

Purpose-Driven Board Governance



In every corner of America. Helping people,
changing lives — for 60 years and counting.

**RECOGNIZING 60 YEARS OF
COMMUNITY ACTION!**



Wisconsin Community Action Conference





Tiffney Marley

Community Action Head Start Graduate



Tiffney Marley, CCAP, NCRT

Senior Vice President, Practice Transformation

National Community Action Partnership

Washington, DC

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.

What We're Covering Today

- Community Action Board Refresh
- Board Purpose Problem
- Four Board Models
- Putting Purpose Into Practice
- Resources



Who is in the room?

- Board Members
- Board Executive Committee Members
- CAA Executive Directors
- CAA Management Team
- State Association Staff



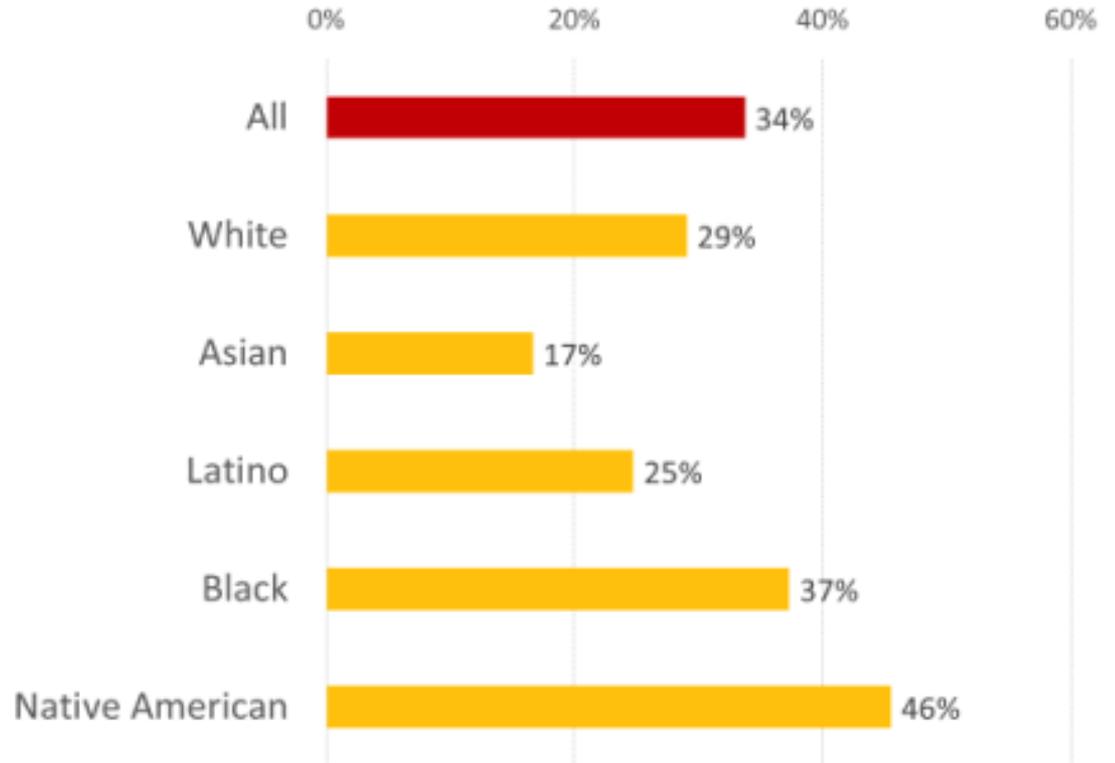


Why did you agree to be a board member?



The Case for Unleashing New Potential

- Share of children with parents in bottom income quintile, who remained in bottom income quintile in adulthood



Reducing Intergenerational Poverty 2023, Consensus Study Report, National Academies Sciences, Engineering, and Medicine



Economic Insecurity Is Widespread, But Families Move In and Out of Poverty

(Drake, 2014)
(Cellini, 2008)
(Mistry, 2002)
(Han, 2021)

Economic insecurity is widespread

-  **Almost 50% of American families** with young children are at risk of poverty before their child enters kindergarten
-  **More than 50% of all Americans** will spend a year in poverty *(by age 65)*
-  **84% of all Black Americans** will spend a year in poverty *(by age 65)*

Families move in and out of poverty over time

-  **Almost 50%** of those who become poor are out of poverty a year later
-  **But more than 50% of those who previously left poverty will return to poverty within 5 years**

**THE VOLATILITY AND TURBULENCE CREATED BY ENTERING & LEAVING POVERTY
MAY CREATE SERIOUS STRESS FOR PARENTS AND IMPACT PARENTING**

Resource: From Chapin Hall, Child and Family Well-being System: Economic and Concrete Supports as a Core Component



We signed on to make a difference

- Create a sense of urgency to get beyond the status quo
- Unleash new potential
- Find new ways to solve tough problems
- Achieve greater impact than we have ever achieved before





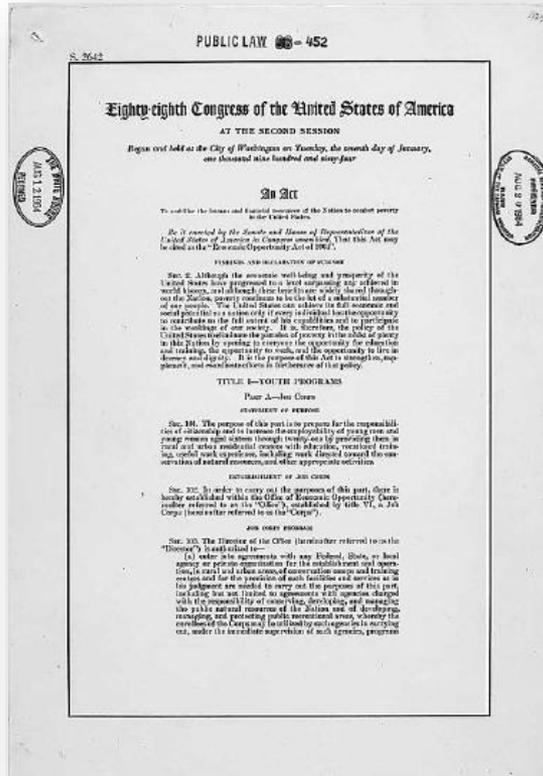
“Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice and discipline.”

— Jim Collins

The Purpose, Power, and Possibility of Community Action



Our Unique Legacy



President Johnson Signs the
Economic Opportunity Act
August 20, 1964



Foundation of Community Action

Economic Opportunity Act of 1964

“Although the economic well-being and prosperity of the United States have progressed to a level surpassing any achieved in world history, and although these benefits are widely shared throughout the Nation, **poverty continues to be the lot of a substantial number of our people.** The United States can achieve its **full economic and social potential** as a nation **only if every individual has the opportunity** to contribute to the full extent of his capabilities and to participate in the workings of our society.”



Strong Roots: Community Action

“...It is, therefore, the policy of the United States to eliminate the paradox of poverty in the midst of plenty in this Nation by opening to everyone the opportunity for education and training, the opportunity to work, and the Opportunity to live in decency and dignity.

It is the purpose of this Act to Strengthen, Supplement, and Coordinate efforts in furtherance of that policy.”

The National Community Action Network has had boots-on-the ground in fighting poverty for low-income children and families in local communities since 1964 when the **Economic Opportunity Act** was ratified.



Our Catalytic Mission

Title II, Section 201 (a), of the Economic Opportunity Act

The basic purpose of Community Action is:

"to stimulate a better focusing of all available local, state, private, and Federal resources upon the goal of enabling low-income families, and low-income individuals of all ages, in rural and urban areas, to attain the skills, knowledge, and motivations, and secure the opportunities needed for them to become self-sufficient."



COMMUNITY ACTION BOARD GOVERNANCE



The Community Action Board

- Community Action Boards are governing bodies that set out the high-level vision, mission, strategic direction of the CAA/CSBG eligible entity
 - The mission establishes the purpose to which the agency resources are to be devoted
 - Boards are required to fully participate in the development, planning, implementation, and evaluation of CSBG (and the agency as a whole too!)
- Boards govern the entire agency, not only CSBG*
 - For a private nonprofit, the governing body IS the board

CSBG Tripartite Board Structure

Democratically Selected
Representatives of Low-
Income Sector

Elected Public Official Sector

Private Sector



At Least 1/3

1/3

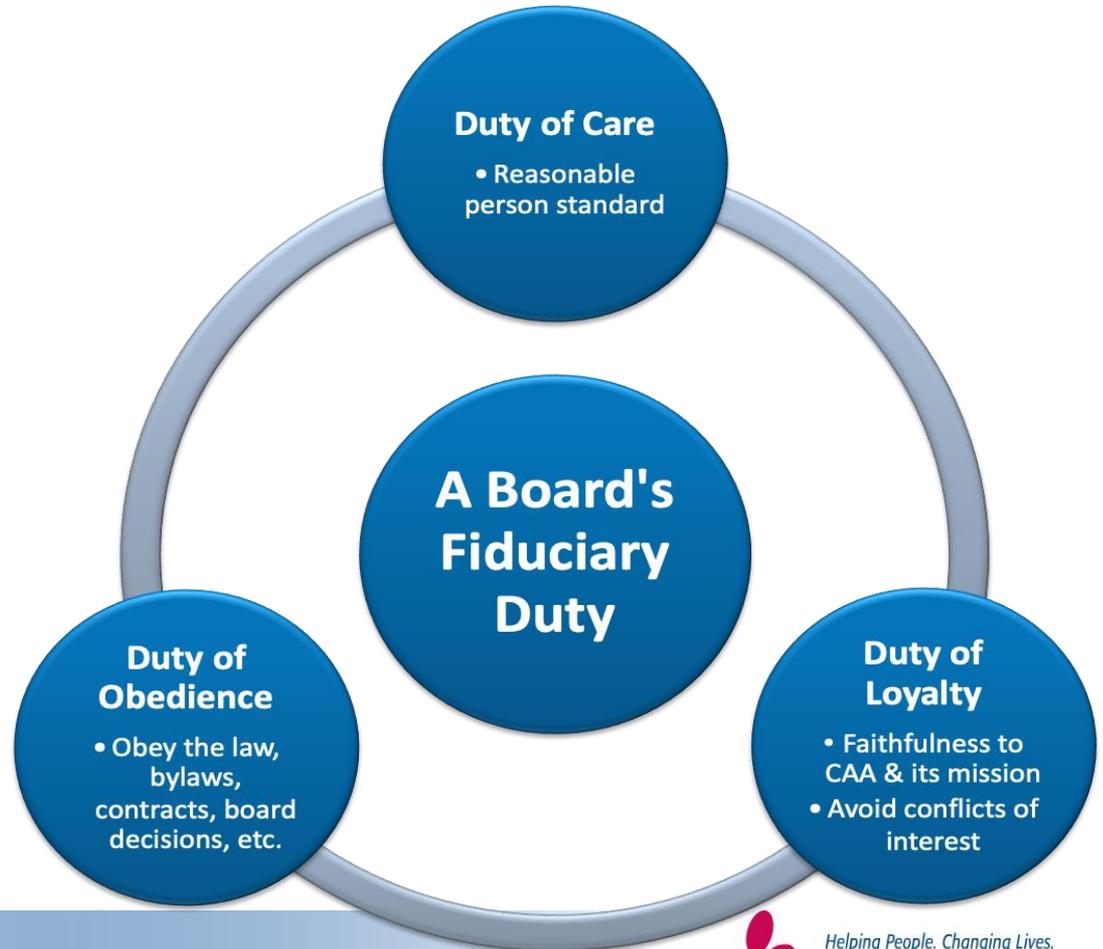
Remainder



Community Action Board Duties

Board members are **fiduciaries**. They have the duty to **act for someone else's benefit** and hold the **agency's interest** ahead of their own

Who benefits?
Who are the
“Shareholders”?



Duty of Care

Board members have a duty of care to act in “good faith” using the degree of “diligence, care, and skill” as “an **ordinarily prudent person** would in a like position and under similar circumstances”

- The “Pay Attention” Duty
- Be attentive, diligent and thoughtful
- Be familiar with organization's activities
- Active preparation and participation in decision making
 - Discuss and dialogue at board meetings
 - Be engaged
 - Ask questions
 - Prep for board meetings
- Attend all board and committee meetings
- Understand the financial position of the organization

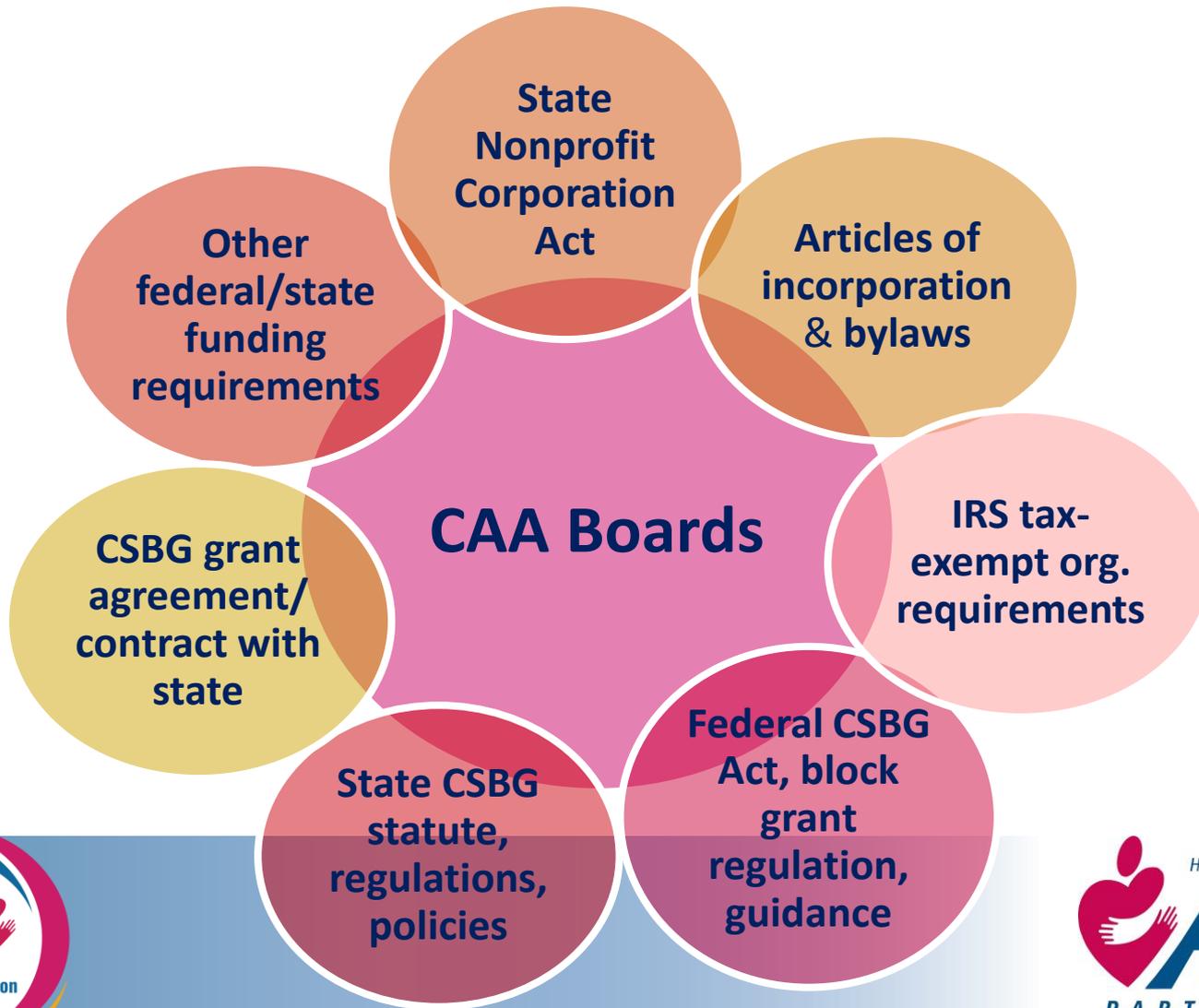
The Duty of Loyalty

- Board Members have a duty to be loyal to the organization
 - Mission
 - Board
 - Avoid Conflicts of Interest
- The “**faithfulness**” duty
- Must act in the **best interests of the organization and its mission**
- Have a written **conflict of interest policy** that is reviewed and signed annually

The Duty of Obedience

- The board has a duty of obedience to the law, organization by-laws, board decisions, contracts, etc.
- Be obedient to the mission of the organization
- Cannot act in a way that is inconsistent to the organization's goals
- Public Trust that board members will manage funds to fulfill the organization's mission
- Ensure organization's resources are dedicated to the mission
- Ensure organization complies with reporting laws

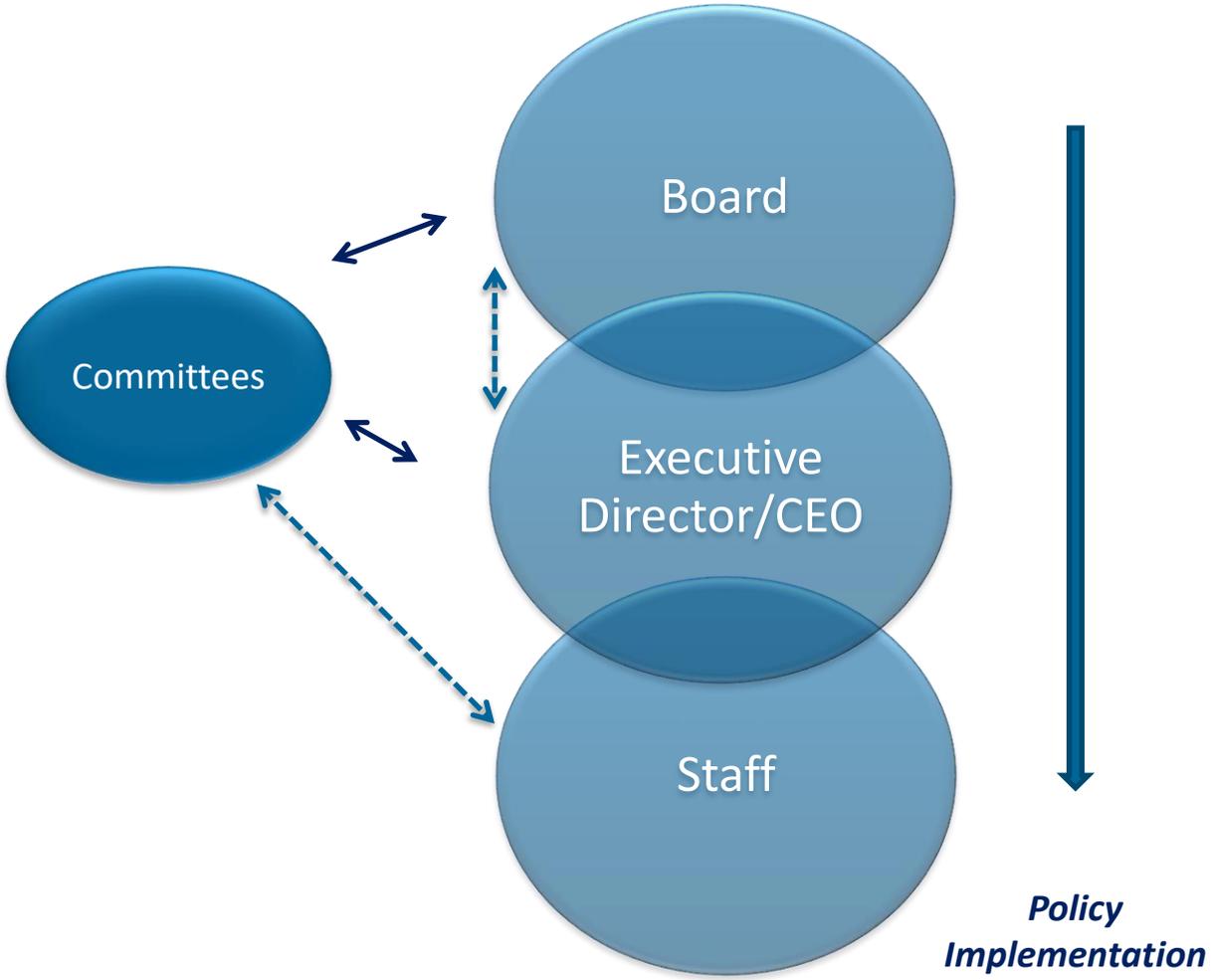
Legal Requirements



Board Members are Expected to:

- Attend board meetings
- Actively prepare for and participate in board meetings
- Understand the financial position and the fiscal documents provided
- Be knowledgeable of the organization's actions
- Do their homework
- Vote on decisions
 - *Honor and respect the overall decision of the board*
- Avoid conflicts of interest
- Honor the sensitive nature of the work
- Be ambassadors of the mission and organization in the community

Board Role



What can Board Engagement Look Like?

- Attend board meetings
- Actively prepare for and participate in board meetings
- Understand the financial position and the fiscal documents provided
- Be knowledgeable of the organization's actions
- Do their homework
- Vote on decisions-honor and respect the overall decision of the board
- Avoid conflicts of interest
- Honor the sensitive nature of the work
- Be ambassadors of the mission and organization in the community

Purpose (Why)



Board Purpose and Meaning

- The essential work can be the least meaningful. Holding the CAA accountable is not compelling.
- However, when we focus the board only on accountability, we have created a job without a compelling purpose.
- When purpose is not compelling people disengage. The more disengaged they are, the less likely they are to ensure accountability-contrary to the fiduciary responsibility.

When we understand our Why, the What gets a lot easier (and compelling)

What

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

How

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

Why

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

The Golden Circle



Purpose-Driven Board Leadership



Noodling

Thinking about your CAA:

- How strong is each area articulated?
- Does the board have a shared understanding in each area?



Putting Purpose Into Practice



Board Purpose and Meaning

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What does your board engagement look like?

- Recruitment
- Retention
- Participation
- From Different Sector Perspectives
- Board Culture



“We fail more often because we solve the wrong problem than because we get the wrong solution to the right problem.”—
Russell L. Ackoff



Board Challenges

- Long-term board vacancies
- High board turnover
- Low board attendance
- Lack of board engagement
- Dysfunctional group dynamics
- Lack of engagement
- Lack of understanding
- Unclear roles, responsibilities, and expectations



Purpose-Driven Board Leadership

Traditional Framing of Board Role

Purpose-Driven Board Leadership



Purpose-Driven Board Leadership

A mindset characterized by four fundamental principles, mutually reinforcing and interdependent, that define the way that the board sees itself and its work.



Noodling

Thinking about your CAA:

- How strong is each area articulated?
- Does the board have a shared understanding in each area?



Purpose-Driven Board Leadership



Purpose before organization: prioritizing the organization's purpose versus the organization itself.



Respect for ecosystem: acknowledging that the organization's actions can positively or negatively impact its surrounding ecosystem, and a commitment to being a respectful and responsible ecosystem player.



Purpose-Driven Board Leadership



Equity mindset: committing to advancing equitable outcomes, and interrogating and avoiding the ways in which the organization's strategies and work may reinforce systemic inequities.

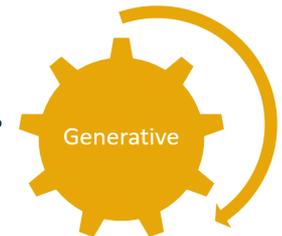
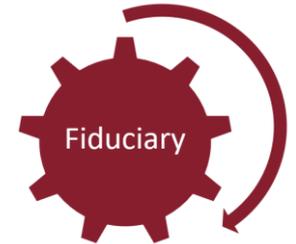


Authorized voice and power: recognizing that organizational power and voice must be authorized by those impacted by the organization's work.

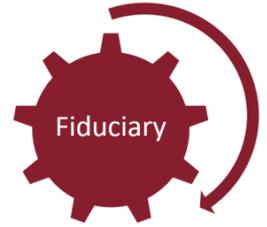


A Tool to Drive Purpose

- Consider when the Board is:
 - Wearing their **fiduciary hat** - boards are watchdogs focused on compliance.
 - In the **strategic mode** - boards are strategists setting goals and mobilizing resources toward execution.
 - In the **generative mode** - boards are engaged and asked to be creative in framing the questions at hand, questioning assumptions, and exploring options.



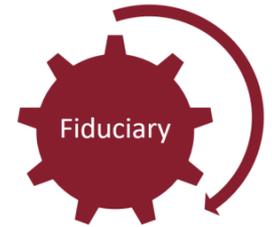
Fiduciary Mode



- The central purpose is stewardship of tangible assets.
- Focus on the fundamentals:
 - Financial status reports
 - Performance outcome reports
 - Ensuring compliance



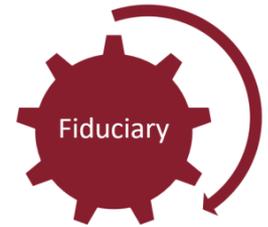
Fiduciary Mode



- Contractual requirements, Audit, IRS Form 990 Review CSBG Organizational Standards, etc.
- There has been a renewed emphasis on boards as fiduciaries—responsible for:
 - Oversight
 - Performance accountability
 - Financial integrity
 - Conservation of assets



Focus on Fiduciary



- Problems are meant to be spotted and beg the question:

What's wrong?

- Sample fiduciary inquiry questions:
 - What does the opportunity cost?
 - What can we learn from the audit?
 - How well does the budget reflect our priorities & mission?



Strategic Mode



- Ensure a winning strategy for the organization
- Focus is on the environment and planning
 - Community Assessment
 - Strategic Plan
 - Navigating Changing Environment



Strategic Mode



- Strategic boards focus on:
 - The direction of the organization
 - Charged with seeing that the organization fulfills its mission
- A strategic board is one that mostly focuses on the strategic goals of the organization, looking out over a multi-year horizon.



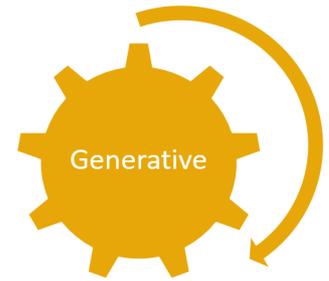
Strategic Mode



- Problems are meant to be solved and beg the question:
What's the plan?
- Sample strategic inquiry questions:
 - What's the plan?
 - Is this business model viable?
 - How well does this model fit with our strategic priorities?
 - Who are our competitors?



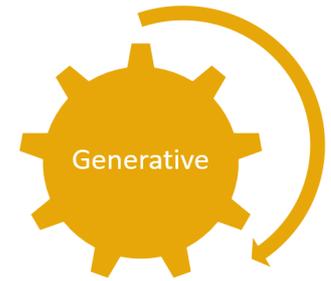
Generative Mode



- A process for deciding what to pay attention to, what it means, and what to do about it.
- Thinks 'outside the box,' or refuses to admit that there IS a box!
- Engages in analytical thinking to probe assumptions and discern challenges.



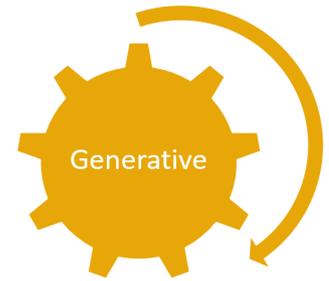
Generative Board



- **‘Governance as Leadership’**- Board's central purpose is to be a source of leadership for the organization.
- A different definition of Leaders:
 - Leaders enable organizations to confront and move forward on complex, value-laden problems that defy a ‘right answer’ or ‘perfect solution.’
- Asks board members to be ‘sense makers’ – interrogating current reality in anticipation of future challenges facing the organization.



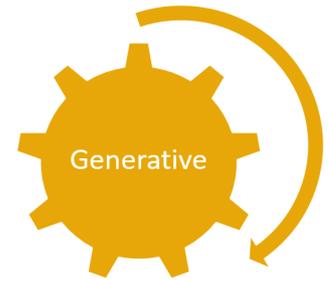
Generative Mode



- Requires
 - The temporary suspension of the things we think we know about how we are supposed to think, and problem solve.
 - To enter the discussion at an earlier phase
 - Intentionally have more philosophical, broader conversations before we discuss a course of action or push for a decision.



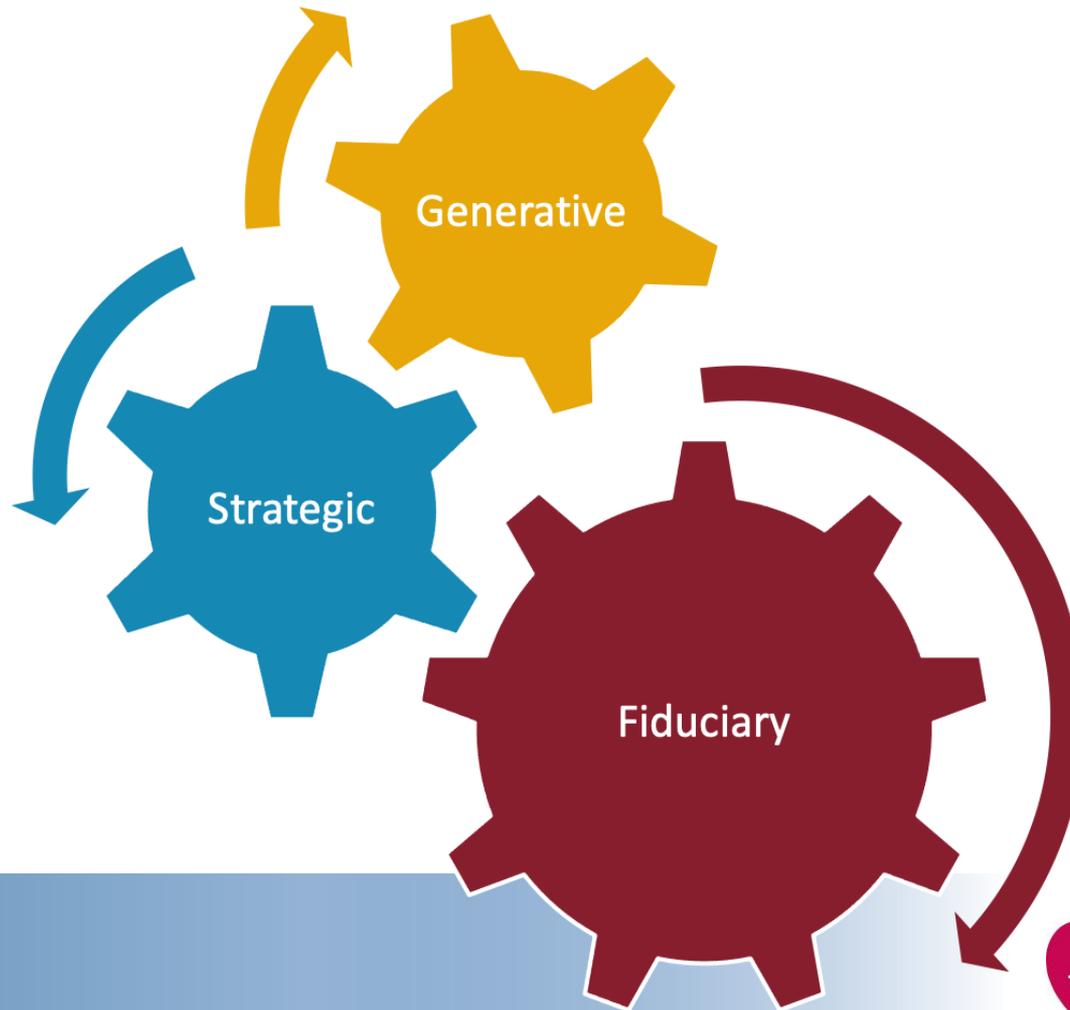
Generative Board



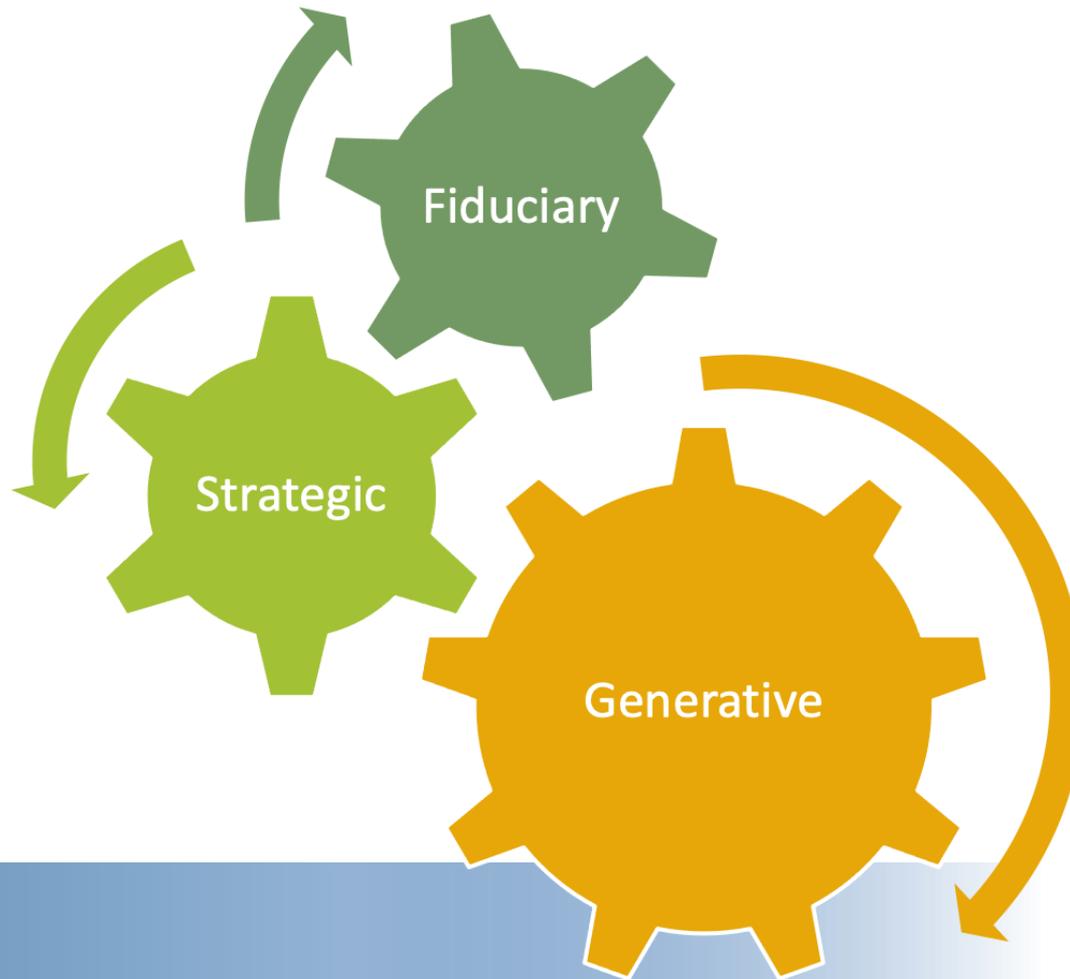
- Problems are meant to be framed and beg the question:
What's the key question?
- Sample generative questions:
 - What are the decisions ahead of us and what process(es) should we use to make them?
 - What can we learn from this?



Three Board Modes

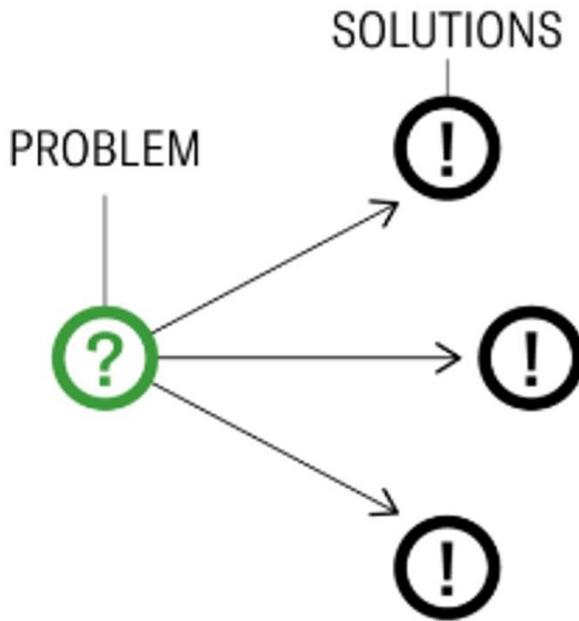


Three Board Modes



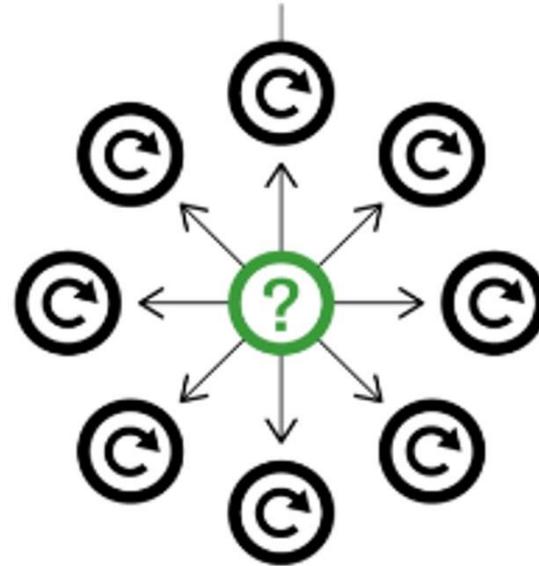
Generative Thinking in Practice

Brainstorming



Frame-storming

ALTERNATIVE PROBLEM FRAMES



Harvard Business Review
[To Solve a Tough Problem, Reframe It](#)

HBR

Board Purpose Problem

- Job descriptions for board members and training for board members tend to speak only to the first 2 modes. Our recruitment of members focuses on modes 1 and 2.
- **Boards need to work in all three modes.**
 - Different issues call for different modes.
- Some boards focus purely on the fiduciary mode. If our question is how to enrich the work of the board, helping the board think more in the generative is a solution worth considering.

Generative Thinking in Practice

Have a consent agenda

Use silent starts

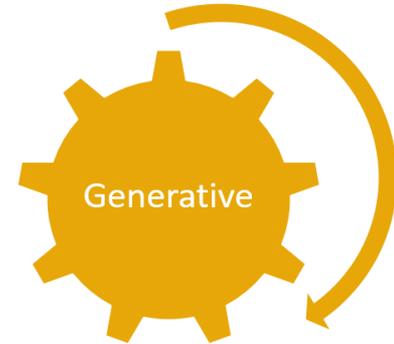
Use one-minute essays

Include time for mini
retreat sessions

Look for "generative
landmarks" during
discussions about even
seemingly routine
matters

Generative Thinking in Practice

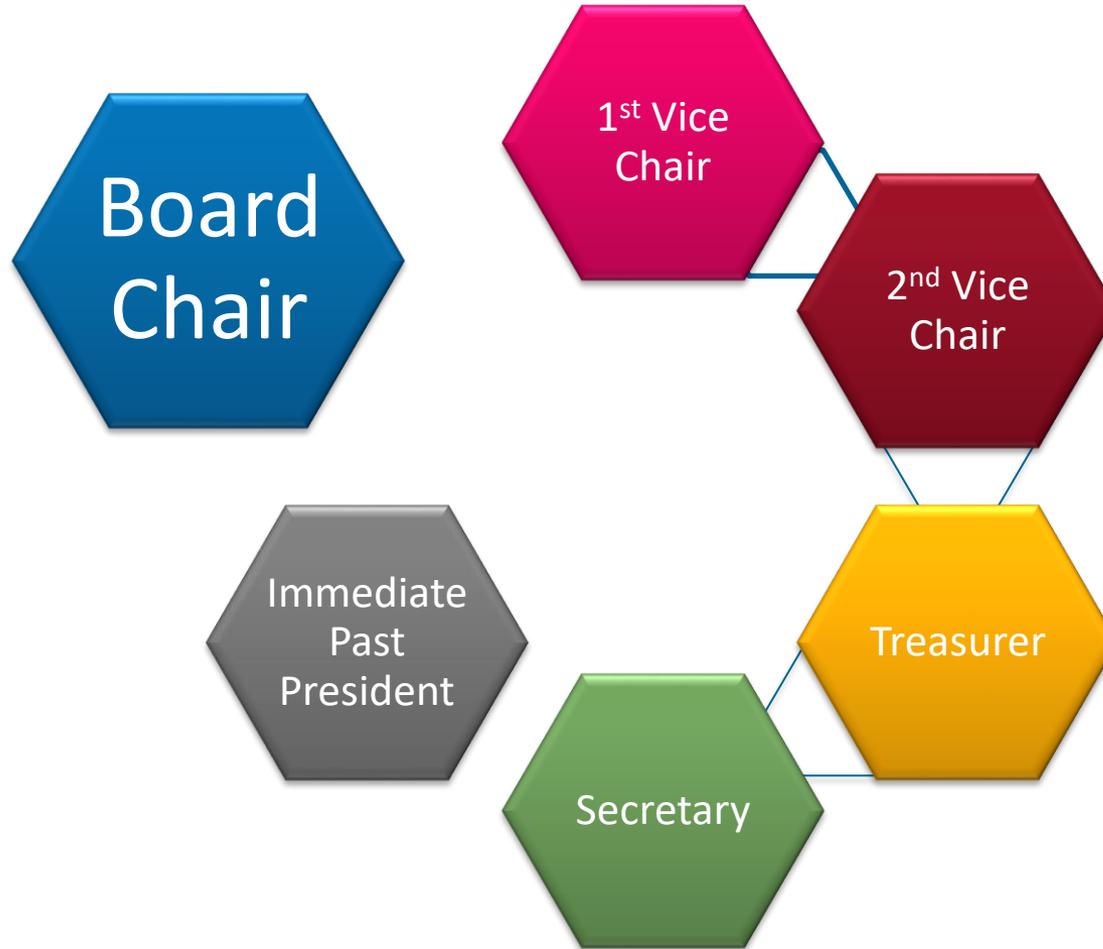
- Assure the Board table is a true container for cocreating with people with lived poverty experience
- Are barriers to lived experience voice emerging addressed (Robert's Rules of Order)?



The Board Acts as a Body But Has Many Moving Parts

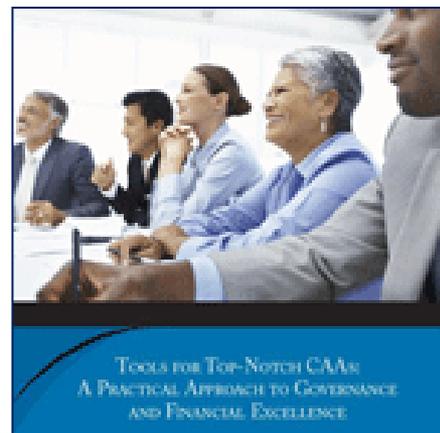


Board Officers



Active Committees

- Clearly define each committee's role and authority
- Get the appropriate people on each committee
- Be sure committees meet as often as needed
- Give committees meaningful assignments in between board meetings
- Have written committee charges



See pages 19 and 31 for
more information on
board committees!

Look at Your Committees

Executive

Finance/Audit

Personnel

Board
Development

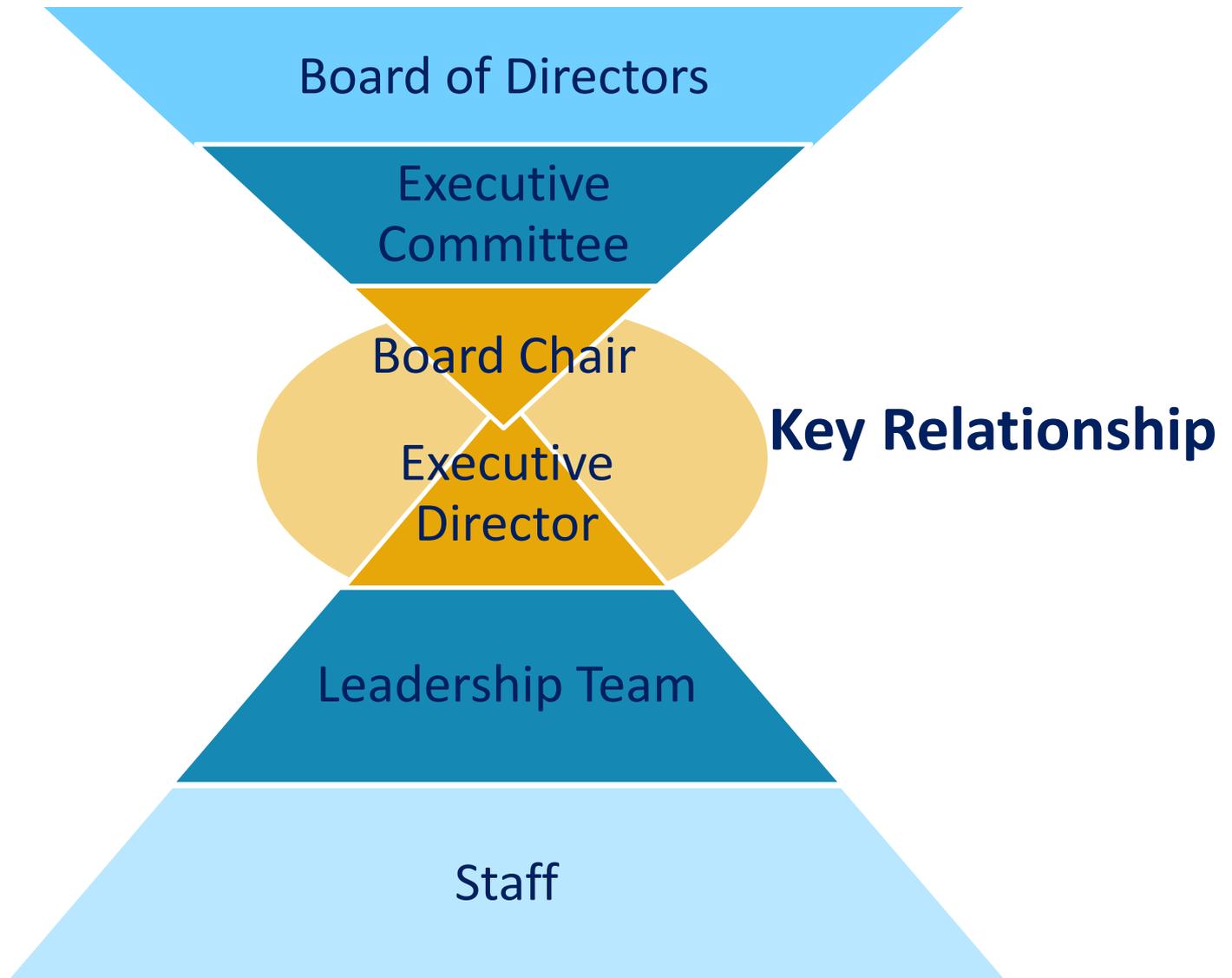
Fund
Development

Program/
Planning/
Evaluation

Strategic
Planning

Other?

Standing
Ad Hoc?



Joint Efforts

Governance

- Meeting Agendas
- Board Calendar
- Board Development
- Board Orientation
- Recruitment

Planning

- Strategic Planning
- Succession Planning

Finance

- Financial Oversight
- Fundraising
- Audit

Advocacy

- Lobbying
- Public Statements
- Community Relations

Key Facet – No Surprises!

Good Governance is Good Leadership

- Board and Management
- Tone at the Top
 - Compliance
 - Ethical Behavior
 - Avoiding Conflicts of Interest
- Bylaws that work for the organization
- Board Directors and Officers Liability Insurance



Board Process: Schedule

- **Frequency, Timing, and Location**

- As frequent as needed; not so frequent that commitment is difficult/there is limited action
- Consider key agency deadlines for activities (strategic planning; agency audit; ED performance and compensation review; Grant Applications; Community Needs Assessment; etc.)
- Time of Day
- Location

- **Notification**

- Ensure all board members have notice of meeting schedule and have reminders of meetings

Board Process: Meeting Agendas

- **Agenda Development**
 - Chair and Executive Director
- **Standing Items for Agenda:**
 - Review & approval of prior meeting minutes
 - Financial report
 - Programmatic report
 - Next Meeting date & time reminder
- **Timing and Flow**
- **Balancing Time Regulative/Fiduciary, Strategic, and Generative Discussions**

Board Meetings

- Know:
 - Attendance required for Quorum
 - Voting Decision Thresholds
 - Required items of action
- Run by Chair, but the Chair shouldn't do everything in the meeting
- Create space and time for discussion
- Create space for informal connection building

Reflection



How are we ensuring good governance in our practices?

- What is working?
- What could we do to strengthen our governance practices?

Resources

Resources

- [The Four Principles of Purpose-Driven Board Leadership](#)
- [The Four Principles of Purpose-Driven Board Leadership \(Video\)](#)



Critical Relationship: Board Chair-ED/CEO



DYNAMIC DUO

A Guide to Enhancing the Board & Executive Director Partnership

A Publication by:



In Partnership with:

CAPLAW
Community Action Program Legal Services, Inc.

IV. EXECUTIVE DIRECTOR AND BOARD CHAIR RELATIONSHIP

The board chair and executive director work closely together to ensure that all board members and senior management are receiving the information they need to execute their respective responsibilities.

A. Establishing the Roles and Responsibilities

The responsibilities of the board chair often include:

- Working with the executive director (and executive committee, if applicable) to establish the agenda for the board meetings;
- Acting as the liaison between the executive director and the full board;
- Serving as the spokesperson for the full board (if so authorized by the board);
- Convening and conducting regular board meetings and ensuring a quorum is established;
- Moderating and facilitating board discussions to encourage varying points of view; and
- Helping to organize and lead new member orientations (with the executive director and governance committee).

The specific positions, titles and duties of an organization's officers, including the board chair, should be set forth in the CAA's bylaws. For nonprofit CAAs, the majority of state nonprofit corporate laws require officers of a nonprofit board to include a president, secretary, and treasurer, in addition to any other position that the board may wish to designate. A board president is often referred to by a CAA as the board chair. If state nonprofit corporate laws require a president, but a CAA has a board chair, the CAA should specify in its bylaws that the board chair serves as the president for purposes of the state's corporate laws. The board chair, along with the other officers, is elected by the board. Officers typically serve for an annual term but the bylaws may specify a longer term. For public CAAs, a local ordinance, if one exists, that establishes the authority of the tripartite board and its bylaws will govern the designation and selection of officers of the board.

B. Cultivating a Partnership

The chair may work with the executive director to help him/her navigate and achieve the goals and objectives established for the executive director by the full board or a board committee. The chair often serves as a sounding board for the concerns of the executive director. When the executive director is under stress or experiencing some difficulty in communicating with board members,

Dynamic Duo: A Guide to Enhancing the Board & Executive Director Partnership

25

CAPLAW Resource: Working with an Elected Public Official's Representative on the Tripartite Board

CAPLAW FAQ



A series of common legal questions and answers for the CAA network

Working with an Elected Public Official's Representative on the Tripartite Board

By Allison Ma'luf, Esq.
September 2018

Elected public officials serve a crucial role on a Community Action Agency's (CAA) tripartite board. Not only do they raise awareness of poverty in the community and at various levels of government, they are also integral in fostering close coordination between local public agencies and Community Action efforts. Recognizing the often overwhelming demands elected public officials regularly face, the federal Community Services Block Grant (CSBG) Act gives a public official invited to serve on the tripartite board the option to have a representative serve in his or her place. This FAQ addresses a variety of questions received by CAPLAW about the selection and management of representatives serving in place of elected public officials on tripartite boards. The answers to these questions often depend on the requirements in a CAA's bylaws. While this FAQ discusses the federal CSBG Act's requirements and offers recommended practices, CAAs should note that they must continue to follow their bylaws as currently written until they are amended pursuant to the applicable bylaws provisions and/or state or local laws.

1. What legal requirements apply to how representatives of elected public officials are selected and managed?
2. Can a representative serve as an alternate or proxy rather than in place of the elected public official?
3. Who may serve as a representative of an elected public official?
4. Is a tripartite board required to accept an elected public official's choice for a representative?
5. What if an elected public official delays in appointing a representative to serve in his or her place?
6. If an elected public official is no longer in office, can the representative continue to serve on the board?
7. Can a representative of an elected public official be unilaterally removed by the elected public official?
8. What happens when a representative of an elected public official is no longer able to serve?

https://caplaw.org/resources/faqs/Governance/CAPLAW_FAQ_WorkingwithElectedPublicOfficialsRep_Sept2018.pdf

Toolkit for Top Notch CAAs



TOOLS FOR TOP-NOTCH CAAs: A PRACTICAL APPROACH TO GOVERNANCE AND FINANCIAL EXCELLENCE

CAPLAW
Community Action Program Legal Services, Inc.

2017 Edition

CAPLAW
Community Action Program Legal Services, Inc.

TOOLS FOR TOP-NOTCH CAAs: A PRACTICAL APPROACH TO GOVERNANCE AND FINANCIAL EXCELLENCE

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Toolkit: Do the Right Thing

Do the Right Thing **GUIDEBOOK**



How CAAs Can Cultivate
a Culture of Compliance
and High Ethical Standards

CAPLAW
Community Action Program Legal Services, Inc.

SECTION III. HOW CAN CAA LEADERS CULTIVATE A CULTURE OF COMPLIANCE AND HIGH ETHICAL STANDARDS?

Following are 10 actions CAAs leaders can take to ensure compliance and ethical behavior throughout their organizations:



These actions – which need neither be expensive nor complicated – represent a continuous process that can and should be integrated into the organization’s existing operations. This Guidebook describes each of these actions in further detail.

CAPLAW All A-Board! Board Training Videos



All a-Board!
The Purpose, People, and Process of CAA Boards

6. Process: The CAA Board Meeting Ecosystem - Consent Agendas and the Conservation of Time
Discussion Guide

Length: 7:56"
[Stream](#) | [Download](#)

Video Summary
Like a complex ecosystem, a board of directors of a CAA has a highly-developed set of structures and processes that help it navigate survival in its world of compliance and governance responsibilities. This video, which is narrated in a manner similar to a nature documentary film, follows a board of directors as it uses a consent agenda to save time and resources at a board meeting. It provides an overview of a consent agenda, what it includes, and how it can be used effectively to allow for in-depth analysis and discussion of important issues, such as strategic planning or development priorities.

Learning Objectives
After watching this video, participants will be able to:

- Understand what a consent agenda is and how a board can use it to help streamline board meetings and improve board efficiency.
- Understand the process required for a board to adopt and implement a consent agenda.
- Highlight the types of items that a board may and may not include on a consent agenda.
- Consider the benefits and drawbacks of a consent agenda and discuss whether it is right for your board.

Using the Video Effectively
Suggestions for how to use this video include:

Raising the Low-Income Voice

Case Studies in Democratic Selection Procedures



INTRODUCTION

Updated April 2021

Since the inception of the Economic Opportunity Act, a fundamental goal of Community Action has been to provide low-income individuals with a voice in the administration of its poverty-alleviating programs. With the Community Services Block Grant (CSBG) Act's call to achieve "maximum participation" of the low-income community in the development, planning, implementation, and evaluation of CSBG-funded programs, a critical venue for the low-income community's participation is their representation on the tripartite board.

Despite the importance placed on maximum participation of the low-income community,

such as election to a position of responsibility in another significant service or community organization such as a school PTA, a faith-based organization leadership group; or an advisory board/governing council to another low-income service provider."

IM 82 advises CAAs to ensure democratic selection procedures "directly through election [or] public form," but if that is not possible, it lists a number of alternatives. The case studies in Raising the Low-Income Voice are focused on the "direct" democratic procedures. If a CAA determines that direct democratic procedures are not possible, it will likely be able to comply with the law by creating what may be called

Raising the Low-Income Voice: Case Studies in Democratic Selection Procedures

- Seek applicants through social media, word of mouth, civic/community involvement and other entities that serve low-income population.
- Qualified applicant(s) is/are elected by low-income population in service area.
- Ballot election is held:
 - » In Community Services Department
 - » During high volume service time
 - » Bio for applicant available during the election process
 - » Educate voting participants in person and in written document as to the need for low income Board representation
 - » Voter sign in sheet
 - » Ballots are tallied when election is complete
 - » Hold orientation for newly elected Board member before the next scheduled Board of Director' meeting
- Outcome of election is presented to Board of Directors for approval at the next scheduled meeting
- Ballots/Voter sign in sheet retained in Board Minutes permanent record

https://www.capl原因.org/resources/PublicationDocuments/CAPLAW_RaisingtheLowIncomeVoice_Introduction_April2021.pdf

CAA Board Meetings: Template Meeting Minutes and Index of Form Resolutions

Introduction

Community action agency (CAA) boards perform vital governance and oversight functions

for the
member
Meet
loyalty
of the

CAA Board Meeting Minutes Template

[CAA Name]
Minutes of a [Regular or Special Meeting of] the Board of Directors
of [Legal Name of the Organization]
Held on [Date] at/via [Location]

Board Members Present: [List names and titles, if any]

Board Members Absent: [List names and titles, if any]

Staff Present: [List names and titles, if any]

Guests Present: [List names, titles, and affiliations, if any]

1. Call to Order

[Board Chair Name] called this [regular or special] meeting of the board to order at [time]. All board members were present at the start of the meeting [except for Name].² A quorum was present. [Board Chair Name] presided over the meeting and confirmed that all participants could see and hear one another. All participated in person, except for [Name], who participated

Template: Board Meeting Minutes and Resolutions

2-part template:

- Board meeting minutes
- Index of board resolutions

Available on the CAPLAW website:

<https://resources.caplav.org/resources/template-meeting-minutes-and-index-of-form-resolutions/>

CSBG Organizational Standards Tools

CAA Careers Press Room Subscribe 0 Items

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CSBG ORGANIZATIONAL STANDARDS

A Brief History...

Oct. 2012
The Organizational Standards Center of Excellence is Established
Launched by the National Community Action Partnership

Jul. 2013
The C.O.E. submits first draft of Organizational Standards to OCS
After a 9 month process of listening sessions, literature reviews, surveys, and field

What are the CSBG Organizational Standards?

The **CSBG Organizational Standards** are a comprehensive set of standards developed with input from the entire CSBG Network through a three-year multi phase process led by the Center of Excellence. The Organizational Standards were announced in January 2015 with the OCS release of *IM 138, State Establishment of Organizational Standards for CSBG Eligible Entities*, directing States to establish organizational standards by fiscal year 2016.

The Organizational Standards are organized in three thematic groups comprising nine categories and totals of 58 standards for private, nonprofit entities and 50 for public entities. The purpose of the organizational standards is to ensure that all agencies have appropriate organizational capacity, in both critical financial and administrative areas, as well as areas of unique importance to the mission of the Community Action network.

<https://communityactionpartnership.com/organizational-standards/>

T/A Guides Toolkits and Webinars for Each of the Nine Categories

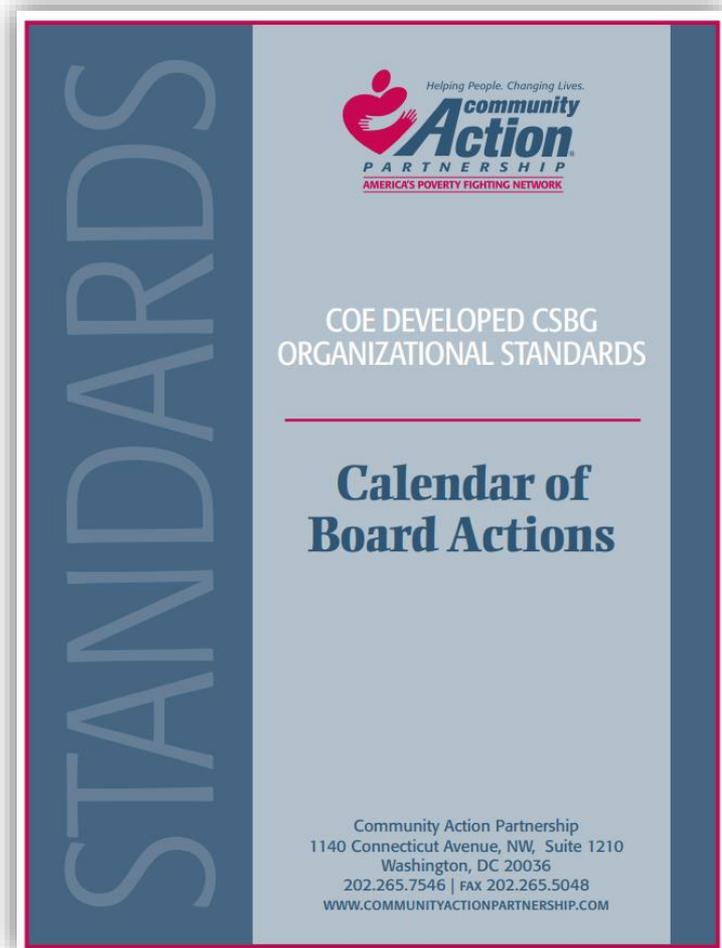
- Additional Guidance
 - Definition
 - Compliance
 - Document
- Beyond Compliance
- Resources
- Assessment Scales



Calendar of Activities

- The Organizational Standards have several requirements for boards that happen on different time cycles—use our Calendar of Activities to help manage requirements

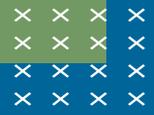
https://communityactionpartnership.com/wp-content/uploads/2018/08/29_Schedule-for-Boards_Final-Fillable.pdf





Executive Director & Board Chair Symposium

June 26th & 27th
St. Paul, MN



LEARN MORE
AND REGISTER!



2024 ANNUAL CONVENTION

Inspiring Hope and Advancing Opportunity

August 28-30 (Pre-Con: 26-27) | Seattle, WA

Join us for a Special Preconference:
Board Development Institute





Where Will Your Excellence Journey Begin?

With the National Community Action Partnership's Pathways to Excellence Program, you can start your journey toward Excellence in the place that's best for you and your Agency.

HERE?



Bronze Tier

The place to explore the Standards of Excellence and start building excitement among your team. Enroll anytime. The Bronze Tier can usually be completed in 3 months.

Silver Tier

The place to learn how to do a self-study, build knowledge, and explore the peer-feedback process. Enroll in February or July. The Silver Tier can usually be completed in 9 months.



HERE?

OR HERE?



Gold Tier

The place to do a full self-study, receive peer-feedback, and see how you perform in every Excellence Standard. Enroll in February or July. The Gold Tier can usually be completed in 14 months.

Platinum Tier

The place to do a full self-study, on your own, and see if your peers judge your agency worthy of The Community Action Award for Excellence. The Platinum Tier usually requires 2 years to complete.



Start Here if You Know
You're Exceeding All
35 Standards

Learn More

[communityactionpartnership.com
/pathways-to-excellence/](https://communityactionpartnership.com/pathways-to-excellence/)



SCAN ME

For More Info



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Thank you!