

2021-2025 COMMUNITY ACTION STRATEGIC PLAN

Helping People Move From Poverty Toward Prosperity

We provide results-oriented, direct supports

Community Action will continue to be a provider of direct assistance to low-income people. Specific types of direct supports will include those that help customers meet a variety of basic needs, supports proven to produce positive intermediate and long-term results at combatting poverty, and, supports that are experimental in nature.

In doing so, we will value our Mission, our Community, our Customers, and our Team

Commitment #1:

Our direct supports will be customer-centered, and we will use delivery methods that help customers seamlessly access multiple supports in and outside of Community Action.

We will be customer-centered by ensuring staff receive training designed to put the customer and the customer's needs and decisions at the center of their work. A customer-centered approach also includes directly addressing issues of equity and diversity. Our integrated service delivery system supports a customer-centered approach by making access to multiple supports seamless and focusing on the whole family. We will remain accountable to the integrated service approach by ensuring regular analysis of the system is conducted and reported to the Board, and, by designing our communication materials to feature the integrated, wrap-around approach.

Action Steps

- A. Division Directors will ensure Partner Services staff and Family Empowerment staff receive training specific to implementing family-centered coaching and family-centered decision making. Training to be provided within 6 months of new employment within the identified staff teams and at least every two years for existing and ongoing staff, beginning in 2021.
- B. Staff and Board will receive training on Trauma-informed Care and Excellence in Non-Profit Customer Service.
 - I. By January 2022, Division Directors will identify specific TIC training, and Customer Service training, appropriate to each staff position. Division Directors will also establish written performance expectations regarding completion of the training and implementation of TIC and customer service practices into daily work.
 - II. Division Directors will monitor, evaluate, and report to the Executive Director on TIC implementation and customer service results at least annually.
 - III. The Executive Director and Executive Committee of the Board will ensure effective TIC and NPO Customer Service Training are provided to all seated Board Members in 2023 and the concepts will be emphasized in subsequent Board Orientations.
- C. ECO and FCO Division Directors, the Executive Director, and the Board of Directors will actively preserve and enhance the integrated service delivery system model.
 - I. Beginning in 2021, Division Directors will report at least quarterly to the Executive Director and appropriate Board Standing Committees on measured progress in enhancing the integrated service model as well as customer results from "bundling" supports.
 - II. In 2021, preservation and enhancement of the integrated model will be incorporated into measurable performance expectations for the ECO and FCO Division Directors and their staff.

- III. By 2021 the agency website and support outreach materials will be designed to communicate and support the integrated service delivery model.
 - IV. Service delivery innovations and/or new projects will be scrutinized by executive leadership and by the Board for adherence to, and not deviation from, the integrated service delivery system model.
- D. Cross reference Equity, Diversity and Inclusion work as it impacts customer-centered approaches from Providing Customer-Centered, Integrated Direct Supports, [Commitment 4](#), page 6.

Benefits

- 1) Continual training reinforces our commitment to being customer-centered and integrated, preserving and building upon gains our agency has made since 2015.
- 2) Evidence indicates a customer-centered and integrated approach will produce demonstrated, positive outcomes for low-income customers, which is an advancement of the agency mission.
- 3) Efficiencies are expected as the agency learns to better coordinate and cooperate to support customers in their journeys out of poverty.

Concerns

- 1) Adds to training aspirations for staff in an environment where time for training is already limited.
- 2) There will be significant pressure from internal and external systems to revert to a silo-oriented approach. It must be avoided and overcome.

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Commitment #2

Our direct supports will employ evidence-informed and innovative methods of fighting poverty.

We will analyze all funding applications and program approaches on available data demonstrating positive, mission-oriented results. Approaches that cannot demonstrate mission-driven results will be modified or eliminated.

Action Steps

- A. The Board and senior staff will ensure reliable internal and external data demonstrates our approaches and direct supports are achieving the desired outcomes.
 - a. Beginning in 2022, all funding applications going before the Board for authorization to submit will be accompanied by an explanation of how the approach is evidence-informed and demonstrated to produce results related to moving people from poverty toward prosperity.
 - b. All new or innovative approaches proposed by staff will be evaluated by senior leadership and the Board to determine how the approach is evidence-informed and that it has demonstrated ability to produce results related to the Community Action mission.
 - c. Approaches and/or supports that cannot be deemed as sufficiently evidence-informed and/or achieving mission-driven results will be modified or eliminated to conform with the commitment.
- B. We will evaluate affordable housing, early childhood education and basic need supports for best practices and evidence informed strategies.
- C. Cross reference internal support for innovation from Delivering Direct Supports Reflective of Core Values, [Commitment 4](#), page 6.

Benefits

1. Being evidence-informed and using progressive approaches will mean greater reliability in Community Action's approaches and improved outcomes.

Concerns

1. New ways of considering our programs (new and old) will face resistance to change among all stakeholders. Care will have to be taken to introduce, obtain buy-in, and be consistent with carrying out the commitment.

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Commitment #3

We commit to actively measuring and analyzing the results of our work.

We will continue to develop and use an agency-wide information system that improves our capacity to track and use unduplicated customer information. We will seek to integrate other data, such as staff and board information, into the same data system. We will use effective and accurate reports to measure, analyze, and demonstrate the results of our work to the Board and other stakeholders.

Action Steps

1. Community Action will support and maintain the effective use of an agency-wide, unduplicated Customer Relations Management database. While such a system is always a work-in-progress, by the end of 2021, we will have full implementation of the Apricot system, which includes full and primary use by Family and Community Outcomes, Affordable Housing, and Early Childhood Outcomes staff.
2. Senior staff will regularly participate in quarterly data review meetings.
3. Data and data analysis will be presented through dashboard reports to the Board through Division Director reports to oversight committees.
4. The Executive Office will produce an annual Outcomes Report that will be circulated among staff, the Board, other volunteers, funding partners, and, through social media. Agency outcomes will be prominently featured on the agency website.

Benefits

- 1) We will have data that reliably depicts who we are serving, in what ways, and how our work demonstrably contributes to achieving the mission.
- 2) Senior staff will become better planners and make data-based decisions and recommendations.

Concerns

- 1) Agencywide systems are costly. It will have to be maintained as an intentional investment by the agency.
- 2) It feels like we've been working toward this goal for a long time and progress is incremental. Staff must understand and value the purpose of the system, data, and meetings. It's difficult to instill that confidence without having the system in full force and functional.
- 3) Some funders require us to use a specific system, so dual effort/expense, etc. will be necessary.

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In doing so, we will be guided by our Mission, our Community, our Customers, and, our Team

Commitment #4

Our service delivery actions and behaviors will represent the agency's core values of respect, integrity, listening, learning, and, innovating.

We will value respect and learning by taking steps to identify and remove barriers related to equity and diversity, and, our staff and volunteers will use trauma-informed approaches to their work. We will value integrity and learning by ensuring staff and volunteers are trained in and held accountable to behaving ethically. We will value listening and learning by creating opportunities for customer and partner input. We will value innovation by designing and implementing systems to expect and reward innovation.

Action Steps

- B. An Equity, Diversity & Inclusion Team will initiate in 2021 and continue through 2025, a direct services review to identify barriers and gaps in access or delivery that may be caused by lack of equity, diversity and inclusion. The Board and staff will actively work to eliminate, or address identified issues.
 - I. Throughout the five-year period, we will document our research, findings, recommendations and resolutions.
 - II. Results of EDI initiatives will be reported at least annually to the Board of Directors, staff, and on agency website.
- C. Staff will be empowered to provide direct services truthfully and ethically.
 - I. Beginning in 2021, the Board will biannually review and update, as needed, agency conflict of interest policies.
 - II. Starting in 2021, staff will receive general ethics-related training during initial onboarding and annually thereafter.
- D. Community Action will listen to and learn from the community, customers, and our team through focus groups and surveys.
 - I. Staff will lead, and Board will participate in, customer and community focus groups in 2022 and 2024.
 - II. Staff satisfaction and input surveys will be conducted agency-wide at least annually beginning in 2021.
 - III. Data from focus groups and staff will be aggregated by senior-level Directors and reported to the Executive Director and Board in each year the activities occur.
 - IV. The Board and senior staff will make resource allocation and program decisions with consideration to issues learned by listening to stakeholders.
- E. Community Action will promote and reward innovation in direct service delivery.
 - I. By 2023, Division Directors and HR will incorporate innovation goals into each job description and performance assessment. Simultaneously, the Executive Director and Board of Directors will implement strategies to recognize and reward innovation by employees and teams of employees.

Benefits

- 1) The supports Community Action provides will be improved and more appealing and successful for our target populations.
- 2) Anticipate seeing greater customer and staff satisfaction and stronger customer outcomes.
- 3) Reduces risk of ethical errors and wrong-doing and emphasizes ethical behavior as a corporate expectation.

Concerns

- 1) Focus group work is intensive and will require allocation of resources to be successfully done. Advanced planning will help.
- 2) Data may reveal a need to reduce or discontinue certain supports or processes and replace them with others. Staff and board will have to be comfortable with change.
- 3) Performance expectations and rewards add a deeper layer of administration to effectively implement and maintain. Goals also likely to add expenses that must be allowable under rules of funding partners or paid through unrestricted resources. Advanced planning will help.

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Commitment #5

We will measurably build the capacities of Community Action to provide direct supports that achieve results.

We will analyze and regularly report on capacity-building progress within the agency. We will add accountability measures to ensure our senior staff are focused on and producing capacity-building results (such as increased funding and new data-informed services). Board participation in generating resources for direct supports will also be measured and reported to the Board.

Action Steps

1. Beginning in 2021, staff will provide the Board of Directors an annual report of progress in agency capacity building in the areas of:
 - a. Structural and service delivery enhancements that improve the agency's capacities to achieve results, particularly in strategies involving affordable housing, early childhood education and basic need supports
 - b. Improved and sustained financial capacities to provide results-oriented, direct supports
 - c. Staff training and development related to results-oriented, direct supports
 - d. Maximized direct-supports outcomes through strategic community partnerships
 - e. Cross reference addressing systemic and structural barriers to access from "We Provide Direct Supports" [Commitment 1](#).
2. Beginning in 2021, Division Directors will be accountable, through measurable performance assessment goals, for building agency capacity with results-oriented, direct supports.
3. The Board will be accountable for building agency capacity to deliver direct supports by:
 - a. Making meaningful personal donations and carrying out other fund-generating endeavors.
 - b. Ensuring resources are devoted to capacity building by considering such matters when reviewing and authorizing grant submissions.

Benefits

- 1) Improved ability of the organization and its direct support systems to weather funding losses and other negative, unforeseen circumstances.
- 2) Better outcomes for customers and for partnering agencies.

Concerns

- 1) In a post-pandemic environment, securing new resources may be more difficult than we've previously experienced.
- 2) Day-to-day responsibilities can be overwhelming and make it difficult for staff to focus on the bigger picture of capacity building.
- 3) Community Action has not yet successfully engaged the Board in fund raising or personal giving.

2021-2025 COMMUNITY ACTION STRATEGIC PLAN

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We are effective advocates.

Community Action will educate the general public and policy makers about the causes, impacts, and persistence of poverty. We will stand beside customers as they advocate for themselves and their families, and we will lend our voice on policy issues of importance to low-income people.

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Commitment #1

We will advocate internally and externally for customer-centered, integrated and Whole Family focused service delivery systems.

Data gleaned from the agency's successes and barriers related to the ***integrated service*** and Whole Family delivery system will be used to advocate for strengthening the integrated system, and, expanding integration activities beyond our own agency. We will seek new, meaningful partnerships also focused on ***customer-centered*** and integrated designs.

Action Steps

1. Cross reference all action steps from Section 1, "We Provide Results Oriented, Direct Supports". By undertaking the activities and adhering to the commitments, Community Action will be a successful advocate for customer-centered, integrated approaches to fighting poverty.
2. Staff will maintain, and provide annually to the Board, demonstration of the various agency partnerships that contribute to our capacity as advocates for effective service delivery systems, particularly in the areas of affordable housing, early childhood education and basic need supports.
3. Staff will maintain membership and participation in a wide variety of community, regional and national networks that provide opportunities for advocacy regarding effective service delivery systems.

Benefits

1. It is possible Community Action's advocacy will lead to better outcomes for low-income people both within and outside of our own organization.

Concerns

- 1) Maintaining our integrated support system internally will require continuous leadership that advocates for the system. It will be easy, with the internal advocacy, for systems to revert to what's easy instead of remaining mission focused.
- 2) Territoriality, competition, fear, and other factors may make it difficult to engage outside entities in truly meaningful partnerships. Attention will have to be given to building strong relationships and trust before attempting to deepen partnerships.

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Commitment #2

We commit to using evidence-informed, innovative methods for effective advocacy that achieves mission-driven results.

We will provide opportunities for building the capacities of our board and staff as advocates. Training selected will be based on how well it incorporates evidence-informed and results-producing methods.

Action Steps

1. Training on proven-effective policy advocacy process and styles will be provided biannually to the Board of Directors, Executive Director, and Division Directors.
2. Training on being an effective advocate through family-centered coaching and trauma-informed care will be provided to 75% of all staff biannually. (Cross reference [Commitment 2](#) in Direct Supports)

Benefits

- 1) Evidence informed methods are likely to produce stronger results for customers and on policy advocacy issues.

Concerns

- 1) If participants are reluctant to engage in policy advocacy, it may be difficult to get strong volunteer participation in training opportunities or to find volunteers willing to ensure the first action step occurs as planned.

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Commitment #3

We will actively measure and analyze the results of our advocacy work.

To carry out this commitment, Community Action will provide accountability reports to the Board.
In some cases, the results of our advocacy work may be shared with other stakeholders.

Action Steps

1. By January 2021, the Executive Office will develop and maintain an advocacy dashboard report for regular presentation to the Executive Committee.
2. Quarterly customer-related advocacy success stories submitted by FCO, AH and ECO divisions will contribute to Division Directors', Executive Director's, and Executive Committee's analysis of agency advocacy work.

Benefits

- 1) Intentional tracking and reporting of advocacy work helps ensure advocacy work gets done.
- 2) The new data may prove valuable in strengthening Community Action's reputation as an effective organization.

Concerns

- 1) Advocacy can be difficult to track if all parties are not invested in the effort.
- 2) Success stories have been difficult to obtain from staff agency wide. More attention and accountability to capturing and reporting this data will be necessary.

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Commitment #4

Our actions and behaviors as advocates will represent the agency's core values of respect, integrity, listening, learning, innovating.

Advocating for our mission means practicing what we preach. We will begin internally, examining and improving upon our own practices and behaviors related to **respect** and **integrity** and we will advocate for internal change where it is identified as needed.

Focus groups will help us **listen** to and identify issues of interest and concern to low-income people.

The Board will regularly include advocacy **learning** issues on meeting agendas.

Action Steps

1. Staff will review direct services to identify barriers and gaps in access or delivery that may be caused by lack of equity, diversity and will advocate for changes that address problem areas. (Cross reference [Commitment 1](#) from providing direct supports.)
2. The Board will ensure that input from low-income people guides what Community Action advocates for
 - a. (Cross-reference Focus Group activities from providing direct supports, [Commitment 1](#).)
 - b. As appropriate to their positions, staff performance goals will require staff to regularly contribute to the Executive Director data and ideas from their direct engagement with Community Action customers, helping identify needs for individual and general advocacy efforts.
3. Issues of concern to low-income people will be communicated to elected officials through the agency's public-sector board members and the Executive Director.

Benefits

1. Being advocates and invoking the core values of our agency upholds the Community Action Code of Ethics.
2. Community Action will build strength and credibility as facilitating the voice of the poor to be heard and heeded.
3. Policy changes can occur through effective advocacy done in a way that respects and values our customer base.

Concerns

- 1) We will need to remain respectful of the fact that the advocacy capacity of some Board Members is limited by their employers.
- 2) There may not always be agreement between what our customers see as important advocacy issues and what agency leadership considers important.

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Commitment #5

We will measurably build the agency's advocacy capacities.

Training and practicing what we have learned will improve the abilities of our staff, volunteers, and our customer-base to be effective advocates. We will compare what has occurred in recent history (2019 and 2020) with what occurs in 2021-2025 to measure our improvements.

Action Steps

1. Having staff directly engage in Equity, Diversity and Inclusion efforts, and advocate for appropriate changes will directly improve the agency's internal advocacy capacities. (Cross reference [Commitment 1](#) from providing direct supports from page 2 and Commitment 1 from [page 14](#))
2. Focus groups, as planned on [page 6](#), will directly improve the data available to the agency to use in advocacy opportunities.
3. Training on advocacy for the Board and senior leadership, as planned in [Advocates/Commitment 3](#), will directly improve the capacity of individuals and the agency to achieve advocacy results.

Benefits

- 1) Improved capacities may lead to increased advocacy actions carried out by Community Action.
- 2) Use of effective advocacy techniques is likely to produce better outcomes on advocacy goals.
- 3) Being advocates instills stronger investment in the mission among active volunteers and staff.

Concerns

- 1) Training will be inconsequential if not followed by action.
- 2) Care should be taken to ensure advocacy training addresses not only what can and should be done, but also what types of behaviors and actions could potentially harm Community Action and/or the communities we support.

2021-2025 COMMUNITY ACTION STRATEGIC PLAN

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We build meaningful partnerships

Community Action will actively coordinate with public and private partners to share resources and enhance opportunities and outcomes for low-income people.

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Commitments #1 and #5

*We will create meaningful partnerships that **build our capacities** and support a **customer-centered, integrated service delivery system**.*

To carry out our goals of being integrated externally and internally, and to successfully incorporate more whole-family approaches to fighting poverty into our work, we will focus on creating partnerships that increase our capacities.

Action Steps

- A. Community Action will continue to explore and implement strategies to expand the internal, integrated service delivery system into external bundling and service integration.
 - 1. Through 2021 and potentially beyond, Community Action will continue participation as a partner in the Healthify pilot project, focusing on creating a closed-loop, interagency referral system for Shawnee County area customers.
 - 2. The agency's 2-Generation, Whole Family Approach project(s) will intentionally build wrap-around, integrated supports for low-income families that include supports provided by other human and social service providers.
 - 3. Evidence of how existing partnerships are supporting a customer-centered, integrated service delivery system will be reported by Division Directors to the Executive Director and Board, through the FCO, AH and ECO Committees, annually between 2021 and 2025.

Benefits

- 1) It is anticipated that partnerships with entities that share our focus and goals will produce stronger, mission-oriented results for customers.
- 2) Accountability of reporting on this aspect of our partnerships will help ensure our agency is living up to this commitment.

Concerns

- 1) Using Healthify currently requires duplicate data entry efforts by staff. If Healthify data cannot be successfully incorporated into Apricot, it may not be practical for Community Action to continue participation with the Healthify project.
- 2) Building effective 2-generational programming partnerships may require an exchange of resources. Community Action may need to concentrate on generating and allocating resources to support the work of partners with our customers.

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Commitments #2 and #3

We will actively measure and analyze the mission-driven results of our partnerships.

We will incorporate data sharing agreements, when possible, with key partners to help us assess how the partnership is contributing to mission-driven results. When the data shows opportunities for improved results, we will follow-up and work towards making improvements.

Action Steps

- A. Staff will ensure that formal partnerships include agreements to collect and share outcomes data necessary to demonstrate how and to what extent each partnership contributes to mission-driven results.
 - 1. Beginning in 2021 and continuing through 2025, each formal partnership agreement will include specific definitions of and arrangements for outcome-evidencing data that results from the partnership.
 - 2. Data gleaned will be analyzed in our quarterly data review meetings and necessary course adjustments addressed.
 - 3. Partnership data will be incorporated into Community Action's annual outcomes report.

Benefits

- 1) Having data will improve our understanding of how our partnerships contribute to our ability to achieve the agency mission.
- 2) We can use partnership data to help guide and attract new partnerships and new resources.

Concerns

- 1) Some data sharing among partners will be limited by law or agency policy.
- 2) It will be easy to overlook or forget to incorporate data sharing in written partnership agreements and the annual outcomes report. Staff and the Board will need to ensure it is consistently happening.

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Commitment #4

In working with partners, Community Action will use actions and behaviors that represent the agency's core values of respect, integrity, listening, learning, and innovating.

Our written partnership agreements will include commitments to our core values, and we will systematically seek partner feedback about how we're doing in upholding those commitments. Identified concerns or deviations from the core values will be addressed and corrected.

Action Steps

- A. The agency's core values will be written as commitments in Memoranda of Understanding/Agreement.
 - 1. In 2021, the Executive Director will coordinate with senior staff to collect and review all existing MOAs to ensure the documents are updated to specifically commit our agency to operating within our identified core values.
 - 2. Newly created MOAs will be written to automatically incorporate a commitment to the agency's core values.
 - 3. An annual reminder will be issued from the Director of Operational Outcomes, to pertinent staff, about our commitment to incorporating core values in our formal partnership agreements.
- B. Community Action will seek partner feedback regarding partner perceptions of Community Action's actions and behaviors and how/if staff and the organization successfully represent the agency's core values.
 - 1. Partnership surveys will be conducted by staff and analyzed by the agency leadership staff and Board in 2021 and 2024.
 - 2. Follow-up to partnership survey findings may include changes to agency processes and procedures in order to achieve improved adherence to Community Action's core values.

Benefits

- 1) Community Action's reputation as a reliable and valued partner will be improved and maintained.
- 2) We will have indicators and evidence of our success in following our core values to build meaningful partnerships.

Concerns

- 1) It will be easy to overlook or forget to incorporate the core values in written partnership agreements. Staff and the Board will need to ensure it is consistently happening.
- 2) Insufficient data might be returned from partner surveys to really assess our success. Additional efforts or costs may be necessary to obtain sufficient feedback.