

This document synthesizes key takeaways, group insights, and practical opportunities from the VACAP Summit 2025 sessions on Elevating Performance Management for Agency Impact. It captures common challenges, emerging themes, and actionable next steps for community action agencies to strengthen their performance management systems.



## Strategic Need for Performance Management

Robust performance management is critical for community action agencies as it ensures accountability, transparency, and continuous improvement in program delivery. It helps agencies demonstrate measurable results, maintain funding, and communicate their impact to funders, partners, and the community.

### Key points identified by participants:

- Ensures continued federal and grant funding.
- Supports data-driven storytelling during community meetings.
- Demonstrates program effectiveness and ability to meet client needs.
- Tracks whether programs are meeting goals and achieving outcomes.



## Questions Agencies WISH Boards or CEOs Would Ask

Participants identified several meaningful questions to promote reflective and results-oriented discussions:

- How do programs fit together from a performance perspective?
- Are we meeting funder requirements and identifying new opportunities?
- What takes up most of the staff's time, and how does that impact outcomes?
- How can we bridge the gap between staff and board communication?
- What partnerships should we develop to serve the community better?
- How is the staff doing (morale, turnover, satisfaction)?
- When should we refurbish or replace assets to maintain efficiency?



## Essential Performance Areas for Board/Funder Meetings

- Clients served (by department/program).
- Outcomes and success stories.
- Budget and financial overview.
- Enrollment trends and demographic shifts.
- Customer service and satisfaction.
- Employee retention and performance.
- Collaboration and community partnerships.



## Core Dashboard Metrics

- Quarterly updates and outcome summaries.
- Enrollment data and demographic insights.
- Financial performance (cash flow, audit findings, budget vs. actuals).
- Client satisfaction and retention rates.
- Compliance and governance indicators.
- Strategic goal progress/measurable impact outcomes.



## CEO-Program Director Dynamic Duo

The relationship between the CEO and Program Director is essential for strong performance management. Each brings unique strengths:

### Program Directors/ Upper Management:

- Bring accurate data and outcome reports.
- Shares success stories and mission moments.
- Provides administrative insight and program context.
- Ensure program operations align with agency goals.

### Executive Directors/ CEOs:

- Sets strategic meeting agendas and priorities.
- Oversees agency-wide financial performance.
- Integrates departmental directives into unified strategies.
- Leads strategic planning and governance alignment.



## Follow-Up and Communication Insights

- Bringing program leads to board or funder meetings to provide real-time data insights.
- Pair data with testimonials and qualitative stories for stronger impact.
- Prepare to discuss impact, mission alignment, and 'what's next'.
- Align follow-up actions with CSBG priorities and community needs.

## Next Step Opportunities for Agencies

### 1. Strengthening Data and Story Integration

- Combine quantitative data with qualitative stories for comprehensive impact reports.
- Develop quarterly dashboards aligned with ROMA outcomes and board priorities.

### 2. Deepen Staff and Board Engagement

- Conduct joint sessions for data review and reflection.
- Use staff satisfaction data to improve morale and reduce burnout.
- Host cross-program briefings to connect individual services to agency-wide outcomes.

### 3. Build Strategic Partnerships

- Map existing and potential community partnerships.
- Collaborate with local agencies for shared funding and outreach opportunities.

### 4. Improve Performance Meeting Practices

- Create a quarterly 'Board/Funder Playbook' featuring metrics, narratives, and next steps.
- Include at least one program leader or staff representative during meetings.

### 5. Implement Continuous Improvement Tools

- Track and review program goals regularly.
- Use satisfaction and needs assessment data to refine programming.
- Monitor employee retention and capacity trends.

### 6. Bridge Communication Gaps

- Create a feedback loop between staff, leadership, and the board.
- Share board highlights with staff and program outcomes with the board.
- Encourage cross-functional communication to align strategic goals.