list of partnerships gathered for standard 2.1 and how it interacts with those stakeholders. Questions the review team can ask to assess the agency's activities in this regard include:

- **Does the agency have established relationships with stakeholders from different sectors?** While gathering information from other sectors during the community assessment and other times is helpful, it is even better if the agency has the opportunity to routinely engage diverse stakeholders in ongoing dialogue about how they perceive the needs and resources of the community. Does the agency participate in collaboratives, advisory bodies, and similar activities that allow it to routinely engage with different sectors?
- **Does the agency work with other sectors to build consensus on community needs and how to mobilize resources for anti-poverty efforts?** An important step beyond simply gathering information for its own purposes is for an agency to actively convene and participate in discussions to build consensus across sectors about the needs of the community and how to coordinate resources to address them. Does the agency convene or participate in community forums, policy dialogues, and similar awareness raising activities build consensus on community needs?

D. Resources

- *Smart Survey Design*
  http://s3.amazonaws.com/SurveyMonkeyFiles/SmartSurvey.pdf
  This guide from Survey Monkey walks through some basic survey tips.

- *A Community Action Guide to Comprehensive Community Needs Assessments*
  http://www.nascsp.org/data/files/CSBG_Resources/Train_Tech_Assistance/Needs_Assessment_FINAL_-_8.22_print_to_pdf.pdf
  The toolkit, written by the National Association for State Community Services Programs (NASCSP) in July 2011 walks through the review process at large with specific information for this standard starting on page 32.

- *Community Needs Assessment Tool Kit*
  http://www.communityaction.org/files/HigherGround/Community_Needs_Assessment_Tool_Kit.pdf
  This toolkit, written by the Missouri Association for Community Action and Missouri State CSBG Lead Agency in April 2009 walks through the review process with specific information for this standard "Statistical Data," "Agency Gathered Data" and "Conditions of Poverty and Issue Areas" on pages 7-30.

2.3 The organization communicates its activities and its results to the community.

A. Guidance on the Definition and Intent of the Standard

This standard is about the CAA telling its story through its website, social media campaigns, its annual reports, news releases, op-ed newspaper articles, public service announcements, newspaper, community outreach, and community announcements of public agency meetings and special events. The key is for the agency to engage in on-going communication with the community about its activities and the outcomes it creates. While the "community" can be defined by the CAA, it needs to include those external to the staff and board of the agency.

This standard provides an opportunity for CAAs to showcase their successful innovations, capacity expansions, and coordination of resources and partners to solve difficult community problems. Its intent is to elevate community awareness of the agency's work, the impact it has, and the role the broader Community Action Network plays in fighting poverty. The communication of the CAA's overall story that includes services it provides for clients, the outcomes it achieves, and the importance of its work provides the entire community with a holistic picture of the agency as a critical anti-poverty agents. Furthermore, this standard provides a foundation for CAAs to build a community agenda to address poverty which strengthens the case for engagement and investment in anti-poverty efforts by the entire community.

The following are examples of types of activities a CAA share with the community:

- Community needs assessment
- Community Action plan
- Strategic plan
- Program and Services brochure/flyer
- Meeting and community events announcements
- Volunteer opportunity advertisements

The following are examples of types of results a CAA share with the community:

- Needs assessment data;
- Strategic plan updates;
- Program activities and outcomes;
- Return on investment reports;
- Agency fact sheet/impact report;
- Op-eds that connect the work of the agency to the activities of the broader Community Action Network.

B. Guidance on Compliance and Documentation

The review team should always begin the process of documenting compliance with the organizational standards by reviewing all available guidance from the State CSBG Lead Agency on the interpretation of the standard and required documentation. The review team should also consider any State requirements for communicating its activities and results to the community. Specific issues the review team should consider that may affect compliance with standard 2.3 include:

- **The agency communicates its activities or results but not both.** It is important for the agency to communicate both the services it provides the community and the outcomes those activities achieve. While an agency may not have outcome data for all its programs, it is important to at least provide a summary of its major accomplishments and the impact they have on the community.
- **The agency does not actively communicate its activities and results to the community.** It is important for the agency to take an active rather than passive approach to communicating about its work. Simply making programmatic reports available on the agency's website or sharing outcomes with key partners may risk not meeting this standard. The review team should clarify the State CSBG Lead Agency's expectations about what constitutes "communicates…to the community" to ensure it is in compliance if there is any concern about meeting the standard.

The following serve as documentation to show that an agency is in compliance with standard 2.3:

- CAA annual report;
- Documentation of social media activity (Facebook page, Twitter account, etc.…);
- Media files of stories published;
- New release copies;
- Community event information; and
- Communication plan

C. Beyond Compliance: Benchmarking Organizational Performance

It is important to emphasize that this standard is important as it supports the CAAs need to consistently inform the entire community about its activities and its documented story of success. With this in mind, the agency can assess how well it communicates to the broader community in a number of ways. Questions for review team to consider include:

- **Does the agency have an overall communications strategy?** While episodic communication with the community about its activities and outcomes may comply with the standard, the impact of these efforts will be far more effective if they are guided by a thoughtful and strategic approach to discussing its work. Does the agency have basic marketing materials that tell its story? Is there a social media strategy to engage the community on a day-to-day basis? Does it routinely engage the local media to build awareness of its work?

- **Does the agency use a variety of methods to communicate with different audiences?** The diversity of stakeholders with which CAAs work virtually requires communication strategies that are tailored to reach different types of audiences. Does the agency have a report on the "return on investment" it services produce to engage the local business community? Does it issue a community "report card" to translate the findings of its needs assessment in a way that resonates with people unfamiliar with its work? Does it have "tri-fold" brochure that highlights its key results to distribute to the general public?

D. Resources

- *Webinar: SOCIAL MEDIA 201: ADVOCACY, STORY-TELLING and IMPORTANT REMINDERS* (2015)
  http://www.communityactionpartnership.com/index.php?option=com_content&task=view&id=31&Itemid=237#SocialMedia
  This webinar discusses how Community Action can best utilize social media to share their stories and outcomes data with a wide audience, as well as promote the importance of CSBG, and CSBG Reauthorization to those outside the Network. Contributors include Community Action Partnership (CAP), National Community Action Foundation (NCAF), the National Association of State Community Services Programs (NASCSP), and Community Action Program Legal Services, Inc. (CAPLAW).

- *Telling Community Action's Story: A Guidebook (2009)*
  https://www.csbgtta.org/index2.php?option=com_member&task=toolkit&act=download&id=463&no_html=1&Itemid=17

- *Brochure: Telling Community Action's Story*
  http://www.nascsp.org/data/images/telling%20community%20action%27s%20stories%20-%20brochure_final.pdf
  These resources from NASCSP provide strategies for using stories to bring Community Action Agency's (CAA's) work, challenges, and successes to life.

- *Communications Planning Guide (2012)*
  https://www.csbgtta.org/index2.php?option=com_member&task=toolkit&act=download&id=102&no_html=1&Itemid=17
  This toolkit from Cal-Neva Community Action Partnership provides an example Communications Planning Guide to help ensure consistent branding and quality in communications for their Community Action Network.

- *Webinar: How to Create an Annual Report People will Actually Read*
  http://nyscommunityaction.org/how-to-create-an-annual-report-people-will-actually-read/
  This webinar was facilitated by Kivi Leroux Miller of Nonprofit Marketing Guide.com and hosted by NYSCAA.

- *Issue Brief: Social Return on Investment (2013)*
  http://www.aphsa.org/content/dam/aphsa/pdfs/Innovation%20Center/2013-05-Social-Return-on-Investment-Brief.pdf
  This issue brief is one in a series published as part of the American Public Human Services Association's Pathways initiative. This brief introduces SROI and highlights SROI methodologies, tools, and models that have been implemented by Government, philanthropic, and for-profit and nonprofit organizations.

2.4 The organization documents the number of volunteers and hours mobilized in support of its activities.

A. Guidance on the Definition and Intent of the Standard

This information referenced by this standard is reported annually by agencies through the Information Survey (IS). When we tell the story about the impact of Community Action, volunteers and particularly the documentation of the number of volunteer hours is very important. Annually, over 24 million hours of volunteer service are donated to CAAs nationally. This is one of the important elements of how CAAs and the Community Action Network tell the story of its impact by leveraging volunteer hours and other resources in the community.

There is no requirement to utilize volunteers, only to document their number and hours, if utilized. As previously specified, this information should already be collected as part of the current National Performance Indicators.

B. Guidance on Compliance and Documentation

The review team should always begin the process of documenting compliance with the organizational standards by reviewing all available guidance from the State CSBG Lead Agency on the interpretation of the standard and required documentation. The review team should also consider any State requirements for the community needs assessment. Specific issues the review team should consider that may affect compliance with standard 2.4 include:

- **Lack of documentation for volunteer hours.** Most agencies should be able to provide reasonably accurate numbers of the volunteers who participate in their activities but may not track the hours they donate. In this case, the agency should consider sampling a subset of volunteers across different activities to estimate the overall number of hours donated.

This standard requires two types of documentation that include (1) the number of volunteers, and (2) the number of hours those volunteers provided it support of its activities. Examples of documentation might include:

- Volunteer sign-up sheets from activities and events;
- Databases records that track volunteers; and
- Agendas, minutes, schedules, and logs from activities and events to document or estimate the number of hours involved.

C. Beyond Compliance: Benchmarking Organizational Performance

While almost every agency uses volunteers in its activities, the review team can consider the strategies their CAA uses to recruit, utilize, and retain their support. Questions reviewers can reflect upon include:

- **Does the agency have a coordinated strategy to engage and retain volunteers?** While individual programs or departments in the agency may have strategies to engage volunteers, it is important the CAA have an overall strategy to inform its efforts. Does the agency have a volunteer coordinator position? Does it coordinate volunteer engagement activities with its key partners? Is there a database that tracks the contact information, activities, and skills of volunteers? Does the agency routinely communicate with volunteers to make them aware of upcoming activities and events?
- **Does the agency engage volunteers from outside of its direct service area?** Working with volunteers from outside the immediate neighborhoods where the agency provides services is an excellent way to raise the overall awareness of Community Action and forge relationships with stakeholders that may not routinely connect with its activities. Suburban faith-based organizations, Boy and Girl Scout Troops, and retirement communities are only a few examples of stakeholders that might provide vital sources of volunteer support to the agency.
- **Does the agency cultivate volunteers for leadership opportunities?** Volunteers provide an excellent source of potential members for the agency's board, advisory bodies, and, in some cases, staff positions. CAA's should consider developing leadership training or similar capacity-building support for volunteers to build their skills and increase the chances they will retain their services.

D. Resources

- *Website Resource: Calculating the Economic Impact of Volunteers*
  http://www.handsonnetwork.org/tools/volunteercalculator
  This article from the Hands on Network website discusses how to place an economic value on the time volunteers give to an organization.

- *Tool: Community Action Partnership of Lancaster and Saunders Counties Online Volunteer Management Website*
  http://www.communityactionatwork.org/about/who_we_are/
  This virtual tool is used by the Community Action Partnership of Lancaster and Saunders Counties to manage volunteer schedules and document volunteer hours.

	Documentation Used	Unacceptable	Unsatisfactory	Satisfactory	Advancing	Outstanding	Action to be Taken	Individual(s) Responsible	Target Date(s)
Standard 2.1 The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the areas.	•								
Standard 2.2 The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.	•								
Standard 2.3 The organization communicates its activities and its results to the community.	•								
Standard 2.4 The organization documents the number of volunteers and hours mobilized in support of its activities.	•								

Category 4: Community Engagement – Standards Review Worksheet Template

	Unacceptable	Unsatisfactory	SATISFACTORY	Advancing	Outstanding
Standard 2.1	The organization no documented partnerships across the community.	The organization has a list of partners; however, no documentation that shows what these partnerships entail and/or achieved are specified	The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the areas.	The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partners continue to provide services independently, but also are engaged in some joint activities that are coordinated and designed for specific populations.	The organization has formal documented partnerships across the community which demonstrate coordinated and jointly targeted services which focus on increased integration and decreased duplication.
Standard 2.2	The organization does not utilize information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times.	The organization utilizes information gathered from key sectors of the community	The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times.	The organization utilizes information gathered from key sectors of the community to set goals and objectives set by discussion and agreement of majority of partners; targets are specific and measurable.	The organization utilizes feedback from partners to actively contribute to identification of and agreement with established goals and objectives; targets are realistic and measurable; data is available and collected regularly.
Standard 2.3	The organization does not communicate its activities and its results to the community.	The organization communicates its activities to the community.	The organization communicates its activities and its results to the community.	The organization communicates its activities and its results to the community; interagency referrals are followed and evaluated for effectiveness and progress toward outcomes is shared.	The organization communicates its activities and its results to the community; interagency referrals are followed and evaluated for effectiveness and Customer/Participation of multiple service and progress towards success is shared among partners.
Standard 2.4	The organization does not document the number of volunteers and hours mobilized in support of its activities.	The organization documents the number of volunteers.	The organization documents the number of volunteers and hours mobilized in support of its activities.	The organization documents the number of volunteers and hours mobilized in support of its activities and includes the program areas supported by volunteer support.	The organization documents the number of volunteers and hours mobilized in support of its activities and demonstrates the return on investment of volunteer hours across key functions/goals of the agency.

Category 4: Community Engagement – Assessment Scale

For all the latest information on Organizational Standards, check out the "Updates on CSBG Organizational Standards and ROMA Next Generation" quicklink on Community Action Partnership's website at www.communityactionpartnership.com

- **Technical Assistance Guides**
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- **Technical Assistance Webinars**
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