



2026 WINTER TRAINING CONFERENCE

“Rooted in Hope”

Identifying Agency
Level Needs for
Assessment and
Planning.

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Learning Objectives



Identify data sources for Agency Level Needs



Practice analyzing data from those sources to identify Agency Level Needs



Understand how to document Agency Level needs in the Community Needs Assessment report



Improve agency capacity to meet Organizational Standards related to Strategic Planning

Original 6 National Goals

Goal 1: Low-income people become self sufficient. (Family)

Goal 2: The conditions in which low income people live are improved. (Community)

Goal 3. Low-income people own a stake in their community. (Community)

Goal 4. Partnerships among supporters and providers of services to low-income people are achieved. (Agency)

Goal 5. Agencies increase their capacity to achieve results. (Agency)

Goal 6. Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive services. (Family).

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.

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Identifying Agency Level Needs Matters!!

- Our ability to deliver services and help obtain positive changes for individuals, families, and our community depends on having the agency capacity to do the work.
- If agency level needs are not clearly identified, peak effectiveness may be compromised.
- Planning for improvement becomes challenging because there is not a well stated focus.
- Without clear needs identified, the strategies might not be effective.

Outcomes are identified because some change is needed!

Strategic plans may focus on outcomes such as:

- reducing siloed programing,
- improving internal workflow,
- building staff capacity,
- upgrading technology,
- meeting organizational standards, and
- increasing funds and resources.

But where does the evidence for establishing these outcomes come from?

If needs aren't documented in the agency's Community Needs Assessment report, how will someone reviewing your Strategic Plan or Community Action Plan know where they came from?



Typical agency improvement plans

- Many *Strategic Plans* in Community Action focus on agency level improvements, but the needs are not included in the Community Needs Assessment reports.
- A “results-oriented approach” requires needs to be *documented*, not assumed.

The elements of the five dimensions identified below will help the agency understand what agency level factors might be supporting the achievement of results and what might be limiting success.



PROCESS OF
OVERSIGHT OF
PROGRAMS



AGENCY'S
FACILITIES AND
OPERATIONS



STAFF
CAPACITY



CUSTOMER
SATISFACTION



COMMUNITY
ENGAGEMENT

AGENCY CHECKLIST

Process for Oversight of Service Delivery

There are processes in place for oversight of programs to evaluate the quality of service delivered (such things as effectiveness and efficiency, quantity, frequency, duration).

Implementation of service is guided by planning information (related to such things as: How many people will be served? Who are they? What services do they receive? What changes? What resources do we have?)

The agency has identified resources in the community that can extend the services it provides directly for individuals and families.

There is a process for using measurement tools as part of implementation to collect data related to both outcomes and outputs.

There are comparisons between the demographics of the population served and the population identified to be in need in the CNA.

There is a regular comparison of projects and actual data. The information from this comparison is used in further planning.

There is a process to show the connections among people, services, and outcomes. Agency data can identify those who have received single services, multiple services, or bundled services.

Recommendations for actions are made to the Board based on analysis of data.

Services, strategies, and performance goals are adjusted as needed, as evidenced by actual performance (i.e., they continue services and strategies that achieve desired performance goals and revise or discontinue those that do not achieve desired performance).

Fiscal policies and procedures are in place to ensure funds are spent appropriately to support the achievement of outcomes.

Facilities, Operations (Communications, Equipment, Processes)

The office is located in an area where people with low income live.

The office is easy to access without a vehicle.

The office is open during times that meet the needs of the community.

The office is accessible to persons with disabilities.

The office is welcoming.

The office has space that supports confidentiality.

The office is free of hazards (mold, leaks, etc.).

There are enough computers to meet needs of staff.

Computers are available for customer use.

Phone system is up to date and easy to navigate.

Recorded greetings are available in language/s that match the languages spoken in the community.

Signage in the office is written in language/s that match the languages spoken in the community.

Internet/broadband access is available.

There are communication channels to ensure information sharing among staff, customers, and stakeholders.

IT support is available for staff.

Staff Capacity-Informed, Assigned, and Equipped

Staff are properly trained and equipped.

Staff know what is expected of them (properly informed and assigned).

Staff speak the language/s that match the languages spoken in the community.

Staff are trauma-informed.

Human Resource policies and procedures are in place to provide supervision, evaluation, and support to staff.

Customer Satisfaction

There is a process in place to collect customer satisfaction data.

There is a process in place to analyze customer satisfaction data.

There is a process in place to include customer satisfaction data in the Community Needs Assessment.

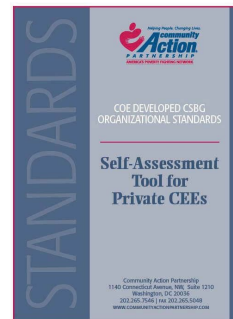
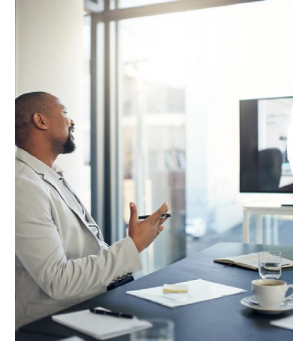
Community Engagement

Community members, including those from various sectors, are engaged in agency programs and services, and there are systems to capture and document the engagement.

There are MOUs in place for community-level work.

There are MOUs and processes in place for interagency referrals for family services, which include follow-up and data sharing.

How does the agency collect this kind of data?



Satisfaction Data - Primary Customer

Source:

- Customer focus group
- Survey
- Formal Grievances

Focus:

Customer experience which could include accessibility of agency facilities, interactions with staff, ability to secure needed services or resources, etc.





Stakeholder (Supporting Customer) Input Data

Source:

- Listening Sessions or Focus Groups
- Partner Surveys
- Referral Feedback

Focus:

Observation of services provided as a result of referral from partner, understanding of eligibility for services, understanding of services offered, etc.



SWOT Analysis

Typically done as part of Strategic Planning, Board and staff often identify their perspectives of the agency's:

- Strength
- Weakness
- Opportunity
- Threats

The report of SWOT activities can be analyzed and compared with prior year SWOT findings to identify possible trends or repeated items.

Agency Report Data



Reports:

- CSBG Annual Report
- Head Start PIR
- Agency Year End Report
- Expense Reports
- Bank Statements
- Program Waitlists

Examples:

- Services Provided (Planned v. Actual)
- Outcomes Achieved (Planned v. Actual)
- Funds (Allocated v. Expended)
- Cost per outcome

More Agency Report Data!

Source:

- Supervisory conference notes
- Exit interviews
- Training Evaluations
- Staff Input (Suggestion Box, survey, other communication)
- Human Resources files and notes

Focus:

Staff feeling of their own competence, training needs, observations related to workload and supervisory support, data on staff turnover, credentials, etc.



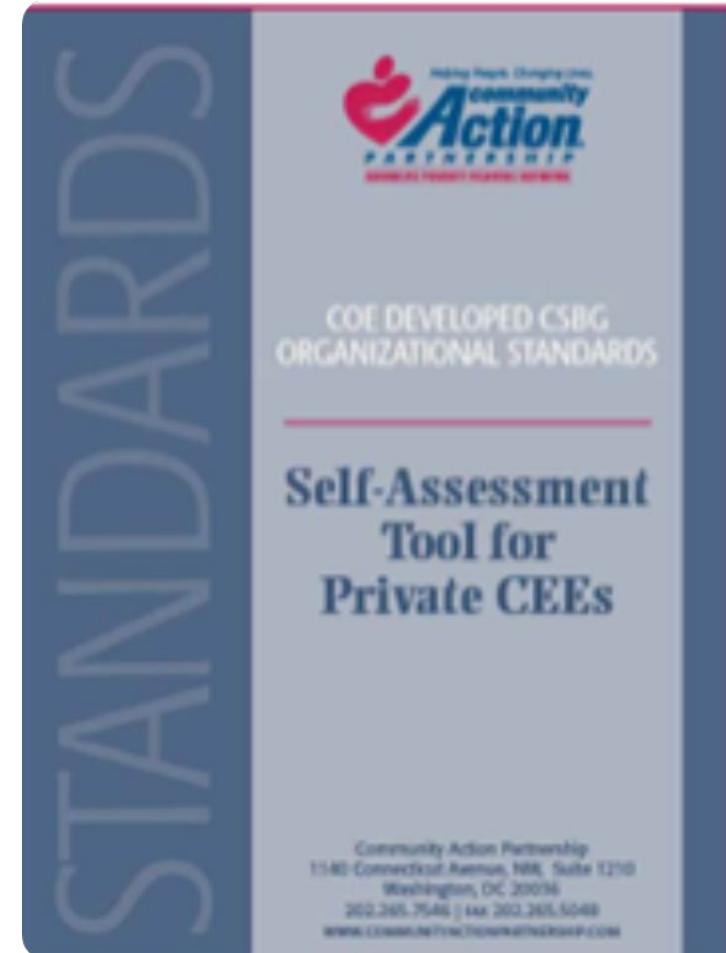
Internal Evaluations and Monitoring Results

Source:

- State monitoring findings
- Internal Quality Assurance/Quality Improvement review results

Focus:

Areas needing improvement



Activity



What are the needs?

You will get sample data to use to identify needs, including:

- a satisfaction survey report
- an outcome report excerpt
- a SWOT statement
- reports of staff input

In groups, review the data and answer:

- What agency level needs does this evidence suggest?
- Where in the CNA report or planning documents could this need show up?





Examples from handout for the activity

Satisfaction Data - Primary Customer



Example:

“We appreciate the help we received, but none of our calls from the VITA program were returned until we made a post on your Facebook page expressing our frustration.”

Stakeholder (Supporting Customer) Input Data

Example:

“Our Job Search center often refers customers to your CAA, but there seems to be confusion on the documents that they need to bring with them for their initial intake.

One customer was accepted into your Work Smart program the day that they applied, but another was turned away that same day, even though they had the same documentation as the person that was accepted.”



SWOT Analysis

- **Strength:** The staff we have are dedicated and committed to helping others.
- **Weakness:** We have multiple vacancies across the agency, which creates additional work for staff.
- **Opportunity:** New funding applications for agency's helping people find employment have been released.
- **Threats:** Staff are leaving our agency and accepting offers with other human service agencies that pay more than we do.



Agency Report Data



Examples:

- **Energy Assistance Department:**

- \$100,000 *allocated* for customer utility assistance during FY 24/25
- \$16,000 *expended* for customer utility assistance during FY 24/25
- Target: 200 out of 200, or 100% of customers will avoid utility shut off during FY 24/25.
- Actual: 32 out of 35, or 91% of customers actually avoided utility shut off during FY 24/25.

- **Self Sufficiency:**

- Self Sufficiency grant decreased from \$765,000 to \$485,000 for FY 24/25.
- Target: 65 out of 100, or 65%, of customers will obtain employment during FY 24/25.
- Actual: 20 out of 100, or 20%, of customers obtained employment during FY 24/25.

More Agency Report Data!



Example: “My supervisor put me on a corrective action plan for not having data entered on time. We switched systems this year and I’ve never had training on the new software, so it takes me longer to get things done. I want to do a good job, but I don’t know how.”

Example: “I loved my job as a support coach, but I cannot do it anymore. I have 75 people on my case load and the most I can do any given day is put out fires-I never get to be proactive or really engaged with my customers.”

Group activity guidance



- Remember, this is not about solving or creating a service or strategy, this is just about identifying a need.
- One way to think about this is to describe the conditions that are represented by the evidence.
- What is happening now that you can observe?



Clarify the Agency Level Need

Don't identify a strategy that could address the need.



- Our agency needs to provide employment services so our customers do not have to go to another agency.
 - **Actual Need: Our agency lacks the trained staff to provide employment services.**
- Type of Strategy
- Our agency needs to establish shelter services for the homeless.
 - **Actual Need: Our agency does not have resources to provide shelter services for the homeless.**
- Type of Strategy
- Our agency needs more childcare slots.
 - **Actual Need: Our agency is not funded to provide child care for everyone who applies for services.**
- Type of Strategy

Examples:

If satisfaction surveys show long wait times between application and acceptance →

Need: Our agency lacks sufficient staffing to process applications in a timely fashion. *(note: to verify this need, you may need additional data)*

If outcome reports show missing data →

Need: There is insufficient oversight of data entry process. *(note: when you collect additional data you may find that oversight is not the problem, but rather there is a need for additional training about data entry requirements)*

In groups, review the data and answer:



What agency level needs does this evidence suggest?

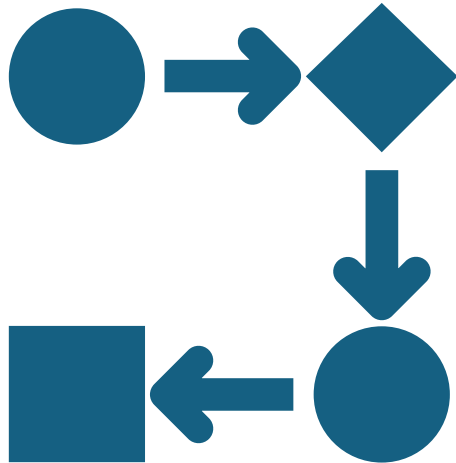


Where in the CNA report or planning documents could this need show up?

Debrief

- Did all groups identify the same needs?
- How clear was the evidence to identify something that needs improved or maintained?
- What evidence was missing that would make the need more defensible?
- How can State Offices and Associations support local agencies in documenting agency level needs?

Using your identified agency level needs



- Include the need for agency level improvements in the Community Needs Assessment reports.
- Use your data to *document the need*, so it is not just assumed.
- Your data will help identify the factors impacting the situation.
- Describe the conditions, not what you want to do to fix the condition.

Connect the dots...or docs...



- Create plans that identify outcomes and strategies that match the needs prioritized in the CNA Report.
- How can outcomes and strategies be included in the Community Action Plan?



Community Needs Assessment Report

Data:

“Satisfaction surveys show long wait times between application and acceptance.”

Agency Level Need:

Staffing is not sufficient to process applications in a timely fashion.

Strategic Plan

Agency Level Outcome:

Staffing is sufficient to process applications in a timely fashion.

Agency Level Strategy:

Reallocate unrestricted funds to create three new customer intake positions.



Community Needs Assessment Report

Data:

Internal monitoring of data entry into XYZ Database revealed services are not entered consistently & outcomes are not marked as completed.

Agency Level Need:

Data oversight is not sufficient to identify data entry errors.

Strategic Plan

Agency Level Outcome:

Data oversight is sufficient to identify data entry errors.

Agency Level Strategy: Department heads will create and implement a data entry review schedule.

What did we learn?

- Agency capacity is a factor in assuring the agency can support the achievement of outcomes for individuals, families and communities.
- We can use checklists and other data collection tools to identify the quality of an agency's capacity.
- We can analyze the data collected and use that to describe conditions that must be improved or maintained.
- Identification of conditions help to establish agency level needs to be addressed in the next program period.
- Planning documents must include outcomes and strategies related to the prioritized agency level needs.

Ways that State CSBG Offices and State Associations can support local agencies in identifying agency level needs:

- 1. Co-create a shared vision:** Acknowledging the importance of high performing agencies with capacity to support achievement of outcomes
- 2. Deliver targeted T/TA:** Focus training on collecting and analyzing data to identify agency capacity strengths and needs.
- 3. Facilitate collaboration:** Use your platform to build cross-sector partnerships that support local impact.
- 4. Foster continuous improvement:** Encourage a learning mindset rather than just compliance.
- 5. Align planning and funding:** Ensure CSBG plans, CNAs, and discretionary funding are aligned to support common outcomes.
- 6. Model results orientation yourselves:** Track and report on the effectiveness of your own support to agencies.



Next steps

Thanks to the National Peer to Peer ROMA Training Project for this presentation.



Thanks to the Association of Nationally Certified ROMA Trainers and Implementers for support and continuous quality improvement efforts related to scaling ROMA across our network.

Contact Us

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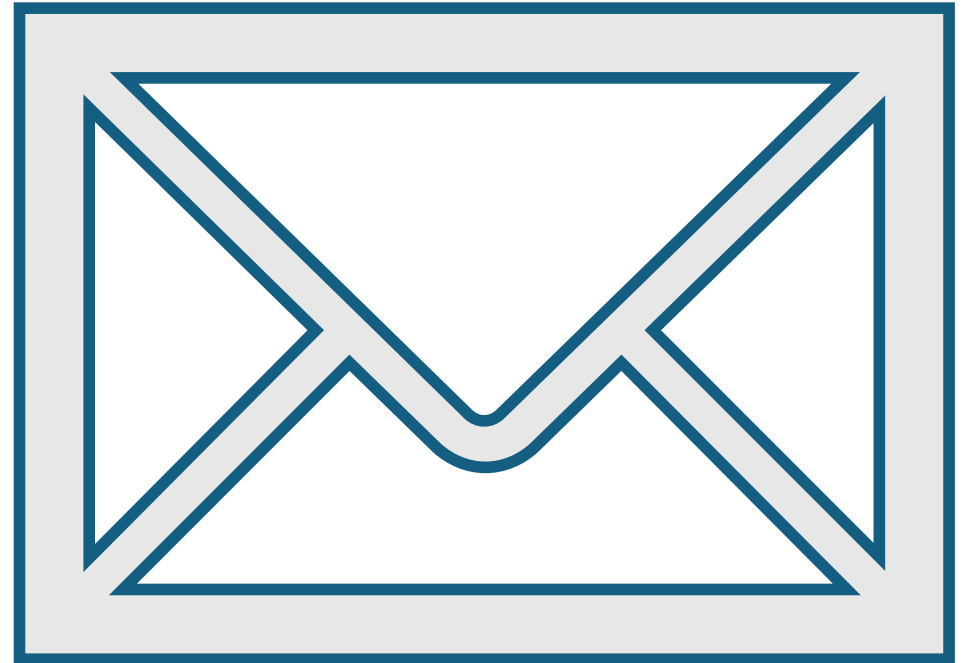
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