Marshall County 2-1-1 First Call for Help

A model of little budgets coming together to meet big needs!

Location
Guntersville, AL

How did it start?
Word of mouth & training opportunity

How is it maintained?
Agencies networking through United Way/211 administration

Network Size
37 community agencies and churches

Key Audiences

- Smaller communities with big needs
- Agencies and churches wishing to build their capacity through partnerships
- Agencies or churches looking for a step by step plan to implementing CharityTracker

Key Learnings

- By sharing the responsibility of entering data, all in the community benefit and agency staff save time.
- There are very few one-stop shops for benevolence help. People in the community need agencies to collaborate.
- Online collaboration gives instant access to information, helping people in a more timely fashion.

Little Budgets Meet Big Needs in Guntersville, Alabama

The Taylor family was shocked at their winter utility bill. Then came another and another. Before they knew it, the big bill turned into a huge $500 collection notice. With the family income shrinking due to overtime being cut, they weren't sure how to pay the bill. As the shut-off notices came, they began calling and visiting local churches and agencies to see if anyone could help them pay the bill. Every afternoon for a week, Mrs. Taylor visited or called anyone she thought might be able to help. She found out that $500 was not only a lot for her family to pay, but a lot of money for the churches and agencies as well--too much, in fact. The Taylor's were turned down several times until one church finally agreed to help with a portion of the bill. While they were thankful, the stress on the Taylor family budget was only temporarily released—until the next past due notice arrived in the mail.

The story above is just an illustration of what can happen when agencies and churches don't communicate with each other to provide assistance. People receive assistance, but it can often be limited at best. At worst, people are completely turned away.

If networking together, could agencies and churches help families write better endings to stories like these? In Marshall County, AL the 2-1-1 First Call for Help (a program of the local United Way) is using a new online tool called CharityTracker to share assistance records, promote networking and increase collaboration. The 37 agencies and churches using this tool are indeed helping families and their community to write a different story.

Writing a better story in Guntersville, AL

Here's the real story of how collaboration works: A family with a shocking $500 utility bill dialed *2-1-1 First Call for Help*. Amy Wills, Resource Specialist, took the call. Using the online CharityTracker Network, she was able to look up their case file to see if the family has ever received assistance before or if there were any alerts about this caller. Seeing none, she referred them to the Salvation Army and Community Action. She also put a bulletin out on CharityTracker, explaining their need.

While $500 exceeded the Salvation Army budgeted amount, they were able to help with a portion of the bill and connected with other care-giving agencies and churches in minutes using the same online system Amy had used to refer the call. At least 36 others agencies and churches in Marshall County use this shared system. Seeing the online bulletin, several churches and agencies responded to the family's need, all giving various amounts. The bill was paid and not one agency exceeded their budgets to make it happen. "We are seeing lots of little budgets working together to meet big needs!" says Amy.

What is 2-1-1?

2-1-1 Connects Alabama is a service of the United Way and is a statewide network of regional call centers whose mission is to provide easy access to health and human services available throughout Alabama. The first call center was established in Montgomery in 2002 and the

network has grown to provide services to all Alabama residents, including the **2-1-1 First Call for Help** center located in Guntersville.

By making services easier to find, 2-1-1 networks give individuals the information they need to get assistance in their local communities. They also play a key role in disaster response and recovery. They work to:

- Help federal, state, and local governments get accurate, current information to the public immediately following a disaster and in the long-term recovery period.
- Channel the efforts of those who want to help – from spontaneous volunteers to people wishing to donate material goods or money – to the right places that can benefit most immediately and directly
- Relieve the burden from first responder organizations by connecting people with non-emergency services they need
- Provide reassurance to callers by responding to rumors and directing them to resources for support
- Work directly with local and state service providers to ensure the dissemination of accurate information about availability of services[i]

A Powerful Team: Marshall County *2-1-1 First Call for Help* & CharityTracker

Since February 2008, this service of the United Way has been using the CharityTracker system. Betty Terrell, Marshall County 2-1-1 Call for Help Director notes that CharityTracker was not the first system used, but it is certainly the most robust to date. "Prior to using CharityTracker we used a program called IRIS. With this program, agencies and churches looking for information about a potential client would call us directly to find out," says Betty. After using IRIS, a new system was introduced called REFER. While REFER monitored 2-1-1 calls and referrals, it still didn't offer online case management that empowered every agency the ability to input their own information and share financial information.

After hearing about CharityTracker from another Alabama United Way director, Betty tried it and liked it. They started working with CharityTracker in February 2008 and have seen huge benefits of using both REFER and CharityTracker simultaneously. Betty says, "We report our assistance on CharityTracker and the agencies are able to access that. We record our calls on REFER. It has taken a tremendous workload off of me! Prior to

Betty Terrell, United Way 2-1-1 Call for Help DireCharityTrackeror and **Amy Wills**, 2-1-1 Resource Specialist

getting CharityTracker we were networking through the IRIS program. REFER did not have that capability. The timeframe for agencies to obtain information from us was limited by our normal office hours, Monday through Friday. Now, agencies have access to information around the clock."

CharityTracker has also greatly built the capacity of 2-1-1 employees by sharing the database entry for case management with all agencies in the network. "Instead of me entering all the assistance, the partnering agencies and churches do it themselves," says Betty.

Amy concurs, "CharityTracker has been very helpful. We as an agency do not disperse funds. We only give out information. One of the things we do is promote CharityTracker with agencies so that as they get the call they can research this person and get the history and see who else was involved and who else has helped them."

This sharing of information not only helps agencies and churches make better and more collaborative decisions on providing assistance, it actually saves money. "It makes an agency or church's use of funds more effective and efficient. There is only so much money in the pot, but there are still many in need. This helps organizations spend their money where it is most effective," says Amy.

Marshall County & Guntersville in Brief

Saving money is something every organization is interested in doing these days. Especially ones located in smaller, more rural community like Guntersville and Marshall County. Located only 40 miles from Huntsville in Northern Alabama, Guntersville is like most rural communities in that it is both profitable and poverty-stricken at the same time. While the poultry industry, bass fishing and small businesses create a comfortable way of life for some, current economic conditions and lack of education have been catalysts for growing pockets of poverty.

As the needs grow, so does the need to expand the network. "Our city population is only 8,000, but our county has 80,000 residents spread out between five towns and five different school systems all in Marshall County. Networking in our own city is important and we are looking to grow beyond," says Amy.

CollaborationStep One: Expose people to possibilities

After learning about CharityTracker, the United Way and Marshall County First 2-1-1 Call for Help held a special meeting at the public library for churches they were already working with as well as other interested organizations. "We held these special meetings with representatives from Simon Solutions. They helped explain the mechanics and security of the website and system," says Betty. In addition to the meeting at the library, CharityTracker was presented at a number of church administration meetings.

Even before working as a 2-1-1 resource specialist, Amy was intrigued by the possibility of networking with others for good. She heard about the public meetings through the grapevine. "I wasn't a part of the 2-1-1 system yet or an employee. I was actually told about this meeting at the library by a Department of Social Services representative who knew I was setting up a food

pantry at a church in town," says Amy. The food pantry was her first involvement in offering charity in Guntersville and when she heard about how CharityTracker could help her network with other care-giving agencies, Amy says, "I was immediately impressed and knew we had to do this."

Step Two: Train for Success

"Technically the program is so simple to use that agencies could have the information entered by the time it would take to call and tell me the information," says Betty. Even though it seems easy to learn, CharityTracker and 2-1-1 worked together to offer training to those agencies and churches signing up for the network. Amy shares, "I was trained by Simon Solutions at that same library. I found it to be a fairly self explanatory system. New members call me as they are trying to get the hang of it and it is usually pretty easy for people to pick up-even for people who are less computer literate."

Step Three: Expanding the Network's Use

In addition to sharing case management of clients served, the Marshall County CharityTracker Network has fully utilized the bulletin function of the system. "Our network is doing an awesome job using the bulletins. For instance, a disabled woman with three children called into one agency needing help with her car. That agency put the need out to all the others using the online bulletin board and had a church respond in less than a day to get her car fixed. They are communicating and needs are getting met faster. Prior to CharityTracker I would have to make 4-5 phone calls. Now, people are getting help wherever they engage with an agency in our network. I feel more capable coordinating a group gift rather than looking at a $500 bill and telling the client 'Sorry we can't help you at all,'" shares Amy.

Marshall County, AL
CharityTracker
Facts & Figures

Over 37 agencies

7,065 cases

15,771 assistance records

$245,577.23 in assistance monies currently being tracked.

The bulletin feature has also been used to alert agencies of possible fraudulent activity. "The Salvation Army is one of our biggest users of this system. They have been great about posting information that warns others of activity that might take advantage of those agencies trying to do good," says Amy.
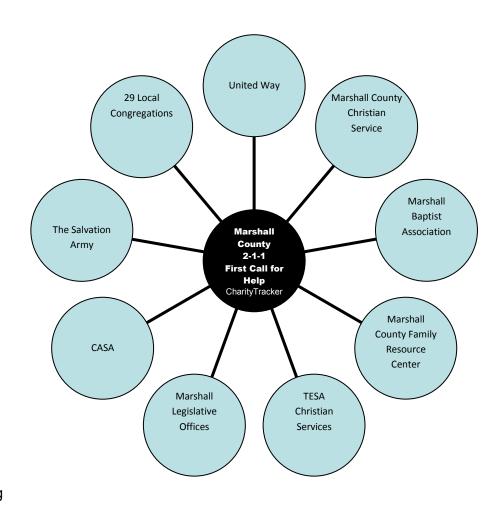
Bulletins are used for more than sharing bad news and scam alerts. This network also shares information to celebrate. "Our bulletins also share the results. Many of our agencies tell each other, 'Thank you! We were able to help with the plumbing' or some other need. Now, with this bulletin board it is synergistic."

Challenges

One area that both Amy and Betty admit needs work is the number of agencies and churches in the network. "There are over 200 churches in the Guntersville area and we have 29 of them currently using this system along with six agencies," says Betty. And like most things in life, there is room for improvement. "Contacting smaller churches to be involved is our biggest

challenge and we know that to improve and strengthen our work, we need more members," admits Betty.

Sometimes the inability to attract new churches is simply a difference in philosophy of meeting needs. "We've run into a few churches that have made the choice not to join because they don't make decisions with this information. They don't worry about what the past history is of a potential client. They make each decision independently," says Amy. They also run into smaller churches that just do not have much of a budget for benevolence, much less funds for computers or online tracking systems.

"In those cases, I do my best to help those churches connect when they do call me wanting advice on a particular person who is asking for assistance," says Amy.

Sustaining the Network

Most organizations do not show resistance to funding their membership to the network. "It was so affordable and I knew that by just making one or two better decisions each month, our church would save more than we had invested to use the system," says Amy.

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[i]http://www.refersoftware.com/211al/ContaCharityTrackerUs.aspx