Coalition Building
TOOLKIT

TRUE CHARITY®

Table of Contents

What Is a “Coalition” — and Why Do We Need One?

A True Charity coalition is a collaborative network of aligned community organizations that work together to ensure the maximum number of individuals make the journey out of poverty.

It’s built on a shared commitment to what effective charity is (and isn’t), ensuring better outcomes through the appropriate blend of relief, rehabilitation, and development. By working together through shared practices, regular meetings, referrals, and (potentially) a unified case management system, it accomplishes far more than any single member can.

Thus, whether you are a church, nonprofit, or community organization, our hope is this toolkit will help you transform effective (but siloed) charity into a relational, collaborative care system leading to significantly better outcomes for those in need.

TOOL SPOTLIGHT

For collaboration to work, competition between organizations can’t be an issue. In this TRUE CHARITY WEBINAR*, Peter Greer of Hope International shares the importance of rooting for rivals.*

Cultivating Relationships

Building a coalition is a significant undertaking, so it's essential to cultivate relationships with organizations committed to the use of True Charity **Model Action Plans** (MAPs), **Toolkits**, or **other member resources**. *If your community lacks that,* we recommend an expansive period of education and individual organizational change first. True Charity offers **extensive resources** to help individual ministries understand foundational principles and improve their practice.

A Three-phase Approach

While coalition building may feel like a heavy lift, don't let that keep you from digging in! There are many ways to systematically build one. To that end, this toolkit will help you work through three phases of coalition building:

- *Pre-work:* Garner buy-in through one-on-one meetings with potentially aligned ministry or city leaders with whom you can form a core group of three to five.
- *Soft Launch:* Pilot small, collaborative efforts with your core group. Determine what works. Then, identify the initial objectives of the coalition.
- *Full Launch:* When ready, fully launch an effective charity coalition, including the strategy you'll use to accomplish your objectives.

Pre-Work: Prepare to Build a Coalition

Identify Coalition-building Readiness

A well-designed collaborative effort amplifies the effect of individual organizational efforts — good and bad. For instance, if a majority of ministries use a perpetual crisis-relief approach, collaboration will increase the availability of handouts without addressing root problems.

That's why a coalition *must start with a critical mass of individually effective organizations, meaning you likely have*:

- Common rapport among like-minded organizations already practicing (or transitioning their practice to) effective charity
- One or more **True Charity ambassadors**
- Your community has successfully hosted a **True Charity Community Workshop** or similar training on effective charity practice
- Community participation in the True Charity Network from multiple local organizations who have made strides to improve their internal practice through True Charity **Model Action Plans** (MAPs), **Toolkits**, and **other member resources**

If your community has organizations like this, it's possible a coalition already exists. If so, don't miss the opportunity to partner where good work is already happening! That may mean slowing (or eliminating) the creation of your coalition.

If no coalition exists and there are like-minded organizations in your community, the next step is to …

Find a Leader to Serve as the Community Catalyst

If you know a True Charity ambassador, community leader, or business owner with a successful leadership record, consider asking him or her to lead the pre-work phase. The Catalyst will also guide future phases of Coalition building (including the planning and implementation of each stage) and may delegate specific roles to other members while continuing to provide general oversight. If the Catalyst needs to hand off responsibilities, that can happen during transitional seasons, such as between the soft and full launch.

Look for someone who is an energized, strategic thinker; who also places high value on relationships; and is deeply committed to collaboration. Their leadership will be invaluable in helping organizations hesitant to share resources get past their initial objections. Don't discount the possibility that if you are reading this toolkit, *YOU are the Catalyst for your community.*

Once your Catalyst is in place, he or she should …

Build a Core Group of Three to Five Organizations by Meeting One-on-One with Their Leadership

Though it's tempting to form a full-blown coalition immediately, doing so with those you *think* are a good fit (only to have one or more publicly oppose your efforts once underway) is *the quickest way to kill it*. You must have the right leaders in place — and good, relational rapport with them — before bringing people together or announcing the formation of a coalition. Slow and steady wins the race.

That's why initial one-on-one meetings with the leadership of potential core group organizations are so important. When you get together, keep these tips in mind:

- Meet over coffee or a meal to informally build camaraderie.
- Discuss hopes for the community and the benefits of a collaborative effort.

- Ask about client problems the leader is invested in and talk about how collaboration could address them.
- Ask who else should be considered for the core group, including **potential funding** organizations that can assist coalition members who need funds to participate.
- Brainstorm a list of aligned organizations that may be interested in joining the coalition.
- Identify the community's current assets and roadblocks.
- Pray for clear vision and endurance.

Also, it's important to remember the makeup and emphasis of the coalition is fluid at this point. The Catalyst can't know — and shouldn't try to define — the types of services it will initially offer. That will become evident over time. Thus, the goal is to identify *potential* core group members and — once others have joined the coalition — allow their expertise to shape services the coalition offers.

That said, your community's needs will likely give the Catalyst a general sense of which organizations to talk with. For instance, if policy changes would be of benefit, approaching like-minded, solution-driven organizational leaders makes sense. To strengthen families, meeting with organizations that have a similar understanding of the nuclear family would be important. Likewise, a faith-driven initiative would mean approaching those with a similar theological perspective.

Without alignment, well-intentioned initiatives can lead to mission drift or conflicting priorities. Failing to properly vet those invited to join the core group is a surefire way to dampen the flame of camaraderie.

If a core group develops, use the rest of this toolkit to implement a coalition soft launch, followed by a full launch.

Soft Launch: Implement Low-stakes Collaboration with the Core Group

Once the core group is in place, the next step is a soft launch in which the group pilots small collaborative efforts. To accomplish that, the group should ...

Further Refine and Commit to Coalition Operational Principles

The following sections specify operational principles the core group should refine and commit to over multiple meetings in preparation to recruit coalition members. As you work through them, we recommend a secretary take notes.

The Coalition Catalyst should ensure the core group is fully on board with:

- A shared understanding of relational, dignifying charity
- A willingness to learn together
- Patience. Coalition implementation is complex and can take two to five years.
- A generally aligned worldview

> ### WHAT DOES "GENERALLY ALIGNED WORLDVIEW" MEAN?
>
> Diversity in your coalition will be a fact of life. In fact, diversity is part of what makes **civil society** work well. Yet to achieve a goal, everyone must be committed to the same fundamental operational principles based on shared values.

> For instance, if the coalition hopes to transform marriages, all members must be committed to a similar view of marriage. Likewise, if it seeks to impact addiction recovery, everyone should agree on what freedom from addiction looks like. If it's a faith-based organization that hopes to impact lives for the Kingdom, there must be agreement on core beliefs.
>
> In other words, on the essentials, agreement. On the non-essentials, liberty, grace, and diversity. Ultimately, secondary differences should be put aside for the sake of a flourishing community.
>
> That said, your core group — and later on, coalition members — must *talk through differences to explore whether there's enough common ground to make the partnership work.* A good question to ask is, "This is our common ground. Are you willing to operate on it?" If there's too much misalignment (e.g., an organization offering clean needles working with a faith-based homeless shelter), it's wise to forego collaboration.

True Charity Takeaways are four-to-seven minute videos designed to help develop a clear understanding of dignifying, relational charity.

Discuss the need for, and benefit of, a coalition.

- Are any community programs already doing what we propose?
- Are there any areas where we would be competing instead of collaborating?
- How might duplication and competition impact those we serve?
- How can we minimize duplication and competition?
- Brainstorm ways collaboration could impact those you want to serve. Be practical.

Also, consider writing **a story like the one below** to describe how your coalition might work together:

Eugene is rebuilding his life after incarceration. He is in a transitional housing program that is part of your coalition, ensuring he receives holistic, comprehensive support.

His case profile is available to case managers through online case management software that enables coordination between a community food cooperative, a personal transportation program, and a local church.

The transitional housing program is helping him obtain his GED. The local food cooperative allows him to exchange his study commitment for weekly food assistance.

Additionally, Eugene works as a facility assistant at the transitional housing site. As part of his care plan, 50% of his earnings are allocated toward a used vehicle (coordinated through the external transportation program), empowering him with greater independence.

This collaborative approach not only addresses Eugene's immediate needs but fosters his long-term success by providing the tools and relational support necessary for a stable future. It may also help identify program gaps that would have been less obvious to a single ministry. For instance, perhaps he would benefit from a work placement program for the formerly incarcerated.

Without this system, Eugene's care would be siloed within the transitional housing program. He would be busy pursuing his GED and working at the facility. However, he would be left on his own regarding food (an immediate need) and future transportation (which would help ensure his long-term success after the program).

TIP FROM THE FIELD

Having an ideal client profile is a great way to stay focused on your mission. Cornerstone Initiative, a job-training ministry in Huntsville, Alabama, has a detailed description of "Cornerstone Cecilia" at their office. Everything they do is centered on empowering her to achieve sustainable employment and community.

At the end of the day, strong operational principles based on an aligned world view is crucial for sustained, long-term impact. As the core group continues to build rapport and establish those principles, it should remember the goal is to fulfill a common vision for the community bigger than one organization can achieve.

TOOL SPOTLIGHT

True Charity's Program Refinement Toolkit (created to help with strategic planning) can be adapted to help you develop the coalition's guiding principles.

Discuss the importance of tracking outcomes.

Outcomes are the long-term results we hope for, e.g., stable families, strong social networks, financial stability, spiritual growth, and education. Organizations and coalitions that don't track success in these areas don't know how effective they are.

Discuss the importance of identifying outcomes — and develop a shared strategy for assessing the results. Feel free to dream big, but keep in mind your goals must be measurable. This **short video** and **example document** can help you brainstorm ways to *improve* outcomes, rather than *increase* outputs. As well, True Charity's **Outcomes Toolkit** has valuable resources to help.

Outcomes to track may include:

- The number of families restored and/or kept together
- Households transitioned off government assistance
- Families who secured and kept housing

PILOT SMALL, COLLABORATIVE EFFORTS FIRST

These efforts should center on utilizing the core group's assets to pioneer small-scale program(s) that serve the poor in your community more effectively. To begin, you should …

Asset map the core group's resources.

Identify core group strengths the group can use to meet community needs. (Later in the toolkit, when you officially launch your coalition, you'll learn how to **asset map your community**). For now, your core group can adapt **this resource** (originally designed for a large group) to identify assets that will energize your collaboration.

After mapping the group's assets, brainstorm potential ideas for collaboration. If asset mapping is too large of a lift, simply …

Create a shareable list of your core group's assets.

At this point, you have a small list of core group organizations that practice effective charity and want to work together. Use **this spreadsheet** (or one similar) to create a shareable list with each organization's name, the services it provides, and contact information. You can choose to let that suffice for an as-needed reference.

Consider creating referral "tickets" for clients' use with other core group organizations.

For instance, imagine you are a case manager and someone comes to you for financial assistance. However, you recognize they also need childcare so they can work. After working out a financial assistance plan, you hand them a referral "ticket" for a core group church down the street that has a **cooperative childcare program**.

In the last section, we shared **this spreadsheet** to help you develop a service list. Note it also has a referral information section. If you've not already done so, gather that information from your core group to begin implementing small-scale referrals.

For a more sophisticated solution, you can use a shared case management system.

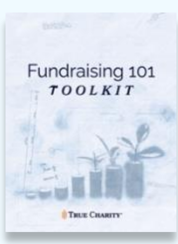
See this section for more information. You can also wait until you've launched a formal, **community-wide coalition**.

INCENTIVIZE FURTHER BUY-IN

As you anticipate recruiting organizations into the coalition, be aware some will be genuinely interested but lack the time and money to participate. Donors can help overcome some of those barriers.

That said, it's important those funds be used to lower barriers to entry *without* attracting otherwise uncooperative coalition members — or ones just looking for easy money. For example, funding community or organizational training is appropriate; paying an organization to attend stakeholder meetings probably isn't.

RESOURCE SPOTLIGHT



Unsure where to find aligned funders? The Fundraising Toolkit can help.

If potential funding organizations have not been part of the core group, now is the time to tell them about your vision for a coalition. During that conversation, you may choose to ask them for a gift that enables partner organizations to join — as long as they are willing to *fully* participate (i.e., not just attend meetings). Or you may elect to wait until you've proven the potential impact of the coalition through success of the small collaborative efforts described above.

Incentive examples include:

- Subsidize organizational membership to the **True Charity Network.**
- Fund a True Charity **Community Workshop, outcomes training**, or **cohort**.
- Fund or subsidize programs within an organization that fill gaps identified by the core group.
- Fund the implementation of case management software.

Move from Core Group to Coalition Formation

Core group participation in this phase involves a commitment of time — and ensuring formation costs (such as snacks at meetings, copying costs, case management software, and community training) are covered. It's possible one organization or funder may choose to foot the bill for everyone. If not, it can be split among core group members and new organizations that join the coalition.

Recruit Additional Coalition Members

Similar to core group formation, the Coalition Catalyst should begin one-on-one meetings with organizational leaders who are likely interested in coalition membership.

As the Catalyst builds buy-in (which will likely take nine months or more) be aware attrition will occur. Some organizations will not continue to embrace the effective charity model; others will choose to leave when the coalition launches. That's why it's important to invest time and effort in recruiting organizations that are truly aligned and therefore motivated to move forward. Given their commitment to effective charity, True Charity Network members will likely be enthusiastic coalition members.

That said, there can and should be engagement from like-minded organizations outside the True Charity Network, so don't miss the opportunity to recruit them!

Also, the following suggestions may help determine how many organizations to have on board before the full launch:

- Small community (less than 20,000): five or more
- Large community (20,000—80,000): 10 or more
- Small city (80,000—300,000): 20 or more

As was the case when building the core group, rapport around the following common values and ideals is important:

- An aligned worldview
- A shared understanding of relational, dignifying charity
- A willingness to learn together
- Patience. Again, coalition implementation is complex and can take two to five years.

Don't obsess with getting every potential organization on board. Start small with organizations committed to working through the difficulties that come with building a collaborative movement. In other words:

- Start small.
- Be aligned.
- Stay committed.
- Foster relationships.

TIP FROM THE FIELD

Some churches may hesitate to include their benevolence programs in the coalition because of concerns over members' privacy. That can be remedied by excluding clients-in-need from the coalition's case management system.

When your coalition is ready to begin meeting, if you've not already done so, consider hosting a True Charity **Community Workshop** to equip charity practitioners and ministry leaders on the foundational principles of effective charity.

In addition, we recommend members sign a **Shared Values Agreement (formally known as a Memorandum of Understanding)** acknowledging their commitment to the coalition's **common values and ideals**.

Once you've recruited members, it's time to …

Identify Initial Objectives

It's now time to identify initial coalition objectives. (These will likely change over time but will provide you with an initial direction).

Sample objectives are listed below (some of which are covered in the remainder of the toolkit):

- Asset map additional **community assets** to create a robust referral network.
- Implement shared information software.
- Build a collaborative referral system.
- Develop a comprehensive resource guide, updated monthly.
- Implement coalition-wide integration tools (such as common intake forms, case management pathways, and/or designated first stop/hub locations).
- Build rapport with non-practitioner stakeholders (i.e., city leadership, the Chamber of Commerce, first responders, etc.).
- Launch educational campaigns (including public service announcements).
- Conduct ongoing program improvement.

These do not need to be completed in order, nor do all of them need to be done before your full launch. Decide what works best for your community.

Full Launch: Pursue Collaborative Efforts

With initial objectives in hand, the following sections offer a range of functional, strategic pathways your coalition can take to leverage collaboration and better serve people in poverty.

Guidance is provided for four types of collaborative efforts. They work well when pursued in sequence. However, this can also be treated as a menu of sorts, and you will see positive results from successfully implementing only one or two:

- **Launch regular, collaborative meetings** to efficiently share information and resources.
- **Map community assets** to create a robust referral network of like-minded organizations.
- **Build a database of volunteers** to help the community build relationships across socio-economic lines.
- **Develop a case management pathway** to ensure coalition members work seamlessly to provide a unified continuum of care.

Launch Regular Collaborative Meetings

NOTE TO FAITH-DRIVEN INITIATIVES

To set the tone for collaboration, consider launching the coalition with a night of prayer and worship — and continue that for as long as the coalition is together. Doing so helps prevent burnout, reminds participants of the necessity of the Lord's guidance and enablement, and promotes unity by reducing the development of unhealthy competition.

ESTABLISH MEETING BEST PRACTICES

Some to consider are:

- Encourage the community-at-large and prospective new members to attend meetings, with appropriate measures to safeguard private information. One way to do this is have a time for networking, during which shared case managers break apart for private collaboration.
- Find a central location. Ask coalition churches or organizations to volunteer their space; or share space with existing networks or Christian businesses.
- Meet at least monthly on the same day and time, if possible. Otherwise, rotate times to accommodate everyone's schedule.
- Plan a simple, recurring agenda, i.e., introductions, an educational component, collaborative problem-solving, and strategic planning.
- Determine each meeting's objective and communicate it in advance. A clear measurable purpose will allow you to track success.

Example: The True Charity Coalition of South Birmingham will meet this month to (a) identify needs that surfaced during the community listening tour and (b) asset map community services.

- Ensure wise use of time by providing content relevant to each meeting in advance (e.g., videos, worksheets, etc.). **True Charity resources** are good tools for this purpose.
- If you create a referral database for your organization, always include a time in the agenda for coalition members to update their information and services.

SAMPLE MEETING AGENDA

RESOURCE SPOTLIGHT

As mentioned earlier in the toolkit, True Charity Takeaways are four-to-seven minute videos perfect for the educational component of your meetings.

TIP FROM THE FIELD

Huntsville, AL Network Member, The ELM Foundation, uses a tiny gong to get everyone's attention. It's a lighthearted way to keep things on track.

Asset Map Additional Community Resources

In addition to regular meetings, your coalition should identify and map additional resources the core group did not. To do so:

- **Get to know your community better by conducting** a listening tour (see the link below).
- **Identify coalition assets that address community needs.**

Get to know your community better by conducting a listening tour.

A **listening tour** is a series of in-depth conversations with community members in poverty. The intent is to understand their *legitimate* needs.

Equip coalition members with a *printed* copy of the listening tour instructions so they'll know how to converse with community members. They should interview a variety of people dealing with various issues (e.g., homelessness, addiction, or limited income or assets).

Create a collaborative document (e.g., a Google doc) to consolidate the interviewees' responses before the next coalition meeting. If that's not possible, members should bring the results of their findings to the next meeting.

Identify (or "map") assets within the community.

The following section contains an overview of asset mapping. To summarize, it's a way to identify and leverage your community's strengths — and shore up weaknesses — to better assist the poor in their journey toward flourishing. For more detailed instructions, consult the **Community Asset Mapping Guide.**

To begin, use the core group's informal asset map to show members what an asset map is. Point out the coalition's map can include:

- Social Assets: Community groups, faith-based organizations, cultural institutions, and social networks
- Community Assets: The skills, talents, and passions of individuals within the coalition such as volunteers, leaders, and professionals

- Public Service Assets: Schools, healthcare facilities, law enforcement resources, public transportation, and emergency services
- Physical Assets: Libraries, parks, rivers, community halls, local businesses, and other physical infrastructure

Next, identify the weaknesses and threats to those assets, as well as opportunities to strengthen them. Again, see the **Community Asset Mapping Guide** for examples.

To summarize, asset mapping can be a launch pad for new programs, stepping into identified opportunities, or **developing a referral system**.

Identify gaps in community support.

Once your community has been mapped, you may realize there are gaps in service. Identify like-minded organizations that may be able to fill them, host them at a meeting or two, then invite them to join the coalition. If they decide not to join, consider whether existing coalition members should fill the need. True Charity's **Model Action Plans** (based on insights from expert practitioners) are a great resource for how an organization can build out new programs.

Build a Database of Volunteers

One way to help clients build social capital is for *someone other than the Coalition Catalyst* to create and maintain a database of trained volunteers who can step in as needs arise. All coalition members should have access to it. Successfully building that database first requires:

VOLUNTEER TRAINING

To ensure all volunteers are aligned with the coalition's approach, potential volunteers should complete a **training course** or attend an annual training event before being added to the database. The coalition should also consider hosting an annual in-person training and/or allowing volunteers to complete an online course before joining the team.

TIP FROM THE FIELD

Hosting an annual event is also a good way to get information for background checks, thank community volunteers, and update information for the database (vs. trying to do so multiple times throughout the year).

RESOURCE PARTNER HIGHLIGHT

Protect My Ministry provides background checks, paperless applications, and child safety training to churches and organizations. Check out the member portal to learn about discounts for True Charity Network members.

RESOURCE SPOTLIGHT

In True Charity's ***Beyond Volunteering*** *online course, volunteers explore the rationale behind making relationship-building a central aspect of volunteerism.*

Collect the following information for your database:

- Name
- Contact information (number and/or email address)
- Areas of interest (family support, food cooperative, transportation, etc.)

- Availability
- Relevant skills (car maintenance, budgeting, construction, early childhood development, etc.)
- Optional: church affiliation

A simple way to gather this information is to use Google Forms or a similar software. If your coalition has the capacity to build a more robust system, **Neighbor Connect** is a good one to use.

Use this **Volunteer Sign-up Template** to build your volunteer database.

Tips for maintaining the database:

Coalition members may choose to host the volunteer sign-up link on their own websites. However, keeping the database up to date can be challenging. Instead, consider sending trusted connections (such as area churches or past volunteers) an annual or semi-annual reminder to update their information. That will allow for periodic engagement and will encourage them to fill needs by recruiting new volunteers.

Either way, it's important that someone in the coalition, aside from the Catalyst, oversee the creation and maintenance of the database.

DID YOU KNOW?

Research shows "The share of high-SES (socioeconomic status) friends among individuals with low SES — which we term 'economic connectedness' — is among the strongest predictors of upward income mobility identified to date. Other social capital measures are not strongly associated with economic mobility."

Define a Case Management (or Care-coordination) Pathway

For those you are serving to flourish, coalition members must provide more than material aid. Effective charity means moving toward compassionate, individualized support with clear action steps and measurable goals. Case management (largely synonymous with goal setting) is the mechanism to achieve that.

Thus, the coalition must understand what relational, goal-oriented case management looks like. Members should study this **Model Action Plan** before implementing a case management pathway. Once completed, they will:

- **Understand the purpose of a collaborative case management pathway**
- **Define a pathway that harnesses your coalition's unique strengths and assets**

Members should be aware completing the process can take many months.

UNDERSTAND THE PURPOSE OF A COLLABORATIVE CASE MANAGEMENT PATHWAY

Some coalition members operate ministries that interact with individuals on a one-time basis, while others provide support over years. Operating on their own, the capacity of these organizations to provide either type of support is limited. However, as you've seen with your core group, when organizations work together in one system, far more can be done.

Example

Jonathan struggles with drug addiction. He lost his job and custody of his children. He feels stuck and unsure of how to rebuild his life. Thankfully, your community has a collaborative case management system like this to offer support:

1. **Initial contact**
   Jonathan visits the Community Resource Center at His Hands Church, which the coalition designated as the best starting point. (See "Step 1: Identifying an entry point" in the next section for more information). He meets with the case manager on duty, Maria, who listens to his story, conducts an intake assessment, and helps identify his

immediate needs: addiction recovery and a job. She refers him to coalition members equipped to assist.

2. **An integrated action plan**
   Working together, Maria and Jonathan create an action plan with specific, measurable goals he must own. The plan includes:

   - Addiction treatment via outpatient care through a local, nonprofit program that specializes in substance abuse
   - Employment support at a local job readiness and placement organization
   - Affordable housing offered by a local church
   - Family reunification, in partnership with a foster care alternative center, that offers parenting classes and parental support through local churches

3. **Continued collaboration**
   Jonathan and Maria meet regularly to discuss his progress — and she commends him when goals are achieved. Along the way, she also checks in with stakeholders involved in his recovery, documenting his progress in the coalition's case management software. If a need arises she is unable to address, she brings it to the coalition either during a monthly meeting, via the software, or during a planned meeting with only the individuals involved.

4. **Restoration**
   After a year or so, Jonathan has maintained his sobriety, regained partial custody of his children, and secured a full-time job. He's well on his way to a flourishing life!

No doubt, this is a heavy lift. In the coalition's early years, it's likely it will only be able to handle a limited number of individuals at this level. But be encouraged! That does not mean the coalition is failing! Instead, it means you are offering deeper empowerment to the individuals you serve — with the confidence that as the coalition grows, you will accomplish more outcomes beyond the reach of one organization. Better outcomes are worth the work!

PLAN A PATHWAY THAT HARNESSES YOUR COALITION'S UNIQUE STRENGTHS AND ASSETS

- **Step 1: Identify an entry point.**
- **Step 2: Implement a referral system**.
- **Step 3: Establish access to shared data**.
- **Step 4: Streamline clients' access to resources**.
- **Step 5: Create a clear pathway to flourishing**.
- **Step 6: Refine and launch your pathway**.

Step 1: Identify an entry point.

Individuals requiring assistance need a clear way to enter the coalition's care system. There are two primary models — having multiple starting points; and use of a clearinghouse.

- *Model 1:* Multiple "starting points" that offer coordinated service

  During a monthly coalition meeting, organizations that have the capacity to train case managers on shared intake practices should be marked on the asset map.

  Each location must have coordinated practices and forms. In other words, community members should receive the same referral guidance regardless of where they enter the system.

  Once this is in place, you may choose to also implement …

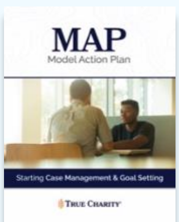
- *Model 2:* An easily accessible clearinghouse for client needs

  This might be a good fit if you identified a specific case manager within an organization with the bandwidth to take on additional, coalition-wide caseloads.

Example

Love INC helps churches build a ministry clearinghouse for their community. According to their website, “The Clearinghouse receives requests for help, screens the requests, verifies the need, and then refers the request to a local church ministry, church volunteer, or community agency. After people are helped, the Clearinghouse follows up to ensure the need was met and to offer continued spiritual support.”

RESOURCE SPOTLIGHT



The Case Management Model Action Plan can be used to train individuals who lead the clearinghouse. It will equip them to conduct a thorough intake procedure and establish clear goals with community members in need.

The **HUB Monnet** uses **this form** as a general touchpoint for individuals looking for resources in their community.

Step 2: Implement a referral system.

Individuals in poverty typically have multiple needs (i.e., transportation, housing, budgeting, employment, legal challenges, etc). Since a single church or nonprofit can address at least one (but not all) of them, it’s vital to have a solid referral system that directs individuals to organizations equipped to offer specific help.

As with Step 1, your asset map will be a valuable tool in creating a network of trustworthy organizations that can render assistance. And while the coalition will be a significant part of your system, it’s likely non-member, like-minded organizations will be available to offer occasional help.

SIMPLE, RESOURCE DIRECTORY | **ONLINE RESOURCE DIRECTORY**
MAP DIRECTORY

At a coalition gathering, use your asset map to create a resource directory. It should include:

- All coalition organizations, the services they provide, and contact information. Use the core group's resource directory as a starting point.
- Outside organizations, the resources they provide, and their contact information

With the list of organizations in hand, develop your referral system. It should include:

- Points of contact for each organization (i.e., who is in charge of managing information that comes and goes?)
- A system for sending referrals, including information to be included (if a shared system is not available)

The system can be the **referral "tickets"** mentioned earlier or a more sophisticated database. Tickets provide clients with a tangible sense of security. They know exactly where they are going and have something to give the organization, which validates their visit.

NOTE

During asset mapping, you may have discovered referral networks outside your coalition. If so, explore ways to collaborate with them — provided they are like-minded and you're confident they can help you maximize impact.

If you implement a directory referral system, include time in your monthly meetings to update organizational information (e.g., changes in personnel, phone numbers, addresses, or hours of operation).

NOTE

If you're unsure about creating a referral system, remember that strong organizational connections enhance every organization's ability to serve clients. As well, giving clients responsibility to follow through restores agency and positively reinforces individual effort.

Step 3: Establish access to shared data.

An important part of collaboration is ensuring work isn't duplicated.

For instance, if your organization is helping someone set goals to be completed before you assist with next month's rent, the coalition should know that. If that's not shared through an email or data system, another organization might pay the bill and disrupt the accountability and relationship you've formed with that person.

Many communities benefit from using a software tool such as Link2Hope, software developed by **Meet the Need**, or **CharityTracker** (developed by Simon Solutions). They help track the distribution of resources, enable accountability, and enhance understanding of a client's situation.

To maximize the benefit of software, all users must understand and adhere to its best practices and confidentiality agreements. For example, every user should:

- Participate in data entry (such as client assistance, items distributed, goals set, or other services provided)
- Diligently search client case activity to properly discern the appropriate assistance needed
- Avoid duplication of cases and services by checking demographic details such as name, date of birth, and social security number

- Verify client household information through documents like SNAP paperwork, school registration, utility bills, lease agreements (to validate a place of residence), custody paperwork, etc.
- Enter all information with professionalism, compassion, and respect for clients' dignity
- Regularly report on and assess outcomes to achieve desired results
- Receive training about, and agree to, the system's confidentiality and security rules

CONSENT TO RELEASE INFORMATION

CHARITY TRACKER MOU

Step 4: Streamline clients' access to resources.

Once you've established a referral network and set up access to shared information, you'll want to ensure clients have speedy access to the right resources. Options include:

- A shared intake form. Completing multiple intake forms often deters clients from seeking help.

  Ask organizations to share copies of their intake and assessment forms. These should include any applicable **case management tools.** Then, work to create *one* form that gathers all necessary information. As you do, assess whether any intake process creates **perverse incentives**. If so, work together to eliminate them.

  The following resources should be helpful:

  - **Seven Steps to Take Your Intake from Clinical to Transformational**
  - **TC Takeaway SWOT**
  - **TC Takeaway Outcomes**

Some organizations may wish to make the form available online, such as **this example**; others may continue using a paper intake process. Either way, having a shared form in addition to a shared information database (such as those mentioned previously), will make collaboration easier.

- Coordinate operating times. Ask:
  - Are there major gaps when critical services aren't available?
  - Can times be shifted to encourage more uniform coverage?
- Ensure clients have transportation. Consult your asset map and ask:
  - How far do clients have to travel to receive services from multiple organizations?
  - Can they reasonably get from one place to another? If not, can their travel be simplified?

Step 5: Create a clear pathway to flourishing.

Every client is a unique individual needing relief, rehabilitation, or development, tailored to their situation — and every coalition member offers services that support growth in one of those areas. Work with coalition members to identify which of their services fall under each type of intervention. Then, update the directory accordingly — and consider creating a graphic version for case managers to use in directing a client's next steps.

Step 6: Refine and launch your pathway.

Before officially launching your coalition's pathway, test its effectiveness. Begin by finalizing each element during a coalition gathering. Ensure each of the following is in place:

- A shared intake form, including whether it will be digital, paper, or both
- Clear protocols for executing the intake process with clients — and that those protocols are integrated into each members' daily operations
- Business hours
- A transportation strategy
- A streamlined directory that identifies each organization's specialty, i.e., relief, rehabilitation, or development

With these in hand, pilot the system with a select group of clients. To aid in troubleshooting, provide coalition members with the questions listed below. You can also use them with individuals who go through the program. Discuss the results during a monthly coalition meeting.

- What went well?
- What difficulties or inefficiencies did we notice?
- Did clients understand the intake process? What questions did they have?
- How well did staff and volunteers follow the new protocols? Were any steps unclear or difficult to implement?
- Were there any barriers to accessing services (e.g., transportation, technology, language, or literacy challenges)?
- Did the directory effectively categorize organizations? Were there any gaps or overlaps in services?
- How did case managers and frontline workers interact with the intake system? What feedback do they have?
- What adjustments should we make before the full launch?

After refining your system to ensure efficiency and sustainability, you're ready to launch the full program!

RESOURCE SPOTLIGHT

Project Beacon is a True Charity program that provides ongoing support for your coalition — from inception to strategies for filling gaps in community services. Reach out to the True Charity Community Engagement Director to learn more.

Conclusion

At the end of the day, no single organization can meet every client's needs. People's struggles are complex and real solutions require a team effort. When churches, nonprofits, and community leaders come together with a shared commitment to effective charity, they move beyond isolated programs to build a connected, relational approach that fosters real, lasting change for more and more people.

Whether you're taking small steps toward collaboration or launching a full-scale coalition, your efforts matter! We hope this toolkit helps you take the next steps with confidence, knowing that *working together* makes all the difference.

Network Member Examples

ELM Foundation HUNTSVILLE, AL

With a commitment to deep relationships and shared responsibility, Expecting Little Miracles (ELM) Foundation in Huntsville, Alabama partners with community leaders to identify individuals ready for long-term growth out of poverty. Through tailored development plans, mentorship, and financial aid for education, childcare (or other barriers), participants pursue self-sufficiency and learn to give back to their families and community, proving the positive impact of a changed life can ripple through generations.

Coalitions of Charities, MONETT, MO

Coalition of Charities exists to connect local people who care with local people in need. By partnering with volunteers, leaders, and organizations, they work to remove roadblocks and build communities where everyone is needed, known, and treated with dignity. Through shared tools like a community intake form and measuring outcomes, they make targeted, effective charity available to a growing number of people.

Special Thanks to Our Research Team and Model Organizations …

Meet the Need, *Florida*

Shared City, *South Carolina*

ELM (Expect Little Miracles), *Alabama*

Love INC National, Virginia

St. Mary's Foundation, *Georgia*

Coalition of Charities, *Missouri*

True Charity Ambassadors, *Nationwide*