Transforming the Delivery of Poverty Services *Update*

HELLO EVERYONE!

As time has slid into 2022, we want to welcome you to our first official newsletter for the "CCUSA Transforming the Delivery of Poverty Services" project. We are thrilled with what has come together over these last few months and are looking forward to the first three pilot projects, Odessa, Monterey, and San Diego go live with their digital transformations. We are so grateful for the input and cooperation of everyone in these early pilot projects and can't wait to roll it out to the next agencies. In the meantime, we are working with Denver and Commonwealth for a rollout in phase 2. We will explain the rollout schedule and more details of the solution in this newsletter.

Our newsletter is intended to provide you with new information each month about ongoing projects, new functionality being added, success stories, and feedback from those using the solution and additional insights on using the software and how your clients/constituents can engage and benefit from the program.

Please stay connected and informed about what this solution will mean for your agency, clients, employees, and volunteers.

We are looking forward to connecting with you each month so, if you're as excited as we are, please read on and share with your co-workers. If receiving this newsletter isn't helpful, please use the link in the email to unsubscribe.

THIS MONTH

itk In The Know Solutions Group

A Quick Introduction

We would like to take a moment to provide a proper introduction
of the teams that are working with you on this project.

ITK leads the project and functions as the architect of the 'Transforming the Delivery of Poverty Services' initiative Case Management solution.

ITK's experience is in helping customers with their Digital Transformation projects. The company has been in business since 2011 and has highly skilled resources. Many team members transitioned from customer roles into consulting roles bringing real customer experience to their projects.

The company is involved in projects across different industries with a strong focus on retail and nonprofit organizations. Microsoft often selects ITK as their preferred partner.

The team at threshold.world focuses on enabling nonprofits to leverage technology to do more good.

The threshold.world team specializes in engaging with customers to design, deliver, and evolve comprehensive technology platforms that focus on putting participants at the center of your mission, raising more resources through fundraising, and improving stakeholder outcomes through program design, delivery, monitoring, and evaluation.

The company is a key Microsoft Tech for Social Impact partner and has been a core contributor to a growing cross-sector movement leveraging data for social and environmental impact since the program's inception. threshold.world is also the creator of the world's first program design and storytelling platform, b.world, for nonprofit program teams.

The Transforming the Delivery of Poverty Services initiative Case Management solution is built on the Microsoft Dynamics 365 CRM platform in the Microsoft Azure Cloud. Notably, Microsoft Tech for Social Impact (TSI) provides grants and discounts to organizations using their technology platform. Their involvement in this project completes the team and allows CCUSA to build a fitting solution with a world-class team on a state-of-the-art technology architecture.

WHAT IS DIGITAL TRANSFORMATION?

Digitization changed everything from banking, to healthcare, travel, shopping, and dating. It has greatly impacted business and economic transactions. The creation of a digital infrastructure requires businesses, nonprofits, and governments to look at their current systems and ways of working. Many organizations have embarked on a Digital Transformation Journey that enables them to achieve more while freeing staff from burdensome tasks.

Here's how Gartner (a global market analysts organization focused on the IT industry) describes Digital Transformation:

Digital Transformation can refer to anything from IT modernization (for example Cloud computing), to digital optimization, to the invention of new digital business models.

WHY SHOULD WE DO A DIGITAL TRANSFORMATION?

We all benefit from digital transformations that altered how businesses function and people work. Buying plane tickets online, going to a doctor's appointment where physicians have access to our electronic medical record, or even streaming a movie are all examples of digital transformations that most of us take for granted. Technology has transformed how we do so many things in our lives.

For profit businesses have embraced the digital transformation journey, which in many industries is now required to be competitive. Digital transformations are as diverse as the organizations that embrace them, but they often revolve around efforts to eliminate paper-

work and administrative tasks that, while time-consuming and costly, don't contribute to the organization's core business or mission.

Digital transformations also typically enable organizations to more effectively share and use data. Healthcare is again a great example: the federal government required the use of electronic health records to eliminate costly paperwork and to enable doctors to effectively share information on each patient's unique needs.

Unfortunately, digital transformation initiatives are not nearly as commonplace among nonprofits. Historically, many lack the financial resources to invest in internal infrastructure and technology companies have traditionally focused on corporate customers.

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This effort, Transforming the Delivery of Poverty Services, in conjunction with Microsoft's Tech for Social Impact, seeks to change that by empowering nonprofits and charitable organizations to use the same technology tools and systems that business concerns rely on to radically increase their productivity and overall effectiveness.

Ultimately the platform we are creating for Catholic Charities USA and the 167 independent agencies that together provide crucially important services to more than 15 million people in the United States, will make it easier for staff and volunteers to do myriad tasks – all with the goal of giving them more time to help clients. Initially, the digital transformation will focus on case management and client intake, a mind-boggling task for many agencies.

In addition to dramatically reducing the time-consuming processes currently in place, the platform will make it possible for agencies to safely and securely share data, a capability that will enable Catholic Charities agencies to not only track each client's progress, but also to proactively address their unique needs, even if they are visiting a different Catholic Charities agency for the first time.

Most importantly, this newfound capability will send a powerful message to clients: "We know you, we understand your needs, and we here for you." In addition, the platform will enable staff members and volunteers to focus less on administrative burdens and more on the opportunity to help others that led them to Catholic Charities. We know you didn't join Catholic Charities to do redundant data entry!

Phase I of Transforming the Delivery of Poverty Services is a pilot program of three agencies of different sizes in Odessa, Monterey and San Diego. Although each

95% of funding decision-makers are likely to contribute to nonprofits that show they are using technology to improve how they deliver on mission.

Microsoft Tech for Social Impact

agency's deployment will be customized to address their own processes, the base platform being created through the pilot program will serve as a foundation that can be applied to all agencies.

In addition to ultimately helping Catholic Charities' agencies to more effectively help clients, the long-term goal of this initiative as just as its name suggests: Catholic Charities seeks to transform the delivery of poverty services. It is also our shared hope that the platform that results can ultimately help charitable efforts worldwide to be more effective. The importance of Catholic Charities work and mission cannot be overstated. It's time for nonprofits to harness the same digital tools and resources industries take for granted!

While disruption is not a driver for the Catholic Charities, the Case Management, Client Intake, and the Annual ...

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... Report processes benefit from the Digital Transformation we are rolling out. It will change the daily activities for many caseworkers and provide access to a comprehensive dataset on the battle with poverty. The relational database will contain up-to-date information to allow caseworkers to offer customer-tailored services on the spot and facilitate updates to the annual report faster and more accurately than before.

How will we do the "Transforming the Delivery of Poverty Services," with D365?

Digital Transformation doesn't come in a box — or a "cloud." It is something that needs to be designed, implemented, accepted, used, and improved. We realize that technical talent is scarce at the agencies, and therefore ITK, threshold.world, and Microsoft have completed the majority of the solution. The pilot projects have provided input and feedback to validate the

solutions that have been built. We realize that technical talent is scarce at many Catholic Charities agencies, and with the solution largely in place, the technical requirements are minimal. It will require time and effort, and we will need your help as you know your agency best.

This doesn't need to be deeply technical (you can hire the technical power), but think about those team members capable of working across different departments or teams. You probably already witnessed it over the past few months where some of your talents stepped up and made things happen under new circumstances. Allowing them to be a part of a new direction for your organization will make a world of difference and help you attract and retain staff. In your new digital culture, roles will become more flexible. Some of the roles will be more permanent to provide structure and technical guidance, but your new digital culture with a continuous flow of initiatives will create new roles that evolve with its needs and pace.

The Microsoft D365 platform we use for this project also offers you powerful tools like Workflow, Power Platform, Cloud, and Cloud automation tools, which over time will help you automate additional time-consuming tasks.

While there is technology involved, let's focus on the one critical question you need to ask yourself: What outcomes do you want for your clients?

As customer expectations continue to shift, it is important to have the organization aligned, and for directors to champion the Digital Transformation innovative not as a flavor of the month, but as a positive change for the organization.

Here at the beginning of the Transforming the Delivery of Poverty Services project at Catholic Charities USA, we are excited to onboard you and help shape your and your clients' future.

80% of donors consider it important to know the real outcome of donations and volunteer work that they entrust you with.

Microsoft Tech for Social Impact
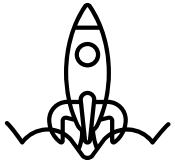
PROJECT UPDATES

The team in Odessa is wrapping up their User Acceptance Testing and a few adjustments before they flip the switch from Excel to the cloud-based Case Management solution we have been working on. It is exciting to see Odessa using the system while Monterey and San Diego are preparing for their go-live dates.

Odessa, Texas • Monterey, California • San Diego, California

PRODUCT UPDATES

Now that these pilot projects are finishing up, we can also firm up the CCUSA Microsoft D365 Case Management solution. Our architects have provided a functionality and capability overview in the image below.
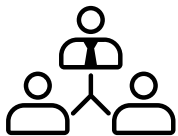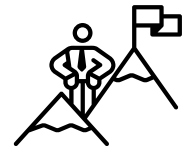
CONSTITUENT MANAGEMENT

Provides a centralized profile for clients, households and other individuals and organizations relevant to the agency including contact information, demographics, employment history and education history.

NOTIFICATION ENGINE

The solution provides a module to allow the automation of event-driven notifications triggered by different actions that may occur through the case management process. This allows more flexibility to the agency to customize desired notifications and recipients.
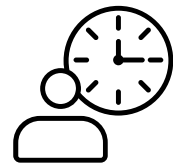
Are you interested in being scheduled for the next phase? Please send us an email...just CLICK HERE

CASE MANAGEMENT PROCESS

Streamlines the agency's intake and case management process from the initial referral and service request through the case end. Every step of the process allows the configuration of forms to customize the align the process to the agency's data collection needs.

Intake	Prescreen	Program Enrollment and Service Delivery	Case Closure

Intake
- Register client basic contact information or search the database for an existing client record
- Identify client needs
- Select services of interest for the client
- For inbound referrals, register information

Prescreen
- Gather program and service specific information prior to program enrollment
- **Intake**
  - Register client basic contact information or search the database for an existing client record
  - Identify client needs
  - Select services of interest for the client
  - For inbound referrals, register information
- **Prescreen**
  - Gather program and service specific information prior to program enrollment
  - Indicate whether the client should be accepted in the program, rejected or referred to an external organization
- **Program Enrollment and Service Delivery**
  - Gather additional information through custom forms, configured based on the agency's programs and services data collection needs
  - Register activities, appointments, case notes and case actions through case closure.
  - Leverage on the event management features to track client participation of agency events
  - Track bookings and occupancy of beds and rooms using the asset management module
- **Case Closure**
  - Indicate whether the client should be accepted in the program, rejected or referred to an external organization

Program Enrollment and Service Delivery
- Gather additional information through custom forms, configured based on the agency's programs and services data collection needs
- Register activities, appointments, case notes and case actions through case closure.
- Leverage on the event management features to track client participation of agency events
- Track bookings and occupancy of beds and rooms using the asset management module

CUSTOM FORMS

Allows the agency to customize and enhance the case management experience by defining forms aligned to each program and service data collection needs and across the different case management process stages.

Form name	Required	Form Type	Status	Date Created
MTR - Basic Intake	N	Intake	Draft	03/02/2022 06:30pm
MTR - TRP Intake Form	N	Eligibility	Pending	03/03/2022 07:23am
Financial Assistance Form	N	Custom Form	Pending	03/03/2022 07:23am
Emergency Services - Househ...	N	Enrollment	Pending	03/03/2022 07:23am

CLIENT INFO

Prefix	---
First Name	---
Middle Name	---
Last Name	---
Suffix	---
Address	---
City	---
State	---
Zip	---
Date of Birth	

EVENT MANAGEMENT AND ATTENDANCE TRACKING

Allows the agency to create events and sessions, register clients to the events and track attendance. Linking the events to the agency's service offerings facilitates identifying the eligibility of the different clients to the event based on their active cases and program enrollments.

ASSET MANAGEMENT, REGISTRATION & BOOKING

Allows defining a list of assets are their physical availability in terms of the locations and facilities of the agencies. Supports the agency's tracking of booked and available assets, particularly optimized to manage room and bed allocation for shelters and temporary housing.

← + Create Booking C Refresh																															
Location 2 ▾	Today	< >	March - 2022																					Female ■ Male ■ Other ■ Unavailable ■ Family							
Facility 1 ▾	1 Tue	2 Wed	3 Thu	4 Fri	5 Sat	6 Sun	7 Mon	8 Tue	9 Wed	10 Thu	11 Fri	12 Sat	13 Sun	14 Mon	15 Tue	16 Wed	17 Thu	18 Fri	19 Sat	20 Sun	21 Mon	22 Tue	23 Wed	24 Thu	25 Fri	26 Sat	27 Sun	28 Mon	29 Tue	30 Wed	31 Thu
⌄ F1 Room 1	5	5	3	3	4	3	2	2	1	1	1	2	2	3	4	4	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
F1 R1 - Bed 1			☑																												
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F1 R1 - Bed 5																															
› F1 Room 2	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
› F1 Room 3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
› F1 Room 4	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
› F1 Room 5	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
› F1 Room 6	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
› F1 Room 7	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
› F1 Room 8	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
› F1 Room 9	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Available Assets	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33
Checked In/Booked	0	0	0	1	1	2	3	3	4	4	4	3	3	2	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Available	33	33	33	32	32	31	30	30	29	29	29	30	30	31	32	32	33	33	33	33	33	33	33	33	33	33	33	33	33	33	33
Occupancy Rate	0%	0%	0%	3%	3%	6%	9%	9%	12%	12%	12%	9%	9%	6%	3%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

POWER BI DATA MODEL AND DASHBOARDS

The solution includes a set of predefined and embedded Power BI Dashboards, presenting Service Delivery, Agency Performance, Cases by Demographics and Referrals measurements.
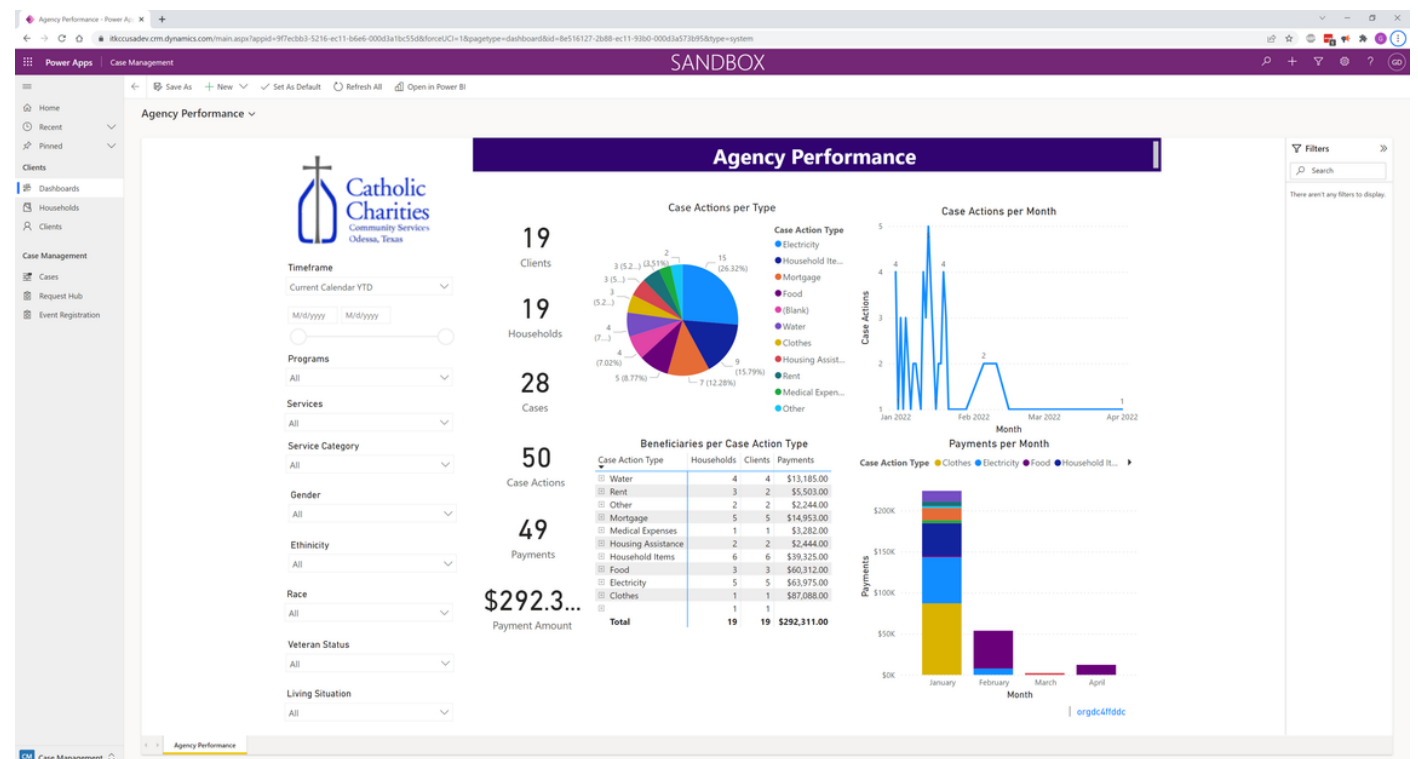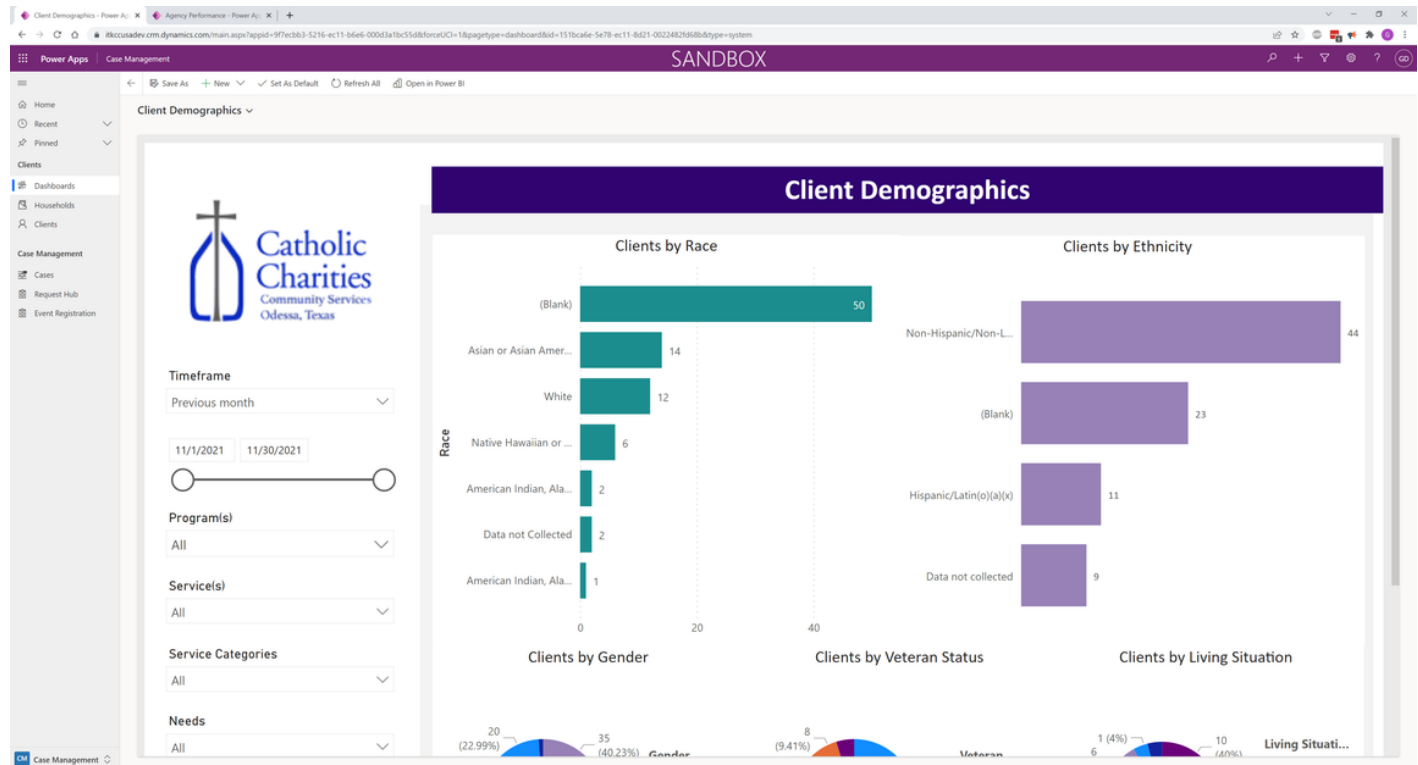
AGENCY INTERACTION PROGRAM

The Agency Interaction Program was established to collect ongoing feedback from each agency that signs up for the program. The program invites agency members to share suggestions that will further improve the solution, supports the daily activities, and add value to the services you provide to your clients.

Suggestions can be forwarded by email to us. We evaluate each entry for fit, after which it will be presented to a panel. Once the panel approves, we will add it to the roadmap and update the timeline.

Are you interested in being scheduled for the next phase? Please send us an email...just CLICK HERE

INTERVIEWS

This section is available for our regular interviews. In this video, we are providing an overview of this initiative from a variety of perspectives, as well as explaining the purpose of this important project.

FAQ'S

This section is available for our regular interviews. We are happy to share a few interviews with pilot users from Odessa this month.

We understand you have questions, and we want to address all of them, if need be, via a call or email exchange. In the meantime, our team has created a list of Frequently Asked Questions, of which we share five below.

Q: HOW WILL TRANSFORMING THE DELIVERY OF POVERTY SERVICES HELP MY AGENCY?

The new platform resulting from the Transforming, the Delivery of Poverty Services initiative, is custom-built for Catholic Charities. It will dramatically streamline client intake, case management, and reporting for all agencies that adopt the system.

Staff will no longer have to enter the same client information more than once when providing multiple services or when collaborating with other Catholic Charities' agencies. The platform will also provide real-time data on clients and programs – empowering agencies to know the impact of the services they offer and the progression of individual clients. This makes it easy to share data with funders and government agencies alike

Q: MY STAFF IS VERY SMALL, SPREAD THIN, AND WE'RE NOT TECH-SAVVY. SHOULD I BE CONCERNED THAT WE DON'T HAVE THE RESOURCES OR TIME TO IMPLEMENT THE NEW PLATFORM??

All agencies will be closely supported throughout the implementation and onboarding process by the world-class IT team that Catholic Charities USA assembled. The pilot program intentionally involves agencies of all sizes to ensure that even the smallest agencies can be brought on board as quickly and effectively as possible. The new platform will also rapidly deliver significant time savings that help offset the commitment required to get the new platform up and running.

FAQ CONT'D

As noted above, the new platform will dramatically simplify and streamline client intake, case management, and reporting. Most importantly, the new system enables flexible creation of custom forms for use in the intake and case management process, meaning that the system adapts to how you currently run your Programs and Services. The platform features an intuitive and easy-to-use interface that will significantly reduce the learning curve for agencies.

The new platform also uses a unified data model that makes it easy to generate reports in a format easily shared quickly. This system empowers all agencies, including those with the fewest resources, to benefit from a common data platform's economies of scale and shared expertise.

Not at all. The independence of all 167 Catholic Charities agencies will remain intact. The Transforming the Delivery of Poverty Services initiative will, however, enable every agency to gain access to a world-class platform that no singular agency would be able to acquire on its own. It will enable us to work more effectively together.

FAQ CONT'D

Q: HOW MUCH WILL THE NEW PLATFORM COST MY AGENCY?

No two agencies are identical, and every agency's unique needs will be thoroughly assessed to provide the most accurate cost estimate. We are also determined to make the new platform as accessible as possible. The purpose of the pilot program, funded by Catholic Charities USA, is to build the essential foundation for intake and case management, which offsets much of the cost typically associated with IT implementations. Moreover, Microsoft Technology for Social Impact is working hard to make technology – that was once only available to corporate America – accessible to non-profits through grants and other forms of assistance.

Still have questions?

Visit the CCUSA project microsite at www.itksolutionsgroup.com/ccusatransformed or contact us at info@itksolutionsgroup.com.

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