Customer Engagement: Building Opportunity Together

Community Action Kentucky

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PARTNERSHIP
AMERICA'S POVERTY FIGHTING NETWORK

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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.

1000+ Community Action Agencies leading change across America

Agenda

Community Action Foundations: Engaging the People We Serve

Authentic Engagement Practices & Principles

Practical Considerations

Resources

August 1964-Signing of the Economic Opportunity Act

"maximum feasible participation"

COMMUNITY ACTION PROGRAMS

SEC. 202. (a) The term "community action program" means a program—

(1) which mobilizes and utilizes resources, public or private, of any urban or rural, or combined urban and rural, geographical area (referred to in this part as a "community"), including but not limited to a State, metropolitan area, county, city, town, multicity unit, or multicounty unit in an attack on poverty;

(2) which provides services, assistance, and other activities of sufficient scope and size to give promise of progress toward elimination of poverty or a cause or causes of poverty through developing employment opportunities, improving human performance, motivation, and productivity, or bettering the conditions under which people live, learn, and work;

(3) which is developed, conducted, and administered with the maximum feasible participation of residents of the areas and members of the groups served; and

(4) which is conducted, administered, or coordinated by a public or private nonprofit agency (other than a political party), or a combination thereof.

CSBG Act

TITLE II—COMMUNITY SERVICES BLOCK GRANT PROGRAM

SEC. 201. REAUTHORIZATION.

The Community Services Block Grant Act (42 U.S.C. 9901 et seq.) is amended to read as follows:

"Subtitle B—Community Services Block Grant Program

"SEC. 671. SHORT TITLE.

"This subtitle may be cited as the 'Community Services Block Grant Act'.

"SEC. 672. PURPOSES AND GOALS.

"The purposes of this subtitle are—

"(1) to provide assistance to States and local communities, working through a network of community action agencies and other neighborhood-based organizations, for the reduction of poverty, the revitalization of low-income communities, and the empowerment of low-income families and individuals in rural and urban areas to become fully self-sufficient (particularly families who are attempting to transition off a State program carried out under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.)); and

"(2) to accomplish the goals described in paragraph (1) through—

"(A) the strengthening of community capabilities for planning and coordinating the use of a broad range of Federal, State, local, and other assistance (including private resources) related to the elimination of poverty, so that this assistance can be used in a manner responsive to local needs and conditions;

"(B) the organization of a range of services related to the needs of low-income families and individuals, so that these services may have a measurable and potentially major impact on the causes of poverty in the community and may help the families and individuals to achieve self-sufficiency;

"(C) the greater use of innovative and effective community-based approaches to attacking the causes and effects of poverty and of community breakdown;

"(D) the maximum participation of residents of the low-income communities and members of the groups served by programs assisted through the block grants made under this subtitle to empower such residents and members to respond to the unique problems and needs within their communities; and

- Concept of Maximum Feasible Participation continues

The National Community Action Network Theory of Change

Community Action Goals

Goal 1: Individuals and families with low incomes are stable and achieve economic security.

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.

Goal 3: People with low incomes are engaged and active in building opportunities in communities.

Services and Strategies

Employment

Education & Cognitive Development

Income, Infrastructure & Asset Building

Housing

Health/Social Behavioral Development

Civic Engagement & Community Involvement

Core Principles

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

Performance Management

How well does the network operate?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System

What difference does the network make?

- Individual and Family National Performance Indicators
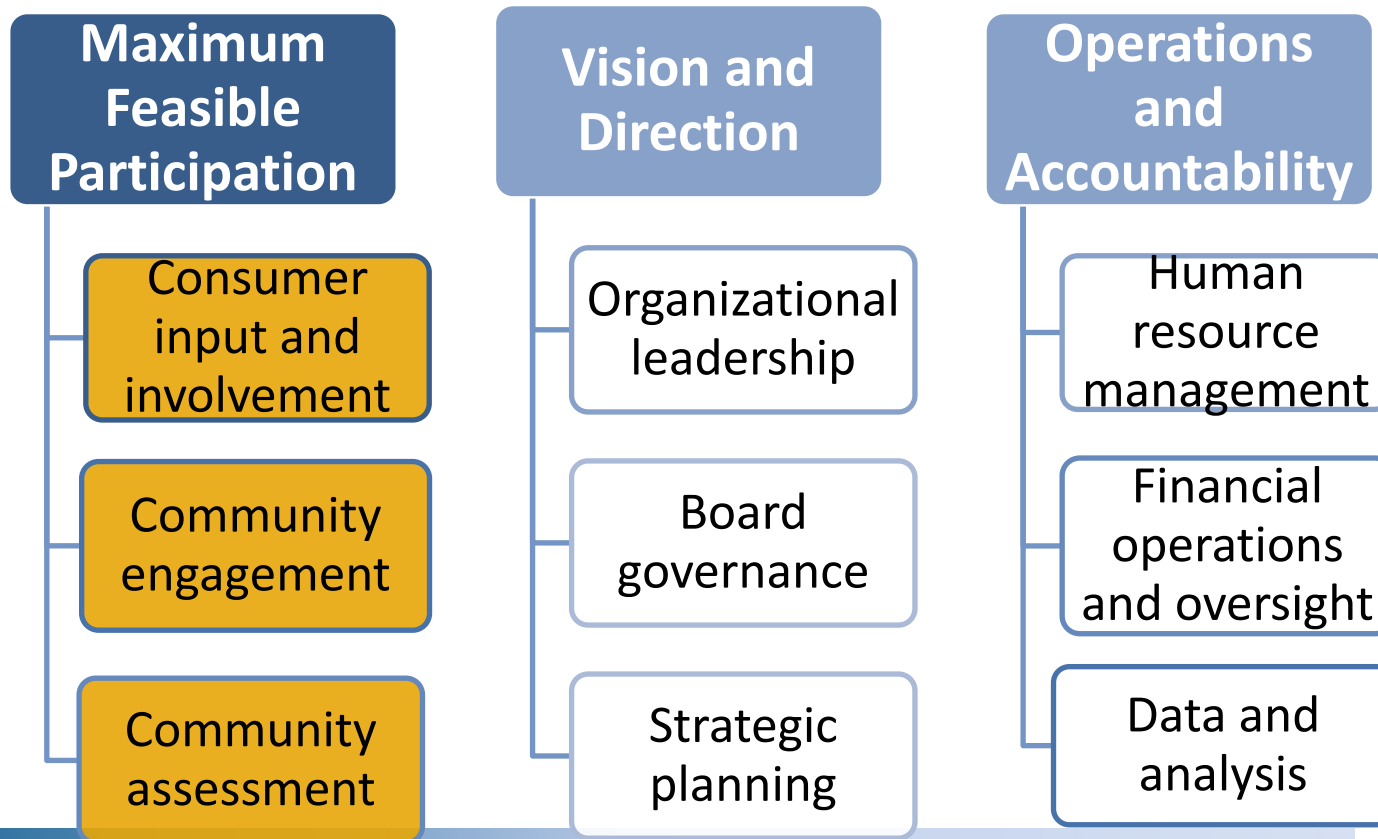- Community National Performance Indicators

A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.

CSBG Organizational Standards

Established in CSBG IM 138:

https://www.acf.hhs.gov/sites/default/files/documents/ocs/im_138_csbg_organizational_standards_fy_2015.pdf

Organized into three thematic groups:

Maximum Feasible Participation	Vision and Direction	Operations and Accountability
Consumer input and involvement	Organizational leadership	Human resource management
Community engagement	Board governance	Financial operations and oversight
Community assessment	Strategic planning	Data and analysis

It's about more than Compliance…

- Community Action Agencies have many *requirements* around engagement:
  - Tripartite Board
  - Community Needs Assessment
  - Customer Satisfaction Survey

The people and communities we serve deserve <u>authentic</u> engagement – this requires thinking of engagement beyond the frame of compliance

Mark Rank on Poverty

Lacking the basic necessities to maintain a minimally adequate life.

Shortage-To be poor is often to live on the outskirts of society.

Mark Rank on Poverty

- A lack of basic capabilities, overall absence of individual freedom and agency. Individuals in poverty are less able to exert control over their lives. They are more likely to be stigmatized and discriminated against, and less likely to be able to take advantage of certain fundamental rights, such as voting, plagued by lower life expectancy, and other constraints.

The Poverty Paradox, Mark Robert Rank

We seek to build power and justice with the people and communities we serve.

Agency/Choice/Freedom

Dignity   **Justice**

POWER

SEM Framework

Economic success:
Having rising income and assets.

Power and autonomy: Having control over one's life, the ability to make choices, and the collective capacity to influence larger policies and actions that affect one's future.

Being valued in community:
Feeling the respect, dignity, and sense of belonging that come from contributing to one's community.

- Change the narrative.
- Create access to good jobs.
- Ensure zip code is not destiny.
- Provide support that empowers.
- Transform data use.

Discussion

- Think of a time your expertise was sought and you were listened to.
  - How did it feel to be sought out for your expertise?
  - What was the outcome? How did the project/situation unfold as a result of your expertise?

What does Authentic Engagement Look Like?

Families and Communities are the respected experts

Nothing about people without people

Start with Equity

More than a seat at the table

LIVING INTO THE PRINCIPLES OF AUTHENTIC ENGAGEMENT

Community Action Fundamentals:
Customer Voice

Families and Communities are the experts in their own lives

Where do we need customer voice?

- Anywhere that the people, families, and communities we serve are impacted
  - ***Nothing about people without people!***

- Customer Voice mechanisms:
  - Tripartite Board
  - Advisory Councils/Boards
  - Community Needs Assessment
  - Community Forums
  - Customer Satisfaction Surveys
  - Program Committees

- Customer voice not just within the agency, but also within the Community

Start with Equity…

Intentional Consideration & Design

- Who in the community is impacted by this program/issue/need/opportunity?
- Whose voice is underrepresented/not at the table?
  - Who has barriers to engagement?
- What is needed for engagement?
  - What are the costs of engagement?
- What are the benefits of engagement?

Think explicitly about Racial Equity

More than a Seat at the Table...

- Voice
- Power & Respect
- Leadership

IAP2 Spectrum of Public Participation

iap² international association for public participation

IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

INCREASING IMPACT ON THE DECISION ➡

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

Empowering Community Through Engagement

Community-focused

Community-centered

Community-led

Community-empowered

This approach involves informing and mobilizing the community to participate in addressing short-term issues. Consider using community meetings, surveys, and door-to-door visits to involve community members.

This approach involves collaboration with community leaders to enable priority setting and decision-making by the community. Consider using workshops, design sessions, and leadership training to empower community leaders.

In this approach, the community is consulted and involved in improving access to services and basic elements of their neighborhood. Consider using focus groups, community hubs, and community events to engage with the community.

This approach involves fully mobilizing community "assets." Consider using community resources, such as volunteers and community organizations, to drive engagement and ownership.
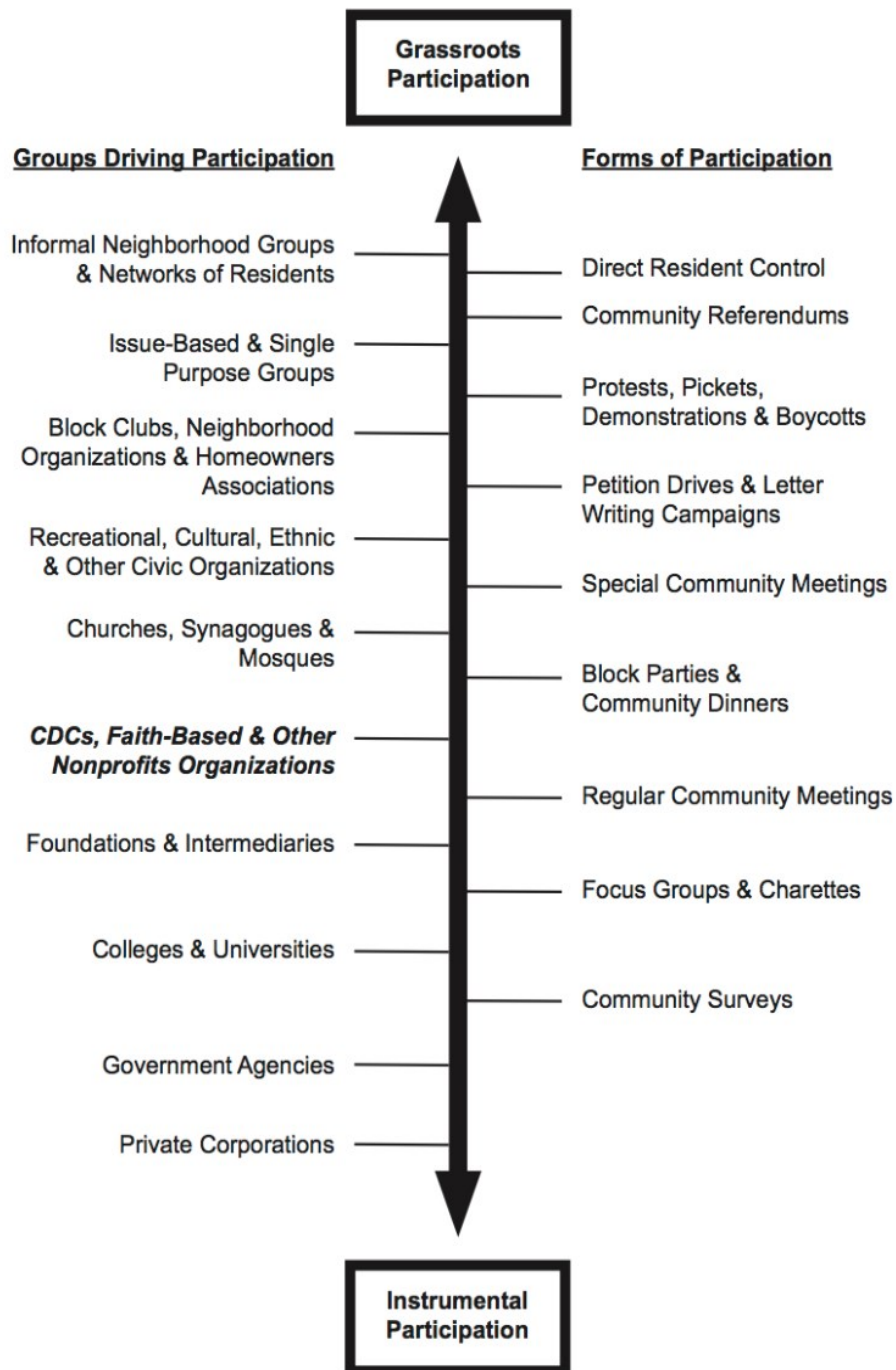
The Citizen Participation Continuum

The specific roles that community-development corporations (CDCs) and community-based organizations (CBOs) play in facilitating the participation of community members in local school, civic, or municipal decision-making.

References
Silverman, R. M. (2005).

Compensation for Expertise

The people, families, and communities we serve are experts in their experiences & lives

- This expertise is valuable and should be fairly compensated

Compensation Considerations

- Relevant
- Meaningful

Board members should not be compensated financially for service

Five Guiding Principles of Equitable Compensation

Connecting with people is the soul of community engagement. Building trustful, collaborative relationships with potential experts is essential to developing strong roots in a community. The starting point for honoring the relationship with community is to adopt five core principles for developing compensation plans for community collaboration.

Keep these five principles in mind when doing the administrative and relational work necessary for paying community members:

1. **Be transparent and honest.** The most important value when planning compensation for community members is transparency. Being honest and up-front about your organization, the project goals and budget, and the compensation timeline and process is essential to fostering trust and mutual accountability with partners.

2. **Seek feedback and allow the perspectives and needs of the community to guide you in the right direction.** Listening to and centering community feedback—from the outset of the relationship—is a key tenet of participatory methods. Seek community feedback on your compensation arrangements early and often to ensure that pay is appropriate to community expectations.

3. **Offer compensation that reflects your respect for community members' expertise.** While compensation rates and amounts will vary by context and project, they should reflect the importance of community contributions to the project. The compensation package for community members should compare favorably with those of other project members who are providing similar project support.

4. **Strive for flexibility to adjust to unforeseen and unintended consequences of compensation.** A mantra of community engagement: the unexpected will happen. Building flexibility into your project budget for unforeseen expenses will help you react quickly and thoughtfully to community needs.

5. **Prepare to advocate for structural change to your organization's compensation framework.** If your compensation efforts are unprecedented in your organization, you may need to advocate for change. This may involve creative thinking to accomplish simple tasks in the short term and longer-term conversations to reform systems and procedures so that compensation runs smoothly in the future.

PRACTICAL CONSIDERATIONS

Connection is the Foundation of Resilience
Put emphasis on these domains that undermine the experience of trauma:

Is the agency a safe place for customers?
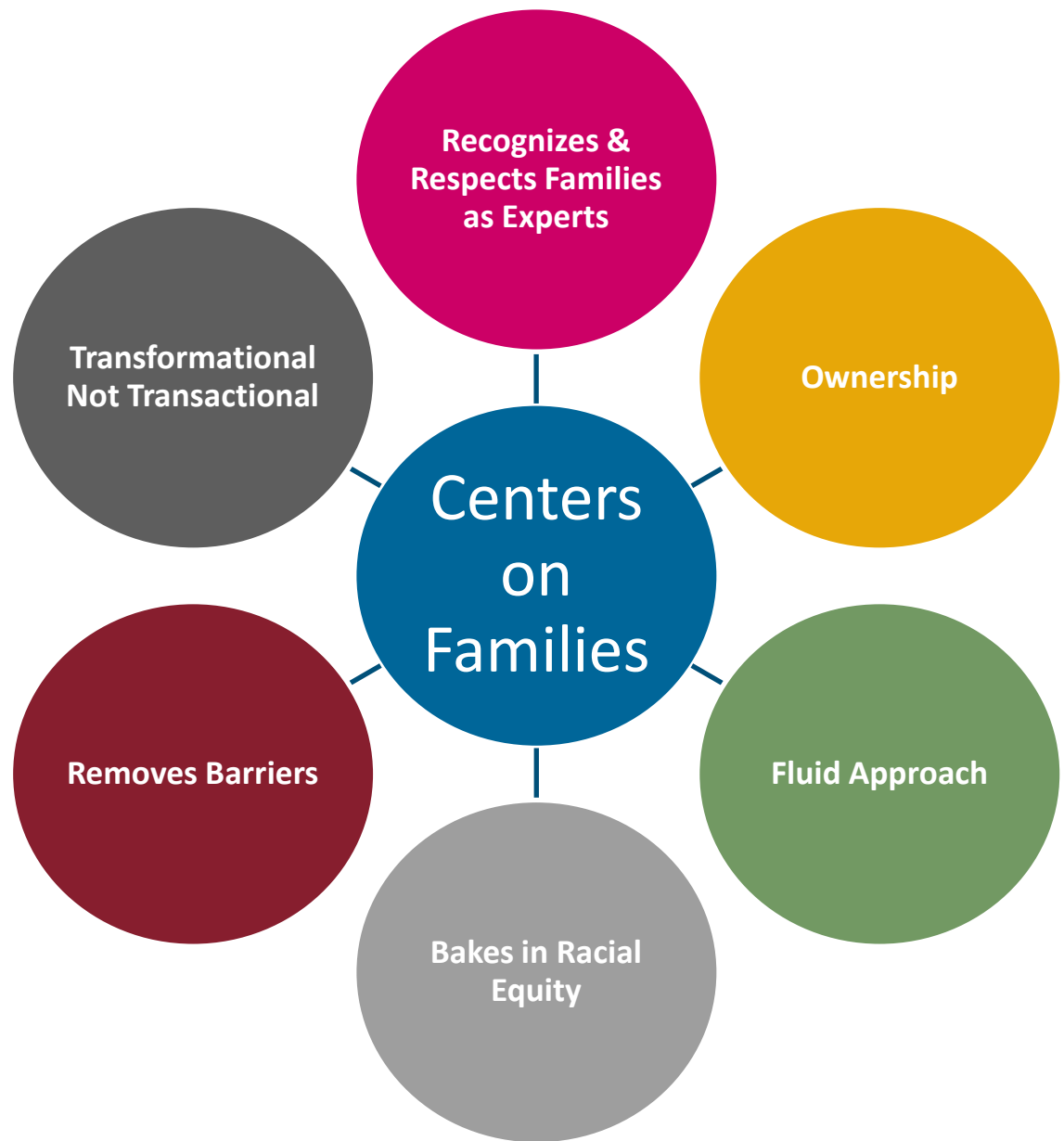
Can staff be trustworthy / transparent?

Do staff provide peer support to customers?

Do customers have choices?

Is there opportunity to collaborate with customers?

Do you empower / give voice to customers?

Reflection: Transactional vs Transformational Engagement

- Transactional – Task-focused; process; limited

- Transformational – Person-focused; Holistic; capacity-building

Coaching Tools and Resources

- The Prosperity Agenda: Family-Center Coaching
  - https://familycenteredcoaching.org/develop-a-practice-of-coaching/#get-to-know-family-centered-coaching

Customer Voice in Services

Service Design

Service Delivery

- Prescribed services & goals vs family-driven
- Who delivers programs?
  - **Representation matters**

Service Evaluation

- Surveys
- Focus Groups

Practical Considerations: Advisory Committees

Augment the voice of community & voice of community members with low-incomes on the board to enhance communication & better inform the board of constituent issues and needs.

Does the Advisory Committee Exercise True Power?

- Formally adopted/appointed by the board (recognized role)
- Committees make recommendations to the board (committee agency)
- Board takes action based on recommendations (expectation of action)

Standard of Excellence 1.4 – External Advisory Committees

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Barriers & Barrier Removal

- **We do not all have the same opportunity to engage**
  - Engagement does not cost everyone the same, or provide the same value

  - What are the costs/barriers/value of your engagements?
    - Focus Groups
    - Community Meetings
    - Advisory Council
    - Head Start Services
    - Tripartite Board

Building Capacity & Offering Support

- Supports Needed
  - Transactional:
    - Compensation
    - Barrier Removal

  - Transformational:
    - Mentoring
    - Leadership Development
    - Training

Equitable Engagement Practices

- Intentional engagement design & facilitation
  - Engagement timing
    - Days of the week / hours of the day
  - Engagement methods / structure
    - In-person? Virtual?
    - Interpretation & Language
  - Engagement leadership
    - Who leads? Who has power?
  - Engagement Onboarding
    - Set people up for success

Practical Considerations: Tripartite Board

- Ensure the board is trained on fundamentals of Customer Voice

- Ensure recruitment processes have intentional outreach/ engagement of customers & community
  - Racial equity
  - Engagement of those not represented

- Structure & Facilitation
  - Committees
    - Leadership & Membership
  - Facilitation
    - Languages
    - Culture
    - Meeting process/procedure

Practical Considerations: Community Assessment

- Assessment *OF* the Community vs Assessment *BY* the Community
  - Not just customer input on needs; go deeper by including the community in the interpretation of results & priorities
  - How will you "close the loop" with the community after the assessment is complete?
- Community Needs Assessment as an opportunity to hire Community Members
- **Compensation for expertise**
  - **Relevant & Proportional**

WHAT IS A NEW STRATEGY OR APPROACH YOU WILL USE IN YOUR ENGAGEMENT EFFORTS?

RESOURCES

International Association of Public Participation – Spectrum of Participation

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

- Additional Guidance
  - Definition
  - Compliance
  - Document

- Beyond Compliance

- Resources

- Assessment Scales

2021 STANDARDS OF EXCELLENCE©

Pursuing and Achieving Excellence in Community Action

From meeting to exceeding standards...

Category 1: Organizational Leadership

1.4 External Advisory Group Roles/Action

External advisory groups, task forces, or other community structures are formally adopted or designated by the Board to augment the "voice of community members with low-incomes" and diverse persons and serve to enhance communication and better inform the Board about low-income constituent issues and needs. These groups actively and systematically represent their constituencies through recommendations to the Board (Standard 1.5) on issues that directly impact new program initiatives, identifying agency advocacy issues, and/or the delivery of services, or organizational operations. *(Links to Standard 1.5)*

Note: For those agencies operating Head Start, the CAA's Head Start Policy Council is legislatively required and thus does not qualify as an "external advisory group" for achieving this standard. For agencies not operating Head Start, the local Head Start Policy Council could serve to achieve this standard if fully engaged by the agency as described by the Standard.

1.5 Maximum Feasible Low-Income Involvement

Over the past three years, the Board has formally adopted, acted upon, or supported issues specifically identified by or recommended by low-income representatives serving on the Board, or via the Community Needs Assessment (CNA), external advisory groups or other low-income community groups as designated by Board in Standard 1.4. *(Links to Standard 1.4)*

1.6 Community Advocacy

The agency demonstrates proactive advocacy activities and results by identifying and acting on unmet needs, structural inequities (including structural racism), gaps in services, lack of funding, or other barriers to those in need as defined or identified in Standard 1.5. The agency broadly disseminates the results of its community needs assessment to build awareness of poverty-related issues. The Board, executive director, and senior agency leadership demonstrate

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From meeting to exceeding standards...

Category 3: Customer, Constituent and Partner Focus

3.1 Customer/Constituent/Community Knowledge

The agency formally identifies, designates, and targets its key external customers using four or more categories including: (1) People with Low Income (2) Partners/ Stakeholders, (3) Investor/Funding sources, and (4) Community. A formal, agency-wide policy is in place that systematically guides the collection, tracking and reporting of all external customer/stakeholder data and feedback. *(Links to Standard 3.2 and Standard 4.3)*

3.2 Customer/Constituent Feedback System

Under an agency-wide policy and process, the agency has adopted a customer satisfaction survey instrument (s) and systematically collects, disaggregates, assesses, and acts upon customer/constituent feedback from its targeted customers about the agency's programs and services. Customer satisfaction data is reported semi-annually to the Board. The agency systematically tracks and produces formal reports using trends and comparative customer/constituent feedback data that provide evidence of a high degree of satisfaction shown among customers with low income, community residents, and other stakeholders, including funding sources and customer groups designated in Standard 3.1. *(Links to Standard 3.1, Standard 4.3, and Standard 7.2)*

From meeting to exceeding standards...

Category 5: Human Resource Focus

5.5 Recruitment System of Staff with Low Incomes

The agency's HR Policy demonstrates proactive diversity recruitment and equitable hiring practices including incorporating specific procedures and methodologies for actively dispersing, promoting and embedding employment, hiring and career pathway opportunity information among low-income populations, partners, affinity groups and other targeted populations. *(Links to Standard 5.1)*

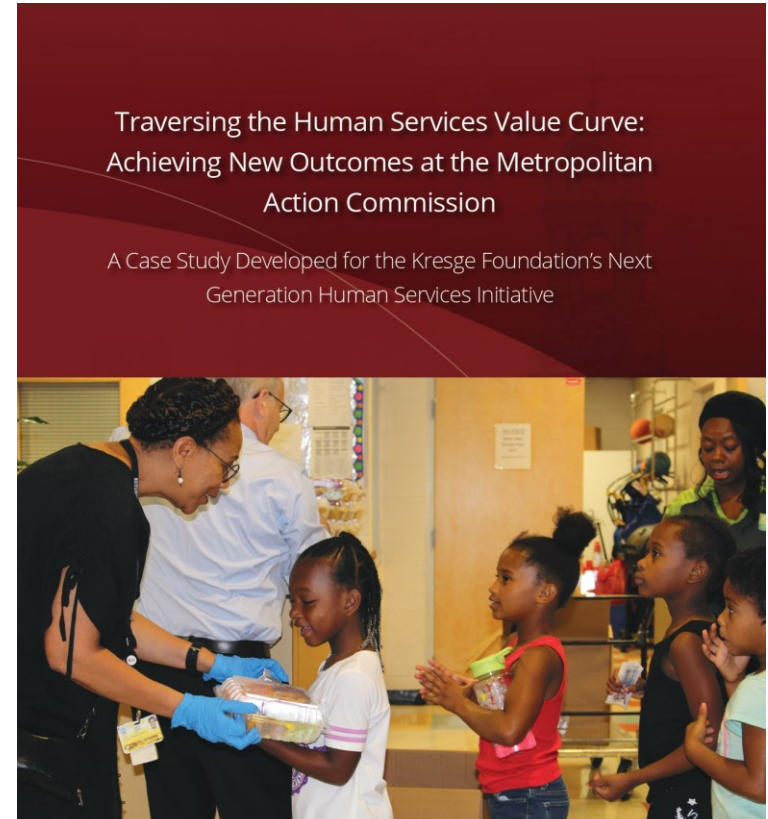# Whole Family Approach Resources
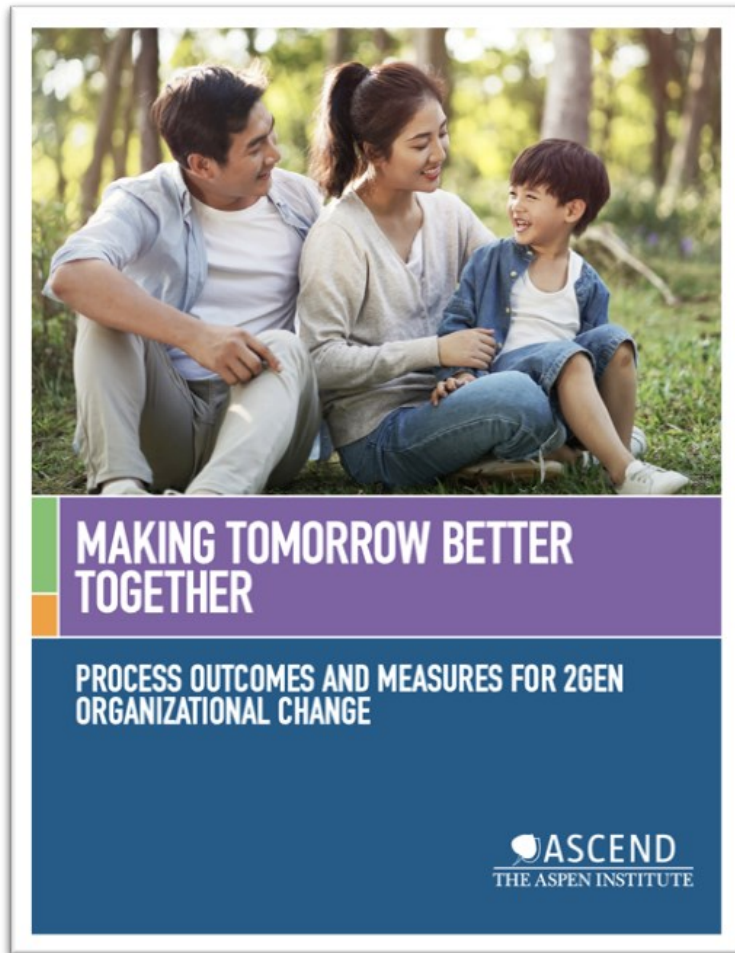
Whole Family Approach Resources

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Executive Director
&
Board Chair Symposium

June 26th & 27th
St. Paul, MN

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Silver Tier

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OR HERE?

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.

PATHWAYS TO EXCELLENCE
BRONZE 2023

PATHWAYS TO EXCELLENCE
SILVER 2023

PATHWAYS TO EXCELLENCE
GOLD 2023

PATHWAYS TO EXCELLENCE
PLATINUM 2023

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HERE?

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Learn More

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SCAN ME

Thank You!

The National Community Action Partnership is YOUR partnership and is always ready to support your organization in any way.

Contact us at any time!

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