



The Path to Successful Collaboration & Financial Stability

Featuring:

Cathy Easley, Trident United Way

Overview

This report features the SafetyNet CharityTracker Assistance Network of the Trident United Way of Charleston, SC. This community collaboration does a great job modelling the 7 C's of Collaboration: Connection, Clarity, Congruency, Creation of Value, Communication, Continual Learning and Commitment. SafetyNet CharityTracker connects people to resources and a path to financial stability. What began as a small group of 35 organizations and churches working together for poverty relief has grown into a vibrant alliance of 300 multi-sector partners coordinating basic needs and helping people achieve self-sufficiency.

The Path to Successful Collaboration & Financial Stability

By Krista Petty, Community Connector

In his book *The Collaboration Challenge*, Harvard Business School Professor Dr. James E. Austin outlines seven C's of strategic collaboration[i]:

- Connection with Purpose & People
- Clarity of Purpose
- Congruency of Mission, Strategy and Values
- Creation of Value
- Communication Between Partners
- Continual Learning
- Commitment to the Partnership

This report features the Safety Net CharityTracker Network initiated by Cathy Easley, Director of Integrated Community Systems of the Trident United Way of Charleston, SC.

This community collaboration is modelling the values and actions



presented in Dr. Austin's research and having a collective impact on their community. What began as a small group of 30 organizations and churches working together for poverty relief has grown into a vibrant alliance of 300 multi-sector partners coordinating basic needs and helping people achieve self-sufficiency.

Cathy Easley, Director of Integrated Systems, Trident United Way

Big Problems Lead to Big Ideas & Solutions

Located on the shores of the Atlantic Ocean, the three-county area of Charleston, SC is home to profitable ports bringing art and industry to America. That same water that connects also divides, as it weaves into rivers, marshes and swamps. While Charleston boasts a rich economy of tourism and art collecting in one area, food insecurity and housing problems exist in another.

Poverty here is disbursed—urban, suburban and even rural. It is also very cyclical, with a number of people trapped in generational poverty. Cathy Easley, Director of Integrated Community Systems at Trident United Way shares this story:

In my early days of working with the community, I became familiar with an elementary school that was located between two government housing projects. The students left the projects to go to an under-performing school and when the bell rang, walked back to the projects. Poverty was all they saw...was all they knew. It shocked me to find out that all those children lived just miles from the ocean, yet only 87% had ever seen it. If that's all you see, that's all you know."

Over the years, many organizations and churches across the three-county area offered help with basic needs such as food and financial assistance. The work was difficult and

done mostly in silos, where agencies and churches didn't always know what services the others provided. Leaders at the Trident United Way (TUW) started receiving calls from some churches and organizations feeling ineffective saying, "We are going to stop offering services and just send you money instead."

"We did not want those churches and others to go away! They were located where people needed assistance," shares Easley. Something had to change, so TUW brought leaders together to discover what could make everyone more effective. As leaders began to meet and talk, a common theme surfaced: churches and organizations wanted to be able to communicate. They didn't want to work in silos. They wanted to explore how to get people to a place where they did not depend on the services offered. Easley shares, "Even though we all love our jobs, wouldn't it be great if we didn't have to do them? Imagine people stabilized and becoming self-sufficient."

From these meetings, the Trident United Way asked leaders and volunteers from these agencies and churches to form a new group. It was called the Safety Net Vision Council. The council's job was to produce a strategic plan, cast a vision for the future, and be an advocate for a collaborative response to human needs in the community. Their new path to a higher level of collaboration was beginning.

Connect with Purpose and People

"Serendipity often prevails as the initiator of connections in the alliance marketplace...but connections are more readily made among organizations predisposed to partners and alert and prepared to seize opportunities."

— James Austin

The agencies that were a part of the fledgling SafetyNet collaboration did not begin to scratch the surface of the great need that was out there. Easley knew that involving the faith

community was critical to having a fuller representation of meeting needs. She also knew that going from church to church was not going to be fruitful. The SafetyNet council needed to include an advocate already working within the collective faith community.

As she attended various community events and meetings, she kept her eyes and ears open. Chuck Coward, who also kept showing up in community meetings, turned out to be that advocate. He was already forming a coalition of churches, called the Human Needs Network, to meet basic needs. At one of the community meetings, Coward shared his passion to connect and train churches to provide services for basic human needs. “I remember thinking to myself, ‘I might have finally met the right person to help me connect with churches of the Tri-county!’” says Easley.

Dreams of a bigger collaboration began to surface. What if churches and agencies were able to network with one another? What kind of continuum of care could be provided? What kind of data could be collected if everyone providing for basic human needs was involved?

Communication Between Partners

“A partnership is without a solid foundation if it lacks an effective ongoing communication process.” — James Austin

When the SafetyNet Vision Council first met, it was clear that there would need to be an efficient and effective way for all partners to communicate. In-person meetings were important, but so were day-to-day interactions if they were going to collectively meet clients’ needs. To obtain greater success, this new collaboration between churches and agencies needed a dynamic tool to bring them together. “We needed an online system that allowed us to communicate with one another, see where a client had been, and collectively run reports. It had to be easy to use and affordable, too,” says Easley.

In researching options, the shared online case management tool, CharityTracker, rose to the top of the list. For two years, SafetyNet leaders had been talking about the need for a system to weave their collaboration together tighter. Within four months of finding CharityTracker, they were launching it. In March 2009, 60 people from 35 churches and agencies were trained on the system and became part of a six-month pilot using this shared database. Once the pilot was finished, the SafetyNet Charity Tracker Network opened up county-wide.

Today, there are 300 organizations and churches networked together, with 900 trained in using it. Trident United Way funds the system. “We didn’t want there to be any barriers for organizations or churches to utilize it,” says Easley. CharityTracker is a part of TUW’s annual budget.

Every client in CharityTracker has signed a Release of Information agreement, and Easley requires each staff member or volunteer using the system to go through training. Easley always communicates the overall vision of their collaboration, making sure all CharityTracker users are clear on the purposes and vision of using the system collaboratively for the client’s benefit.

Clarity of Purpose

“Above all, collaborators need to be clear about the purpose of joint undertakings.”

— James Austin

The Financial Stability Framework is the backbone of the SafetyNet CharityTracker network. Nicknamed “the caterpillar,” this stepped approach serves as a guide to all the partners in the collaboration. Every organization has a part to play in the movement of a client toward self-sufficiency.

In the first two steps of the framework, the goal is to stabilize people. “When all you can think about is where your next meal is going to come from, it’s hard to focus on getting a job or the skills needed to get one,” says Easley. That comes through meeting their immediate need whether it be food, shelter or clothing.

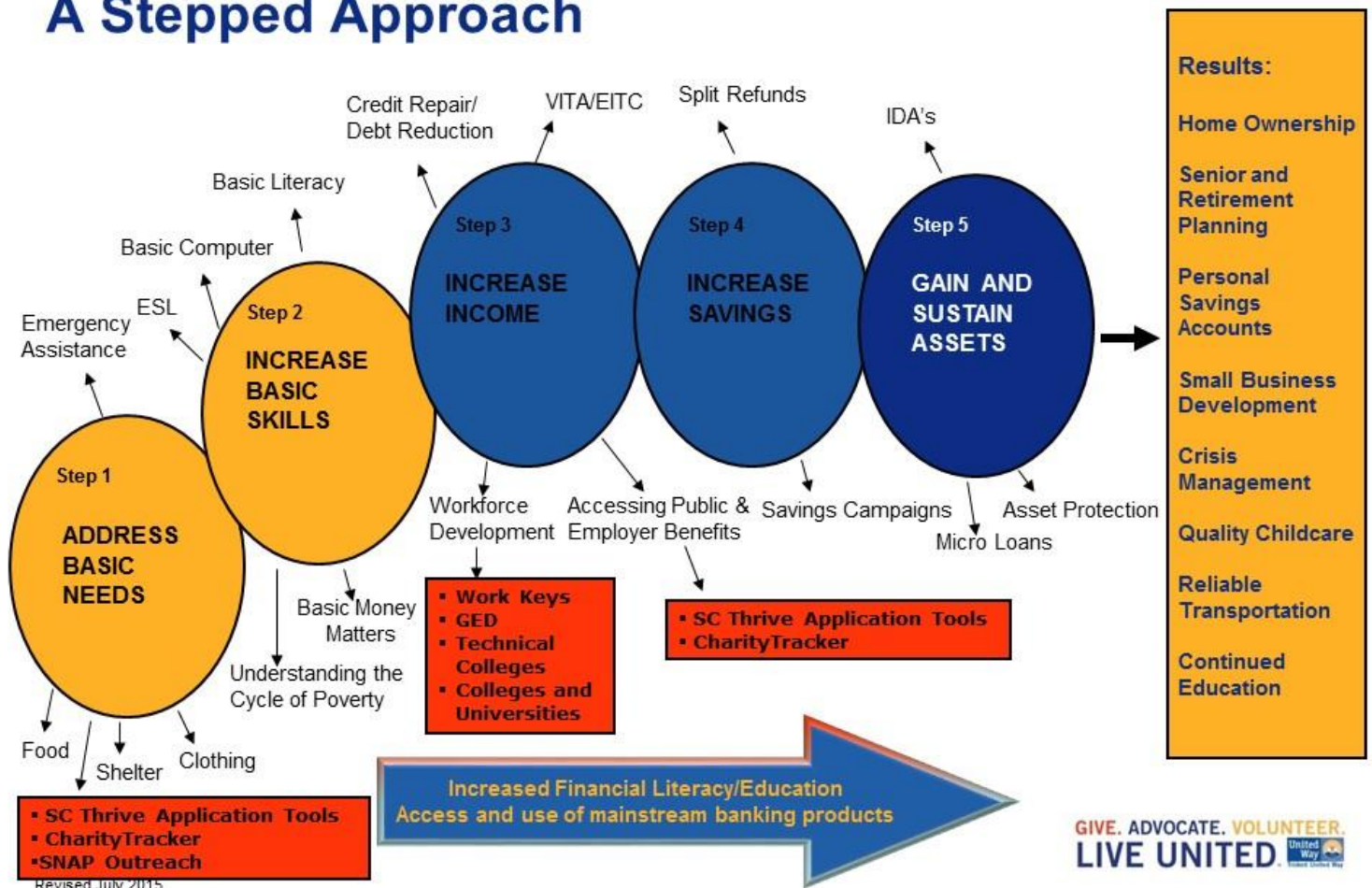
Next, it is important to help people look ahead and prepare for the future. This often means seeing if the person or family qualifies for some ongoing assistance through benefits such as SNAP (food stamps), Medicare, Medicaid or TANF (Temporary Assistance for Needy Families). It could also mean discovering what is keeping them from having employment or managing their income better.

Becoming stable could look different for each client. “For an elderly woman, this could mean connecting her to Meals on Wheels and stabilizing her through receiving a hot meal once a day. For a single mom in her 20s, it might mean helping her apply for SNAP and take an ESL class so she can better be in a better position to get a job,” says Easley.

The next steps in the Financial Stability Framework focus on helping increase or manage income and helping both organizations and their clients understand how to break out of the cycles of poverty. “We want to help people realize that there is something different out there,” says Easley. This takes education about money, budgeting, and readiness to work.

The final phase is to help people sustain their financial success, “Our organizations often tell people the first step in this is to have \$300 in savings. Just this amount can help people not fall back into the cycle of needing basic needs met again,” says Easley.

Financial Stability Framework: A Stepped Approach



Create Value for All Partners

“High-performance collaborations are about much more than giving and receiving money. They are about mobilizing and combining multiple resources and capabilities to generate benefits for both partners and social value for society.” James Austin

Implementing shared case management has added value to individual organizations as well as to the network. “I had a church group, mostly run by older women, who was very excited

to be using the computer to track who they were serving,” says Easley. The group had a hunch that most of the people they served were grandmothers raising their grandchildren, and they wanted to narrow their scope and improve programs for these grandmothers. Easley was able to show them how to run reports and verify that data. Sure enough, their report showed that 85% of the people they served were grandmothers taking care of grandchildren. “They were thrilled to take that information to their board and show them the work they were doing and have their new vision approved,” says Easley.

As Network Administrator, Easley can help organizations and churches forge even tighter bonds of collaboration in a more hyper-local context. She can create subgroups within the larger database allowing organizations and churches in a certain area to give and receive referrals and alerts to one another. It is in the giving and receiving of referrals that clients often take big steps to financial stability. While one organization is great at helping stabilize a client, another organization down the street may offer the skills training to move a client along. It brings the best of all resources together for a family and everyone can see the progress.

CharityTracker also offers a bulletin feature, where organizations can communicate their programs and special events to one another. Easley says that one very positive outcome has been organizations seeing what others are doing and it stirs their imagination on what they could be doing as well.

Continual Learning

“Continual learning is what enables continuous improvement.” – James Austin

In addition to the training for new organizations and users of CharityTracker, the SafetyNet collaboration meets every other month with about 125–150 people in attendance. In these

meetings, they discuss any improvements or changes to be made to the system as well as other collaboration and community endeavors.

On the off months, the Prosperity Centers, a collective project between GoodWill, Family Services and Trident United Way, offer round table meetings that always include a capacity-building training as well. Those meetings also see great attendance, and welcome new organizations and churches into the collaborative.

Easley thought at some point she would reach a saturation point with training people on CharityTracker and adding organizations to the network, but that hasn't been the case. Just recently, she learned of another agency, adding value to the network. "I had no idea that the Medical University of South Carolina had a Victims Assistance Center. We connected with them, and they are becoming part of the network. At a recent Prosperity Center round table meeting, they trained network members on how to respond to a client who shares they have been a victim of violence. It was an extremely effective and empowering training," shares Easley.

Congruency of Mission, Strategy and Vision

"As alliances evolve, they can influence even the partners' definitions of their respective missions and values, which in turn can lead to new areas of overlap and engagement."

— James Austin

While many organizations are in the SafetyNet collaboration and Trident United Way funds the CharityTracker network, not all organizations receive direct funding from TUW. In 2016, TUW starts a new funding cycle. According to Easley, they are looking to fund partners willing to promote and provide sustainable solutions. "If you are an organization providing food, are you making sure the client has SNAP if they are eligible? Are you finding out what

some of the barriers are to your clients finding food for themselves? Agencies have to provide the next step.” she continues.

One example of a partner agency expanding its work to stay congruent with the mission of moving people from crisis to self-sufficiency is Helping Hands in Goose Creek. They offer food assistance and benefit application services and have also implemented various classes. After coming to receive food assistance three times, Helping Hands workers ask clients to take a class. They have partnered with Sun Trust Bank to conduct budget training, GED preparation, and computer training courses to help clients enhance their employment opportunities.

While food distribution by friendly volunteers remains the primary focus of Helping Hands, they are also moving people along the financial stability framework. Easley shares, “The director reported to me how surprised she was that people are very willing to take a class and that there is a waiting list for classes. They find the more classes people take, the less they come in needing food assistance.”

Committed to the Partnership

“Sustainable alliances institutionalize their collaboration process.”

— James Austin

As of December 2015, the SafetyNet collaborative has a total of 48,000 households, representing 110,000 people, recorded within their CharityTracker system. There are over 388,000 acts of kindness noted, with \$6.5 million distributed. What’s next for this collaboration?

While those are impressive outputs, they are moving to the next level of commitment by measuring outcomes. How many people are moving along the Financial Stability Framework, and what steps are they taking to do it?

Easley and her team have worked with CharityTracker to customize a new outcomes tab in the system. Within outcomes, a case manager can ask clients about their goals and the actions they will take to reach them. There are various outcome categories, such as education, health, financial, and more. Under each category is a list of possible goals, such as obtaining a GED, becoming certified in a particular skill, or taking a parenting class. Goals can be selected, notes can be made about the conversation, and a calendar is offered to set a date that the client wants to meet the goal.

It has been said that you measure what you value. SafetyNet is taking a big step in actually measuring people's movement across the financial stability framework. While there are only a few organizations using the outcomes component at this time, Easley hopes the early adopters will pave the way for others. Trident United Way knows that only when many partners work together will their community reach its goal of lifting 30% more families out of poverty by 2020.

[i]James E. Austin, *The Collaboration Challenge: How Nonprofits and Businesses Success Through Strategic Alliances*, (San Francisco: Jossey-Bass, 2000), 173.

