Virginia Office of Economic Opportunity

Strengthening Performance Management in Community Action Agencies

Turning Common CSBG Concerns into Strategic Strengths

Purpose of This Document

This guidance provides CAAs with concrete action steps to strengthen performance management systems, improve compliance, and, most importantly, increase measurable impact on the communities they serve. Each section reframes a common challenge into an opportunity for growth, with practical steps that can be implemented at the staff, leadership, and governance levels

1. Align CAN, Strategic Plan, and Programs

Action Steps

- Develop clear need statements (Condition, Cause, Impact) directly from CNA data.
- Map each program to a specific CNA-identified need using a simple alignment matrix.
- Require all new or continuing programs to answer:
  - What need are we addressing?
  - What data supports this need?
- Integrate CNA findings into strategic planning sessions and board discussions.

What Success Looks Like

- Every program can clearly trace its purpose back to a documented community need.
- Strategic plan priorities directly reflect CNA findings.

Crosswalk- Organizational Standards

3.1–3.5; 6.1–6.5

2. Shift from Outputs to Outcomes

Action Steps

- Redefine program success by identifying 2–3 meaningful outcomes per program.
- Train staff on the difference between:
  - Outputs (services delivered)
  - Outcomes (changes achieved)
- Incorporate outcome tracking into case management workflows (e.g., intake, follow-up, exit).

- Regularly review outcome data during team meetings.

What Success Looks Like

- Reports clearly demonstrate how lives are improving, not just how many people were served.

Crosswalk- Organizational Standards

4.2, 4.4, and 6.5

3. Improve Data Quality

Action Steps

- Develop standard operating procedures (SOPs) for data entry.
- Create a data dictionary with clear definitions for all key fields.
- Conduct monthly data quality checks (missing fields, inconsistencies).
- Provide ongoing staff training and refreshers.

What Success Looks Like

- Data is consistent, complete, and reliable across all programs.
- Staff understand *why* accuracy matters, not just *what* to enter.

Crosswalk- Organizational Standards

4.1, 4.3, and 5.9

4. Use Data for Decision-Making

Action Steps

- Establish monthly or quarterly data review meetings.
- Use simple dashboards to track:
  - Outcomes achieved
  - Trends over time
  - Program performance gaps
- Ask guiding questions:
  - What is working?
  - What is not working?
  - What needs to change?

What Success Looks Like

- Leadership and staff regularly use data to adjust programs and improve results.

Crosswalk- Organizational Standards

4.2, 4.4, and 6.5

5. Build an Agency-Wide Performance Management Culture

Action Steps

- Integrate performance expectations into job descriptions and staff evaluations.
- Provide agency-wide training on the ROMA cycle and performance management basics.
- Share performance data across departments—not just with leadership.
- Celebrate successes and improvements publicly within the organization.

What Success Looks Like

- Staff at all levels understand how their work contributes to agency outcomes and mission.

Crosswalk- Organizational Standards

All Standards

6. Clarify Roles and Responsibilities

Action Steps

- Designate a clear CSBG lead or coordinator.
- Develop a roles and responsibilities chart for:
  - Data entry
  - Reporting
  - Monitoring preparation
- Hold regular coordination meetings for staff involved in CSBG activities.

What Success Looks Like

- Staff know exactly what they are responsible for, reducing confusion and duplication.

Crosswalk- Organizational Standards

5.1, 5.2, 5.4, 5.7, 5.8, 7.2, and 7.3

7. Strengthen Board Engagement

Action Steps

- Provide board training on performance management and outcomes.
- Include performance dashboards in board meeting packets.
- Schedule regular discussions on:
  - Program outcomes
  - Strategic progress
- Develop a formal board evaluation process tied to oversight responsibilities.

What Success Looks Like

- The board actively engages in reviewing data and guiding strategic decisions.

Crosswalk- Organizational Standards

All of Category 5

8. Establish Strong Internal Monitoring Practices

Action Steps

- Conduct routine case file reviews across programs.
- Develop a monitoring checklist aligned with Organizational Standards.
- Schedule quarterly internal program reviews.
- Document findings and implement corrective actions as needed.

What Success Looks Like

- Issues are identified and resolved internally before external monitoring occurs.

Crosswalk- Organizational Standards

8.1, 8.2, 8.7, 8.9, and 8.10

9. Align Funding Streams with Outcomes

Action Steps

- Map each funding source to:
  - Services provided
  - Expected outcomes
- Ensure outcome tracking reflects specific funder requirements.
- Train staff on how different funding streams support program goals.

What Success Looks Like

- Agencies can clearly demonstrate how each funding source contributes to results.

Crosswalk- Organizational Standards

All of Category 8

10. Fully Implement and Close the ROMA Cycle

Action Steps

- Create a visual ROMA cycle plan for the agency.
- Assign responsibility for each phase:
  - Assessment
  - Planning
  - Implementation
  - Evaluation
- At the end of each cycle, conduct a formal evaluation session:
  - What worked?
  - What did not?
  - What will we change?
- Use findings to inform the next CNA and strategic plan update.

What Success Looks Like

- The agency operates in a **continuous improvement loop**, not isolated activities.

Crosswalk- Organizational Standards

4.3

Final Reflection: From Compliance to Impact

Turning these concerns into strengths requires a shift in mindset:

- From **checking boxes → building systems**
- From **reporting data → using data**
- From **individual responsibility → shared accountability**
- From **service delivery → measurable impact**

When these action steps are implemented consistently, performance management becomes more than a requirement—it becomes a strategic driver of meaningful change, enabling agencies to fulfill their mission of reducing poverty and strengthening communities.