

TECHBRIDGE'S GUIDE TO ACHIEVING POVERTY ALLEVIATION COLLECTIVE ACTION THROUGH NONPROFIT AND COMMUNITY TRANSFORMATION

TECHBRIDGE MISSION

Our mission is to break the cycle of generational poverty through the innovative use of technology to transform nonprofit and community impact.

TECHBRIDGE VISION

Our vision for poverty alleviation is a United States able to measurably alleviate poverty, within select communities, by enabling the nonprofit ecosystem with:

Data: Collect more meaningful data with better accuracy by improving capacity for front-line nonprofits and services providers

Insight: Aggregate nonprofit community data; analyze causation, trends and efficacy; and share insights with service providers, advocates and residents

Resources: Allocate goods, services and funding more efficiently and timely to the programs critical in reducing resident poverty

TECHBRIDGE YESTERDAY, TODAY, AND TOMORROW

Since 2000, TechBridge has served as the philanthropic bridge from the technology sector to the nonprofit community. The corporate technology sector created TechBridge to leverage their resources, talent and innovation to drive community impact and this support and motivation continues. TechBridge has honed its experience from 19 years of providing strategic, capacity building, and technology services to over a thousand nonprofits across the US. After supporting a wide variety of nonprofit missions and geographies, TechBridge realized that nonprofits focused on poverty alleviation tended to invest the least in their own capacity. Knowing that gains in overcoming poverty produce the greatest social and community outcomes, TechBridge made the strategic decision in 2015 to focus its efforts and resources on nonprofit and community capacity building for poverty related causes within the United States. This focus made it possible to deliver programs such as a logistics platform delivering 500 million pounds of donated food a year; as well as drive collective action initiatives, such as a city-wide data sharing system with New York City which helps neighborhoods to utilize data analytics to direct agency resources and services to more effectively fill the meal gap in underserved areas. The demonstrated impact of such efforts led to TechBridge redefining its mission in 2017 to match our focus and further dedicate ourselves to improving community systems so that breaking the cycle of poverty can become a reality for more people.

WHY COLLECTIVE ACTION

To effectively break the cycle of generational poverty, communities must better coordinate services and use data to fund the combination of programs and services most effective in moving residents from survival to stability to success. A community able to successfully execute on collective action is empowered with the following:

- Front-line agencies with the capability to collect, share, analyze and act on meaningful data
- A connected infrastructure that supports the coordination of care and services across agencies and makes data sharing, aggregation and community level analysis both possible and efficient
- A coordinated theory of change that sets aspirational goals for the community, connects the coordination of services necessary to achieve these goals, and integrates with the theories of change, logic models and program models of individual nonprofits
- Innovation and decision-making driven by deep insight into field level data combined with insight into previously hidden drivers of success or barriers for community residents suffering from poverty
- Investment decisions based on performance, contribution to community goals, and addressing funder and service gaps that hinder progress
- A community that engages in continuous improvement by taking the learnings and innovations provided and applies them to continuing iterations of introspection, planning, and execution

WHY NONPROFITS AND COMMUNITIES HAVE FAILED TO ALLEVIATE POVERTY

Despite over 50 years of concentrated investment and effort, the US has been unable to measurably improve outcomes for those suffering in poverty (see figure 1, right). The philanthropic sector invests capital into individual nonprofits with missions to solve those community problems and improve those indicators. Communities continue to struggle with an inability to alter the economic mobility outcomes critical to moving people out of poverty, such as the percent of people living at or below the federal poverty level, the percent of people earning a living wage, and the percent of children earning a higher income than their parents.

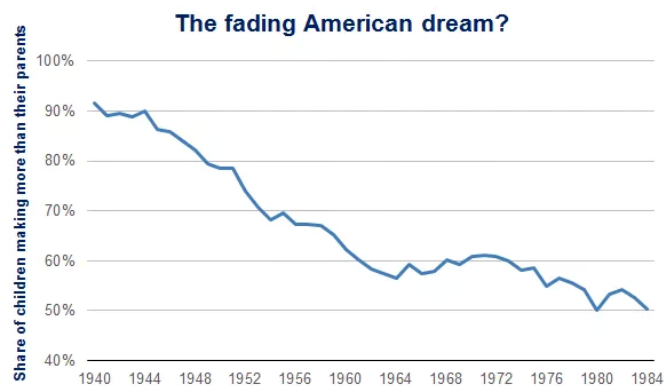


Figure 1: Chetty et al., "The fading American dream: trends in absolute income mobility since 1940. Brookings Institution.

TechBridge has identified **three critical reasons** why collectively, nonprofits have failed to improve these critical outcomes:

1. Lack of an integrated data strategy

Front-line nonprofits participating in collaboration efforts quickly realize the need for a new theory of change that expands outside the scope of their organization and connects with other service providers necessary to drive impact in the targeted community indicators. Without this integrated model of data, services, and indicators, nonprofits are unable to understand their role in the overall community success. The result is critical data not collected and/or shared. Furthermore, collaboration that is happening is either frustrated by the complexity of sharing without clear direction on data to collect, share, and indicators to report, or the scope of the interaction goes to such a low level of scope that opportunities for synergies and impact are lost.

2. Lack of integrated data management

Even when agencies gain an understanding of the information needed, they often lack the means to efficiently collect the identified data. As many agencies rely on overly manual processes for outreach, intake, delivery of services, and outcome reporting, they lack the time and resources to make substantial changes or ensure data quality (e.g. # unduplicated clients served, demographics of clients served, quantifiable outcome measures.) This lack of data management within the front-line agencies translates to

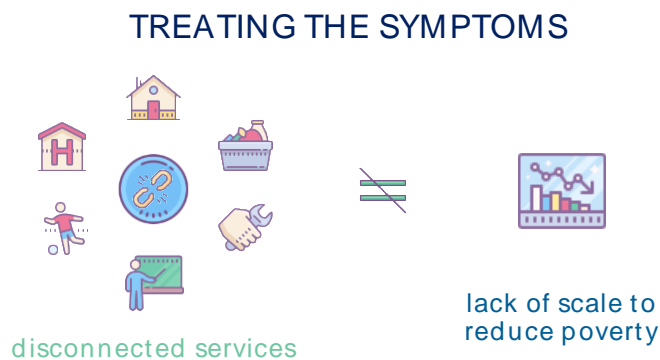


Figure 2: Treating the symptoms of generations poverty. TechBridge.

a lack of capability for the entire collaborative. As nonprofits cannot provide timely proper data, sharing is unable to occur or the cost of sharing becomes too prohibitive to continue. Likewise, data not flowing to collaborative leadership and/or partners, means they are unable to track community indicators (at least with accuracy) and that strategic coordination of community investment and alignment does not occur.

3. Lack of integrated technology

Communities that realize the need for effective data management often seek to remedy this by selecting a single software system and developing a plan for its adoption. Utilizing a single software as a collaborative can never account for the complexity of functionality and data tracking needed by the individual organizations. Using the same system often introduces duplicate data entry and reporting by nonprofits that have selected a system for their own organizational needs and often must use multiple systems to meet funder and community requirements. Nonprofits often share that funders are asking for very similar data but imposing unique reporting requirements. As nonprofits have an abundance of manually intensive processes, compliances result in hundreds of additional hours a month. Collaboratives that enforce one software system for the entire collaborative result in data that is often the least common denominators of the organizations' collective measurement and loses out on the rich diversity of data that individual organizations can bring to the collaborative.

THE COLLECTIVE ACTION SOLUTION

Making the vision of collective action and poverty alleviation a reality requires a transformation of individual nonprofit operations, shared community data capabilities, and community service coordination. Transformations of these core capabilities allow each stakeholder to effectively support each other in the execution of the strategic plan and achievement of long-term results.

Nonprofit Transformation and Capacity Building

Nonprofits seeking to participate in a collective action collaborative must first develop an effective and sustainable operating model, including the following critical elements:

1. A clearly defined **theory of change** and fully implemented **data** strategy. A Theory of Change provides a clear model for translating a nonprofit's mission into a specific plan of action to improve target community indicators; and identifies the other organizations a nonprofit will partner with to drive community change. A fully defined and implemented **data strategy** details which data to capture, analyze, and share, both internally and with their broader community (for more information, see TechBridge's [Practical Guide to Defining and Implementing a Nonprofit Data Strategy](#))
2. A robust **client management system** adhering to a common taxonomy and capable of integrating with a community platform allowing for the effective sharing of data, providing and receiving of referrals, and collaboration across agencies to provide coordinated care for clients.
3. A model for **financial sustainability** identifying funding sources and fundraising goals for a nonprofit to increase and diversify funding for their program model as they demonstrate impact. Stronger financial sustainability enables nonprofits to free up time and energy to focus on the work of collective action in their chosen collaborative.

A NONPROFIT'S PATHWAY TO DATA SHARING



Figure 3: A nonprofit's pathway to data sharing. TechBridge.

Through experience working with thousands of community nonprofits, TechBridge has found that most nonprofits operate with deficits in these three critical elements. As a result, TechBridge developed our operational readiness model which assesses nonprofit operational maturity in terms of those nonprofits that:

- are **progressing** towards sustaining their programming
- are **sustaining** their current programming but don't have a growth trajectory
- are in a **growth** stage working on scaling or replicating their program model
- are in an **innovation** stage where they have all of the three critical elements to fully participate in collective action data sharing and service coordination

TechBridge helps nonprofits with the data and technology capacity building to advance along this operational readiness model and become prepared for collective action. TechBridge first helps nonprofits to develop a theory of change and data strategy; designs the data collection, reporting and analysis process; and helps nonprofits to implement robust client management systems. TechBridge helps nonprofits go through the comprehensive "transformation" necessary for participation in a community collective action model. As a result, TechBridge is helping communities improve on the following metrics through transforming nonprofits:

Nonprofit transformation metrics:

- % of nonprofits that use outcome results to innovate programming based on data learnings
- % of nonprofits that use data to communicate impact with stakeholders and increase and diversify their revenue
- % of nonprofits that improve their operational readiness score (progress, sustain, grow, innovate)
- % of nonprofits that are ready for community data sharing
- % of nonprofits participating in community data sharing

Community Transformation

Communities seeking to transform their ability to aggregate data and coordinate services across nonprofit agencies must follow a transformational roadmap with three distinct phases: design, implementation, and analysis.

I. Design Phase

During the design phase, a community must bring together leaders and representatives from local nonprofits, foundations, government entities, schools and academic institutions, corporations, community intermediaries and conveners, and community residents to foster a spirit of collaboration. Fostering a spirit of collaboration should focus on the ultimate community return on investment of the collaborative and what that means to the various stakeholders comprising the collaborative.

Community Return on Investment: Listen to each leader or representative's desired return from their investment of time and resources towards participation in the collaborative. Desired results from the various stakeholders often include:

- **Nonprofit Service Providers:** trustworthy and reliable partner network for collaborative care and an improved ability to focus on mission and core programming
- **Foundations:** ability to demonstrate community outcomes and demonstrate progress in solving community problems

- **Government:** reduction in deficit and debt, a decreased need for public benefits, and a broadened tax base
- **Schools and Academic Institutions:** ability to better prepare students for success in the global economy, trustworthy and reliable partner network to supplement school and district resources
- **Corporations:** A pipeline of a talented, skilled workforce and an ability to better demonstrate company's impact on the community
- **Community Intermediaries and Conveners:** quality data on community resource allocation, improved ability to recommend data-driven strategic investments
- **Community Residents:** ability to easily navigate available community services, access to education and skills-based training, living wage jobs, and asset and wealth accumulation

TECHBRIDGE POWERS COLLABORATIVE OUTCOMES

COLLABORATIVES

Collaboratives bring together cross sector organizations focused on solving common community problems and improving sector-based community indicators.

TechBridge helps drive and support coordination within the collaborative for efficiency of effort, positive outcomes and lasting community change

COLLABORATIVE GOALS	DESCRIPTION	MEASURABLE OUTCOMES
COMMUNITY COORDINATION	Nonprofits, Funders and Partners use data to more effectively provide services to meet service demand	Resource allocation based on: <ul style="list-style-type: none"> • Service demand • Identified services duplication • Identified service gaps • Program effectiveness • Data-driven investment approach
NONPROFIT CAPACITY	All nonprofits in the collaborative share data for coordinated, evidence-based services	<ul style="list-style-type: none"> • NPO's theory of change connected with community change • Data management system that integrates with community platform • Ability to give and receive referrals
PHILANTHROPIC INVESTMENTS RETURN	Increasing the return of every investment dollar	<ul style="list-style-type: none"> • Increase wealth generation • Decrease social spending • Increase social impact

Figure 4: TechBridge powers collaborative outcomes

After defining the community return on investment that the collaborative wishes to achieve, the collaborative should work together to define and document the following critical components:

- **Collective Action Theory of Change:** an overall blueprint for how services interact to improve specific outcomes for one or more target populations
- **Collective Action Logic Model:** process flows for supporting programs and detailing of the indicators necessary to drive outcomes defined in the Theory of Change
- **Collective Client Journey Map:** document how data around a community resident will flow through multiple systems, from coordinated intake and referral to management of services in a nonprofit's independent client management system.

- **Collective Data & Reference Architecture Model:** detailing of data sources, interactions, and the mapping of data elements between stakeholders. Each stakeholder may choose or retain their own independent technology solution, given the solution adheres to a set of common data standards and communication protocols defined in the Governance document and with a technical capability to integrate with the selected shared community technology through an open API (see figure 4, below).
- **Data Governance:** definition of proper governance of data sharing with identification of roles, decision making process, communication protocols, and methods for performance tracking
- **Sustainability Model:** development of a sustainability model that considers long-term costs, availability of funding, potential partners, and the ability of participating agencies to contribute to the operational costs to maintain the infrastructure

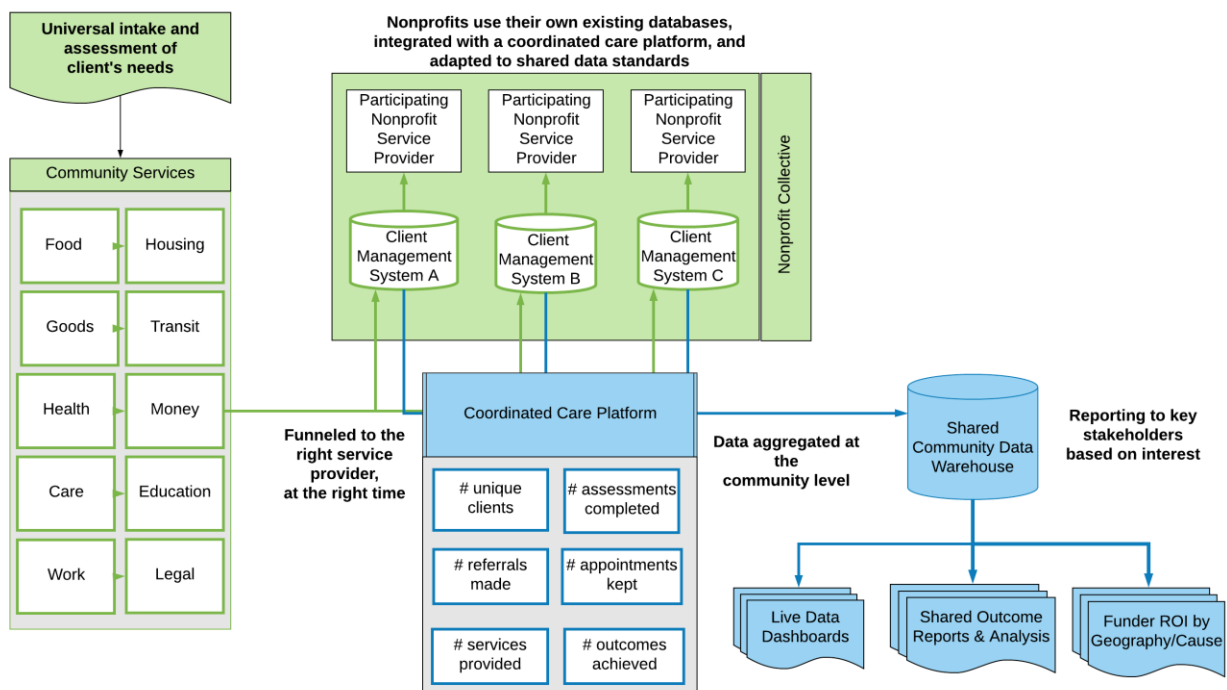


Figure 5: Sample Data & Reference Architecture Model. TechBridge.

2. Implementation Phase

Once a community has completed the design phase, it is ready to select and implement a community platform. Effective implementation requires each participating nonprofit agency to commit the time necessary to participate in requirements meetings, system testing, and training; the selection of an effective professional services organization capable of managing the project, assisting with change management, and assisting with requirements and training; and finally, the selection of a technology platform with functionality meeting the requirements defined in the design phase.

While technology functionality will vary based on design requirements, an effective solution will always include the following critical functionalities:

- i) Collect data from participating agencies,
- ii) Facilitate and manage the coordination of services across agencies
- iii) Aggregate data with proper mapping allowing for detailed analysis
- iv) Perform detailed analysis to spot trends, drivers, and gaps
- v) Identify opportunities for improved outcomes
- vi) Provide intelligence for future investment and focus

3. Analysis Phase

Effective data analysis includes the capacity to monitor visuals of real-time results and make short-term, data-driven decisions through **community dashboards** as well as the accessibility of aggregated long-term, historical information for institutions to conduct **research** and develop evidence-based best practices specific to the community's needs.

Community dashboards should be customized to meet the needs of each collaborative. Collaboratives may have multiple dashboards; such as, one for funders, one for nonprofits, etc. Dashboards will vary from community to community; however, every community should have dashboards providing the following information in a real-time, visual format:

- Cataloging of collaborative outcomes around goals in community coordination, nonprofit capacity, and philanthropic return on investment (see figure 5, below)
- Cataloging of population demographics
- Cataloging of service demand for each target population
- Cataloging of available services in a community, by service category. TechBridge uses three basic categories to identify capacity or gaps within each area, determine how services support or lead to other services, and provide a method to track individual progress and overall community performance:
 - (1) **Survival:** providing for a person's essential life needs, such as food, shelter and health services
 - (2) **Stability:** providing the social programs that help families and individuals deal with crisis and achieve a level of stability necessary for a focus on aspirational goals
 - (3) **Success:** providing the skills, knowledge, and income needed to achieve life-long success and escape poverty for themselves, their family and their future generations
- Mapping of services and indicators between agencies
- Identifying of service duplication and service gaps

Research and analysis projects including partnerships with leading research universities, government agencies, and think-tanks will help collaboratives fully understand the community intelligence information they are gathering. Access to a community platform with rich data sourced from agencies on the front lines of poverty, largely unavailable today, will better equip research institutions to uncover previously hidden insights related to poverty alleviation, better answering questions such as:

- How can nonprofits use data to better determine program and service effectiveness?
- How does data from frontline agencies align with current evidence-based best practices for service delivery? How can current best practices be modified to drive better outcomes?
- How can feedback on program effectiveness help nonprofits continually innovate programs and services based on data learnings?
- How can funders use a helicopter view of service duplication, service gaps, and program effectiveness to make more data-driven strategic investments that better align allocation of resources to service demand?
- What are the leading measurable improvements on community indicators related to poverty alleviation?

TECHBRIDGE'S COLLECTIVE ACTION EXPERIENCE

- **The NYC Food Collaborative** is funded by the Helmsley Trust and championed by United Way of NYC and engaging collaboration with NY State government, NYC government and the largest distributors of donated food in NYC. 1.37 million New Yorkers were food insecure during 2014, according to USDA statistics. TechBridge created a data-sharing system and community portal allowing all participating nonprofit and governmental organizations to see food pantry allocations, actual food supply, and neighborhood-level service statistics for the 900 food pantries across the five boroughs of New York City. 10 million pounds of new food will be distributed to more than 40 local food programs in 11 underserved neighborhoods annually. Visit <http://helmsleytrust.org/programs/place-based-new-york-city-new-york-city-food-assistance-collaborative> for more information.
- **ACE Nashville (All Children Excel)** in Nashville, TN. The mission of ACE Nashville is to prevent and mitigate the lifelong impact of childhood adversity so that Nashville is a safe, stable, and nurturing community for all. ACE Nashville wanted to improve outcomes for children through improved service coordination among providers of services for children and youth. ACE Nashville engaged TechBridge to transform its core leadership organizations so they would be ready for data sharing and integrated service delivery with the collaborative. More information is available at <http://www.acesconnection.com/g/ACE-nashville>
- **The Colorado Training Provider Outcomes Toolkit.** The Colorado Training Provider Outcomes Toolkit shares data between job training program providers and the State of Colorado unemployment insurance and wage data to provide longitudinal wage and employment outcome measures on job training programs. The benefits of this toolkit are that job seekers will be able to make more informed decisions about their education, training providers will be able to respond more quickly to market and employer needs, and employers will have a more skilled talent pool from which to hire. For more information visit <https://openreferral.org/open-referral-helps-skillful-provide-data-transparency-around-workforce-training-programs/>
- **Westside Works:** Atlanta, GA. Westside Works is focused on helping Atlanta Westside residents obtain job skills training and employment. Integrity CDC is the managing partner for Westside Works and they are responsible for the recruitment and assessment of participants. Participants are then referred to the job training programs offered by Westside Works; such as, culinary, child development associate, construction, and information technology. TechBridge helped the Westside Works partners to improve the client journey experience from case management, to job training programs, to employment, to financial success. More information is available at www.westsideworks.org
- **Westside Connect:** Atlanta, GA. Westside Connect partners are committed to improving the health and well-being of individuals and families by providing wraparound services to residents in need. Westside Connect was developed to allow a variety of agencies to identify essential needs and ensure individuals and families are linked to vital resources. Westside Connect embraces the concept of "no wrong door" where residents will get the help they need regardless of which organization they turn to for help first. TechBridge designed an integrated data solution that streamlines how agencies work together to ensure residents are linked to direct support and provision of essential services. This allows Westside Connect to engage additional partners and funders in supporting multi-agency collaboration, identify and address gaps in community service, and achieve a more effective system for person-centered care coordination.