Thomas H. Pollak

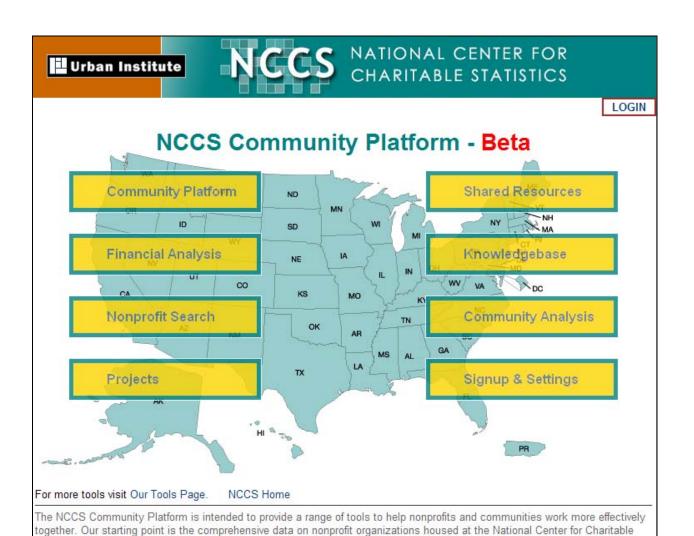
Program Director National Center for Charitable Statistics Center on Nonprofits and Philanthropy phone: 202-261-5536 fax: 202-833-6231

# e-mail: TPollak@ui.urban.org

# **NCCS Community Platform:**

Tools for Community Engagement, Analysis and Leadership

#### **April 2010**



Statistics (NCCS) at the Urban Institute. But this is only a starting point!



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Appendix: NCCS Community Platform User Scenarios



#### NCCS Community Platform: Tools for Community Engagement, Analysis and Leadership

National Center for Charitable Statistics Center on Nonprofits and Philanthropy The Urban Institute

#### **Executive Summary and Introduction**

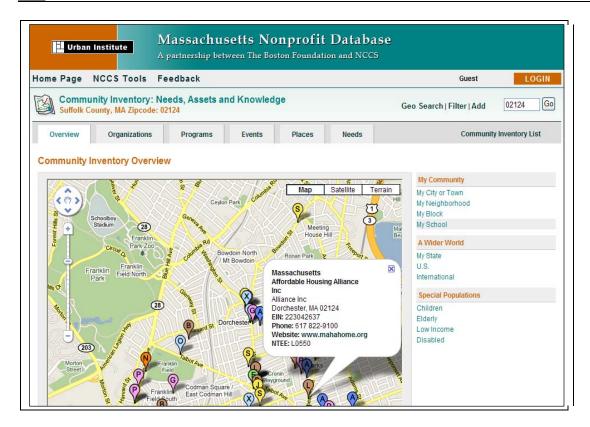
NCCS with support for the initial proof of concept from the Boston Foundation, has embarked on a major initiative, the NCCS Community Platform, to make our data, along with other Urban Institute knowledge resources and interactive tools, useful at the state, municipal and neighborhood level where many of the key decisions about community resources are made and where the greatest opportunities for strengthening civic and community engagement lie.

As the screen on the following page shows, nonprofit organizations and community members can quickly see a map of nonprofit and other resources in their community – and click on links to a wide range of other resources and tools for both research and action. We have also incorporated program descriptions and detailed financial data on nonprofits from the IRS Form 990s that NCCS archives.

The Community Platform will not be limited to NCCS information from our IRS archives. Data can be submitted by individual organizations and community research projects, and we hope to build information sharing agreements with a number of other national, state and local organizations. For example, we are in the process of working through the details of a data sharing partnership with the Foundation Center, which has collected and classified decades of detailed information on foundation grants.

We have presented the system to several groups convened by the Boston Foundation and the Ethos Roundtable, including funders and place-based service providers, and the reception has been consistently and strongly positive. We have also presented the system to a number of funders in other states with the expectation of building a broad network of users, lowering the cost of maintaining the system, and developing a full array of useful resources, local demonstration projects, and knowledge sharing.





### The NCCS Community Platform Concept

There is currently a convergence of efforts focusing at the community level. There is emerging consensus that action at the community level is where progress must occur to beat back poverty, improve education, and reach our potential as a nation. President Obama has spoken of a "new era of responsibility" and "remaking this nation…block by block." The Hudson Institute's William Schambra echoes the same sentiment: "Many Americans sense that the way to fight back against spiritual sickness is to revitalize the family, churches, neighborhood organizations, and voluntary associations—the institutions that once gave form and substance to our deepest moral convictions."

Nonprofit organizations, dedicated to providing a public or community benefit, are the key players at the local level —especially with large federal and state budget deficits, high unemployment, and major market failures highlighting the limitations of the government and forprofit sectors. The nonprofit sector's ability to strengthen communities, however, requires information as well as resources.

<sup>1</sup> Obama, Barack. Transcript Of Barack Obama's Victory Speech. Nov. 4, 2008. Retrieved from <a href="http://www.npr.org/templates/story/story.php?storyId=96624326">http://www.npr.org/templates/story/story.php?storyId=96624326</a> (Nov. 11, 2008).

<sup>&</sup>lt;sup>2</sup> Schambra, William. 1998. Faith-based Healing Isn't Just for the Underclass. Retrieved from <a href="http://robtshepherd.tripod.com/taejf98j.htm">http://robtshepherd.tripod.com/taejf98j.htm</a> (Nov. 2009).



Harlem Children's Zone, the comprehensive place-based initiative that the federal government plans to replicate in twenty "Promise Neighborhoods" over the next couple of years provides one model for how this can be done with a focus on children and youth. It seems likely that as many as a hundred proposals could be submitted. Other models for children and youth include partnerships between public school systems and afterschool programs, between child welfare organizations and schools, and more.

On the other end of the demographic spectrum, "aging in place" initiatives to help the elderly remain in their homes represent a quickly growing movement and one that fills a vital need. In between are numerous opportunities for nonprofit organizations to strengthen their collaborations with other nonprofit organizations and build deeper ties to their communities in order to improve the environment, save energy, promote the arts, or address public health challenges, to name just a few of the possible challenges that nonprofits are helping to address.

These types of community initiatives require a range of resources: knowledge about local needs and resources; knowledge about what sorts of programs work; local leadership; a vision of how nonprofits can work better together and with their local communities; and the financial, human and social capital to sustain the work. The Community Platform will contribute in a number of ways.

The Community Platform will provide quick facts and deeper information on community programs, assets and deficits for planning and needs assessments by organizations, government and public users. It will include a range of tools to facilitate this type of work:

- Describe, classify and map community programs and resources. Mapping will include the
  location of community organization offices and the service delivery areas so that a user
  can quickly get a list of, for example, all after-school programs serving a particular
  neighborhood. The Master List also can include government-affiliated programs and forprofit organizations such as daycare providers, which provide services in parallel or in
  collaboration with nonprofit organizations. All U.S. public schools are already in the
  data system.
- Incorporate Census and other demographic and economic neighborhood-based data so users can readily assess community needs and resources such as poverty levels, affordable housing, educational attainment, and other indicators down to the neighborhood level in relationship to nonprofit and community resources.
- Provide tools for authorized users and nonprofit organizations to update and enrich information in the database, share resources, and organize and manage communitybuilding projects.

Each aspect of this project has been implemented before. What makes this different is the unique blending of approaches, organizing principles, and the timing. Technology now exists that makes



this synthesis of data possible and affordable. Demand for such data is growing at an increasing pace. NCCS has both the expertise and the relationships that will enable such a platform to play an important role in both new and existing efforts to involve citizens in improving their communities.

#### Thinking Globally, Acting Locally

At the national political level, Americans are deeply divided about the proper role of government and business. Little can be accomplished through purely political means if we remain as polarized and politically immature as we are today.<sup>3</sup> Our prospects for successfully tackling the major fiscal, environmental, social, and foreign policy challenges of the next several decades will be much improved if people of good will in the nonprofit sector and in local communities demonstrate to a skeptical and alienated public that Americans can work together patiently, systematically and responsibly to address our major challenges—starting with work at the local level.

As John Gardner, founder of Common Cause and Independent Sector, put it: "We must continue the work of community building in school, congregation, neighborhood, workplace. It's not just that we shall be building communities. We shall be developing citizens who know out of their own intimate experience the disciplines and satisfactions of community. They will understand teamwork, the observance of shared values, collaborative problem solving and the building of trust."

They will also begin to understand that, as Elinor Ostrom, this year's winner of the Nobel Prize for Economics, put it, "Instead of presuming that optimal institutional solutions can be designed easily...'getting the institutions [for collective action] right' is a difficult, time-consuming, conflict-invoking process." 5

Our hope is that the Community Platform provides a platform of data, knowledge and wisdom for this work. Keeping this larger goal explicit may also help to energize people around it. We must begin.

#### **NCCS Community Platform Modules**

The Community Platform provides a number of tools and resources to help people understand their community and to strengthen the capacity of communities and their nonprofit organizations to work together:

<sup>&</sup>lt;sup>3</sup> Brooks, David. *The God That Fails*. The New York Times. Retrieved from <a href="http://www.nytimes.com/2010/01/01/opinion/01brooks.html?pagewanted=print">http://www.nytimes.com/2010/01/01/opinion/01brooks.html?pagewanted=print</a> (published Jan. 1, 2010)

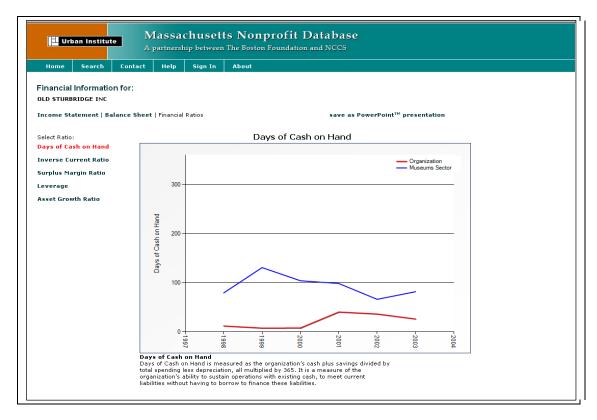
<sup>&</sup>lt;sup>4</sup> Gardner, John W. 2003. Living, Leading, and the American Dream. San Francisco: Jossey-Bass. (p.163)

<sup>&</sup>lt;sup>5</sup> Ostrom, Elinor. 1990. *Governing the Commons: The Evolution of Institutions for Collective Action*. New York: Cambridge University Press. (p. 14)



*Community Inventory*. Users can view, edit and add nonprofit organizations, schools, churches or other organizations or resources to the Community Inventory and compare resources to community needs via maps, charts, lists and tables. (Note that only approved registered users can add or edit.) Community needs can also be catalogued and prioritized, and, in subsequent versions, there will be tools to facilitate projects and activities to address such needs.

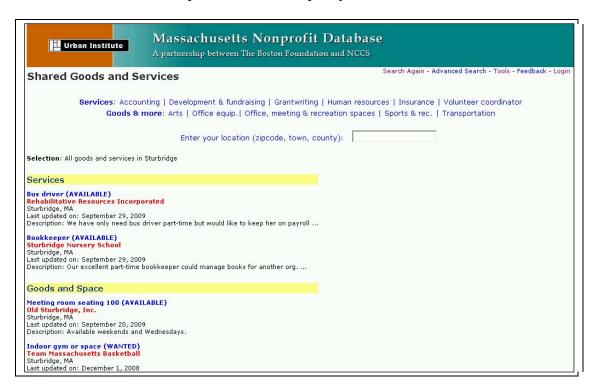
Financial Analyzer. As the sample screen below shows, the Financial Analyzer permits registered users – managers, board members, potential donors, etc. – to compare an organization's financial performance to similar organizations. The tool is flexible: Users can choose the "peer/comparison group" based on the organization's National Taxonomy of Exempt Entities (NTEE) category – its purpose or activity – its size, and geographic region. Alternatively, a user can create a custom peer group by selecting individual organizations regardless of their characteristics. Once selected, the Financial Analyzer compares the organization to its peers on a number of standard financial ratios and, if the data are available, on operational performance and outcomes as well.



*Shared Goods and Services Tool.* In difficult economic times, nonprofits can often benefit by greater sharing of staff, consultants, office space, open space, and equipment. The Shared Goods



and Services Tool provides a convenient system for nonprofits to communicate with one another about both their needs and potential excess capacity.



Program and Service-Delivery Area Mapping. The system provides a comprehensive source of program-level data on nonprofits, large and small, in their communities. We can provide these data directly to users, or link to 2-1-1 information and referral hotlines (often run by local United Way agencies) to make our data available to them or vice versa. The program descriptions—and NCCS-assigned program classification codes—from the IRS Form 990s provide an excellent starting point for identifying all nonprofits and their services. In return, we hope to obtain the more detailed data that the 2-1-1 systems usually have on a subset of providers in their communities. Working together, we believe we can significantly boost the scope and quality of the data in all of our systems.

In communities without information and referral systems, our Community Platform also provides the interactive tools to capture the more detailed information needed to help community members find needed health and human services. This more comprehensive information – including hours of operation, location, fees, and eligibility requirements – can be completed by the parent organizations themselves, or by a local United Way or other support or research organization.

Outcome Measurement. Closely related to the Program and Service Delivery Area Mapping module is the ability to track program outcomes or results. Organizations or researchers can add



standardized outcome measurement data, either directly through the Program pages or, in subsequent versions, through linkages to systems like Social Solutions' Efforts to Outcomes system. These data can be compared over time or with other organizations, or aggregated by location or type of activity. We have also incorporated the fourteen outcome frameworks we have developed as part of Urban Institute's Outcome Indicators Project in collaboration with the Center for What Works and include other resources on outcome measurement in our KnowledgeBase.

*KnowledgeBase*. The website is intended to lower the barriers for communities and nonprofit organizations to work together. Lack of good data is just one barrier; we also provide a well-organized and searchable "knowledgebase" of links and resources to meet the needs of both organizations and community members for both practical information and a deeper understanding of how and why to think globally and act locally (and effectively).

To help organizations understand their financial performance and measure their outcomes, we include some of our own work as well as links and resources drawn from the Free Management Library, Nonprofit Accounting Basics (a resource developed by the Greater Washington Society of CPAs, to which we contribute), the Center for What Works, IdeaEncore, and more.

To help community members understand community-level data, provide community leadership and project management, and conduct community asset and needs mapping projects, we provide carefully selected resources and links drawn from the 7,000-page Community Tool Kit (available in Spanish and English from the University of Kansas) and other sources such as the Corporation for National and Community Service and the Asset-Based Community Development Institute. For a deeper understanding of the social science, psychology and philosophy of community building and leadership development, we will include links to a wide range of free "wisdom on the web," including thoughtful articles, radio stories, and videos drawn from sources ranging from NPR, *Atlantic Monthly*, and the *New York Times* to the Sapling Foundation's TED website on "Ideas Worth Spreading."

Version 2 of the KnowledgeBase will add in more interactive features: Users will be able to tag items of particular interest, to mark them as read, or to create their own categories to which they can assign items, and add private or public notes or summaries. Like other "social tagging" systems, users can make their lists available to others as well. In keeping with our principle to build on the work of others, we expect to permit sharing of tags with other sites offering similar services.

Community Planning & Analysis. NCCS has a range of more sophisticated web-based data analysis tools through its NCCS Data Web available for researchers and policymakers interested in exploring the role of the nonprofit sector in their communities. Community Platform users will be able to access these resources. NCCS and other centers within the Urban Institute also have



extensive experience conducting research on a wide array of issues dealing with the nonprofit sector and communities and will provide technical assistance to project partners.

Project Management Tools for Community Research and Engagement. The Community Platform currently provides tools for creating project work groups whose members can assign tasks to one another (currently limited to contacting the nonprofit organizations in their community) and share information in a private workspace. Future versions of the system will expand this capability to include management of community projects intended to meet community needs.

#### **Our Vision: Collaboration Is Key**

This is the "golden age" of web-based mapping and data. The barriers to making data available in raw format or as maps on the web have fallen as software services and internet bandwidth have improved. We see no value in competing against other nonprofits with similar and complementary capabilities. Instead, we hope to collaborate with and integrate data from key national data and information providers such as the Foundation Center, Idealist.org, Social Actions, the Community Tool Kit, GuideStar, Craigslist, IdeaEncore, VolunteerMatch and the Urban Institute's National Neighborhood Indicators projects (includes a wealth of U.S. Census data as well as housing, foreclosure and crime data available at a neighborhood level in most cases) as well as Massachusetts providers such as Mass 2-1-1, the Boston Indicators Project, and others.

The Community Platform infrastructure can accommodate "real-time" data sharing to and from our partners. This could permit, for example, the display of Foundation Center data in conjunction with "micro-payments" to the Center for use of data that requires a fee.

Partnerships with a variety of local organizations and networks will allow the Community Platform to integrate local data for improving neighborhoods and engaging citizens, creating service learning and community service opportunities for students, and improving coordination of and access to human services and other services and resources that nonprofits and government provide. Local partners are likely to include:

- Community foundations and other locally focused funders
- University community outreach and research projects
- University nonprofit centers
- United Way organizations and 2-1-1 information and referral services
- Volunteer centers
- Place-based initiatives and coalitions in education, human services and community development
- Community-wide, neighborhood and field-specific coalitions of nonprofit organizations
- State and other nonprofit associations



- Local community mapping and analysis projects, such as the Boston Indicators Project
- Community action agencies (mandated by federal law to provide periodic community needs assessments as a condition of their Community Service Block Grant funding)
- Local community websites such as those hosted by i-Neighbors or the Front Porch Forum.

#### Major Components, Scope of Work & Costs

Our goal is to add a dozen local communities or states in the first year of the grant and an additional twenty in year two. In the first year, we expect to provide in-depth technical assistance via regular conference calls, webinars and onsite. If funding permits and if it seems warranted, we will also plan a national meeting of participants to share learning. We anticipate the cost for these services will be approximately \$20,000 per site, which we hope to secure from local funders or nonprofit coalitions. As we gain expertise, refine the model, and add new partners, we hope to dramatically lower the cost so that the model becomes affordable to all communities for as little as \$2,000 for sites with the ability to pay and probably free for those that cannot.

Outreach and Partnerships. Over the next year and beyond, NCCS plans to continue its outreach work and develop partnerships across the states to use the system to address practical needs. University partners can use the system for community research projects examining the scope of services or financial health of organizations, or a myriad of other issues; nonprofit umbrella organizations such as National Council of Nonprofits affiliates can help nonprofit boards and managers interpret the financial trend charts and peer group analysis that our system provides; neighborhood associations can organize teams to catalog community needs and assets, or to build stronger networks of nonprofits that can effectively share resources and coordinate service delivery. At a very practical level, we hope to build data sharing systems with human service and health care information and referral systems such as Mass 2-1-1, the Connecticut 2-1-1 system, and others. Appendix A on User Scenarios provides more detailed information on system uses.

*Technology Development.* Simultaneously, we will continue to develop the technology and provide technical assistance to users. Feedback from users will be vital for improving the system. We also plan to integrate modules that now reside at Community Logic, Inc. – our development partner on the Massachusetts Nonprofit Database and host server for the maps and charts – directly into the Urban Institute infrastructure.

Content Development. Additional tasks include expanding the content in the KnowledgeBase and formalizing systems for knowledge sharing across communities and local projects. (We will explore formalizing our collaboration with Urban Institute's National Neighborhood Indicators Project, which has demonstrated the ability to sustain a "learning community" among many cities over many years.)



*Data Collection.* Completing our collection of program descriptions from IRS Form 990s will be accomplished with funds from local partners and other sources.

#### A Springboard for Action and Research

The Community Platform is intended to be useful for both action and research. The geographic scope of projects can be as small as a neighborhood, as large as the nation, or somewhere in between. Our hope is that metropolitan and state-wide funders and support organizations – community foundations, United Way or 2-1-1 providers, state nonprofit associations, and others – will work with us to create numerous projects in their communities to test different variations on how the system can be used on the ground.

Some communities will want to the tools to focus on strengthening the nonprofit sector broadly, others will see this as a tool for developing place-based education or environmental projects. Communities are already in touch with us about mapping their assets in preparation for competing for Promise Neighborhood grants. The range of potential projects is wide.

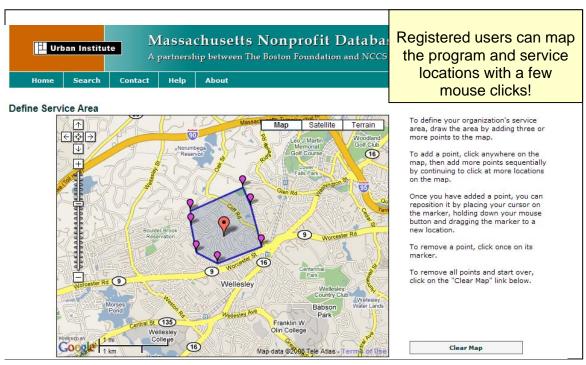
#### **Additional Screenshots**

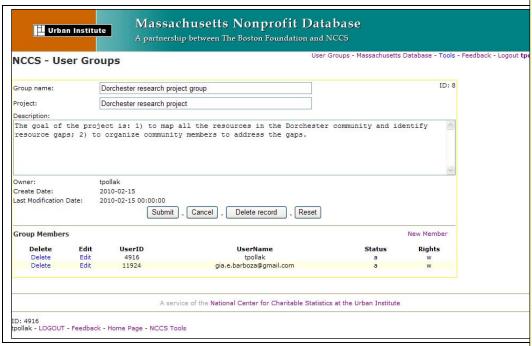
The following screen shots show some of the major features of the platform.

#### Conclusion

Time will tell, but we are hopeful that this project will be the basis for transformative community change by enabling public-spirited citizens and nonprofit organizations to work together in new and more effective ways.

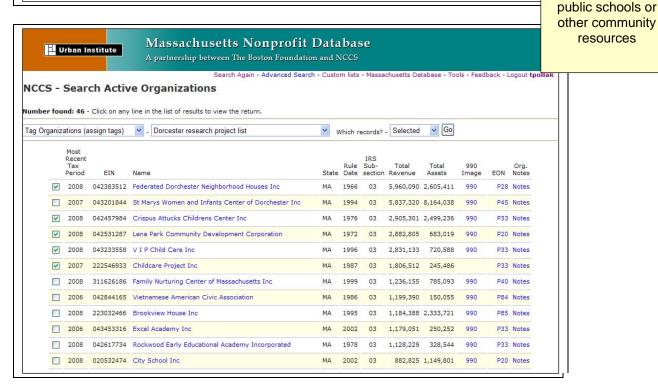


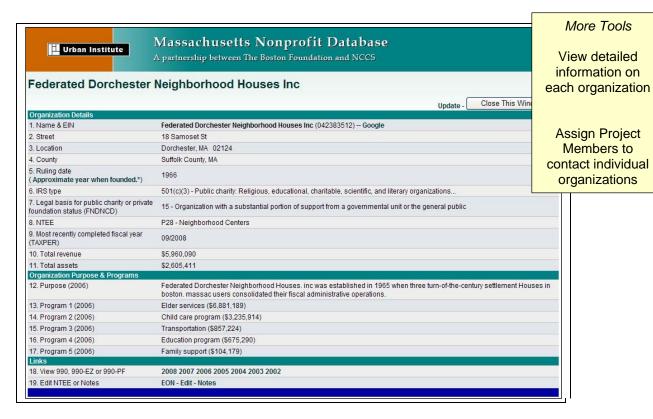


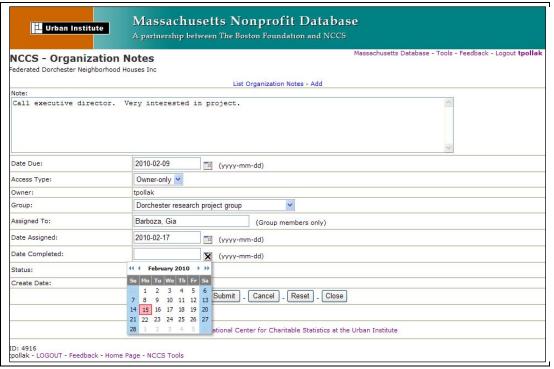


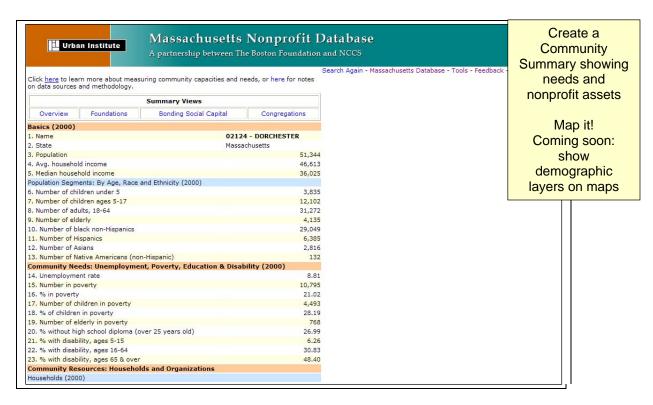
Tools: Create Project User Groups/ Teams Create Custom Organization Lists and add public or private notes Assign Contacts to **Project Members** Organizations are searchable by Activities, Type, Location, & Name Add informal unregistered

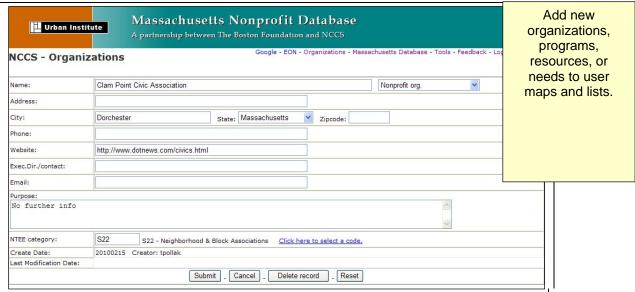
organizations,











# Appendix: State Nonprofit Database & Community Platform User Scenarios

#### **Scenario 1: Nonprofit financial managers**

In the District of Columbia, CFOs of child welfare organizations meet periodically to discuss government contracting and other financial issues. If they don't already exist, similar "peer learning groups" could be established in Massachusetts by the Massachusetts Nonprofit Network or other formal or ad hoc nonprofit associations. A member of one of the groups could prepare a report using the Community Platform showing the key financial ratios of the peer group of participating organizations and use that as the basis for a discussion about what strategies are working for dealing with cash flow problems, generating new earned and contributed income, or budgeting.

Financial advisors, such as CPA firms, could provide comparative analyses using the Community Platform for their clients to help them understand if their financial strengths and weaknesses are unique to them or are field-wide. (If they are field-wide, the solutions may be very different then if they are unique to an individual organization.)

Financial managers can also click on the "Create Powerpoint" button to create a presentation for board members, bankers, or others who may want to get a snapshot of an organization's financial performance.

#### Scenario 2: Private and government funders and policymakers.

Funders and policymakers often struggle to understand if their grantees and their communities are best served by general operating support or program-specific funding. Analysis of the financial health of grantees can help shed light on this question. Funders can create custom lists of grantees and map them in relation to other organizations. Are they distributed consistent with the goals of the funder? Do some neighborhoods receive a disproportionate number of grants? These are among the questions the tool can help with.

#### Other questions include:

- o If grants are reduced or eliminated due to endowment losses or a decline in state revenue, do grantees have the wherewithal to survive?
- O Do grantees or potential grantees have balance sheets that can support bank loans or lines of credit to cover slow payments by government funders or make needed investments in IT or other infrastructure?

#### Options for encouraging use of the tool:

- Training sessions for nonprofit umbrella organizations. They, in turn, could use the system to report on trends in their fields.
- Train-the-trainer sessions with umbrella organizations and consultants who could then work with their members and clients.

#### Scenario 3: Shared Goods and Services

The first step is outreach through state and local nonprofit associations and funders to encourage their members to take advantage of the system.

Once we have a few users, we will find and document (possibly with a short video as well as in writing) examples of organizations that are sharing resources successfully. Our sense is that many organizations would find sharing resources and personnel valuable if they were to try it. However, busy schedules, inertia, and a bit of trepidation about the potential for problems means that sharing doesn't happen as often as it ought to. Providing an easy-to-use system and a gentle nudge from umbrella associations and funders seems likely to encourage more organizations to try it.

#### Scenario 4: Creating a community nonprofit network

The nonprofit sector appears fragmented in many communities. The staff and volunteers of small grassroots organizations – as well as many larger organizations – are often preoccupied with their core missions or financial survival and have had scant opportunity to connect to other organizations—especially those outside their immediate area of activities. Yet there are often opportunities for collaboration that benefit both the collaborating organizations as well as the broader community.

For example, in the Pleasant Plains neighborhood of Washington, DC, this year, a small coalition of nonprofit organizations came together to create the Pleasant Plains Neighborhood Network and produced a monthly newsletter. The arts organization has primary responsibility for producing the newsletter while the students who participate with the local mentoring and tutoring program hand deliver the newsletter to every home in the neighborhood, since many of the residents lack access to the internet.

The Community Platform facilitates the creation of these networks by providing organizations with access to lists and maps of all the nonprofit organizations in their community and descriptions of their programs and activities. Registered teams of users can also assign team members to contact individual organizations and track information on the contacts in private team notes. The teams can then create a custom list of network members that can be tracked and mapped separately from the other organizations in the community.

#### Scenario 5: Linking a community nonprofit network to the neighborhood

In Washington DC's Ward 1, a diverse and gentrifying area immediately north of the city's downtown area, 70 people from approximately 50 local nonprofit organizations met to create Strengthening Ward One Together (SWOT). The lead organization is the ward's family support collaborative, a ten-year old organization created by the city council which has become a major human service provider in its own right. The members of SWOT are planning to canvass the community (although activities around the U.S. Census may delay the project). The goals are several:

- Identify the needs of residents and projects that nonprofits and the community can take on to strengthen the community.
- Identify people who are interested in volunteering or contributing in other ways to local nonprofit organizations and efforts to improve the community.
- Communicate to residents through the act of canvassing that there are people and organizations in the community actively working to make it a better place.
- Link residents to nonprofits or government agencies that can help meet individual needs.
- Bring members of the network together around a concrete project that will benefit the
  whole community and strengthen each individual organization by, we hope, finding new
  volunteers and sources of support, and increasing the community's awareness of its
  activities.

The Community Inventory can serve several purposes in developing projects like this. The Individuals module, when completed, will permit the system to be used for tracking individuals' views on their neighborhoods, their role as volunteers, and their self-identified needs. It will also give organizations the ability to track contacts with or services provided.

#### Scenario 6: Creating place-based initiative to support young people or senior citizens

With the addition of the Individuals module, the system could provide a basic platform for organizations to share information on the services that young people and their families are receiving from a tutoring program, a community center, and an anti-violence program that are working together to lower dropout rates in a community. The Harlem Children's Zone model, which provides comprehensive wrap-around services for young people ranging from its charter school to health and human services could be facilitated by our platform. Alternatively, we have built APIs to permit sharing of data with other web-based systems and this same approach could be used to integrate with existing case management systems such as Efforts-to-Outcomes or with new products more narrowly tailored to providing community-wide shared case management services.

#### Scenario 7: Supporting a university-based community research project

Campus-community programs like those affiliated with Campus Compact or classes in community sociology or community development can use the Community Platform for a number of different types of projects:

- Map community needs and resources on a block-by-block basis.
- Survey residents about their civic engagement, willingness to volunteer, and involvement with local nonprofit organizations.
- Assess the financial health of local nonprofit organizations.
- Use Community Platform as the basis for a survey of organizations.

#### Scenario 8: Providing a community resources database or directory

Many but not all communities are served by information and referral services such as the "211" systems run by many United Way agencies. Our system has the data collection, classification and search tools to support these sorts of efforts. Ideally, in communities that have existing systems, we would like to exchange data. For example, we can easily create a real-time feed of

our program and organization data for a directory service. For all but the best funded, this would provide them with some new organizations that they don't have in their files. We, in turn, could benefit from the highly detailed program data that these services often collect.