#### **National Association for State Community Services Programs**



WINTER TRAINING CONFERENCE April 3 – 7 | Arlington, VA

# MISSION POSSIBLE Restoring Hope

**Succession Planning at the State Office** 

www.nascsp.org







# CSBG Team Program Funding Details:

- Federal CSBG (30 CAA's)
- State CSBG (30 CAA's)
- State CSBG/BIPOC & Rural Communities (30 CAA's)
- WA State Diaper Program (34 Grantees)
- Tax Credit Community Outreach (38 Grantees)
- WA State Family Resource Center (24 Grantees)
- WA State Asset Building Program (15 Grantees)
- EITC Annual Campaign State Wide Outreach
- WA State Community Action Partnership
- Community Software Group/On-line Report System

#### 8 Statewide Programs

- 1 Federal funded (CSBG)
- 7 State funded (CSBG & Others)

233 Grants/Contracts

140 Grantees

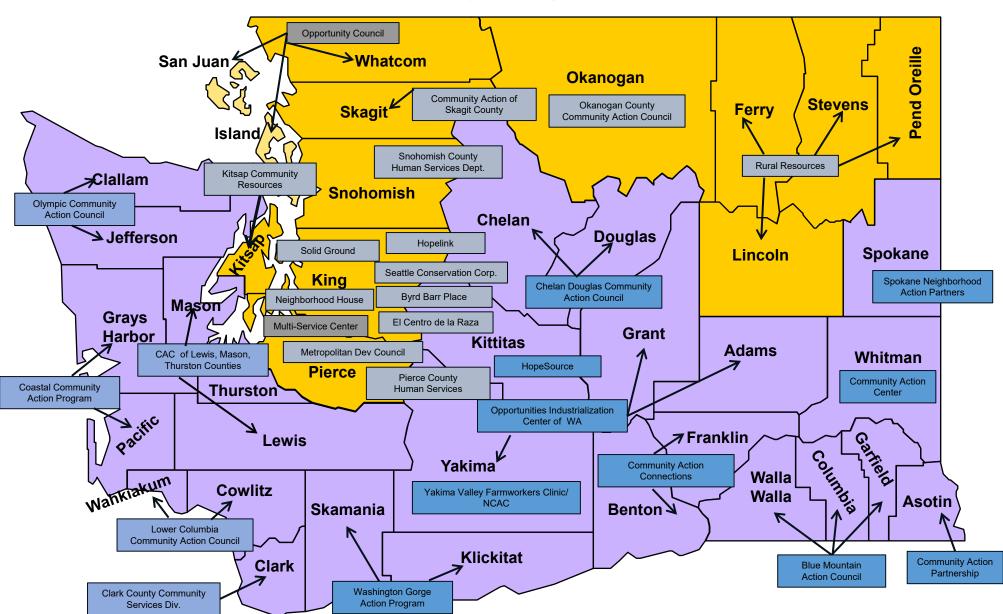
\$43M Grant Funded Awards

#### 4 Program Staff

- 1 Program Manager
- 2 Grant Managers
- 1 Program Specialist
- Manage/Monitor both Program and Fiscal Compliance

**CSBG Map** 

Washington State
Community Action Agencies



## State CSBG Office



## Dos & Don'ts

Succession Planning Tips For Long-Term Team Stability



DON'T

Limit your outreach & communication



DON'T

Neglect to involve others in the planning process



DO

Lead staff as if tomorrow will be your last day



DO

Discourage staff from "knowledge hording"



OC

Remember CSBG is more than just a program!

## Plan.....Plan..... Then Plan again

- Before you begin to develop a Succession Plan, the organization needs to understand your job.
- Organizations are not truly successful if they cannot be successful without you.
- Build leaders who are willing to take blame and give away the credit
- If the plan doesn't work, change the plan, not the goal.













# Ensure state office staff have access to systems and sites (i.e.; back up plan):

- Grants Solutions Center (CSBG/LIHEP/WAP Reporting)
- State Legislative platforms
- NACSP Member site (User ID, Password)
- State Reporting Platforms
- Designated Representative Information (Partners, funders, grantees, contractors, etc.
- Ensure incoming staff have approval to access internal forms and systems.

#### **Communicate changes internal and external:**

- Federal Partners, State Organizations, Funders, Internal agency staff, legislators, statewide network, State Association, RPIC, Region Representatives, etc.
- Set up e-mail and voice mail forwarding for users
- Update Site information contacts

# What is your state's plan for CSBG Staff Succession?





	TRANSITION PLAN	POSITION	Title	
	Proposed Transition Plan for Karen Dunn, Program Manager	#0965	Commerce Specialist 5	
	Date: March 2023	COMMMUNITY SERVICES DIVISION	Community Economic Opportunities Unit	
- 1		I I		i

#### CURENT PROGRAMS MANAGED

Program Name	Funder	Current Awards	Funding Codes	Current Funding Amounts
Community Services Block Grant	Federal	FFY22: 10/1/21 – 9/30/23	Admin 321N0120 Pass-Thru 321N0220 Discretionary 321N0320	\$437,000 \$10.9 \$437,000
Community Services Block Grant	Federal	FFY23: 10/01/22 – 09/30/24	Admin 321P0120 Pass-Thru 321P0220 Discretionary 321P0320	\$486,000 \$11.2M \$486,000
Community Services Block Grant	State	SFY22-23: 07/01/21 - 06/30/23	Admin 32B0110 Pass-Thru 32B0210 Discretionary 32B90313	\$250,000 \$2M \$250,000
Community Services Block Grant, Supplemental Funding	State (Proviso)	SFY23: 07/01/22 – 06/30/23	Admin 32B90112 Pass-Thru: 32B90212 Discretionary: 32B90312	\$475,000 \$7.3M \$475.000
Family Prosperity Act (Asset Building Program)	State	SFY22-23: 07/01/21 - 06/30/23	Admin 32M10110 Pass Thru 32M10210 DSHS IAG 32M103Z3	\$25,000 \$200,000 \$20,000
Working Families Tax Credit Community Outreach Program	State (Proviso)	SFY23: 07/01/22 - 06/30/23	Tax Exemption Pass-Thru 32O10212 Tax Payer ID Pass-Thru 32P10212 Admin/Technical Assistance 32Q10112	\$4.75M \$7.2M \$250,000

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PROGRAM RESPONSIBILITES/ASSIGNMENTS							
PRIORITY	ACTIVITY/DESCRIPTION	RESPONSIBLE	COMPLETION DATE				
	CSBG Annual Report		Annual by March 31st				
Federal CSBG Reports	CSBG Community Action Plan	CSBG Program & Grant Managers	Dependent upon Federal CSBG Award date (typically within 60 days of award)				
	Organizational Standards Assessment		Annual by November 30th				
Asset Ruilding Program		Develop report identifying outcomes, demographics, services, new programs, etc. funded through State Supplemental Funds (SFY23 only)	September 30, 2023				
		Asset Building Program and Grant Managers	July 31, 2023. Launch RFA for Asset Building Coalitions for new biennium				
		CSBG Program Manager	Administer WSCAP Grant for CSBG Training, Technical Assistance, and CAA partnerships act effective 10/1/21 – 9/30/25)				

	REQUIRED REPORTS AND DOCUMENTATION SUBMITTALS				
Report Name	Report Submittal Description		Status		
CSBG Annual Report Module 1	Federal Grants Solution Center	CSBG State Annual Report	Annually by March 30		
CSBG Annual Report Modules 2, 3, & 4	Federal Grants Solution Center	CSBG Statewide CAA reports on programs and activities	Annually by March 30		
CSBG State Plan	Federal Grants Solution Center	Federal State Plan for use of funding	Every 2 years, next report due September 2024		
WA Diaper Program Outcome Report	WA State Legislature	Results, outcomes, and key components of SFY22-23 WA State Diaper Program	September 30, 2023		
Tax Credit Community Outreach Program Results	WA State Legislature	In coordination with DOR, develop report identifying outcomes, results, challenges, and future needs for funding	July 30, 2023		

G grant renews every 2 years. the statewide on line reporting c to CSBG and Asset Building. act effective 10/1/21 – 10/30/23)

EXTERNAL RELATIONSHIPS/CONTACTS						
Name	Organiz ation	Phone & Email	Relationship Description			
Jeff Deluca, Executive Director	WA State Community Action Partnership		State Association Primary Contact			
Community Action Agency Directors  See List of WA CAA Network  Hugh Poole, State Program Director  National Association of State Community Service Programs  Beverly Buchanan, NASCSP Board Chair  National Association of State Community Service Programs			Grantee Primary Contact			
			Association Primary Contact			
			Board Chair for NASCP			
Kevin Dixon, Executive Director	Working Families Tax Credit Program/WA Department of		Collaboration for Tax Credit Grants			

	Interi	nal Contacts	
Name	Division/Office	Phone & Email	Relationship Description
Steven Elwanger	CSD Budget Office		Lead CSBG Budget Representative
Cheryl Marks	Commerce Fiscal Office		Funding Awards and Draws
Nicole Rivera	Human Resources		CEO Unit HR Representative
Cindy Guertin-Anderson	Deputy Director		Grant and Contract Approval/Signature
Cecil Daniels	Managing Director, CEO Unit		Immediate Supervisor
Diane Gianoble	Deputy Managing Director, CEO Unit		
Brian Sarensen	LIHEAP Program Manager		Questions and information regarding Federal/State Funding with non-profit organizations
Sarah Champion	Commerce Contracts Office		Questions regarding granting & contracting
Sarah Coggins	Commerce Director's Office		Scheduling agency director for appearances, speaking roles, proclamations, etc.
(Insert rows as needed)	_		

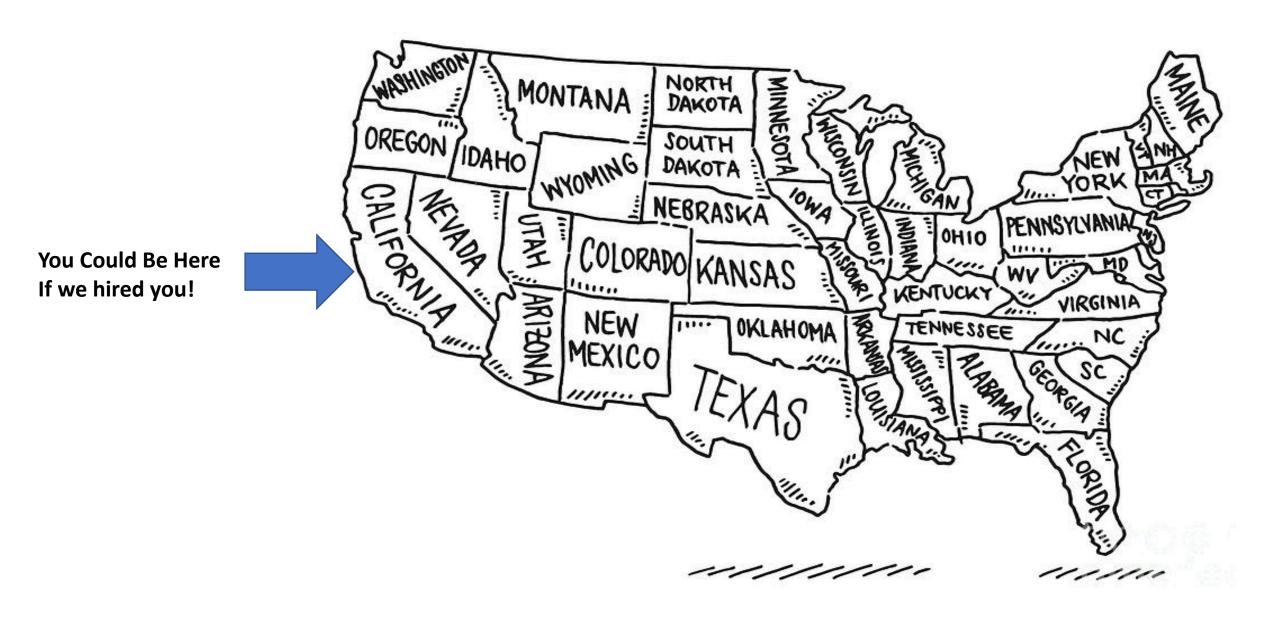
ınder Contact

ADVISORY & BOARD MEMBERSHIPS						
Name	Organization	Contact	Description of Activities			
Board Member	National Community Action Partnership	Raymond Thomas, NASCSP	Region 10 Representative (ID, WA, CA, OR, AR, CO and AK			
Working Families Tax Credit Advisory Workgroup	Department of Revenue, WFTC Division	Perla Gamboa, DOR	Representative for underserved, rural, and low income communities			
Family Resource Center Advisory Board	Department of Children Youth and Families		Representative for low income families			

Attachments:

Position Description

	SUPERVISOR DETAILS				
	Name	Official Title	Contact	Schedule	Description of Activities
	Jessica Brown Date of Hire: 1/1/21	Commerce Specialist 3	360-555-5555 Cell JesicaB@Commerce.wa.gov	Mon – Thursday 7:00 AM – 5:30 PM Telecommuting 100%	Manages Grants and Proviso funding
	Karl Hoffmann Date of Hire: 5/16/19	Commerce Specialist 3	360-555-5555 Cell Karl Hoffmann@Commerce.wa.gov	Mon – Thursday 6:30 AM – 5 PM Telecommuting 100%	Manages Grants and Proviso Funding
	Rebecca Hanson Date of Hire 9/1/16	Commerce Specialist 1	360-555-5555 Rebecca.HansonCommerce.wa.gov	Mon – Thursday 6:30 AM – 5 PM Telecommuting 100%	Coordinates program activities and processes



## California CSBG Service Areas

- 58 Counties
- 60 CSBG Eligible Entities
  - Public/Private
    - CAA
    - MSFW
    - NAI
  - Limited Purpose Agencies



### Community Services Division

### Staffing

Administrative

1 Associate Analyst

Field Operations

1 Manager

6 Field Representatives

 Program Development and Reporting

• 1 Manager

5 Program Analyst

2 Retired Annuitants



Community Services Block Grant

Type: federal

Allocation: \$67M

California Earned Income Tax Credit Program

Type: state

Allocation: \$20M

Farmworker Resource Center

Type: state

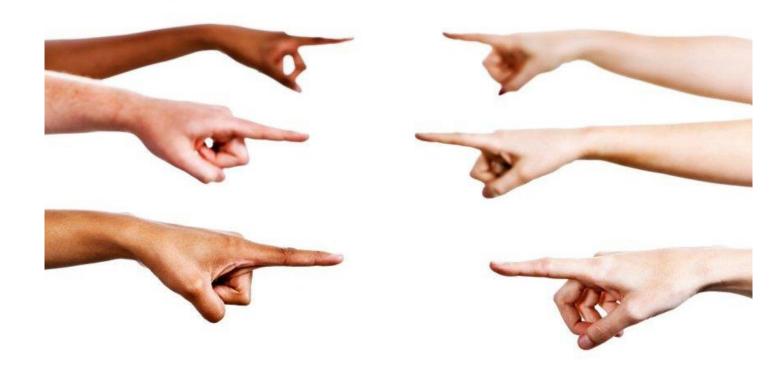
Allocation: \$3M



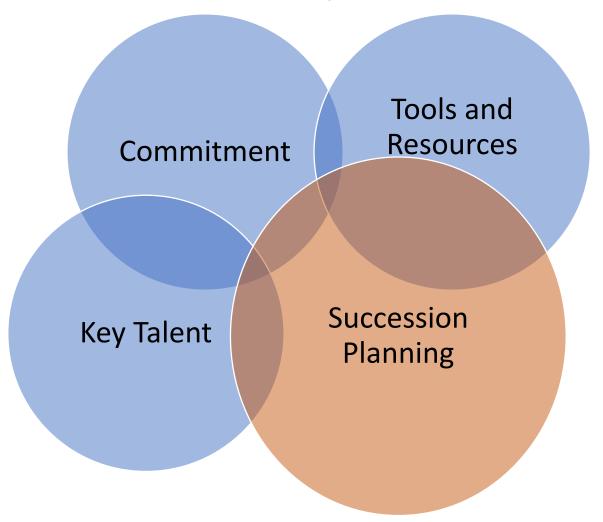
## Why does Succession Planning Matter



Who is Responsible?



## Where do you start?



## Commitment

- Buy in from leadership
- Part of strategic plan
- Accountability
- Follow up





### Tools and Resources

- Transition binder
- Policies and Procedures
- Key Partnerships
  - Network Key Staff
  - State Association
  - National Partners
- Access to systems
  - Instructions for using the system
  - Key reports

- Key Dates of work products
  - State Plan
  - Annual report
  - Organizational Standards
- Internal Partners
  - Accounting
  - Audits
  - Contracts

## Key Talent





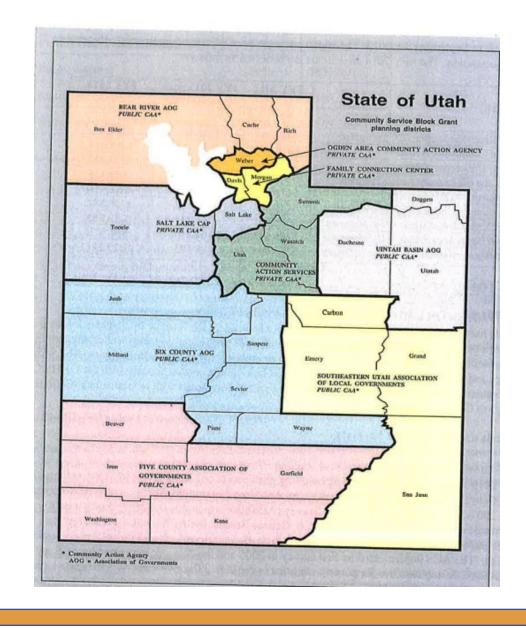
• The "holy grail" of effective succession planning turns out to be surprisingly obvious but unsurprisingly difficult: balance empathy and attention to human factors with objective decision-making and the organizational discipline to see the process through.

Unknown

## Utah

#### Who we are:

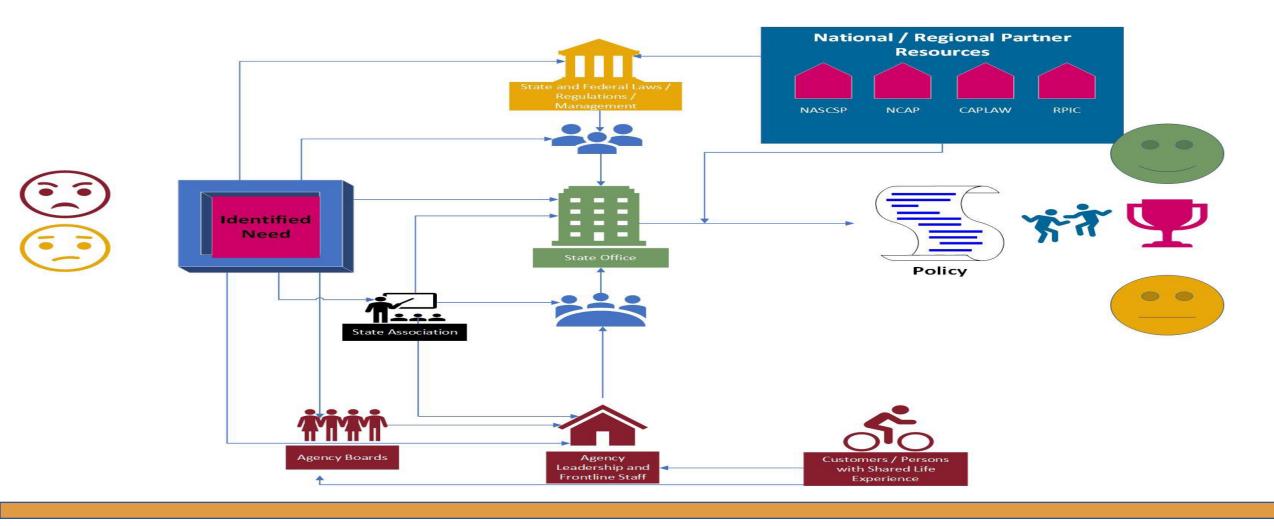
- "Small State"
  - \$3.8 million CSBG (FY22)
  - Just under \$4.9 million-CARES
- CSBG staff:
  - 1 manager + 1/3 program specialist
- 9 CAAs—4 private/5 public
- Strong Partnership with State Association



# The Impact of the Statewide Network in Utah in FY 22

- The network served 41,069 households and 91,989 individuals
- 19,861 unduplicated Individuals progressed towards greater selfreliance
- CSBG dollars were leveraged with 1,107 partnerships
- For every \$1 of CSBG, \$15.14 of other federal, state, local, and private dollars were used as leverage and \$3.39 of that leverage came from private dollars

## Why Does It Matter to the Larger Network?



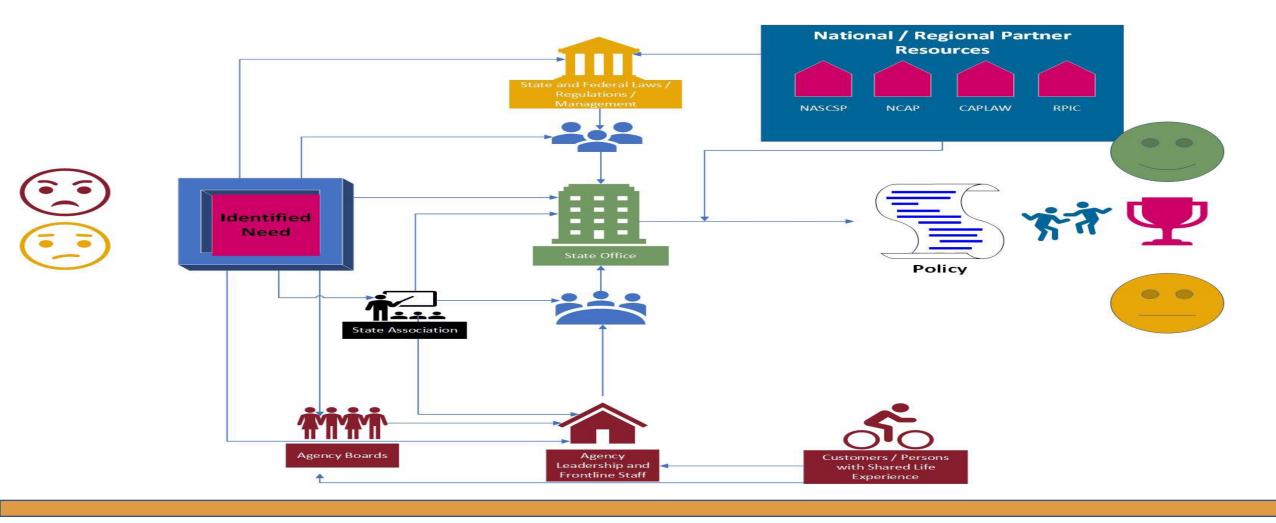
## Challenges When There is no State Succession Plan

(1) Income / Use of Income					
Base Year:	[Insert Base Year				
A – Income Area C	haracteristics				
Characteristics (see the Data Element suggestions under Issue Area "Use of Income")		В	y Co	Overall Measure for Utah	
Individual Poverty Rate (overal	I): DWS https://jobs.utah.gov/wi/data/library/other/poverty.html				
Percent Change in poverty rate	from last assessment				
Family Poverty Rate (overall)	DWS https://jobs.utah.gov/wi/data/library/other/poverty.html				
Poverty Rate By Race: : DWS	https://jobs.utah.gov/wi/data/library/other/poverty.html		Τ		
White alone			十	Ш	
Hispanic					
Black or African American					
American Indian and Alaska Native, alone				Ш	
Asian alone					
				Ш	
Native Hawaiian and Other P: Some other race, alone	acific Islander, alone		+	$\vdash$	+
Some other race, alone			+	HH	
Two or more races			+	$\sqcup \sqcup$	
Poverty Rate By Age: DWS ht	tps://jobs.utah.gov/wi/data/library/other/poverty.html				
Under 18 years					
Under 5 years			$\top$		
5 to 17 years					
18 to 64 years					
18 to 34 years					
35 to 64 years					





## How Can State Associations and RPICS Help?





Open Doors Community Action / ROMA Management Training

Wednesday, February 1, 2023

Questions



Scan here to complete the evaluation for this session!

