

Fiscal Years 2027 – 2029

Community Assessment Report & Strategic Plan

Planning Guide for Community Action Agencies



Massachusetts Executive Office of Housing and Livable Communities
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I. Letter from EOHLC



Commonwealth of Massachusetts EXECUTIVE OFFICE OF HOUSING & LIVABLE COMMUNITIES

Maura T. Healey, Governor ♦ Kimberley Driscoll, Lieutenant Governor ♦ Edward M. Augustus Jr., Secretary

May 2025

Dear Community Action Agency Executive Directors, Staff and Board Members,

The Executive Office of Housing and Livable Communities (EOHLC) is pleased to share the Planning Guide for Community Action Agencies (CAAs) and officially kick off the FY 2027-2029 Community Assessment Report & Strategic Plan (CARSP) process. The CARSP process is undertaken by Massachusetts' CAAs once every three years to inform the approach to fulfilling goals of the CSBG Act which are to reduce poverty, revitalize low-income communities, and empower low-income families and individuals to become self-sufficient.

As you may recall, the last two CARSP processes were modified in response to challenges due to the COVID-19 pandemic. The FY 2027-2029 CARSP cycle reflects a return to the pre-pandemic process, with a combined community assessment report and strategic plan document due July 31, 2026:

Community Assessment - During the community assessment phase beginning fall 2025, your agency will gather information to help identify the most pressing needs faced by low-income individuals and families in your community. However, this phase is not just about data gathering, it is also a critical opportunity for your agency to increase visibility as a leader in the community, reach community members that do not know what your agency offers, and to reinforce strategic partnerships across all sectors of your community. An effective assessment will mobilize board members, agency staff, volunteers, and community partners in engaging with the community.

Strategic Plan - In the strategic plan phase beginning spring 2026, your agency will develop goals to address the most pressing needs of low-income people determined through the community assessment. Your strategic plan addresses several requirements tied to the CSBG Act and CSBG Organizational Standards. As a result, the CARSP planning guide specifies what must be included in your strategic goals description. The goals also feed into your agency's annual Community Action Plan, which is a key mechanism your agency uses to monitor and evaluate progress implementing the strategic plan.

To acknowledge the official kickoff of the FY27-29 CARSP process, please be on the lookout for an invitation to a state-wide virtual training and information event this summer hosted by the Massachusetts Association for Community Action (MASSCAP) and EOHLC.

EOHLC would like to extend our sincere appreciation to the network for the time and attention it will devote to this process over the next year as well as the valuable work you do in your communities. Every person connected to Community Action plays an important role in the CARSP process and in our network's shared goal of improving the lives of low-income people.

Best wishes,

A handwritten signature in cursive script, appearing to read 'Tamara Fahey'.

Tamara Fahey
Community Services Unit Supervisor
Division of Strategy and Climate, EOHLC
CSBG State Office

II. Introduction

1. History & Requirements

The Community Services Block Grant (CSBG) is federal funding from the U.S. Department of Health and Human Services (HHS) created through the Economic Opportunity Act of 1964 and administered at the State and territory level. Pursuant to the federal [CSBG Act](#), the funding supports activities that help to reduce poverty, revitalize low-income communities, and empower low-income families and individuals to become self-sufficient. In Massachusetts, CSBG is at the core of a network of Community Action Agencies (CAAs) which mobilize resources and communities to fight poverty. The Executive Office of Housing and Livable Communities (EOHLC) is designated as the lead administering agency for the funding source.

Among the assurances listed in section 676(b)(11) of the [CSBG Act](#) is that states will collect from their eligible entities, or CAAs, a Community Action Plan (CAP) *“that includes a community-needs assessment for the community served, which may be coordinated with community-needs assessments conducted for other programs”*. To meet this assurance, EOHLC includes similar requirements for CAAs in language of the state regulation [760 CMR 29.00](#) and applicable contract provisions. Effective 2015, further requirements were added under the Center of Excellence (COE) developed CSBG Organizational Standards, implemented in Massachusetts pursuant to the Department of Health and Human Services Administration for Children and Families, Office of Community Services [Information Memorandum 138](#). These requirements include that CAAs must complete a community assessment and issue a report at least every three years, that they must complete a strategic plan at least every five years, and that agency strategic plans must include certain information collected during the community assessment. Organizational Standards are referenced throughout this planning guide where they apply, and a complete list is available in [APPENDIX A](#).

Although Organizational Standards only require a strategic plan every five years, to streamline workflow, the Massachusetts CAA network advocated combining their community needs assessment/report and strategic plan into one process conducted every three years. The Community Assessment Report & Strategic Plan (CARSP) is the final document resulting from this process. The CARSP is designed to feed a CAA’s annual CAP over a three-year period, ensuring short-term performance objectives and activities tie to identified needs in the community served as well as needs specific to the agency. Since CSBG is unlike most federal funding sources in that it can be used with relative flexibility and does not represent one service or program, work of the entire agency must be

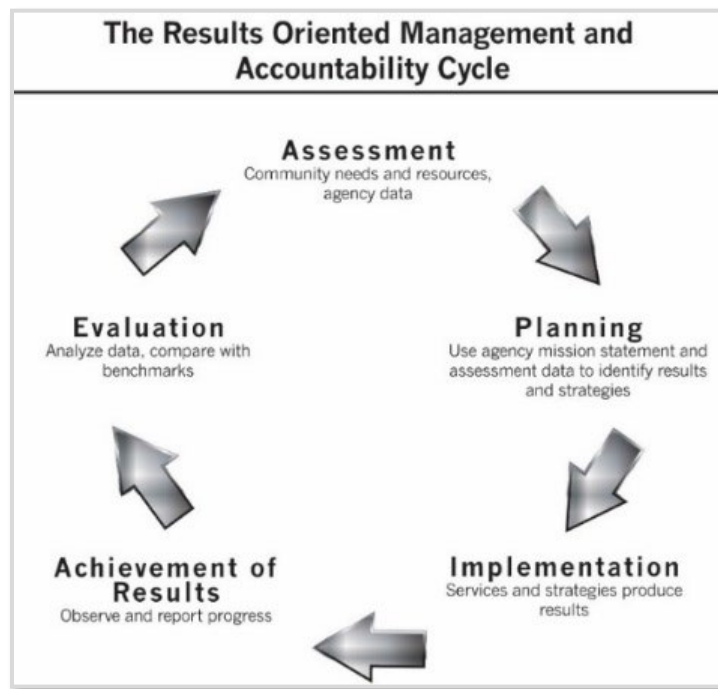
accounted for in the CARSP and subsequent CAP reports. EOHLC utilizes both documents to evaluate whether a CAA is fulfilling their core purpose of meeting the overarching goals of the [CSBG Act](#).

Please note this document provides general guidance for conducting a community and internal needs assessment as well as developing the CARSP. Many other in-depth training and technical assistance resources are available through the Community Action network's national partner organizations including the National Community Action Partnership (NCAP), National Association of State Community Services Programs (NASCS), and the Results Oriented Management and Accountability (ROMA) National Peer to Peer (NPTP) Training Project. Where more specific guidance is available through a national partner resource, the guide will indicate. Although certain elements are required in the final CARSP (to meet Organizational Standards, assurances in the [CSBG Act](#), etc.) CAAs can customize how they conduct the assessment and write the document. As you write, keep in mind external audiences, particularly your stakeholders. Organizational Standards require agencies "issue" a report on their community assessment (*Organizational Standard 3.1*) and communicate the agency's "activities and its results to the community" (*Organizational Standard 2.3*). To help meet both requirements, EOHLC encourages agencies to make the final CARSP available on their website.

2. Results Oriented Management and Accountability (ROMA)

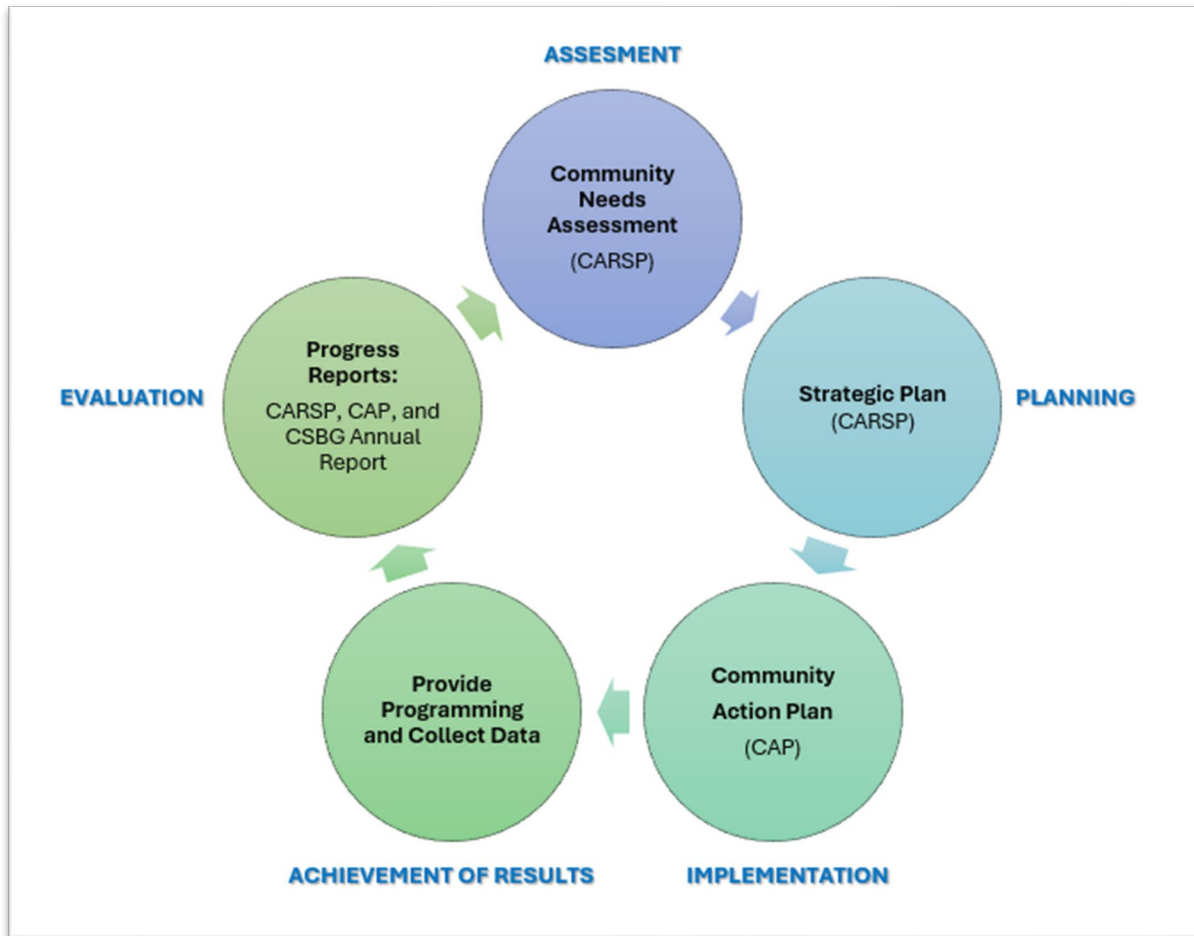
Section 678E(a) and the assurance under Section 676(b)(12) of the federal [CSBG Act](#) require States receiving CSBG funds to participate, and all CAAs in the State to participate, in a performance measurement system. Since 2001, Massachusetts has participated in the Results Oriented Management and Accountability (ROMA) System. ROMA is an outcome-based management approach in which agencies utilize data continuously to guide their decisions, as illustrated by the ROMA cycle that follows¹:

¹ The ROMA Cycle graphic was developed by the National Peer to Peer (NPTP) ROMA Training Project, based on guidance regarding Core Activities for States and CSBG Eligible Entities provided by OCS Information Memo 49. From Planning for Results © 2006, J. Jakopic and B. Mooney, Community Action Association of PA. Curriculum developed with funding from the US Department of Health and Human Services – Office of Community. Use is permitted with this footer. All other rights reserved.



The CARSP document is critical to all phases of the ROMA cycle. (*Organizational Standard 4.3*) The CARSP shows a CAA’s strategic direction over a three-year period, based on the priority needs identified in a community and internal needs assessment (**Assessment & Planning**). Information in the CARSP then feeds into a CAA’s annual CAP for three fiscal years (**Implementation & Achievement of Results**). Finally, a CAA will refer to their CARSP regularly to monitor progress towards its goals (**Evaluation**).

Under the CSBG Organizational Standards, CAAs are expected to use the services of a certified ROMA professional to assist in implementation of the ROMA Cycle within their agency. (*Organizational Standard 4.3*) In the Massachusetts CAA network, these individuals are closely involved with all key CSBG reports/deliverables required by EOHLC. The graphic that follows depicts these key deliverables aligned to the phases of the ROMA cycle. To further a “Results Orientation” throughout their agency, ROMA certified individuals must also be empowered to provide input to their agency’s leadership team (board, Chief Executive Officer/Executive Director, senior managers) and program staff at each phase of the cycle.



3. New for the FY27-29 CARSP

After timelines for our network’s last two CARSP cycles were disrupted due to the COVID-19 pandemic, the FY 27-29 CARSP will return to our pre-pandemic process. For this cycle, there is only one key change to be aware of, which is described below. As a reminder, no CSBG triennial reviews are scheduled during FY26 so agencies can focus on conducting the community assessment.

A combined Community Assessment Report & Strategic Plan is due July 31, 2026

While we initially planned to continue the practice of separating the Community Assessment Report and Strategic Plan into two documents with staggered due dates, the network provided feedback that agencies prefer to return to a combined document with one due date for this cycle. Due to adjustments made to CARSP cycles during the

pandemic, agencies last submitted a full Strategic Plan in July 2021. As a result, the FY27-29 CARSP due date was set for July 2026 so agencies can meet the requirement to have a strategic plan in place that has been approved by the board within the past five years (*Organizational Standard 6.1*).

Finally, in continued support of the network's effort to streamline and enhance data collection and analysis tied to the community assessment, EOHLC allocated discretionary funds to MASSCAP for use of the mySidewalk data tool for this assessment process. Specific instructions on how agencies should incorporate information from mySidewalk is referenced Section IV. of this guide.

III. Timeline and Deliverable Dates

FY 2025	
May 2025	EOHLC Issues CARSP Guide
June - August 2025	Work on Community & Internal Assessment Plans
August 29, 2025	Community & Internal Assessment Plans Due
August 2025 (Dates TBD)	CARSP Virtual Training Event
September 2025	Conduct Community & Internal Assessment...
FY 2026	
October 2025 - February 2026	Conduct Community & Internal Assessment...
February 2026 (Dates TBD)	Report on Progress Meetings with EOHLC
March – April 2026	Work on Strategic Plan goals and draft CARSP document
May – July 2026	Finalize Strategic Plan goals and secure board approval of CARSP
July 31, 2026	Community Assessment Report & Strategic Plan Due
August – September 2026	EOHLC anticipates completing review/approval of CARSP
September 2026 (Date TBD)	FY27 Period 1 CAP (initial plan) Due
FY 2027 - 2029	
<p align="center"><u>CARSP Implementation/Ongoing Monitoring</u></p> <p>Implementation and monitoring of the CARSP requires that agencies utilize a ROMA approach (see graphic below). Most activities in this phase of your CARSP connect to an EOHLC deliverable and/or Organizational Standard requirement (<i>see 4.4, 6.5, and 9.3</i>). As a result, these activities should already be part of your agency's normal processes and be clearly documented in board meeting minutes when they occur.</p> <pre> graph TD subgraph ASSESSMENT A1[FY27-29 Community Assessment (CARSP)] A1 --> A2[Conduct: Summer 2025 – Early 2026] A1 --> A3[Submit: July 2026] A1 --> A4[Update: As Needed] end subgraph PLANNING P1[FY27-29 Strategic Plan (CARSP)] P1 --> P2[Create/BOD Approve: Spring-Summer 2026] P1 --> P3[Submit: July 2026] P1 --> P4[Update: As Needed] end subgraph IMPLEMENTATION I1[Community Action Plan Period 1 CAP Report] I1 --> I2[Create/BOD Approve: Each Fall] I1 --> I3[Submit: Each September] end subgraph EVALUATION E1[Provide Programming and Collect Data] E1 --> E2[Ongoing] end subgraph REPORTING R1[Progress Reports: CARSP] R1 --> R2[Update BOD: At Least Annually] R2 --> R3[Period 2 & 3 CAP Report] R3 --> R4[Submit: Each April & October] R4 --> R5[CSBG Annual Report] R5 --> R6[Submit: Each January] end A1 --> P1 P1 --> I1 I1 --> E1 E1 --> R1 R1 --> A1 </pre>	

IV. Writing the Community Assessment Report & Strategic Plan

Please follow the outline below when developing your FY27-29 CARSP. Guidance on specific content needed, including applicable COE Organizational Standards, is listed for each section. It is acceptable to reorder and/or combine sections so long as you clearly label (in the table of contents) where content for each can be found in the document.

1. Table of Contents

List all CARSP sections in the order they appear. Be sure to provide headings for each section and number all pages of the report.

2. Executive Summary

Provide a short (approximately 2-3 pages) summary of the CARSP and its components.

3. Board Authorization

A page or form to indicate the agency's governing board approved the CARSP prior to its submission to EOHLC and the date approval occurred. (*Organizational Standards 3.5 and 6.1*)

4. Agency Description

A brief (approximately 1 page) description of your agency and its history.

5. Mission Statement

A brief statement of your agency's purpose.² Please also indicate when, as part of the agency's strategic planning process (or another time within the past 5 years), the mission statement was reviewed by the governing board to assure specifically that 1) it addresses poverty and 2) that the agency's programs and services are in alignment with the mission. (*Organizational Standards 4.1*)

6. Vision Statement

A description of the long-term goals of/desired change from your agency's work.

² For additional guidance on mission statements, please refer to: Drucker, Peter et al, *The Five Most Important Questions You Will Ever Ask About Your Organization* (San Francisco: Jossey-Bass, 2008), 11-19.

7. Community Profile

A concise summary analysis of the general and poverty-related data available for your agency's service area and target populations. All elements listed below must be included, however, for the sake of brevity, it is acceptable to include detailed data considered in an appendix.

- ✓ A listing of communities your agency serves, including designated CSBG service areas and undesignated areas.
- ✓ Discussion of major conditions affecting the community and its members
- ✓ Qualitative and quantitative data, including current data specific to poverty as required by Organizational Standard 3.2 for your *entire service area*, not just your CSBG designation.³ (*Organizational Standards 3.2 & 3.3*)

Note: For the FY27-29 Community Assessment, agencies must incorporate dashboards provided by mySidewalk into the report to meet the minimum quantitative data requirements of Org. Standards 3.2 & 3.3. The dashboards were negotiated by a workgroup representing Massachusetts Community Action Agencies, MASSCAP and EOHLC, with significant input from the Planner's Community of Practice and include common poverty-related indicators.

8. Community and Internal Assessment Process

Provide a narrative overview (approximately 2-3 pages) of the methodologies (e.g. – surveys, interviews, focus groups, secondary data, etc.) your agency used to conduct the Assessments and determine key findings. The overview should also include the information noted below. For information on conducting a community and internal needs assessment, refer to Sections VI. and VII. of this guide.

- ✓ An explanation of how board members and agency staff were involved in the process

³ Pursuant to MA Information Memorandum (IM) CSBG – FY 2017 – 03, EOHLC interprets “Service Area(s)” to mean any geographical location for which the agency receives funding to provide services. Given that the purpose of a CAA's community assessment is to feed their agency-wide strategic plan which in turn feeds their agency-wide annual workplan, data considered during the community assessment process must be sufficient to inform agency-wide strategic choices. For a copy of MA IM CSBG - FY2017 – 03, contact EOHLC. Also note that, though many CAAs in MA define service area specific to the city/town level, it is acceptable to reference county level data.

- ✓ A description of how surveys were administered and whether any challenges impacted the responses.
- ✓ An explanation of how low-income individuals were engaged in the process. (*Organizational Standard 1.2*)
- ✓ A description of how information was gathered and utilized from key sectors of the community including, at least, community and faith-based organizations, the private and public sector, and educational institutions. (*Organizational Standard 2.2*)
- ✓ An explanation of how customer satisfaction data and customer input was collected and utilized. (*Organizational Standard 6.4*)

9. Key Findings - Community Assessment

Summarize your key findings on the causes and conditions of poverty and the needs of the communities assessed.⁴ (*Organizational Standard 3.4*) Within the summary, clearly state the top 3-5 *Individual/Family* and *Community Level* needs identified (state any *Agency Level* needs in the next section)⁵ and specify the technique (e.g. – count, compare, examine trends) your agency used to determine their priority. The summary should also indicate if there are community strengths that can be drawn upon to meet those needs as well as any recommended solutions. As you write this section, keep in mind that the information included will be of particular interest to your stakeholders. It is also your opportunity to both educate about needs in the community *and* build consensus on solutions the community can build together. As a result, the section should be written so that it can be easily pulled out of the larger document and shared.⁶

⁴ For specific guidance on what is meant by “*key findings on the causes and conditions of poverty*” please refer to the: National Community Action Partnership, *Technical Assistance Guide, COE Developed CSBG Organizational Standards, Category 3 – Community Assessment*, 21.

⁵ The “*level*” of need (e.g. – Individual/Family, Community, or Agency) is a key concept in ROMA and to acquire certification, ROMA professionals must demonstrate their knowledge of it. As such, if further guidance is required to identify levels of need, write need statements, etc., the agency should consult with their ROMA certified individual.

⁶ Crocker, Jarle. “Writing Your Community Assessment: Organizing the Report.” Webinar, Community Action Partnership, March 14, 2019.

10. Key Findings - Internal Assessment

Summarize your findings on the agency's needs and strengths (i.e. – overall financial state, ability to recruit/retain high quality staff, level of board engagement, visibility in the community, etc.)

11. Outcomes, Strategies, Actions

a. Strategic Three-Year Goals

Describe the broad goals that will “guide the agency’s programs and operations to meet the needs of low-income individuals, families, and communities”⁷ over the next three years. More specifically, the goals are your agency’s plan to address the top 3-5 individual/family and community needs, and internal agency needs (identified in your key findings). These goals, which should stem from your mission, signal where the agency “will concentrate resources for results”⁸ and should address the “reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.”⁹ (*Organizational Standard 6.2*)

Agencies are free to structure this section however they choose but the description must address the following elements:

- ✓ **Goal Level** – Is it clear whether each goal is at the individual/family, community or agency level? (*Organizational Standards 6.3*)
- ✓ **Funding Strategies** – Pursuant to the assurance under Section 676(b)(3)(C) of the [CSBG Act](#), how will coordination of CSBG funds with other public or private funding sources be used to help achieve the goals (i.e. – fundraising and/or leveraging)?
- ✓ **Service Delivery System** - Pursuant to the assurance under Section 676(b)(3)(A) of the [CSBG Act](#), how will services targeted to low-income individuals and families be provided or coordinated with CSBG funds?

⁷ Community Action Partnership, *Technical Assistance Guide, COE Developed CSBG Organizational Standards, Category 6 - Strategic Planning*, 1.

⁸ Drucker, Peter et al, *The Five Most Important Questions You Will Ever Ask About Your Organization*, 66.

⁹ For specific guidance on what is meant by “approved strategic plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient” refer to: Community Action Partnership, *Technical Assistance Guide, COE Developed CSBG Organizational Standards, Category 6 - Strategic Planning*, 9-13.

- ✓ **Linkages** - Pursuant to assurances under Sections 676(b)(5) and (b)(6) of the [CSBG Act](#), how will the agency link or coordinate with governmental and other social services, especially antipoverty programs, to assure effective delivery and avoid duplication of CSBG services to low-income people and communities? In other words, how will the agency build upon existing services, resources, and/or strengths in the community to meet each need?
- ✓ **Service Gaps** - Pursuant to the assurance under Section 676(b)(3)(B) of the [CSBG Act](#), how will the agency use linkages to fill identified gaps in services through the provision of information, referrals, case management, and follow-up consultations? In other words, if an identified community need exceeds your agency's capacity to meet it and/or there are others already working to meet it in the community, have you answered questions such as: Can our agency bring more attention to this need in the community? Can our agency leverage resources to meet this need? Can our agency fill a service gap by coordinating with others to address this need?

Note: Information from the Key Findings and Strategic Three-Year Goals will populate the "Need, Goal/Strategy Statements" in your agency's CAP (see [APPENDIX B](#) for examples). Collectively, these statements are the mechanism for showing how agency programs, initiatives, and other activities help achieve strategic goals and address the priority needs in your CARSP. Since the agency's CAP is organized by CSBG expenditures domain (Employment, Education and Cognitive Development, Housing, Agency Capacity Building, etc.) it may be helpful to organize your CARSP similarly so you can more easily connect the two. (Organizational Standard 4.2)

b. Specific Objectives

Describe the specific steps your agency will take in Year One, Year Two, and Year Three to achieve each of the "Strategic Three-Year Goals". These objectives should feed into your agency CAP (i.e. - Year One objectives feed the FY27 CAP, Year Two feeds FY28, etc.) The description should also include any linkages (e.g., information and referral services, case management, follow-up consultation, advocacy for and in conjunction with other local service providers, regionalization, etc.) or funding strategies your agency will employ to achieve your goals.

12. Next Steps - Plan Monitoring and Reporting

Briefly explain how the agency and its board will monitor and evaluate the implementation of this plan. Be sure to identify key dates and people

responsible. As a reminder, the “Specific Objectives” listed for each “Strategic Three-Year Goal” should feed into your agency’s CAP which the board must receive updates on. (*Organizational Standard 4.4*)

VI. Guidance on Conducting the Community Assessment

The community assessment process happens in four general phases: 1.) Assessment Planning 2.) Data Gathering 3.) Data Analysis and 4.) Report Writing. Prior to completing your needs assessment, EOHLC asks CAAs to submit a *Community & Internal Assessment Plan* outlining key participants and timelines for your agency's assessment process no later than **August 29, 2025**. A sample of the form is available in [APPENDIX C](#) of this guide and an electronic version is available on EOHLC's website at:

<https://www.mass.gov/service-details/community-services-block-grant-csbg>. Once your agency's assessment process is underway, EOHLC may also request a report on progress before the CARSP is due. What follows is general guidance and considerations when conducting a community assessment. For more detailed guidance, see resources available through the CSBG National Partner organizations including: the Community Needs Assessment Online Data Hub¹⁰ and "A Community Action Guide to Comprehensive Community Needs Assessments".¹¹

1. Assessment Planning

- **Initiating the planning process:** To initiate the planning process, NASCSP recommends agency board members and management staff meet to discuss the scope of the community assessment.¹² Things to consider as part of this meeting are:
 - ✓ Did the last assessment give enough information to inform your last strategic plan?
 - ✓ Is there anything you want to do differently from your last assessment?
 - ✓ Gain board agreement on the scope, content, and cost of community assessment
 - ✓ Gain buy-in from key stakeholders on the process and its goals
 - ✓ Opportunities to collaborate with community partners

¹⁰ "Community Action Partnership's Data Hub," CARES Engagement Network, accessed March 25, 2025. <https://cap.engagementnetwork.org>.

¹¹ National Association for State Community Services Programs. "A Community Action Guide to Comprehensive Community Needs Assessments." Last modified July 2011. <https://nascsp.org/wp-content/uploads/2018/02/needs-assessment-final-8.22-print-to-pdf.pdf>

¹² Ibid.

- ✓ Determine if you will target specific communities in the assessment
 - ✓ How will you group/categorize the assessment information/issues?
- **Form a planning committee:** The next step in the planning phase is to form a planning committee. Generally, the committee's role is to outline the assessment process including developing the timeline, identifying who is responsible for creating and implementing assessment tools, determining how progress gets reported to the board, etc. The planning committee should include board members and staff but could also include volunteers, partners from other organizations, key stakeholders, etc.
 - **Select the data sources:** While the board and management team decides how to group/categorize assessment information, the planning committee determines what data is needed and how to get it. Below are some questions the committee should consider.
 - ✓ What quantitative data sources will you use? **Note:** *Effective for the FY27-29 Community Assessment, agencies must incorporate dashboards provided by mySidewalk into the report to meet the minimum quantitative data requirements of Org. Standards 3.2 & 3.3. The dashboards were negotiated by a workgroup representing Massachusetts Community Action Agencies, MASSCAP and EOHLC, with significant input from the Planner's Community of Practice and include common poverty-related indicators.*
 - ✓ What tools/methods will you use to collect qualitative data (e.g. - surveys, focus groups, community forums, etc.)?
 - ✓ What partner organizations, volunteers, and key stakeholders will you involve in the process?
 - **Determine the timeline:** Once the committee is formed and you know what data sources you will collect, you can determine the timeline for your assessment activities. For each planned assessment activity, enter the key point(s) of contact and timeline in the "Schedule of Activities" chart of the *Community Assessment Plan* form.¹³

¹³ A sample *Community & Internal Assessment Plan* form is available in [APPENDIX C](#) of this guide and an electronic version is available at: <https://www.mass.gov/service-details/community-services-block-grant-csbg>.

- ***Present the plan to the board:*** Prior to submitting your *Community Assessment Plan* to EOHLC, it should be reviewed and endorsed by the board.

2. **Data Gathering**

Things to keep in mind when collecting data:

- ***Quantitative Data*** – As a reminder, agencies must incorporate the *mySidewalk* dashboards, which include common poverty-related indicators, into the report to meet the minimum requirements of Org. Standards 3.2 & 3.3.
- ***Qualitative Data Methods*** – Resources on qualitative data collection methods are available in the NCAP Category 3 Technical Assistance Guide.¹⁴ Useful information on conducting forums, focus groups, stakeholder interviews, and surveys is also available in the “Assessing Community Needs and Resources” chapter of the [Community Tool Box](#).¹⁵
- ***Input from low-income residents and customers*** - Organizational Standards direct CAAs to collect input from low-income residents and consumers of agency services during the community assessment. *(Organizational Standard 1.2 and 6.4)* The intent of these standards is to ensure maximum feasible participation by giving low-income residents a strong voice in the community assessment process. To give an accurate description of community needs, agencies should also actively seek out input from low-income residents *who are not current clients* in their programs.

3. **Data Analysis**

- ***Organizing the Findings*** – Begin to sort the data under the “framework” (ex. – CSBG Domains) that the board and management team determined early in the planning process.

¹⁴ Community Action Partnership, *Technical Assistance Guide, COE Developed CSBG Organizational Standards*, [Category 3 – Community Assessment](#), 17-20.

¹⁵ “Assessing Community Needs and Resources,” *Community Tool Box*, accessed March 25, 2025, <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources>.

- ***Qualitative and quantitative data should be complimentary*** – When analyzing data collected, look for opportunities to strengthen your discussion of community needs and strengths by using quantitative data to support information collected through surveys, interviews, focus groups, etc. Conversely, look to use qualitative data to give community statistics a human face.¹⁶
- ***Analyzing Input from low-income residents*** - Organizational Standards direct CAAs to ensure input from low-income individuals is collected and analyzed. (*Organizational Standard 1.2*) Again, the intent of this standard is to ensure maximum feasible participation by giving low-income residents a strong voice in the community assessment process. Agencies should not only ensure they analyze information from low-income individuals but document when and how this occurred as part of the community assessment to ensure compliance with this standard.
- ***Top 3-5 Community Needs*** – Once you’ve analyzed the data and sorted it under your framework of issues, determine which 3-5 needs are the top priorities in your service area(s).

4. **Report Writing**

- See “Section IV. Writing the Community Assessment Report & Strategic Plan” for guidance.

¹⁶ For additional guidance on using complimentary quantitative and qualitative data, please refer to the: Community Action Partnership, *Technical Assistance Guide*, COE Developed CSBG Organizational Standards, [Category 3 – Community Assessment](#), 17-20.

VII. Guidance on Conducting the Internal Needs Assessment

The internal assessment process helps agencies identify gaps and strengths in their programs and operations that impact their ability to meet the needs of low-income individuals and families. All levels of an agency (staff to board) should be engaged in the internal assessment process to give a complete view of the agency. Though agencies have flexibility in how they conduct their internal assessment, its key findings must be factored into the agency's strategic three-year goals to address top community needs. As part of the internal assessment process, agencies should consider questions such as:

- What is our agency's overall financial health?
- How visible are we/what are we known for in the community?
- Do all our programs address priority needs? If not, why do we continue them?
- Are all our programs running well/achieving results?
- What is our succession plan for key staff/roles? Is it strong?
- Do we recruit/retain high quality staff? If not, why?
- How engaged is our board in the development, planning, implementation and evaluation of the agency's programs and activities?
- Are our staff and board adequately trained?
- What are the greatest challenges our agency faces?

In their *Technical Assistance Guide*, NCAP cautions CAAs to ensure the anti-poverty mission of our network is at the forefront when developing their strategic plan, including when utilizing information from an internal assessment:

“Some agencies contract out the development of the strategic planning process to consultants who are not fully aware of the need to directly connect strategic plans goals to those of the CSBG Act. In other cases, agencies focus their strategic plans on management and operational goals internal to the organization (e.g. information technology, facilities, fundraising), often assuming that goals for the customers and communities they serve are addressed in the Community Action Plan. Such a situation risks creating a fragmented and piecemeal approach to the design and implementation of programs and service delivery strategies by not connecting them to an overarching strategic framework that guides the long-term work of the agency. Standard 6.3 also affirms the importance of such an

approach by requiring CAAs to include family, agency, and/or community goals in their strategic plans.”¹⁷

In other words, the agency’s internal needs assessment should complement its community needs assessment and findings from both should help the agency form its plan for meeting the needs of low-income individuals and families.

Just as the community assessment requires multiple methods to gain a complete understanding of needs, the internal assessment should also involve a comprehensive approach. Below are some examples of activities the agency might consider conducting as part of their internal assessment:

- Agency retreats
- Use of consultant/facilitator
- Reviews of program data
- Surveys, interviews, focus groups
- Reviews of customer satisfaction data (*Organizational Standard 6.4* requires this)
- Self-assessments
- Best Practice Analysis

Please include key participants and timelines for your agency’s internal assessment process on “Schedule of Activities” of the *Community & Internal Assessment Plan* form.¹⁸ EOHLC may also request an update on the internal assessment process as part of a report on progress before the CARSP is due.

¹⁷ Community Action Partnership, *Technical Assistance Guide, COE Developed CSBG Organizational Standards, Category 6 - Strategic Planning*, 9.

¹⁸ A sample *Community & Internal Assessment Plan* form is available in [APPENDIX C](#) of this guide and an electronic version is available at: <https://www.mass.gov/service-details/community-services-block-grant-csbg>.

VIII. References

- CARES Engagement Network. "Community Action Partnership's Data Hub." accessed June 3, 2019. <https://cap.engagementnetwork.org>.
- Community Action Partnership. "Technical Assistance Guide, COE Developed CSBG Organizational Standards, Category 3 Community Assessment." Last modified September 1, 2015. https://communityactionpartnership.com/wp-content/uploads/2018/07/Final-Draft_Community-Assessment.pdf.
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- Community Tool Box. "Assessing Community Needs and Resources." Accessed June 3, 2019. <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources>.
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- Crocker, Jarle. "Writing Your Community Assessment: Organizing the Report." Webinar, Community Action Partnership, March 14, 2019.
- National Association for State Community Services Programs. "A Community Action Guide to Comprehensive Community Needs Assessments." Last modified July 2011. <https://nascsp.org/wp-content/uploads/2018/02/needs-assessment-final-8.22-print-to-pdf.pdf>.

APPENDIX A: Organizational Standards¹⁹

COE Organizational Standard Number and Description	
Community Assessment	1.2 The organization analyzes information collected directly from low-income individuals as part of the community assessment.
	2.2 The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.
	2.3 The organization communicates its activities and its results to the community.
	3.1 The organization conducted a community assessment and issued a report within the past 3 years.
	3.2 As part of the community assessment, the organization collects and includes current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for their service area(s).
	3.3 The organization collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the community assessment.
	3.4 The community assessment includes key findings on the causes and conditions of poverty and the needs of the communities assessed.
	3.5 The governing body formally accepts the completed community assessment.
	4.2 The organization's Community Action Plan is outcome based, anti-poverty focused, and ties directly to the community assessment.
	6.4 Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.
Strategic Plan	4.1 The governing board has reviewed the organization's mission statements within the past 5 years and assured that: 1. The mission addresses poverty; and 2. The organization's programs and services are in alignment with the mission.
	4.3 The organization's Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (ROMA) cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation
	6.1 The organization has an agency-wide strategic plan in place that has been approved by the governing board within the past 5 years.
	6.2 The strategic plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.
	6.3 The approved strategic plan contains family, agency and/or community goals.
	6.4 Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.
	6.5 The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.
Update/ Review	4.4 The governing board receives an annual update on the success of specific strategies included in the Community Action plan.
	6.5 The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.
	9.3 The organization has presented to the governing board for review or action, at least within the past 12 months, an analysis of the agency's outcomes and any operational or strategic program adjustments and improvements identified as necessary.

¹⁹ As specified in our most recent CSBG State Plan, which was accepted by HHS-OCS on September 26, 2024, Massachusetts utilizes the 58 Center of Excellence (COE) developed organizational standards for eligible entities pursuant to CSBG IM 138. Of the 58 standards, those listed in this appendix relate directly to the Community Assessment and Strategic Plan process.

APPENDIX B: Example “Need, Goal/Strategy Statements”

Community Assessment Report & Strategic Plan

Top Individual/Family and Community-Level Needs

Enter the top needs identified through the agency’s most recent community and internal assessment process as well as the strategic plan goal(s) to address each need. The statements entered will link the agency’s identified needs and strategic goals to the Programs and Initiatives reported annually in the Community Action Plan (CAP). Where a Program/Initiative reported in the CAP helps achieve a strategic goal to meet an identified need, the agency will select the applicable statement from those entered below.

No.	CSBG Domain ?	Need, Goal/Strategy Statement(s) ?	Action
	Housing ▾	<p>Individual/Family Level</p> <p>XYZ Agency’s FY27-29 assessment revealed that low-income individuals and families in our community cannot afford their housing costs. Over the next three years, our agency will provide case management to low-income households to assist them in maintaining housing costs and attaining economic security.</p> <p>Community Level</p> <p>XYZ Agency’s FY27-29 assessment revealed the need for more affordable housing in our community. Over the next three years, our agency will work to increase the number of affordable housing units in the community.</p> <p>Agency Level</p> <p>XYZ Agency’s FY27-29 assessment revealed the need for training across our divisions about available resources to help low-income participants with housing needs. Over the next three years, our agency will provide training to agency staff on housing resources available through our agency and community partners.</p>	
	Health and Social/Behavioral Development ▾	<p>Individual/Family Level</p> <p>XYZ Agency’s FY27-29 assessment revealed low-income individuals are experiencing increased food insecurity. To address over the next three years, our agency will expand and enhance access to our food pantry and distribution of food gift cards for individuals/families who are not able to access the pantry.</p> <p>Community Level</p> <p></p> <p>Agency Level</p> <p></p>	
	Agency Capacity Building ▾	<p>Individual/Family Level</p> <p></p> <p>Community Level</p> <p></p> <p>Agency Level</p> <p>XYZ Agency’s internal assessment revealed the need to scale agency capacity to support expanding programs, departments, and property development. Over the next three years, XYZ Agency will increase agency capacity.</p>	

APPENDIX C: Community & Internal Assessment Plan

Directions: Submit your agency's *Community & Internal Assessment Plan* to your assigned Program Representative no later than August 29th, 2025. It is acceptable to use a different format than the template below so long as the same information is included. EOHLC will review each plan and provide feedback where appropriate within a few weeks.

Planning Committee Members		
Member Name/Position	Representing <small>e.g. – Board, staff, volunteer, partner agency, outside consultant, etc.</small>	Assessment Activities Involved In

(add more rows if needed)

Schedule of Activities		
Activity <small>e.g. – review mission, gather quantitative data, administer surveys, conduct stakeholder interviews/focus groups, analyze results, determine strategic goals, write report, etc.</small>	Lead/Point of Contact Name	Timeline

(add more rows if needed)

Partner Organizations/Stakeholder Engagement	
Partner/Stakeholder Type*	How will they be engaged? <small>e.g. – survey, interview, focus group, etc.</small>
Community-Based Organizations <i>(including other CAAs)</i>	
Faith-Based Organizations	
Private Sector	
Public Sector	
Educational Institutions	
Other Community Action Agencies	
Agency customers	
Low-income community members <i>(including non-customers)</i>	
Agency Staff	
Volunteers	
Board Members	
Other <i>(Please Specify):</i>	

(add more rows if needed)

*Be sure to document the type of partner/stakeholder engaged when conducting your assessment since you may need to reference how information from each type was utilized when writing your report.