

2018 Report

United Way & CharityTracker



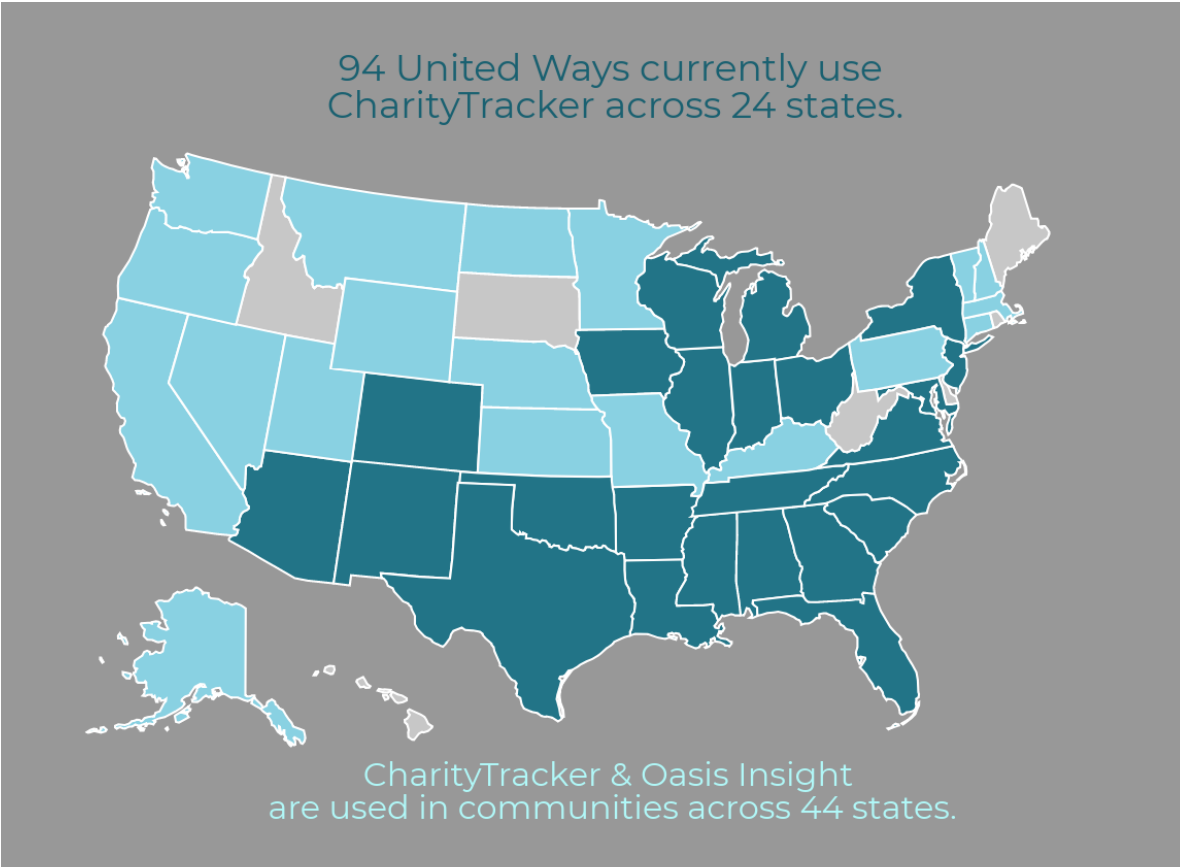
Keeping track of your good work while collaborating with others

From its inception over 12 years ago, CharityTracker has worked alongside United Ways across the U.S. helping them keep track of their good work through data collection and reporting. United Ways and their 211 systems have also used CharityTracker to collaborate and communicate with agencies, schools, churches and more. As Maret Cahill-Wicks, Executive Director of United Way of Central AR says, **"With CharityTracker, we are able to really live united in our community."** United Ways have not only benefitted from CharityTracker solutions, they have contributed to the ongoing research and development, keeping United Ways and our solutions relevant to today's landscape of social change. This report highlights:

- The ever-expanding network of United Way and CharityTracker partnerships
- An in-depth look at our 10-year partnership with Trident United Way, Charleston, SC
- How United Ways view CharityTracker



Our United Way Partners Across the U.S.



For a complete listing of current United Way partners, see page 9.

CharityTracker's Impact Nationwide

In addition to United Ways, CharityTracker is used across the country by Food Banks, Homeless Coalitions, Ministry Councils, Department of Human Services, Regional Planning Commissions, Catholic Charities, St. Vincent DePaul Councils, and more.

1,336 Cities use CharityTracker in their community	16,910,353 # of assistance records added since 2007	\$490,537,417 assistance dollars recorded since 2007	4,900,979 # of people served since 2007	18% est. Annual Savings for organizations using CharityTracker
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Trident United Way, Charleston, SC and CharityTracker

A Case Study of Community Collaboration

In his book *The Collaboration Challenge*, Harvard Business School Professor Dr. James E. Austin outlines seven C's of strategic collaboration¹:

- 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



Downtown Charleston, SC. Photo By Brian Stansberry (Own work) [CC BY 3.0 (<http://creativecommons.org/licenses/by/3.0/>)], via Wikimedia Commons

This report features the SafetyNet CharityTracker Network initiated by Cathy Easley, Director of Integrated Community Systems of the Trident United Way of Charleston, SC. This community collaboration is modeling the values and actions presented in Dr. Austin's research. Collectively, they are having great impact on their community. 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.

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 living in generational poverty. 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 did not always know what services the other 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 Cathy Easley, TUW Director of Integrated Systems. Something had to change, so TUW brought leaders together to discover what could make everyone more effective. As leaders met, a common theme surfaced: churches and organizations wanted to be able to communicate. They did not want to work in silos. They wanted to explore how to collaboratively and effectively move people from crisis to sustainability. 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." Out of these meetings the SafetyNet Vision Council was formed. The council's job was to produce a strategic plan, cast vision for the future, and be an

¹ James E. Austin, *The Collaboration Challenge: How Nonprofits and Businesses Success Through Strategic Alliances*, (San Francisco: Jossey-Bass, 2000), 173.

advocate for collaborative response to human needs in the community. Their new path to a higher level of collaboration had begun.

Connecting with Purpose and People

While serendipity often prevails as the initiator of connections in the alliance marketplace, 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. As she attended various community events and meetings, she kept her eyes and ears open for someone who could connect her to the faith community on a large scale. Chuck Coward, who also kept showing up in community meetings, turned out to be that advocate. Coward 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. As Easley and Coward got to know one another and bring their two networks together, 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?

Communicating 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. "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. CharityTracker rose to the top of the list. 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 individuals trained on using it. TUW funds the system as a part of their annual budget. "We didn't want there to be any barriers for organizations or churches to utilizing it," says Easley. Every client in CharityTracker has signed a Release of Information agreement, and Easley requires each staff 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.

Clarifying their Purpose

Above all, collaborators need to be clear about the purpose of joint undertakings. – James Austin

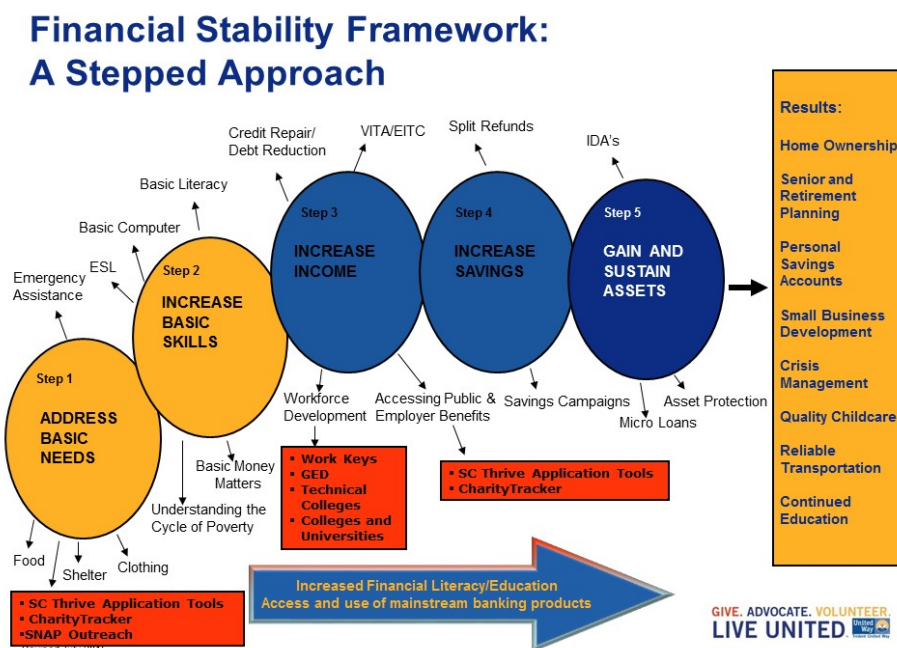
The Financial Stability Framework is the backbone to the SafetyNet CharityTracker network. Nicknamed “the caterpillar” this stepped approach serves as a guide to all the partners in the collaboration. Every organization has a part to play in the movement of a client towards self-sufficiency. In the first two steps of the framework, the goal is to stabilize people with food, shelter or clothing. “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.

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 on-going assistance through benefits such as SNAP (food stamps), Medicare, Medicaid or Temporary Assistance for Needy Families. It could also mean discovering what is keeping them from having employment, or managing their income better. Becoming stable looks different for each client. “For an elderly woman, stabilization could mean connecting her to Meals on Wheels. For a single mom in her 20s, it might mean applying for SNAP and taking an ESL class so she can be in a better position to get a job,” says Easley.

The next steps in the Financial Stability Framework focus on increasing or managing income, and helping both organizations and their clients understand how to break out of the cycles of poverty. This takes education about money, budgeting, and readiness to work. CharityTracker allows organizations and churches to easily make referrals for these services to other agencies. Collectively, agencies, organizations and churches on the network can keep records, assisting the client in reaching his or her goals.

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. In every CharityTracker training Easley teaches users about this Framework and stresses the vision for working together.

During training, Easley also stresses using the shared information about clients positively, not punitively. CharityTracker helps staff and volunteers see a fuller picture of the client’s situation, where they have been, and what their challenges and patterns might be. “Just because someone has multiple assistance records doesn’t mean they are taking advantage of the system,” she notes.



Creating 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 were 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 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. Subgroups can be created 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 where 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.

Continually Learning

Continual learning is what enables continuous improvement. – James Austin

In addition to the trainings 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 collaborative endeavors.

On the off months, the Prosperity Centers, a collective project between GoodWill, Family Services and TUW, offer round table meetings that always include a capacity-building training. Those meetings also see a 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.

Staying Congruent to 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 TUW funds the CharityTracker network, not all organizations receive direct funding from TUW. In 2016, TUW started a new funding cycle. According to Easley, they looked to fund partners willing to promote and provide for 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 are some of the barriers for your clients finding food for themselves? Agencies have to provide the next step," she continues.

One example of a partner agency expanding their 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, benefit application services, and have implemented various classes. After coming to receive food assistance three times, clients are asked to take a class offered through Helping Hands in partnership with Sun Trust Bank. They 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 moving people along the financial stability framework as well. 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 had 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 is next for this collaborative? While those are impressive outputs, Easley and her team are going deeper, working 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 it will take to reach them. There are various outcome categories, such as Education, Health, Financial and more. Under each category are a list of possible goals, such as obtain a GED, become certified in a particular skill, or take a parenting class. Goals can be selected, notes made about the conversation and a calendar is offered as 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 the big step in measuring people's movement across the financial stability framework. TUW knows that only when many partners work together will their community reach its goal of lifting 30% more families out of poverty by 2020.

Back to work that night

"An alert went out about a woman whose sole income came from sewing. Her sewing machine broke that morning and she had come in asking for assistance to get a new one. Within five minutes of sending out the alert, there were offers of five machines from other agencies. She was back to work that very night."

– Cathy Easley

Helping Communities Live United



United Way and CharityTracker should be going hand in hand. **I am so much more relevant by providing this software.** It has truly strengthened our relationship with the whole community, not just our partners. **We are truly living united because of CharityTracker.**

- **Maret Cahill-Wicks**, *Executive Director*, United Way of Central AR

This is a wonderful tool to help people in need. The more community agencies, churches and other helping organizations that join the local group will only enhance the way our community can serve those people seeking assistance.

- **Vickie V. Spence**, *Executive Director*, United Way of Gordon County, Calhoun, GA

We recommend this program to agencies that work together to make the best use of their resources and want to ensure that those who are in real need are served, rather than those who would attempt to abuse the system.

- **Jan Ballard**, *Executive Director*, United Way of Lowndes County, Columbus, MS

Whenever I do campaign presentations, I talk about community connectivity. The two things that I highlight are our online volunteer center and our CharityTracker Network. **People can see that our United Way uses the money to create a collective impact in our community.**

- **James Jackson**, *Executive Director*, Ada United Way

Our Current United Way Partner Across the U.S.

<p>Alabama Lake Martin Area UW, Alexander City, AL UW of Athens-Limestone County, Athens, AL UW of Autauga-Prattville, Prattville, AL UW of Etowah County, Gadsden, AL UW of Lee County, Opelika, AL UW of Madison County, Huntsville, AL UW of River Region, Montgomery, AL UW of Marshall County, Guntersville, AL UW of Northwest Alabama, Florence, AL UW of Selma & Dallas County, Selma, AL 211, Alexander City, AL UW of East Central Alabama, Anniston, AL</p> <p>Arkansas UW of Central Arkansas, Conway, AR UW of the Ouachitas, Hot Springs, AR UW of Union County, El Dorado, AR Northwest Arkansas 211, Springdale, AR</p> <p>Arizona UW of Pinal County, Casa Grande, AZ</p> <p>Colorado Moffat County UW, Craig, CO</p> <p>Florida Heart of Florida UW 211, Orlando, FL UW of Marion County, Ocala, FL</p> <p>Georgia UW of Forsyth County, Cumming, GA UW of Gordon County, Calhoun, GA UW of Hall County, Gainesville, GA UW of the Coastal Empire 211, Savannah, GA UW of West Georgia, LaGrange, GA UW of Toombs/Montgomery/Wheeler, Vidalia, GA UW of Central Georgia, Macon, GA</p> <p>Illinois UW of Knox County, Robinson, IL UW of Danville, Danville, IL UW of Champaign County, Champaign, IL</p> <p>Iowa UW of the Great River Region, Keokuk, IA</p>	<p>Indiana Jackson County UW, Seymour, IN Jennings County UW, North Vernon, IN Knox County UW, Vincennes, IN Lake Area UW, Griffith, IN UW of Johnson County, Inc., Franklin, IN The UW of Whitewater Valley, Richmond, IN UW of Madison County, Anderson, IN UW of Marion County, Marion, IN UW of Miami County, Peru, IN UW of Wells County, Bluffton, IN UW 2-1-1, Columbus, IN</p> <p>Louisiana UW of Southwest Louisiana, Lake Charles, LA UW of St. Charles, Luling, LA</p> <p>Maryland UW of Charles County, La Plata, Md.</p> <p>Michigan Allegan County UW, Allegan, MI</p> <p>Mississippi UW of Lowndes County, Columbus, MS UW of Northeast Mississippi, Tupelo, MS UW of Southeast Mississippi, Hattiesburg, MS UW of West Central Mississippi, Vicksburg, MS UW Pinebelt, Laurel, MS UW of Jackson & George Counties, Pascagoula, MS</p> <p>New Jersey UW of Monmouth County, Farmingdale, NJ</p> <p>New Mexico UW of Eastern New Mexico, Clovis, NM</p> <p>New York UW of Southern Chautauqua County, Jamestown, NY</p> <p>North Carolina Beaufort County United Way, Washington, NC Davie County UW, Winston-Salem, NC UW of Henderson County, Hendersonville, NC UW of Lee County, Sanford, NC UW of Forsyth County, Winston-Salem, NC UW of Davidson County, Lexington, NC UW of Haywood County, Waynesville, NC UW of Rutherford County, Forest City, NC UW of the Cape Fear, Wilmington, NC</p>	<p>Ohio UW of Ross County Chillicothe, OH UW Services of Geauga County, Chardon, OH UW of Summit County, Akron, OH UW of Erie County, Sandusky, OH UW of Hancock County, Findlay, OH</p> <p>Oklahoma Ada Regional UW, Inc., Ada, OK Stillwater Area UW, Stillwater, OK UW of Enid and Northwest Oklahoma, Enid, OK UW of Pottawatomie County, Shawnee, OK</p> <p>South Carolina Trident UW, Charleston, SC UW of Horry County, Conway, SC UW of Kershaw County, Camden, SC UW of the Lowcountry, Inc., Beaufort, SC UW of the Midlands, Columbia, SC UW of the Piedmont, Spartanburg, SC</p> <p>Tennessee UW of Blount County, Maryville, TN UW of Rutherford and Cannon Counties, Murfreesboro, TN UW of Metropolitan Nashville, Nashville, TN UW of Greater Clarksville Region, Clarksville, TN</p> <p>Texas The HUB - UW, Wichita Falls, TX The UW of Lamar County, Paris, TX UW of Wise County, Decatur, TX UW Galveston County, Mainland, Galveston, TX UW of Galveston, Galveston, TX</p> <p>Virginia Piedmont UW, Culpeper, VA Rappahannock UW, Fredericksburg, VA UW of Franklin County, Rocky Mount, VA UW of Greater Augusta, Staunton, VA UW of Henry County & Martinsville, Martinsville, VA</p> <p>Wisconsin Tri-City Area United Way, Marinette, WI</p>
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