



COE DEVELOPED CSBG
ORGANIZATIONAL STANDARDS

Category 7

Human Resource Management



Community Action Partnership
1140 Connecticut Avenue, NW, Suite 1210
Washington, DC 20036
202.265.7546 | FAX 202.265.5048
WWW.COMMUNITYACTIONPARTNERSHIP.COM

Table of Contents

Introduction to Category 7	1
Considerations for the Review Process	2
Category 7 Standards	4
Standards 7.1, 7.2 and 7.7 - HR Policies and Procedures	5
A. Guidance on the Definition and Intent of the Standards	5
B. Guidance on Compliance and Documentation	7
C. Beyond Compliance: Effective Policy Communication, Training and Enforcement	10
D. Resources	11
Standards 7.4 and 7.5 – Standards for Effective HR Governance	12
A. Guidance on the Definition and Intent of the Standards	12
B. Guidance on Compliance and Documentation	14
C. Beyond Compliance: Effective HR Governance	15
D. Resources	17
Standards 7.3, 7.6, 7.8-7.9 – Effective HR Management	18
A. Guidance on the Definition and Intent of the Standards	18
B. Guidance on Compliance and Documentation	23
C. Beyond Compliance: Effective HR Management	26
D. Resources	29
Standards Review Worksheet Template	31
Assessment Scale	32

This publication was created by National Association of Community Action Agencies – Community Action Partnership in the performance of the U.S. Department of Human Services, Administration for Children and Families, Office of Community Services Grant Numbers 90ET0434 and 90ET0445. Any opinion, findings, and conclusions, or recommendations expressed in this material are those of the authors and do not necessarily reflect the views of the U.S. Department of Health and Human Services, Administration for Children and Families.

Introduction to Category 7

The purpose of this Technical Assistance Guide is to help a CSBG Eligible Entity (referred to as an agency or organization) assess its compliance with Category Seven of the Organizational Standards (7.1-7.9, referred to as the “Standards”) that pertain to Human Resource Management. The first section below provides general considerations to help an agency evaluate and strengthen its Human Resource (HR) function and systems. The next three sections address each of the Standards in this category by logical grouping, 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.

Effective and efficient use of Federal CSBG resources is predicated on the strength of an organization’s staff and its use of payroll, benefits, and training and technical assistance (T&TA) related budgets. All aspects of the organization rely on its employees to achieve the mission of Community Action in the local community. An organization’s relationship with its staff reflects its values and commitment to achieving its goals. The connections between good governance, the oversight of the CEO/executive director, trained and competent supervisors, and a stable, engaged workforce are the domain of a strong HR function. Through written policies and procedures, ongoing performance management, fair compensation and benefits, and formal training and development, the HR function provides the capacity to deliver high-quality services in low-income communities.



This Technical Assistance Guide helps an agency answer two questions: (1) Are we in compliance with the requirements of the Standards, and (2) How well are we performing in managing HR for the organization and its employees? It is important to note that agencies are only required to comply with the Standards, and that guidance and materials for how to assess performance are intended as a capacity-building resource. However, there are a number of reasons that an agency should consider going through the complete assessment process described in this Guide:

- Preparation for succession, promotions, hiring, and planned or unplanned staff turnover;
- Support for changing employment law and regulatory updates;
- Building governance, leadership, and supervisor capacity to effectively plan and manage HR policy and procedures; and
- Integration of the ROMA cycle into organization-wide training and development.

Considerations for the Review Process

This section of the Technical Assistance Guide provides questions to help agencies think through all of the Standards included in Category Seven. Questions to consider for HR include:

- **How is Category Seven connected to the overall process for assessing and meeting the Standards?** Staff involved in reviewing the Standards related to HR should ensure their efforts are consistent with an overall agency process for Standards assessment in regards to interpreting the Standards, recording findings, managing and storing documents, and conducting any necessary follow-up activities to achieve compliance. Some compliance information from other categories may be useful in reviewing Category Seven, including but not limited to: Category Four (4.5, 4.6), Category Five (5.8, 5.9), Category Six (6.3), and Category Nine (9.2, 9.3).
- **Who should participate in Human Resource Management?** It is possible for small agencies to manage HR without dedicated Human Resources staff. Typically the HR function, policies, procedures, and administration are divided between the governing board, executive team, and managers/supervisors; with one executive team member named as accountable for HR within the organization. Larger organizations, typically over 50 employees, recognize that HR is a critical and complex function requiring one or more dedicated staff. In all circumstances, HR spans the agency and requires time and attention from the “management team.”

The agency should consider assembling a committee to help measure, meet and improve upon the Standards in Category Seven. This committee might include management currently involved in administering HR functions, program managers with many staff reporting to them, an individual responsible for compensation and benefits, and a competent HR expert or Employment Lawyer (even if they are volunteer, on contract, or otherwise employed outside the agency).

- **What is the appropriate level of effort for an agency with and without an HR staff in assessing Category Seven?** Agencies should consider the costs and benefits of expending different levels of effort in assessing Category Seven. If the HR function is contained with a single person or small department, those individuals will need the assistance of leadership and supervisors to evaluate and implement necessary policies, procedures and improvements. If the HR function is shared by multiple staff, a temporary task force or formal committee is strongly encouraged to conduct a full review and plan the necessary steps to meet the Standards. If technical assistance is deemed necessary in this area, the organization should communicate early on with its State CSBG office to arrange for support.

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

- **How will the staff assess whether the Standards are met?** Staff should always begin the assessment process by reviewing all guidance from the State CSBG Office 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 assessment process suggested in this Guide, it is strongly suggested that the staff use the five point assessment scale included at the end of the Guide 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 assessment and organize related files and materials to document compliance. Staff should begin by determining whether the agency meets each of the Standards in Category Seven using guidance from the State CSBG Office and, if conducting a full performance evaluation, how well it rates using the evaluation questions and assessment 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, 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 assessment process?** Standards that are assessed as 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 use the assessment process and resources in this Guide to make recommendations to the agency on how to improve HR based on their findings. Even if the assessment 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 portion of HR needing attention. 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 assessment process?** When the assessment 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 assessment was conducted, who participated, any issues or “lessons learned” that are helpful to note for future assessments, and clear instructions for how to find all documents and materials referenced in the findings. Again, even if the assessment process has a more limited focus on compliance, it is recommended that staff include their evaluation of each standard on the five point assessment scale along with brief notes explaining the rationale for the finding to help benchmark performance for future assessments.

Category 7 Standards

The Standards in Category Seven cover a wide range of HR scope in the organization. As the purpose of this guide is to help assess compliance and practices within this large Category, the nine Standards have been grouped as follows to help organize evaluation, documentation, and any follow-up improvements needed:

HR POLICIES AND PROCEDURES

- Standard 7.1** The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.
- Standard 7.2** The organization makes available the employee handbook (or personnel policies in cases without a handbook) to all staff and notifies staff of any changes.
- Standard 7.7** The organization has a whistleblower policy that has been approved by the governing board.

EFFECTIVE HR GOVERNANCE

- Standard 7.4** The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.
- Standard 7.5** The governing board reviews and approves CEO/executive director compensation within every calendar year.

EFFECTIVE HR MANAGEMENT

- Standard 7.3** The organization has written job descriptions for all positions, which have been updated within the past 5 years.
- Standard 7.6** The organization has a policy in place for regular written evaluation of employees by their supervisors.
- Standard 7.8** All staff participate in a new employee orientation within 60 days of hire.
- Standard 7.9** The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.

7.1, 7.2 and 7.7 - HR Policies and Procedures

A. Guidance on the Definition and Intent of the Standards

STANDARD 7.1: The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.

These Standards refer to what are often called HR Policy and Procedure Manuals, Personnel Policies, and Employee Handbooks. All three titles fall under the definition of communication tools that help managers and staff understand what is expected of them, and how to carry through with the agency's expectations related to each of the people-oriented decisions and tasks needed to remain in compliance and deliver quality services to the local community.

The Society for Human Resource Management (SHRM) differentiates Employee Handbooks and Policy and Procedures Manuals as follows:

An **Employee Handbook (or Personnel Policies)** is written with employees as the intended audience. It is most often written using a straightforward layout for easy referencing of company policies and procedures and is a vehicle for familiarizing employees with basic company policies and benefit programs, as well as the general expectations of the company, including acceptable and unacceptable behavior and disciplinary measures.

A **Policies and Procedures Manual** is a comprehensive text that details every aspect of company policy, the procedures for following those policies, and the forms needed to complete each process. A policies and procedures manual is *a reference tool for managers and supervisors*. This tool is much more complete in detail than the employee handbook and should be used for back-up when more information is needed to explain a policy or when a deeper understanding of a process is desired. As a benefit to management, the manual can contain references to federal and state laws that correlate to each policy. Managers and supervisors then have access to the rationale for the policies, thus providing them with assistance for enforcement.

For the purpose of this Guide, **Personnel Policies** are used universally to describe what Standards 7.1 and 7.2 require for compliance.

Guidance on the intent behind requiring federally funded agencies to document and communicate Personnel Policies come from three primary sources:

- Department of Labor (DOL)
- Office of Management and Budget (OMB), and
- The Society for Human Resource Management (SHRM)

The Department of Labor oversees guidance and compliance on national laws and regulations pertaining to Employee Benefits (20 CFR) and Labor (29 CFR). Within these broad Federal Regulations are dozens of critical HR laws, conditions, and requirements that must be followed by various types of employers in the United States.

The Office of Management and Budget, part of the Executive Office of the President, dictates the rules and regulations for use of federal award dollars such as the Community Services Block Grant. The OMB develops and executes a government-wide management agenda that includes information technology, financial management, procurement, performance, and *human resources*. Relative to HR, OMB's Uniform Guidance (2 CFR Part 200) dictates requirements in areas such as incentive policies, compensation, employee health and welfare, record retention, etc.

Finally, the *Society for Human Resource Management* serves as the world's largest HR membership organization devoted to human resource management. SHRM provides guidance on general and specific Personnel Policy matters, focusing on required and best practice materials for employers.

Taken together, these authorities and the Office of Community Services make clear that organizations of all sizes must have written Personnel Policies that are updated regularly and communicated to employees. There are clear risks of being out of compliance on Standards 7.1 and 7.2, as HR law and regulations change frequently. Lack of compliance can result in costly claims, law suits, or loss of funding. Strong Personnel Policies on the other hand create transparency and accountability that make organizations stronger and add capacity in all areas where staff can impact the administration and delivery of services.

In addition to the legal and compliance requirements that stipulate organizations develop and communicate Personnel Policies, the intent of Standard 7.1 is also to ensure uniformity across states for the maximum time period between Personnel Policy updates and approvals (5 years). Previously each State determined the monitoring and compliance requirements for HR-related policies and procedures. While the State may mandate more frequent policy updates and approvals, Standard 7.1 sets the maximum amount of time that may pass before an agency must review, update and gain governing board approval for its Personnel Policies.

STANDARD 7.2: The organization makes available the employee handbook (or personnel policies in cases without a handbook) to all staff and notifies staff of any changes.

In addition to creating and updating a reviewed Personnel Policy manual for employees, the intent of Standard 7.2 is to promote effective and consistent communication of employee-relevant information to staff, to help ensure HR compliance and performance. Without follow through on policy changes and organization-specific information, managers and employees are left to their own devices to determine expectations and the proper course of action in countless situations requiring rules and good guidance. All staff, at levels in all parts of the organization, need to receive a written or electronic copy of the Personnel Policies. They all need to be notified of changes.

In communicating policies and procedures effectively to managers and supervisors, it is strongly recommended that a separate and more thorough Policy and Procedures Manual be created and communicated to ensure consistent administration of policies across the organization.

STANDARD 7.7: The organization has a whistleblower policy that has been approved by the governing board.

This standard refers to a policy that protects individuals who report fraud or gross misconduct to the appropriate authorities. A whistleblower policy encourages staff and volunteers to come forward with credible information on illegal practices or violations of adopted policies of the organization,

specifies that the organization will protect the individual from retaliation, and identifies those staff or board members (or outside parties) to whom such information can be reported.

The intent of this Standard is to ensure that agencies are in compliance with federal law, and that they protect employees at all levels from retaliation in cases where individuals act to protect the organization and community from illegal or unethical activities.

The Whistleblower Protection Act of 1989 is a federal law that protects federal whistleblowers who work for the government and report agency misconduct. In 2013, Congress created a pilot program to ensure that employees of federal contractors, sub-contractors, and **grantees** are provided with similar protections. Additionally, 45 states have enacted laws to protect whistleblowers from retaliation in the workplace.

A federal agency or grantee violates the Whistleblower Protection Act if agency authorities take (or threaten to take) retaliatory personnel action against any employee or applicant because of disclosure of information by that employee or applicant. Whistleblowers may file complaints that they believe reasonably evidences a violation of a law, rule or regulation; gross mismanagement; gross waste of funds; an abuse of authority; or a substantial and specific danger to public health or safety.

The law protects individuals from reprisal for reporting potential misconduct or alleged criminal activities. Reprisal can come in the form of a prohibited personnel practice which occurs when a person with authority takes, fails to take or threatens to take a personnel action against an employee because of the employee's protected disclosure and can include details, transfers, reassignments, and significant changes in duties, responsibilities, or working conditions.

The *Office of Inspector General (OIG)* for the relevant agency investigates allegations of retaliation from such employees. The *Office of Special Counsel (OSC)* is an independent federal agency charged with investigating and prosecuting violations of the Whistleblower Protection Act.

B. Guidance on Compliance and Documentation

STANDARD 7.1: The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.

The assessment team for HR Management should always begin the process of documenting compliance with the Organizational Standards by reviewing all available guidance from the State CSBG Office on the interpretation of the standard and required documentation. The assessment team should also review any State requirements for Personnel Policies. Specific issues the assessment team should consider that may affect compliance with standard 7.1 include:

- **“In process” policy and/or procedure updates that began sometime in the 5 years after the previous update and approval.** An agency may find itself being assessed for compliance with Standard 7.1 when it is about to begin or is in the process of updating its Personnel Policies, but the previous update was completed more than five years ago. In such cases it is suggested that the agency inform the State CSBG Office of the situation, confirm whether planned or “in process” policy updates will meet the Standard in accordance with the State’s interpretation, and clarify the process for and any associated deadlines with confirming compliance if the anticipated completion date of the update falls after the State’s monitoring process for compliance.

- **Differences in State requirements for the frequency of conducting Personnel Policy updates.** If the State previously required agencies to conduct a policies review or update over time periods longer than five years, or not at all, Standard 7.1 will supersede this requirement and agencies will now have to conduct such updates every five years at a minimum. In addition, States can still require agencies to conduct Personnel Policy updates more frequently than every five years, so standard 7.1 does not absolve agencies of such State requirements.
- **Counting an individual policy or procedure update or notification as complying with Standards 7.1 (and 7.2).** Many agencies update individual policies and/or procedures in between conducting a full review of all Personnel Policies. Unless otherwise allowed by the State, such updates would not qualify as compliance since the intent of the Standard is for the agency to conduct a full review of its written Personnel Policies every 5 years. It is important to note that the Standard calls for a full review, however, and not necessarily policy or procedure updates. These will depend on compliance with changing federal, state and local labor laws, as well as policy decisions by the board and management.
- **What qualifies as “reviewed by an attorney” in Standard 7.1.** There is no requirement that the reviewing attorney be paid, but he or she should be a currently practicing attorney. Final reviews by attorneys who serve on the board (or on staff) are not recommended, but are not disallowed. Agencies may work with human resource professionals (such as SHRM certified staff) and others (attorneys on staff or on the board) prior to the external legal review to minimize cost. Note that not all attorneys are familiar with HR issues and agencies are encouraged to use attorneys with Labor and/or Employment Law credentials.

Documentation that an agency is in compliance with Standard 7.1 should show three things: (1) Reviewed Personnel Policies that include review/edit dates and approval dates from an attorney and the governing board, respectively; (2) a statement or invoice from the attorney reflecting the review; and (3) documentation that confirms the governing board has formally considered and approved the Personnel Policies within the past 5 years.

Documentation might include:

- A physical or electronic copy of the Personnel Policies, including the whistleblower policy
- An invoice or statement from the reviewing attorney reflecting the review
- Board pre-meeting materials/packet
- Board meeting minutes

STANDARD 7.2: The organization makes available the employee handbook (or personnel policies in cases without a handbook) to all staff and notifies staff of any changes.

Here, too, the assessment team for HR Management should always begin the process of documenting compliance with the organizational Standards by reviewing all available guidance from the State CSBG Office on the interpretation of the standard and required documentation. The assessment team should also review any State requirements for communicating Personnel Policies and related changes. Specific issues the assessment team should consider that may affect compliance with standard 7.2 include:

- **What qualifies as “makes available” and “notifies staff” in Standard 7.2.** States may have specific requirements around the definitions of “makes available” in reference to Personnel Policy communication. Agencies should not assume that actions such as posting a copy of the Personnel Policies to its intranet or internal file system complies with the Standard unless otherwise confirmed by the State. Requirements may include actively disseminating the Personnel Policies to all staff (e.g. providing printed or electronic copies and requiring a signature). Agencies should also not assume that providing an updated copy of the Personnel Policies qualifies as “notifies staff” of changes. The State may require the production of additional change memoranda, e-mail, or similar documents. Agencies should always confirm how the State interprets the terms “makes available” and “notifies staff”.

Documentation that an agency is in compliance with Standard 7.2 should show three things: (1) Personnel Policies (or Employee Handbook) that include a signatory page or other form of acceptance by staff; (2) an identified process for notifying staff of updates; and (3) documentation of the location and availability of the Personnel Policies.

Documentation might include:

- A physical or electronic copy of the Personnel Policies, including the signatory page
- A process or procedure document for staff communication (may be included with the handbook/policies)
- Documentation of location and availability of the Personnel Policies
- Samples of agency communication of policy change notification to staff

STANDARD 7.7: The organization has a whistleblower policy that has been approved by the governing board.

One specific issue the assessment team should consider that may affect compliance with standard 7.7 include:

- **Differences in State requirements for the use of a certain whistleblower service or a “fraud hotline.”** Many state agencies have implemented whistleblower protections and dedicated hotlines (or online forms) specific to the needs of their employees and funded agencies. Departments of Health, Human Services, Community Services, Commerce, Education, etc. across the country are participating in whistleblower protections at the state and local level due to the prevalence of fraud and misconduct in government. Check with your funding sources’ State offices to ensure your policy and procedures are in compliance.

Documentation that an agency is in compliance with 7.7 should show two things: (1) the Whistleblower Policy set forth in the agency’s Personnel Policies (or Employee Handbook) that includes anti-retaliation language; and (2) documentation of governing board approval.

Documentation might include:

- Whistleblower policy
- Board minutes
- Board pre-meeting materials/packet

C. Beyond Compliance: Effective Policy Communication, Training and Enforcement

It is strongly suggested that the HR assessment team use the questions and resources in this section to conduct an evaluation of how Personnel Policies have been communicated, trained, and enforced within the agency. No matter what level of effort the team chooses, assigning a score for Standards 7.1, 7.2 and 7.7 using the *Assessment Scale* at the end of this Guide along with recording brief notes that detail recommendations for ways to improve helps the agency benchmark its performance and incorporate the ROMA cycle into the process for regularly assessing compliance with the Organizational Standards. Options might include:

- **Review discipline warnings, personnel files, and other policy compliance documentation over the past five year period.** The team can ask for records (with confidentiality protected) from HR or the accountable management representative to identify trends and gaps in supervisor and staff ability to follow Personnel Policies. Root cause analysis using this data can help the team understand if the Personnel Policies are not written clearly or with enough detail, if communication was lacking, or if supervisors were not properly trained or supported in enforcement of the policies in question.
- **Conduct a brief survey or interviews of supervisors to evaluate the strengths and weaknesses of the Personnel Policies and related communication.** The assessment team can conduct a survey or brief interviews with select supervisors to inquire about potential areas for improvement. The team can also ask staff to participate from their point of view.
- **Compare the sections and content of the agency's Personnel Policies to model policies listed in the Resources section below.** Tools such as *Wipfli LLP's HR Policies and Procedures Manual* ("HR Pro") and the *Nonprofit Risk Management Center's Policies in HR* provide robust content and helpful benchmarks against which an agency can assess its Personnel Policies. The assessment team can compare the existing policies with quality samples and assess whether State specific requirements are included. Contacting other agencies to request copies of their Personnel Policies can also offer helpful standards for comparison.
- **Ensure that your attorney is qualified and/or credentialed.** While Standard 7.1 does not stipulate that a specific kind of attorney review the Personnel Policies, laws are constantly changing and becoming more complex for any sized employer. Labor and employment lawyers specialize in issues including employment at will, employment contracts, collective bargaining, workplace discrimination, sexual harassment, retaliation and whistleblowing protections, occupational safety, and wage and hour rules. There are specialty areas of the law that also include ERISA, health care, insurance, and other matters critical to the agency's policies. The National Employment Lawyers Association (NELA) or your State or Local Bar Association can refer a qualified and credentialed attorney.

- **Identify an external hotline or state/federal authority in your Whistleblower Policy.** It is increasingly difficult for employees with information about fraud or misconduct to find the appropriate reporting channels, even with anti-retaliation protection. Ensure that your agency is protected from risk by identifying and/or purchasing a hotline service. Publicize the hotline and your agency's procedures with HR postings and in other employee communications.

D. Resources

The United States Department of Labor's Summary of Major Laws. Includes 16 categories of labor and employment laws necessary for most organizations to incorporate in Personnel Policies and/or staff communications: <http://www.dol.gov/opa/aboutdol/lawsprog.htm>

The Office of Management & Budget's Uniform Guidance for Federal Awards:
<http://www.gpo.gov/fdsys/pkg/FR-2013-12-26/pdf/2013-30465.pdf>

Society for Human Resource Management (SHRM) HR Topics & Strategy site for Employee Handbooks:
<http://www.shrm.org/hrdisciplines/employeerelations/pages/employeehandbooks.aspx>

SHRM site for access to all policies and procedures from all HR Disciplines:
<http://www.shrm.org/hrdisciplines/pages/default.aspx>

"My Wipfli" Nonprofit and Government Membership Service. A federal compliance membership site providing templates, up-to-date regulations, questions and answers, and access to expert advice. Features a comprehensive HR Policy and Procedure Manual tailored to grant-funded nonprofits:
http://www.wipfli.com/Industry_NG_Tools_GrantFunded.aspx

The Nonprofit Risk Management Center's *Community Action Partnership Risk Management Portal*. Provides 81 unique questions about HR risk in your agency, including a Written Employment Policy questionnaire and corresponding policy templates: <http://www.riskassessment.org/cap>

Office of Inspector General (OIG) Whistleblower Info Sheet:
<https://oig.state.gov/system/files/whistleblowerinfo.pdf>

Federal Whistleblower Rights & Protections Video:
<https://www.youtube.com/watch?v=jzf2pboRaoQ>

The Community Action Partnership's training, *Essential Tips for Developing Whistleblower Policies*. Aired September 14, 2015: <https://www.youtube.com/watch?v=bLXOnjXdpQ0&feature=youtu.be>

7.4 and 7.5 - Standards for Effective HR Governance

A. Guidance on the Definition and Intent of the Standards

STANDARD 7.4: The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.

STANDARD 7.5: The governing board reviews and approves CEO/executive director compensation within every calendar year.

Building upon Organizational Standards Category 5, Board Governance, these Standards clarify the expectation of the governing board to provide appropriate HR oversight of its only employee: the chief executive officer (CEO)/executive director. Oversight of the executive and maintaining a strong human resources infrastructure are key responsibilities of board oversight. In its *Ten Basic Responsibilities of Nonprofit Boards*, BoardSource lists the following in its top three duties, just behind “determining mission and purpose”:

1. **Select the chief executive.** Boards must reach consensus on the chief executive's responsibilities and undertake a careful search to find the most qualified individual for the position.
2. **Support and evaluate the chief executive.** The board should ensure that the chief executive has the moral and professional support he or she needs to further the goals of the organization.

In order to effectively select, hire, support and evaluate the executive, an agency's governing board needs to be professional and thorough in its approach. Standard 7.4 and 7.5 are intended to provide a foundation for seated executives that help support the accountability and transparency goals of the Community Action Network. Regular reviews of executive performance and compensation also set the tone for ROMA at the very top of the agency.

One of the greatest risks to both private and public agencies is unethical or fraudulent behavior between individuals with access and power, in this case the governing board and the executive. Through a fair and consistent performance evaluation, the board maintains control over executive behavior at an appropriate level. Executive compensation decisions and communication (Standard 7.5) can then be conducted by the governing board with more confidence in its process and decision-making criteria. As reiterated in the Community Action Partnership's Self-Assessment Tool, the approval of the performance appraisal is often done in conjunction with setting the CEO compensation.

Market research, objective measures, consensus decision-making, and clear communication comprise what effective HR governance looks like in an agency.

Guidance on the intent behind requiring federally funded agencies to have the board appraise executive performance comes from two primary sources – the DOL Center on Executive Compensation, and the OMB's Compensation-Personal Services regulations contained in the OMB's 2 CFR.

The Department of Labor's Center on Executive Compensation (CEC) oversees guidance and compliance on national laws and regulations pertaining to compensation for executives – who are named specifically in the Fair Labor Standards Act (FLSA) as likely exempt from overtime rules and therefore considered “salaried employees.” The CEC supplies six principles for executive compensation programs:

1. Aligned with the best interests of the Company's Shareholders and other Stakeholders
2. Fully compliant with applicable laws and regulations
3. Independently informed and approved
4. Appropriately customized to the agency's culture, values, industry and strategy
5. Transparent and accessible
6. Fair and reasonable to the agency's shareholders and executives as a whole

The Office of Management and Budget's Uniform Guidance (2 CFR Part 200.430 and 431) dictates requirements as to the allowability and the reasonableness of costs associated with federal grant awards. Compensation decisions must follow the agency's written policies, as well as comply with “comparability” rules that set the guidelines for how to go about ensuring fair and transparent compensation for the most high profile roles in grant-funded organizations. OMB's Uniform Guidance for compensation is in section CFR 200.430 (a) through (g).

Beyond creating more transparency and accountability for the agency externally, the board and organization benefit from enhanced communication and clearer expectations through the process. There are several other reasons these Standards are included in the HR Management Category:

- **Promotes a minimum uniform schedule for executive evaluations and pay for the Community Action Network.** If the State previously required agencies to conduct evaluations and compensation reviews less frequently than once year, or not at all, Standard 7.4 and 7.5 will supersede this requirement and agencies will now have to conduct these updates every year at a minimum.
- **Manages the risk of executive power and control of nonprofit resources.** Incorporating an annual performance evaluation in conjunction with an annual compensation review is a key step to reducing the exposure risk of the agency (and the Network) to recent public fraud and ethics issues. Proactively assessing the performance of top leaders helps to ensure the public trust and keeps the governing board and executive focused on goals important to the mission and services of the agency. Using a scheduled compensation review creates a culture of accountability to federal grants and other revenue that goes towards payroll and benefits.
- **Improves the quality and efficacy of Community Action Network's leadership and talent.** With a pay structure in line with the comparable market and similar positions, the agency will be able to recruit and retain quality nonprofit executive talent to its key CEO/executive director position, even in challenging labor markets. Annual performance appraisals provide the governing board and executive with regular opportunities to assess critical development needs and find creative ways to meet them. Ultimately, the combination of regular appraisals and performance- or merit-based compensation adjustments leads to higher performing executives and organizations.

B. Guidance on Compliance and Documentation

STANDARD 7.4: The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.

STANDARD 7.5: The governing board reviews and approves CEO/executive director compensation within every calendar year.

The assessment team should always begin the process of documenting compliance with the Organizational Standards by reviewing all available guidance from the State CSBG Office on the interpretation of the Standard and required documentation. The assessment team should also review any State requirements for executive performance appraisals and compensation. Specific issues the assessment team should consider that may affect compliance with Standards 7.4 and 7.5 include:

- **An executive who has never been appraised by the governing board.** This happens frequently and suggests that the board is uncomfortable or ill prepared to provide constructive or relevant feedback to the executive. Goal-setting and working to align the agency's CSBG Plan, Strategic Plan, and Values with the executive director's role description and performance goals are a critical first step to linking compensation and performance. Any tool selected or designed for executive performance evaluation should reflect these inputs.
- **The board's appraisal and notes are not available for review.** When the HR leader, department, or assessment committee cannot execute its role in evaluating this Standard, the CEO/executive director needs to help obtain the necessary documentation for compliance with the Standards. It is imperative that the governing board take responsibility and action to meet the State's criteria for documentation. If the executive appraisal has not been adequately documented, the committee or executive should submit, in writing or through other board processes, a formal request for evidence of the executive's review.

Documentation that an agency is in compliance with Standards 7.4 and 7.5 should show action by the governing board on the appraisal and compensation of the CEO/executive director such as a motion noted in the minutes or a resolution.

Documentation might include:

- Board minutes
- Board resolutions
- Board by-law, policy and/or procedures for executive performance and pay
- Official board communication to the executive or to the agency
- Executive employment contract
- Blank self-assessment for the executive
- Raw market data collected for compensation comparison

C. Beyond Compliance: Effective HR Governance

Strong management of the many people-oriented policies, procedures, programs, and support functions in an agency require that the leadership of the organization prioritizes HR requirements and best practices. The labor market is changing more rapidly than at any time in the U.S. economy's history, and a shortage of experienced and qualified talent for key positions is already a reality in many local communities and for most nonprofits. Community Action governing boards not only need an HR professional with broad experience, but they need to look as closely at HR Personnel Policies, controls, investments, and practices as they are likely accustomed to looking at fiscal areas.

During the evaluation process for Standard 7.4, pay particular attention to the methods, tools, forms, communication, and interactions that need to occur to be in compliance. The same general processes and requirements are necessary to meet Standard 7.6, concerning performance evaluations for staff. If the culture of the agency does not support forthright and formal performance management practices, it is unlikely there will be full compliance across both Standards. Start with the CEO/executive director. Align his or her performance appraisal closely with the agency's vision and long-range goals. Once the first performance appraisal process is complete, use the executive's appraisal criteria to cascade down to his or her direct reports, to managers, etc.

If there have been written policies for performance evaluations in place for a long time, it is likely that the agency is in compliance or close to compliance in both Standards. Ensure that the board is consistently scheduling and executing reviews for the executive. Ask the executive how effective the approach has been for him or her; focusing on the criteria used to evaluate performance and the types of feedback provided by the board (versus the outcome of the evaluation). It is not suggested the HR committee ask questions about compensation adjustments or performance feedback from specific board members.

For both executive performance and pay, consider the following questions to extend your governance capacity beyond compliance:

- **Did the board discuss national, regional and local comparable compensation data?**
Many agencies compete not just locally for executive talent, but across the Community Action Network and into other nonprofit and community services networks nationally. It is the intention of Standard 7.5 to ascertain comparable salaries for similar organizations and jobs *in the market in which the agency competes*. If the agency needs to post a high level job outside of its immediate geography, then market data for the region or nation should also be used to compare executive compensation levels. This step is critical for the recruitment and retention of future leaders, even if the executive has no plans to leave.
- **Did the board do their due diligence in selecting appraisal criteria that reflects the executive's job description, the agency's strategic vision and goals, and/or ROMA?**
Many executive directors/CEOs report that there is little connection between the board's annual evaluation and the needs and expectations of the community and low-income customers. The annual appraisal is an opportunity to address this potential gap.
- **Did the board reach outside of itself to gather feedback from the community, partners, peers, or employees to help evaluate the executive's performance?** There are

“360 degree” assessments that ensure the executive is reviewed by *all* key stakeholders of the Community Action organization.

- **Where on a transparency scale was the communication of the executive’s performance appraisal? Did he or she share any of the feedback with direct reports or staff? Or does the rest of the organization have no visibility into the process or results? Does the community have any access to information on executive performance?** The community has access to compensation via GuideStar and the agency’s 990 tax exemption filing with the IRS. If there are questions or concerns from the public, stakeholders, or the media about executive compensation, having the ability to communicate performance expectations and results is essential.
- **How was the executive’s compensation compared to the competitive labor market?** Most often, a wage study will include the executive director or CEO. Is the base pay and benefit package in alignment with the market, trailing, or far above market? These are all strategic considerations for the governing board.
- **What is the income gap between the executive (top pay) and other positions in the agency? Does the market support the income differential?** There is often support in the market for a difference between the executive/CEO’s compensation and the next highest paid position in the agency. It is critical for the governing board to understand the market and reward the executive position *appropriately* for the services performed for the agency and the community. This includes but is not limited to proportionate pay for the size of the agency and its programs, the complexity and scope of programs and services, the specifics of the job responsibilities, and the immediate past performance (one year) of the incumbent executive.
- **What are the other connections between the executive performance process and compensation review, and the organization’s practices in the same areas for staff?** As employees of one agency, the HR System (all of the policies and practices) should be consistent from the top of the organization to the bottom, and across all programs and functions. Using the executive director/CEO as a model for best practices, compensation and performance systems can be replicated for all levels.

D. Resources

National Council of Nonprofits – guidance and a sample policy for board approval of executive compensation: <https://www.councilofnonprofits.org/tools-resources/executive-compensation>

U.S. Department of Labor’s Center on Executive Compensation:
<http://www.execcomp.org/About/Principles>

Office of Management & Budget’s Uniform Guidance (2 CFR Part 200.430 and 431):
<http://www.gpo.gov/fdsys/pkg/FR-2013-12-26/pdf/2013-30465.pdf>

GuideStar – Webinar and guidance on establishing nonprofit CEO compensation:
<https://www.guidestar.org/rxa/news/articles/2014/establishing-ceo-compensation.aspx>

Economic Policy Institute – Methodology for measuring CEO compensation and the ratio of CEO-to-worker compensation: <http://www.epi.org/publication/methodology-measuring-ceo-compensation-ratio/>

Nonprofit Risk Management Center – Policy Library: www.nonprofitrisk.org/cap

Office of Head Start Wage Comparability 101 – A sample program guide for conducting a wage and fringe benefits comparability survey: [https://eclkc.ohs.acf.hhs.gov/hslc/tta-system/operations/mang-sys/fiscal-mang/wage-tools/tools/fiscal BI 30607a 111908 2 \(2\) - 10-1-09%5B1%5D.pdf](https://eclkc.ohs.acf.hhs.gov/hslc/tta-system/operations/mang-sys/fiscal-mang/wage-tools/tools/fiscal_BI_30607a_111908_2_(2)_-10-1-09%5B1%5D.pdf)

Fair Labor Standards Act, 29 CFR Part 541 – White collar exemption and other regulatory information: http://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title29/29cfr541_main_02.tpl

7.3, 7.6, 7.8-7.9 - Effective HR Management

A. Guidance on the Definition and Intent of the Standards

These four Standards reflect the foundations of effective HR management in any nonprofit agency, and should be focal points for agencies in achieving basic compliance for effective and efficient administration of personnel functions:

- 1) Up-to-date job descriptions for every unique role
- 2) A standard approach for staff performance evaluations
- 3) Employee orientation for all staff
- 4) Staff development and training aligned to results and accountability

The employee life cycle is a concept in HR Management that describes the stages of an employee's time with a particular organization, and the role the HR function plays at each stage. Some models of the employee life cycle have four stages, while others have six or more. The four Standards in this group apply as follows:

- *Job descriptions* (or defined roles and responsibilities) are the basis for recruitment, selection, performance, succession and development. They apply across the cycle as foundational documents necessary to effective management.
- *Performance evaluations* create clear expectations and provide key documentation in the performance, succession, and development stages of the cycle.
- *Employee orientation* fills the gaps between recruitment, selection, and performance by providing employees with the basic information and tools to meet expectations and succeed in the critical first 60 days in the agency.
- *Development and training* complete the cycle for employees year-over year through performance, succession, development and transition.



STANDARD 7.3: The organization has written job descriptions for all positions, which have been updated within the past 5 years.

The intent of this standard is to ensure direction and accountability for all staff through standardized and up-to-date job descriptions. Job descriptions should reflect the roles and responsibilities required of each position to contribute to the agency's strategies, goals, budgets and expected outcomes. Descriptions need to be updated regularly to reflect the changing workplace, updated roles, and added or eliminated roles.

Beyond creating clearer work expectations and direction, the agency benefits from enhanced supervisor communication and more appropriate enforcement of disciplinary policies when job descriptions are in place. There are several other reasons this standard is included in the HR Management Category:

- **Promotes a minimum uniform schedule for job description updates for the Community Action Network.** If the State previously required agencies to update job descriptions less frequently than once every five years, or not at all, Standard 7.3 will supersede this requirement and agencies will now have to conduct updates every five years at a minimum.
- **Manages the risk of non-compliance with federal and state labor laws.** Incorporating key provisions, accommodations and verification in all job descriptions protects the agency from risk associated with individual employee issues, class action law suits, or adverse union activity. The implementation and communication of job descriptions for all employees is a key step to reducing the exposure risk of the agency (and the Network) to recent public HR management issues. Having and using a scheduled job description review and update policy helps create a culture of accountability to federal grants.
- **Improves the quality and efficacy of Community Action Network's leadership, administrative, and program talent.** With job descriptions aligned to the work needed and performed, the agency will be able to recruit and retain quality nonprofit talent at all levels of the agency. Annual performance appraisals against goals and job duties, fair and equitable compensation, and effective training and development all hinge on the accuracy of the agency's job descriptions.

There are many templates and varieties of job description within nonprofit organizations. From the Society for Human Resource Management (SHRM):

A job description is a useful, plain-language tool that describes the tasks, duties, functions and responsibilities of a position. Job descriptions are used for a variety of reasons, such as a tool for recruiting, determining salary levels, conducting performance reviews, clarifying missions, establishing titles and pay grades, and creating reasonable accommodation controls, as well as for career planning and training exercises.

Additionally, job descriptions are important tools for maintaining compliance with the Fair Labor Standards Act (FLSA) and the Americans with Disabilities Act (ADA).

The process of developing job descriptions involves: a) performing a job analysis; b) determining the essential functions of the job; c) organizing the data concisely and in the

company's standardized job description format; d) including a disclaimer that indicates that the job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee; and e) finalizing the draft job description for review and approval by management and the human resource department.

The five key components typically seen in job descriptions are:

- Heading information
- Summary of the job or objectives of the job
- Job duties and responsibilities
- Special demands or responsibilities
- Minimum qualifications

Additionally job descriptions should clearly state the agency's policy on equal opportunity employment, employment at will, ADA accommodations, Health Insurance Portability and Accountability Act (HIPAA), and other HR statutes as they apply.

STANDARD 7.6: The organization has a policy in place for regular written evaluation of employees by their supervisors.

The intent of this standard is to ensure agency accountability for staff supervision and performance reviews through a written policy. The agency's policy should be included in the Personnel Policies (Standard 7.1), and it should outline the reason for conducting employee evaluations, the timing for regular evaluations, and what employees should expect from their supervisors in terms of evaluation criteria, ratings, and how the evaluation will be used to determine any compensation, promotion, or performance improvement decisions. The organization's HR Policy and Procedures manual should further document the procedures and methods for supervisors to follow in conducting regular written evaluations for employees.

Beyond creating clearer performance and evaluation expectations and direction, the policy will help new employees understand and operate in the organization's culture, and provide a common link between supervisors, employees, and HR. There are several other reasons this standard is included in the HR Management Category:

- **Promotes a minimum uniform expectation for employee evaluations across the Community Action Network.** If the State previously did not require agencies to implement a policy for regular written employee evaluations by supervisors, Standard 7.6 provides this requirement and agencies will now have to write or revise their policies to ensure regular written evaluations are conducted by supervisors for all employees.
- **Manages the risk of employee discrimination and/or conflict of interest claims.** Incorporating written evaluations for employees protects employees, supervisors and the agency from risk associated with individual employee/supervisor issues, class action law suits, or adverse union activity. The implementation of a written evaluation policy is another key step to reducing the exposure risk of the agency (and the Network) to recent public HR management issues. Using a common evaluation form, and expecting all supervisors to provide regular written evaluations under an agency policy helps create a culture of accountability to federal grants.

- **Sets appropriate expectations for the role of supervisors, and the process by which employee performance is effectively managed.** Coordinated written evaluations, in conjunction with good supervisor training, ensures the organization can be proactive in setting performance expectations, evaluating performance fairly, and rewarding or disciplining based on objective rather than subjective criteria. Too many organizations have strong disciplinary policies for documented behavior detrimental to its success, without equally strong policies for managing the behavior and talent that make it successful. For the Network and individual organizations to continue to excel, this Standard is a priority for HR Management in the future.

STANDARD 7.8: All staff participate in a new employee orientation within 60 days of hire.

New employee orientation refers to a training program that occurs when an employee first begins employment with an organization. The Standard anticipates that the 60 day hire clock begins the first day an employee works at the organization. According to SHRM, there are three purposes to providing new employees with a timely orientation:

- 1) Orientation – communication of factual information about pay and benefits, reviewing company rules and policies, and completing paperwork.
- 2) Onboarding – an introduction, typically for new managers or technical staff, to the work they will be supervising, the culture, and the operation of the agency.
- 3) Socialization – meetings or other processes to help new hires adapt, form work relationships, and find their place in the organization.

The intent of this standard is to ensure that organizations follow through on the investment in employees and avoid costly turnover by providing new hires with the information, training, and resources necessary to be successful in the culture and in their job roles. A key task during orientation is to provide an early introduction and overview to many – if not all – of the organization’s Personnel Policies.

Beyond timely communication of key policies, establishing a thorough onboarding process helps to create and sustain an organizational culture where the mission of Community Action, agency and program goals, roles and responsibilities, and performance expectations can be shared in a consistent and positive way. There are several other reasons this standard is included in the HR Management Category:

- **Promotes a minimum uniform schedule and expectation for employee orientation across the Community Action Network.** If the State previously required agencies to provide new hire orientation with more flexibility than within 60 days of hire, or not at all, Standard 7.8 will supersede this requirement and agencies will now have to conduct orientation for all employees within 60 days of their first day at work.
- **Shortens the employee learning curve for complex programs and operations.** Human service programs include a wide range of specializations, job duties, partnerships, community stakeholders, and associated knowledge. Administration of federal and state grants, program operations, and business support functions also involve jobs with a high degree of complexity. Timely and thorough orientation helps to introduce key goals of Community

Action in the local community, while imparting critical organization and job-specific knowledge necessary to perform quickly and effectively.

- **Sets appropriate expectations for the role of HR (and/or of agency leadership) in the employee life cycle.** Organizations often put much time and resources into the recruiting and hiring processes for new employees. Selection of qualified staff is a critical concern to everyone in the organization, yet preparation and retention of that staff is difficult to manage if left to individual supervisors. New hire orientation, coordinated by HR and supported by executive leadership, is a proven strategy to reduce voluntary turnover and improve on-the-job productivity in a shorter time frame.

STANDARD 7.9: The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.

Training and staff development are critical for any viable service organization, and especially those which provide services to customers in communities where resources for low-income families are scarce. Community Action staff are often one of the only links a customer or family has to meet basic needs. Without appropriate training, that link can be broken or badly executed. The intent of this standard is to ensure that training and technical assistance (T&TA) is appropriately provided to staff to support the purpose and goals of Community Action in local programs. ROMA (results oriented management and accountability) is included to ensure a “continuous improvement” focus across the Network, within every agency and job role.

Guidance from OCS in the Partnership’s Self-Assessment Tool instructs that there are no specific requirements for training topics or training content, with the exception of ROMA (or a comparable system if one is used and approved by the State). Standard 7.9 may be met through in-house, community-based, conference, online and other training modalities.

There are several other reasons this standard is included in the HR Management Category:

- **Promotes ongoing training to support the employee life cycle after orientation.** If the organization considers an orientation the end of formal job training, this Standard helps to ensure attention is given to continued development of staff, maximizing payroll investment in current employees, and allocating T&TA budgets to all staff.
- **Supports a learning and development culture across the Community Action Network.** There are many opportunities for training and development for agencies in local communities and across the country, including online and on-demand options. It is an agency or program decision to continuously prioritize time and resources and help staff to identify, attend, and implement training best suited for their job responsibilities. Benefits to establishing a learning culture include: better applicants for open positions, better retention, improved quality, improved productivity, succession and replacement options, and less risk across the organization.
- **Increase agency capacity.** Most agencies struggle to add staff between funding cycles, and many have consolidated positions and the number of resources over the past decade or more. To continue to serve the mission of Community Action and the changing needs of local communities, organizations need to be creative, flexible, and continuously adding

capacity without adding payroll expense. According to the Association for Talent Development (ATD), the top capacity-building investments for service organizations are individualized development plans connected to an overall talent management strategy.

B. Guidance on Compliance and Documentation

STANDARD 7.3: The organization has written job descriptions for all positions, which have been updated within the past 5 years.

The assessment team should always begin the process of documenting compliance with the Organizational Standards by reviewing all available guidance from the State CSBG Office on the interpretation of the Standard and required documentation. The assessment team should also review any State requirements for the agency's job descriptions. Specific issues the assessment team should consider that may affect compliance with this Standard include:

- **If job descriptions are standardized and complete across the agency.** The Standard is clear that all positions have job descriptions that are updated at least every five years. Many agencies update descriptions only when filling a vacancy, creating a new job role, or in case of an emergency replacement. The requirement is to ensure that all job descriptions are being reviewed and updated regularly.
- **If the same job description is used for dissimilar roles with varying responsibilities. Or, contrarily, each employee has his/her own job description.** Often job description updates are overlooked at times of growth or consolidation. This can lead to the copy/paste effect for agencies where one description or a variation is used to describe many different roles. By contrast, some agencies allow supervisors or HR to create descriptions for each employee. This approach fails to recognize that many roles within an agency are substantially the same and can use the same or similar job descriptions.
- **How job descriptions are updated and the involvement level of supervisors and staff in the process.** Depending on the agency's job description policy and procedures, it is important that the individuals who best know the qualifications, responsibilities, and changing nature of each job are involved in the development, review, and/or updating of descriptions. Even in smaller agencies, it is usually inappropriate for one individual to have the responsibility for updating every job description. Supervisor and position incumbents or, at a minimum an HR committee, should participate in updating relevant job descriptions.

Documentation that an agency is in compliance with Standard 7.3 should show three things: (1) what qualifies as "all" positions; (2) the agency's job descriptions; and (3) dated documentation noting that the descriptions have been updated.

Documentation might include:

- Organizational chart(s)
- Staff lists with role titles
- Standard job description template
- Alternative job description templates
- Sample job descriptions (or all job descriptions, depending on the state)

- Dated board, committee, or HR documentation noting documents have been updated.

STANDARD 7.6: The organization has a policy in place for regular written evaluation of employees by their supervisors.

The assessment team should again begin the process of documenting compliance by reviewing all available guidance from the State on the interpretation of the Standard and required documentation. The assessment team should review any State requirements for written employee evaluations. Specific issues the assessment team should consider that may affect compliance with this Standard include:

- **If there is an existing employee evaluation policy for the agency.** Does the evaluation policy include how often each individual's performance will be evaluated, when during the year, and by whom? Is the policy clear about a written evaluation as the requirement, including who writes the evaluation, in what format, and where the documentation is archived? Formal performance documentation should be kept in each employee's HR file, secured in the HR department or a similar restricted and secure area.
- **If there is no existing employee evaluation policy for the agency.** Ensure that executive leadership and/or the governing board are prepared to support regular appraisals for every employee. Share this Standard and the intent provided in this document with them. Choose a policy template or ask neighboring or partner agencies for copies of theirs. Ensure the newly drafted policy aligns to the agency's vision and values, and that supervisors are clearly accountable for the regular written performance evaluation.

Documentation that an agency is in compliance with Standard 7.6 show that the organization has an evaluation policy, which may be embedded in larger Personnel Policies and/or HR Policy & Procedures manual.

STANDARD 7.8: All staff participate in a new employee orientation within 60 days of hire.

The assessment team should document compliance by first reviewing guidance from the State on the interpretation of the Standard and required documentation. The assessment team should review any State requirements for employee orientation. Specific issues the assessment team should consider that may affect compliance with this Standard include:

- **If there is an existing employee orientation program for the agency.** Does every employee receive the orientation within 60 days of his or her start date? If the implementation of the orientation is unstructured, steps should be taken to ensure that an individual or a small team can update the process and orientation calendar to meet the Standard's key requirement. Many organizations group new hires whenever possible and deliver orientation in stages, beginning with key policy and benefit information in the first 30 days of hire.

Documentation that an agency is in compliance with Standard 7.8 should show two things: (1) policy related to orientation; and (2) dated documentation in HR files noting attendance.

Documentation might include:

- Personnel Policies or Employee Handbook
- Orientation checklist(s)
- Orientation presentation or materials
- Onboarding presentation or materials
- Sampling of HR/personnel files for documentation of attendance

STANDARD 7.9: The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.

The assessment team should first review all available guidance from the State on interpretation of the Standard and required documentation. The assessment team should review any State requirements for employee training and development. Specific issues the assessment team should consider that may affect compliance with this Standard include:

- **If there is ongoing staff training made available.** Does staff have access to training communication and registration opportunities? Is there a ROMA trainer available to staff in your state? (If not, has the state communicated ROMA equivalency options?) If the training provided in the past has not been made readily available to staff, has not been an ongoing priority, *or* is missing ROMA, then the organization is at risk for being out of compliance. These three stipulations should be assessed and remedied first.

Documentation that an agency is in compliance with Standard 7.9 should show that training was conducted or made available and that the offerings include ROMA.

Documentation might include:

- Training plan(s)
- Documentation of trainings: presentations, evaluations, attendee lists
- Documentation of attendance at offsite training/events/conferences

C. Beyond Compliance: Effective HR Management

As a keystone to organizational success, it is critical to move beyond HR management compliance and consider methods for achieving stronger practices to be successful and sustainable in an uncertain future. There are several things you can do to improve around the employee lifecycle. Consider:

- **How employee evaluations are written, delivered, and then documented and submitted by supervisors.** Depending on the organization's policy and State requirements for performance evaluations, it is important to provide clear procedures and some form of supervisor training that aligns to the policy. The procedures can be kept in the HR Policy & Procedure manual and/or provided through ongoing supervisor coaching and development activities. As with new employees, new supervisors require some orientation and training about duties and responsibilities they gain with the role. Written performance evaluations that support the organization's goals and talent management approach are a learned skill.

- **Job descriptions contain policy compliance language and employee and management acknowledgement.** All job descriptions in the agency should reflect the major applicable federal and state labor laws. These clauses and language additions should be covered in the Personnel Policies and included on every job description. Employees should be asked to review and sign an acknowledgement of receipt of their designated job description for effective communication and risk mitigation.
- **Implementing performance management as a year-round process.** Best practice performance management systems include employee goal-setting, regular informal check-ins, consistent coaching and/or mentoring, and more than one formal meeting to manage performance. The annual appraisal event becomes less of a burden on supervisors, and each employee benefits from guidance and development consistent with a learning and growth culture.
- **Customizing training opportunities.** Strong learning organizations typically spend less on training and development, yet have better retention of their best people. Take the time to learn individual staff motivators, goals, and training styles. Supervisors can record this basic “talent tracking” information in the HR database or in their informal employee files. Identify learning opportunities that best fit individual or small group needs, budget accordingly, and establish a simple request and approval process that checks back against the documented talent information.
- **Establishing a system of coaching and mentoring.** Today’s changing workplace and diverse talent pool mean managers need to be able to adapt their approach to the person and situation. Simple directives and discipline for non-compliance are no longer an effective motivators; new and tenured staff require help seeing how they: (1) contribute to the mission; (2) work through continuous change and transitions; and (3) achieve challenging outcomes for low-income customers and communities. Formal coaching and mentoring programs may not replace hierarchical organization structures, but they are effective approaches for the world we live and work in.

It is strongly suggested that the HR assessment team, with support from executive management and – if appropriate – the governing board, use the questions and resources that follow to conduct an evaluation of how the organization manages *all of its HR function and processes* (the “HR System”). No matter what level of effort the team chooses, documenting and sharing recommendations for ways to improve helps the agency incorporate the ROMA cycle into the regular assessment process for compliance with the Organizational Standards.

Incorporating HR best practices from the various perspectives – legal, compliance, compensation and benefits, talent management, and employee engagement – can be daunting, even for an experienced HR professional or team of qualified agency leaders. Options might include:

- **Join the local or regional SHRM Chapter and attending meetings and training events.** SHRM membership offers the dual benefits of access to best practice tools and templates, and networking with other HR professionals who can provide resources and technical assistance. The organization has affiliate groups in all major metropolitan areas, near many rural communities, as well as annual conferences and training events offered

nationally. The SHRM website is extensive and online learning is offered frequently. SHRM certification is also a consideration for larger organizations with dedicated HR staff. There are various levels of certification, all globally recognized for their core competencies and proficiency levels.

- **Invest in an external HR System review or “audit” from a professional consultant and/or employment lawyer.** If extensive internal training and knowledge development is required before the organization has the capacity to pursue best practices in its HR System, it may consider the short-term assistance of a qualified external consultant or advisor. A typical review/assessment and deliverable will help the organization analyze and prioritize opportunities for improvement, and provide expert suggestions on maximizing resources efficiently.
- **Arrange a peer review of the organization’s HR System.** If the organization is seeking ideas and support for best practices within the Network or from other community nonprofits, sometimes all it takes is an invitation and commitment to sharing in the future. Many communities include networks of practitioners in HR, who work for organizations that encourage capacity building in other community-based organizations. Contact SHRM to locate them, attend a Chamber of Commerce or like meeting, or consider reaching out to your governing board, advisory councils, and other low-income community members.
- **Identify the future talent needs and gaps in the HR function and plan ahead for future hiring/succession.** Whatever the method and timeline selected to pursue improvements to the HR System, the organization will benefit from advanced preparation for the future of talent management. Many trends in the grant-funded nonprofit industry point to a growing need for professional HR management. Agencies which have traditionally managed HR functions without a qualified/experienced HR staff will likely need to change strategies. With the nine Standards in place, now is a key time to anticipate and research what the agency needs to be successful in 3, 5, or 10 years. Please note that Standard 4.5 under Organizational Leadership states that *“The organization has a written succession plan in place for the CEO/ED, approved by the governing board, which contains procedures for covering an emergency/ unplanned/ short-term absence of 3 months or less, as well as outlines the process for filling a permanent vacancy”*
- **Subscribe to leading magazines and websites/blogs for up-to-date HR practices.** Much of the leading knowledge and innovations within HR practice can be found in published content – both online and offline. The committee responsible for assessing Category Seven can further educate and equip themselves for ongoing improvements by selecting and subscribing to any of the following magazines, blogs, and websites:
 - HR.com
 - HR Magazine (SHRM)
 - Linked:HR (LinkedIn)
 - Human Resources Professionals Worldwide (LinkedIn)
 - Fistful of Talent Blog (Kris Dunn)
 - The HR Capitalist Blog (Kris Dunn)
 - True Faith HR Blog (Matthew Stollak)
 - TLNT Blog (Various Authors)

- @JenniferMcClure (Twitter account for Jennifer McClure)
 - @lruettimann (Twitter account for Laurie Ruettimann)
 - @psecundaWrkProf (Twitter account for Paul M. Secunda, PhD)
- **Write and communicate HR philosophies, plans, and strategic goals to align with the organization's Strategic Plan.** The Organizational Standards as a whole set forth an expectation that the entire agency aligns with its community needs, a shared vision, one strategic plan, and common goals. The HR System should be connected directly to these broader concepts in as many ways as possible. Beginning with philosophy statements for critical HR functions such as compensation, benefits, and staff development, the more effective approach to increasing the capacity and effectiveness of HR is through planning and intentional support of the wider goals and outcomes of the organization.
 - **Identify the schedule and process for ongoing HR System assessment and evaluation.** Assessment of Category Seven and the HR System should not be a one-time event. To achieve ROMA principles of continuous improvement and to maintain compliance in HR, the organization should create an ongoing process for self-evaluation, implement a schedule to make the work effort acceptable to leaders and committee members, and plan and communicate the outcomes to coincide with external monitoring and other organizational assessments, as appropriate.
 - **Consider adding more strategic questions to the Standards assessment in the future:**
 - What are the employee retention and engagement trends at the agency? Are these tracked and reported on regularly to decision-makers?
 - Is there an employee council or committee that contributes to HR decision-making? If not, is there a reliable and anonymous system of upward feedback?
 - Are job descriptions inclusive of the job's mission relative to the agency? Do they include knowledge, skills, abilities (or competencies)?
 - How are job descriptions used in other key HR related processes?
 - Is the performance management approach a year-long process or a one-time evaluation event, from the employee's perspective?
 - Do employee performance ratings and written evaluations go anywhere in the agency? For example, to a compensation committee? Or to the directors and executives for succession planning?
 - What is the connection between job role, performance, compensation and other rewards in the agency?
 - Is the agency's or its programs' orientation measured in terms of employee satisfaction? Do employees volunteer to help with orientation for others?
 - Are training and development decisions tied to goals? Does the agency promote and implement individualized training plans?
 - How is the T&TA budget allocated for different grants, programs, and teams/staff?

D. Resources

Association for Talent Development (ATD), a professional membership organization supporting those who develop the knowledge and skills of employees in organizations around the world. <https://www.td.org/>

Society for Human Resource Management's (SHRM) *HR Magazine* online:
<http://www.shrm.org/publications/hrmagazine/>

U.S. Department of Health & Human Services Sample Individual Development Plan, a sample/template for individualized employee training and development plans, to assist with Standard 7.9: <http://www.hhs.gov/asfr/ogapa/acquisition/sample-acquisition-workforce-individual-development-plan.html>

ROMA and Quality Assurance, an application of the ROMA model to six infrastructure areas in agencies to assist with Standard 7.9: http://www.roma-nptp.org/resources/QCAS_Overview.ppt

The Community Action Partnership's overview of HR technical assistance, *Category 7 – Human Resource Management*. Aired September 15, 2015:
<https://www.youtube.com/watch?v=wH4pMb6QuA0&feature=youtu.be>

	Unacceptable	Unsatisfactory	SATISFACTORY	Advancing	Outstanding
Standard 7.1	My organization does not have written personnel policies.	My organization has written personnel policies that have not been reviewed by an attorney in the past 5 years and/or approval by our governing board has not been documented in that timeframe.	The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.	My organization has current written personnel policies that have been reviewed by a Human Resources professional and an Employment Law attorney in the past 2-3 years. Our governing board reviews and approves policies annually.	My organization has met the Advancing criteria for 7.1 and our governing board includes a Human Resources expert or HR committee, which is involved in annual policy reviews, updates, and approvals. Supervisors are trained on the policies and procedures.
Standard 7.2	My organization has not made available the employee handbook (or personnel policies) to all staff; it does not have adequate written policies to share at this time (Standard 7.1).	My organization does not consistently make personnel policies and changes available to all staff; it is not making adequate progress on the necessary reviews and approvals from Standard 7.1.	The organization makes available the employee handbook (or personnel policies in cases without a handbook) to all staff and notifies staff of any changes.	My organization makes available an employee handbook to all staff, as well as HR policies and procedures for supervisors. Regular and consistent communication on updates, changes or policy interpretation is provided.	My organization has met the Advancing criteria for Standard 7.2 and proactively communicates updates, changes or policy interpretation to supervisors and staff through identified communication channels and training opportunities.
Standard 7.3	My organization has some written job descriptions; the majority have not been updated within the past 5 years and subsequently do not reflect current job roles and responsibilities, requirements, or needed competencies.	My organization has written job descriptions for all or most positions; they have not all been updated within the past 5 years and subsequently do not reflect current job roles and responsibilities, requirements, or needed competencies.	The organization has written job descriptions for all positions, which have been updated within the past 5 years.	My organization has written job descriptions for all positions, which have all been updated within the past three years. Job descriptions are also updated whenever a position changes significantly, or the person in the position changes.	My organization has met the Advancing criteria for Standard 7.3 and incorporates job descriptions in other annual HR systems and processes: hiring, performance evaluations, promotions, succession, and training and development.
Standard 7.4	Our governing board does not conduct a regular performance appraisal of the CEO/executive director; a performance appraisal tool does not exist to evaluate the CEO/executive director role.	Our governing board conducts a performance appraisal of the CEO/executive director less frequently than each calendar year.	The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.	Our governing board conducts an annual performance appraisal of the CEO/executive director, which includes feedback from all board members.	My organization has met the Advancing criteria for Standard 7.4 and ties measurable goal attainment and performance to CEO/executive director compensation (Standard 7.5).
Standard 7.5	Our governing board does not conduct a compensation review for the CEO/executive director.	Our governing board reviews and approves the CEO/executive director compensation less frequently than each calendar year.	The governing board reviews and approves CEO/executive director compensation within every calendar year.	Our governing board reviews and approves the CEO/executive director compensation and benefits package within every calendar year; it uses reputable market data from comparable organizations and positions.	Our governing board has met the Advancing criteria for Standard 7.5 and assures that the organization conducts a compensation and benefits review for all management positions every three years.

Category 7: Human Resource Management – Assessment Scale

	Unacceptable	Unsatisfactory	SATISFACTORY	Advancing	Outstanding
Standard 7.6	My organization and its leaders do not support written evaluations of employees by their supervisors; neither a policy nor an evaluation tool exists.	My organization does not have a policy in place for written evaluation of employees by their supervisors; employees are inconsistently provided feedback and/or written evaluations by their supervisors.	The organization has a policy in place for regular written evaluation of employees by their supervisors.	My organization has a policy in place for annual written evaluation of employees by their supervisors; it incorporates individual goals and alignment between compensation and promotion/performance improvement actions.	My organization has met the Advancing criteria for Standard 7.6 and incorporates formal goal setting, training and development plans, and regular coaching into the employee evaluation procedures. Supervisors are trained on the policy and procedures.
Standard 7.7	My organization and its leaders do not support a culture of transparency and accountability through a written whistleblower policy; a policy does not exist.	My organization has a whistleblower policy that has not been reviewed or approved by our governing board in the past year.	The organization has a whistleblower policy that has been approved by the governing board.	My organization has a board approved whistleblower policy in place that includes procedures for confidential disclosure and reporting, investigation steps, retaliation protections, and communication/corrective action.	My organization has met the Advancing criteria for Standard 7.7 and the whistleblower policy is periodically reviewed by our governing board to ensure compliance.
Standard 7.8	My organization does not have new employee orientation for all staff.	My organization has new employee orientation for all or most staff that occurs sometime after hire, but not always within 60 days.	All staff participate in a new employee orientation within 60 days of hire.	My organization provides new employee orientation within 60 days of hire that is specific to the individual workplace, includes timely employee handbook information, and prepares new employees for the culture and basic expectations of the workplace.	My organization has met the Advancing criteria for Standard 7.8 and the orientation involves cohorts of employees who will work together, current leadership or management representation, and follow up beyond the 60 days to measure compliance and employee satisfaction.
Standard 7.9	My organization does not conduct or makes available staff development/training (including ROMA) on an ongoing basis.	My organization conducts or makes available staff development/training to some or all employees but it does not include ROMA theory, concepts or application.	The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.	My organization conducts and/or makes available staff development/training that includes ROMA and is specific to the individual's role and responsibilities within the organization.	My organization has met the Advancing criteria for Standard 7.9 and consistently incorporates formal training/development plans in its budgets.

	Documentation Used	Unacceptable	Unsatisfactory	Satisfactory	Advancing	Outstanding	Action to be Taken	Individual(s) Responsible	Target Date(s)
Standard 7.1 The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.	•								
Standard 7.2 The organization makes available the employee handbook (or personnel policies in cases without a handbook) to all staff and notifies staff of any changes.	•								
Standard 7.3 The organization has written job descriptions for all positions, which have been updated within the past 5 years.	•								
Standard 7.4 The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.	•								
Standard 7.5 The governing board reviews and approves CEO/executive director compensation within every calendar year.	•								

	Unacceptable	Unsatisfactory	SATISFACTORY	Advancing	Outstanding
Standard 7.1	My organization does not have written personnel policies.	My organization has written personnel policies that have not been reviewed by an attorney in the past 5 years and/or approval by our governing board has not been documented in that timeframe.	The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.	My organization has current written personnel policies that have been reviewed by a Human Resources professional and an Employment Law attorney in the past 2-3 years. Our governing board reviews and approves policies annually.	My organization has met the Advancing criteria for 7.1 and our governing board includes a Human Resources expert or HR committee, which is involved in annual policy reviews, updates, and approvals. Supervisors are trained on the policies and procedures.
Standard 7.2	My organization has not made available the employee handbook (or personnel policies) to all staff; it does not have adequate written policies to share at this time (Standard 7.1).	My organization does not consistently make personnel policies and changes available to all staff; it is not making adequate progress on the necessary reviews and approvals from Standard 7.1.	The organization makes available the employee handbook (or personnel policies in cases without a handbook) to all staff and notifies staff of any changes.	My organization makes available an employee handbook to all staff, as well as HR policies and procedures for supervisors. Regular and consistent communication on updates, changes or policy interpretation is provided.	My organization has met the Advancing criteria for Standard 7.2 and proactively communicates updates, changes or policy interpretation to supervisors and staff through identified communication channels and training opportunities.
Standard 7.3	My organization has some written job descriptions; the majority have not been updated within the past 5 years and subsequently do not reflect current job roles and responsibilities, requirements, or needed competencies.	My organization has written job descriptions for all or most positions; they have not all been updated within the past 5 years and subsequently do not reflect current job roles and responsibilities, requirements, or needed competencies.	The organization has written job descriptions for all positions, which have been updated within the past 5 years.	My organization has written job descriptions for all positions, which have all been updated within the past three years. Job descriptions are also updated whenever a position changes significantly, or the person in the position changes.	My organization has met the Advancing criteria for Standard 7.3 and incorporates job descriptions in other annual HR systems and processes: hiring, performance evaluations, promotions, succession, and training and development.
Standard 7.4	Our governing board does not conduct a regular performance appraisal of the CEO/executive director; a performance appraisal tool does not exist to evaluate the CEO/executive director role.	Our governing board conducts a performance appraisal of the CEO/executive director less frequently than each calendar year.	The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.	Our governing board conducts an annual performance appraisal of the CEO/executive director, which includes feedback from all board members.	My organization has met the Advancing criteria for Standard 7.4 and ties measurable goal attainment and performance to CEO/executive director compensation (Standard 7.5).
Standard 7.5	Our governing board does not conduct a compensation review for the CEO/executive director.	Our governing board reviews and approves the CEO/executive director compensation less frequently than each calendar year.	The governing board reviews and approves CEO/executive director compensation within every calendar year.	Our governing board reviews and approves the CEO/executive director compensation and benefits package within every calendar year; it uses reputable market data from comparable organizations and positions.	Our governing board has met the Advancing criteria for Standard 7.5 and assures that the organization conducts a compensation and benefits review for all management positions every three years.

Category 7: Human Resource Management – Assessment Scale

	Documentation Used	Unacceptable	Unsatisfactory	Satisfactory	Advancing	Outstanding	Action to be Taken	Individual(s) Responsible	Target Date(s)
Standard 7.6 The organization has a policy in place for regular written evaluation of employees by their supervisors.	•								
Standard 7.7 The organization has a whistleblower policy that has been approved by the governing board.	•								
Standard 7.8 All staff participate in a new employee orientation within 60 days of hire.	•								
Standard 7.9 The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.	•								

	Unacceptable	Unsatisfactory	SATISFACTORY	Advancing	Outstanding
Standard 7.6	My organization and its leaders do not support written evaluations of employees by their supervisors; neither a policy nor an evaluation tool exists.	My organization does not have a policy in place for written evaluation of employees by their supervisors; employees are inconsistently provided feedback and/or written evaluations by their supervisors.	The organization has a policy in place for regular written evaluation of employees by their supervisors.	My organization has a policy in place for annual written evaluation of employees by their supervisors; it incorporates individual goals and alignment between compensation and promotion/performance improvement actions.	My organization has met the Advancing criteria for Standard 7.6 and incorporates formal goal setting, training and development plans, and regular coaching into the employee evaluation procedures. Supervisors are trained on the policy and procedures.
Standard 7.7	My organization and its leaders do not support a culture of transparency and accountability through a written whistleblower policy; a policy does not exist.	My organization has a whistleblower policy that has not been reviewed or approved by our governing board in the past year.	The organization has a whistleblower policy that has been approved by the governing board.	My organization has a board approved whistleblower policy in place that includes procedures for confidential disclosure and reporting, investigation steps, retaliation protections, and communication/corrective action.	My organization has met the Advancing criteria for Standard 7.7 and the whistleblower policy is periodically reviewed by our governing board to ensure compliance.
Standard 7.8	My organization does not have new employee orientation for all staff.	My organization has new employee orientation for all or most staff that occurs sometime after hire, but not always within 60 days.	All staff participate in a new employee orientation within 60 days of hire.	My organization provides new employee orientation within 60 days of hire that is specific to the individual workplace, includes timely employee handbook information, and prepares new employees for the culture and basic expectations of the workplace.	My organization has met the Advancing criteria for Standard 7.8 and the orientation involves cohorts of employees who will work together, current leadership or management representation, and follow up beyond the 60 days to measure compliance and employee satisfaction.
Standard 7.9	My organization does not conduct or makes available staff development/training (including ROMA) on an ongoing basis.	My organization conducts or makes available staff development/training to some or all employees but it does not include ROMA theory, concepts or application.	The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.	My organization conducts and/or makes available staff development/training that includes ROMA and is specific to the individual's role and responsibilities within the organization.	My organization has met the Advancing criteria for Standard 7.9 and consistently incorporates formal training/development plans in its budgets.

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



The screenshot shows the Community Action Partnership website. A red arrow points to the 'quicklinks' section on the left sidebar. The main content area features a banner for the 'COMMUNITY ACTION PARTNERSHIP ANNUAL CONVENTION' held in San Francisco in August 2015, and a 'SAVE THIS DATE!' announcement for the '2016 MANAGEMENT AND LEADERSHIP TRAINING CONFERENCE' in New Orleans, LA, scheduled for January 6-8, 2016. The right sidebar contains links to the 'NATIONAL TRAINING CENTER', 'RESOURCES', and 'LEARNING COMMUNITIES RESOURCE CENTER'.

COMMUNITY ACTION PARTNERSHIP
THE NATIONAL ASSOCIATION | WASHINGTON, DC

quicklinks

- Partnership Membership Form
- Updates on CSBG Organizational Standards and ROMA Next Generation
- Annual Convention
- Certified Community Action Professional (CCAP)
- Subscribe to the eNews
- Community Action Code of Ethics
- New Reality Initiative
- Community Economic Development Website
- Managing My Money Financial Literacy Website
- 2015 Community Action Partnership Fact Sheet

COMMUNITY ACTION PARTNERSHIP ANNUAL CONVENTION
August 25–28, 2015
San Francisco Marriott Marquis
San Francisco, California

SAVE THIS DATE!
JANUARY 6-8, 2016
COMMUNITY ACTION PARTNERSHIP
2016 MANAGEMENT AND LEADERSHIP TRAINING CONFERENCE
WESTIN NEW ORLEANS CANAL PLACE
100 IBERVILLE ST.
NEW ORLEANS, LA

Click [here](#) for the registration form.

PurchasingPoint®
Saving Nonprofits Money for Mission

THE PROMISE OF COMMUNITY ACTION
Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

HOW YOU CAN HELP
Community Action Partnership
1140 Connecticut Avenue, NW
Suite 1210
Washington, DC 20036
phone 202 265 7546

- Technical Assistance Guides
- Update Webinars
- Assessment Tools
- Videos for Governing boards
- Technical Assistance Webinars
- Communications from OCS
- Glossary of Terms
- ...and more!



Community Action Partnership
1140 Connecticut Avenue, NW, Suite 1210
Washington, DC 20036
202.265.7546 | fax 202.265.5048
www.communityactionpartnership.com