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Collaborative Learning

A case study on

More Than Wheels & Ways to Work

Robert Wood Johnson Foundation

rootCAUSE

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Over the past decade, an explosion in the number of nonprofits in the United States, combined with a recession, has forced many organizations to do more with less. This, in turn, has resulted in a great deal of attention paid to nonprofit mergers. Although merger conversations often fail to lead to a decision to merge, the information shared during these conversations can be highly beneficial.

The reasons why organizations choose not to merge are familiar to any organizational leader who has considered a merger. Even organizations with similar programs can have very different cultures. Moreover, integrating two organizations structurally and culturally requires an enormous amount of time and resources. What may be less familiar are the advantages that result from sharing information between organizations with similar or complementary missions, particularly in resource-strapped contexts. In situations where a merger may not be the right solution, an in-depth, facilitated exchange of information can help organizations accelerate their growth and strengthen their abilities toward producing better outcomes. This approach can save organizations the time and resources of trying to do the work on their own or hiring a consultant. It also makes it possible for organizations tackling similar issues to work together as collaborators rather than competitors. Finally, for funders, it provides a cost-effective approach of supporting grantees by helping them identify ways to strengthen and grow their organizations, ultimately leading to better outcomes.

This was the case for *More Than Wheels* and Ways to Work, two poverty reduction programs that initially explored a merger. Both organizations work with individuals and families with challenging credit histories, enabling them to rise out of the cycle of poverty. *More Than Wheels* helps low-to moderate-income individuals and families secure the lowest prices on cars by negotiating with car dealers and by providing program participants with low-interest loans. Since its inception in 2001, *More Than Wheels* had assisted more than 1,400 poverty-stricken families to obtain cars through its existing New Hampshire site. In late 2009, the organization was looking to expand its impact beyond its original New Hampshire site. One of its funders, the Robert Wood Johnson Foundation, suggested that *More Than Wheels* might benefit from a potential merger conversation with Ways to Work. Ways to Work provides low-income families with small, short-term loans that are used to buy

or repair a car in 95 percent of the cases. As a 25-year-old Community Development Financial Institution, Ways to Work had provided 32,000 low-income families with access to $64 million in low-interest loans.

The merger talks led *More Than Wheels* and Ways to Work to determine that a merger was not the optimal solution for either organization to scale its impact. Despite the decision not to merge, both organizations found the in-depth discussions and information exchange beneficial to growing their individual organizations. *More Than Wheels* was able to shift its growth strategy, and Ways to Work used knowledge it gained about *More Than Wheels* to shape the development of a new program, called "Next Step to Success," to help qualified clients acquire bigger loans.

This case study analyzes the experience of *More Than Wheels* and Ways to Work and provides a framework for collaborative learning, an alternative to merger negotiations. Collaborative learning is a structured, facilitated learning process with a degree of depth that is similar to merger conversations. Through exchanges facilitated by a third party, nonprofits learn about strategies and programs that would take years to discover on their own. They use this knowledge to strengthen their own organizations without engaging in a merger. As was the case for *More Than Wheels* and Ways to Work, this form of learning can have a substantial impact on an organization's ability to learn faster and grow smarter.

The analysis that follows explores how *More Than Wheels* and Ways to Work gained valuable insights from each other to strengthen their organizations, thus serving as a model for collaborative learning. The case study begins by summarizing the challenges that *More Than Wheels* and Ways to Work faced individually as they sought to scale their impact. Next, it will describe the steps taken to prepare for the merger conversations. These provide an indication of the preliminary steps necessary for successful collaborative learning. The case study will then examine the ways in which *More Than Wheels* and Ways to Work shared in-depth information to demonstrate how other organizations can also learn from a similar exchange. Finally, the conclusion will offer a four-step framework for collaborative learning.

COLLABORATIVE LEARNING:

Collaborative learning is a structured, facilitated learning process with similar depth to merger conversations. Through exchanges facilitated by a third party, nonprofits learn about strategies and programs that would take years to discover on their own. They use this knowledge to strengthen their own organizations without engaging in a merger.

The Case For Collaborative Learning: Meeting Organizational Challenges

When *More Than Wheels* and Ways to Work began their merger conversations, each organization was grappling with how to expand the reach of its model to make progress on difficult issues relating to poverty and health. To understand how the two organizations benefitted from collaborative learning, it is helpful to consider the mission of each organization, their individual impact, and the initial appeal of the merger.

Figure 1: Summary of More Than Wheels and Ways to Work

	MORE THAN WHEELS	WAYS TO WORK
YEAR ESTABLISHED	2001	1984
ANNUAL 2010 BUDGET	$1.5 m	$4.4 m
KEY PROGRAMS	Low-interest loans of $10,000-15,000; Financial education and credit repair programs	Low-interest loans of $4,000–6,000; Financial and credit education
LOAN ATTRIBUTES	AVERAGE INTEREST RATE: 5.5 percent AVERAGE TERM: 60 months AVERAGE MONTHLY PAYMENT: $285	AVERAGE INTEREST RATE: 8 percent AVERAGE TERM: 27 months AVERAGE MONTHLY PAYMENT: $181–221
MAJOR CHALLENGES RELATING TO SPREADING IMPACT	Expanding to new sites in New England and beyond; significantly increasing the volume of clients	Expanding its programming to better transition program graduates to more traditional sources of credit
DURATION BETWEEN INTAKE CALL AND LOAN CLOSING	2–12 months	3–6 weeks

More Than Wheels

Overview

Created in 2001, *More Than Wheels* believes that reliable, affordable transportation leads to long-term employment and financial stability. The organization provides low-interest care loans and financial education that enable its clients to develop and manage household budgets, while improving their credit and savings. Using one-on-

one counseling, *More Than Wheels* works with its clients to create customized plans with goals that prepare the clients for credit approval. It also helps clients research and choose a vehicle most suitable to their needs. The clients are coached on how to choose insurance and prepare loan documents. In addition, the clients receive financial education for the duration of the loan.

Challenges to Scaling Impact

By 2009, *More Than Wheels* had begun expanding its approach through a replication strategy that involved opening new offices throughout New England. This approach to replication quickly proved challenging for three reasons. First, opening new offices carried a very high cost of implementation. It involved drawing on limited sources of funding to build new infrastructure and finding new clients and partners. Second, it would become extremely difficult to manage staff and quality of services across different locations. Third, *More Than Wheels* faced an uphill battle in gaining brand recognition and acquiring a high volume of clients. This was particularly challenging in Boston, where *More Than Wheels* opened a new site. With more than 36,000 nonprofits, Boston's highly saturated social sector required a costly investment in building the organization's brand and contacts to be able to procure and serve a worthwhile volume of target beneficiaries. Consequently, *More Than Wheels* entered the merger conversations looking to explore alternative models that could enable it to scale impact faster. The organization was also seeking access to national partnerships for client acquisition, fundraising, earned revenue streams, and policy changes that could help clients access low-interest loans.

MORE THAN WHEELS: IMPACT AT A GLANCE

By 2009, the organization's original site had facilitated more than $12 million in loans for its clients, while providing the ability for more than 850 individuals to buy vehicles through its six offices in New Hampshire. According to an evaluation conducted by University of New Hampshire, the *More Than Wheels* approach demonstrated significant changes in its clients' job sustainability, family life, and financial health. Fifty percent of its clients were reported to have an increased ability to get to work. Thirty-four percent reported an increased capacity to maintain a steady work schedule, and 68 percent were able to increase their credit scores.

Ways To Work

Overview

Founded in Minneapolis in 1984, Ways to Work operates more than 50 loan offices across the country to provide its clients with low-interest loans. Ways to Work is a sister organization to the Alliance for Children and Families, which is made up of a variety of organizations that provide human services. These service organizations host the loan offices, providing the infrastructure, resources, and staff for Ways to Work to have a local presence.

Challenges to Scaling Impact

Ways to Work had begun looking to expand the range of services it could offer. The organization's existing model helped low-income clients raise their credit level of D or F to a C. However, without a post-completion follow-up program, Ways to Work had no way of building on this progress to help its clients qualify for traditional loans. The organization also wanted to be able to broaden the pool of new clients who could benefit from its services. While Ways to Work had already created a business plan for a new service to address this goal, the merger presented the possibility of addressing strategic challenges to scaling impact without having to start a new program. First, Ways to Work could utilize *More Than Wheels'* programs to expand upon its services and client base. Second, having the ability to add a new set of services that complemented its existing portfolio would allow both organizations to have greater impact.

WAYS TO WORK: AN OVERVIEW OF IMPACT

By 2009, Ways to Work had become a national organization with 33 loan offices working across 23 states. An external evaluation conducted by a third-party consultant showed that the organization's approach had demonstrated significant workforce development outcomes. Seventy-five percent of the participants reported higher net monthly incomes. Ninety percent of borrowers stated that their Ways to Work car enabled them to sustain or improve their employment situation.

Setting The Stage For Collaborative Learning

Before the merger conversations started, it was essential that both organizations conducted the steps necessary to give them the confidence and trust that would enable them to participate in an intense process of sharing of information.

More Than Wheels and Ways to Work thus began exploring the idea of a merger through two steps.

Step One: Exploring the Opportunity

In the first step, the executive leadership of *More Than Wheels* and Ways to Work explored the merger opportunity by familiarizing themselves with each other's operating models, missions, and values. During initial calls and meetings with the CEOs and board chairs of both organizations, *More Than Wheels* and Ways to Work built trust and explored whether further merger discussions would make sense for both organizations.

INSIGHT

After two organizations decide to engage in collaborative learning, they should develop a collaborative learning scope of work that clearly states the objectives for each organization. A third party can assist both organizations in the process of goal setting and information gathering.

Step Two: Setting a Collaborative Learning Agenda

As trust was built and each organization started to feel more receptive to the idea of a merger, the organizations' leadership teams signed a non-disclosure agreement and worked together to develop a scope of work that defined each organization's goals for the merger talks. In addition, each organization agreed that a third party would provide the much-needed objectivity and structure necessary to move forward. They

hired Root Cause as a third-party facilitator to lead the process. Root Cause helped the organizations develop a scope of work that outlined the following two objectives for the merger discussions:

1. Developing a clear understanding of how the *More Than Wheels* and Ways to Work models can work together towards greater scale and impact
2. Completing legal and financial due diligence to ensure that there are no substantial impediments or complications that could prevent a successful merger

For each objective, the scope document outlined a process and deliverables that the facilitator would oversee. This made it possible to ensure that questions relating to the merger would be answered and that learning from each organization could take place.

THE ADVANTAGE OF A THIRD-PARTY PERSPECTIVE

A third-party facilitator helps to ensure that both organizations achieve the level of trust necessary to share proprietary information with each other. The facilitator's role involves talking with each organization about its needs and priorities, analyzing information from both organizations to help answer key questions, and representing both parties' interests as they explore ways the information shared can help meet the individual challenges each organization is facing.

In-Depth Knowledge Exchange

When the scope of work had been finalized, *More Than Wheels* and Ways to Work exchanged detailed information in four core areas: populations served, program models, performance measurement, and financial models. This exchange and dialogue resulted in expedited learning that directly helped each organization meet the challenges they were facing. Figure 2 provides a summary of the learning process.

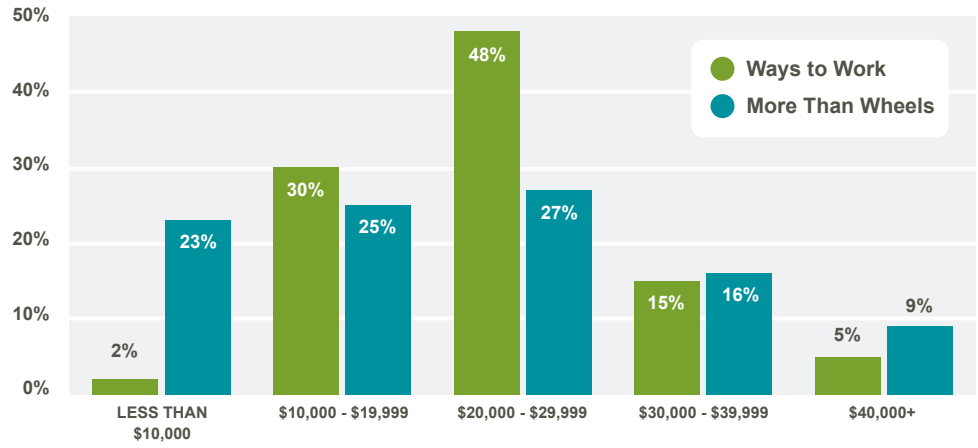
Figure 2: Summary of Information Shared, Learning, and Results

INFORMATION SHARED	LEARNING	RESULT
POPULATIONS SERVED	Specific needs of populations not yet served	Modification of services based on population need
PROGRAM MODELS	Effectiveness of components of each model	Understanding of niche program offerings
PERFORMANCE MEASUREMENT	Factors critical to the success of the key measures each had prioritized	Reinforcement of activities that drive success in priority key measures
FINANCIAL MODELS	Cost-reducing initiatives and new revenue streams that still furthered their own approach	Re-evaluation of revenue streams and cost sharing between national office and affiliates

Populations Served

More Than Wheels and Ways to Work shared details on the similarities and differences in the populations they served, including demographics in terms of gender, ethnicity, income, family status, and age. Although the majority of Ways to Work and *More Than Wheels'* clients (95 and 91 percent respectively) have incomes below $40,000, *More Than Wheels* had a larger percentage of clients with incomes at the lowest end of the spectrum (below $10,000) (See Figure 3). Average annual incomes were similar for *More Than Wheels* (average = $29,000 in the last 96 transactions) and Ways to Work (average = $26,000 in the last 72 transactions).

Figure 3: Percentages of Clients by Income Level



Although *More Than Wheels* and Ways to Work worked with populations that had similar levels of income, their clients received differing levels of services and loans. Ways to Work could use programmatic data from *More Than Wheels* to understand the impact of its credit repair counseling and financial fitness courses. The level of financial fitness that *More Than Wheels* demanded of its clients before loan approval helped Ways to Work understand what outcomes and expectations were reasonable. Finally, the success of *More Than Wheels* clients informed Ways to Work that its clients, who were targeted for the Next Step Program, could handle larger loans than originally anticipated.

The analysis of the information shared and the learning that followed allowed Ways to Work to modify its pilot program to better serve the needs of the target population that it wanted to grow. Having gained a new appreciation for the one-on-one consumer counseling and financial education that *More Than Wheels* undertakes, Ways to Work incorporated an online financial education course for its clients. It also set higher expectations of financial fitness and education from these set of clients before approving a Next Step loan. Finally, based on the *More Than Wheels* client success, Ways to Work increased the loan amount beyond its original estimate.

INSIGHT

Comparing populations served can enhance an organization's understanding of ways to serve different populations with different sets of services.

Program Model

Next, the organizations analyzed each other's program models and compared the processes that each organization provides for clients (See Figure 4). This made it apparent that *More Than Wheels* starts with a more active recruiting process. Ways to Work uses the strength of its network to appeal to potential clients with minimal outreach. In addition, *More Than Wheels* does more extensive screening and provides greater support for finding cars and helping clients with financial fitness and credit repair.

Figure 4: Comparison of Processes for Serving Clients

MORE THAN WHEELS	WAYS TO WORK
Recruiting	Applicant calls local office to receive info on WtW
Screening	Intake
Counseling & Steps to Success	WtW Orientation / Financial Education Class
Financial Fitness	Applicant schedules appointment with local loan officer for application processing and interview (budget creation & credit review)
Credit repair and the establishment of positive credit history	Applicant is presented to loan committee for approval
Vehicle selection	Client finds car and has an approved inspection
Loan financing	WtW National funds the loan Local loan officer performs loan-closing
Car delivery	Client support and program completion through case management

Reviewing these models side by side led to important realizations for both organizations. For example, the *More Than Wheels* approach involved establishing a long-term relationship with its clients, leading them through credit repair, and eventually helping their clients find a reliable car. This raised the question of whether the *More Than Wheels* approach could be scaled through the Ways to Work affiliate model. *More Than Wheels* interviewed the local agencies about Ways to Work's service delivery model and outcomes. This investigation involved details about volume and method of client acquisition, clients' level of interest in purchasing a car, types of cars most clients bought with the loans, market outside the Ways to Work clientele who would be interested in buying a car, and potential increase in client volume as a result of their approach.

Simultaneously, Ways to Work went through a process of experiential learning without having to implement its own program. Since it was looking to implement its Next Step program with larger loans, it gained evidence from the *More Than Wheels*' model on best practices for clients who held more substantial loans. This allowed Ways to Work to answer questions about acquiring clients, risk of loss, and the differences in working with clients seeking bigger loans. From *More Than Wheels*' service delivery model, Ways to Work learned that 60 percent of *More Than Wheels* clients purchased slightly used cars with a warranty. This was particularly valuable for Ways to Work since the organization had concluded that used cars were easier to buy than new cars.

INSIGHT

Sharing information about program models can force organizations to scrutinize the effectiveness and efficiency with which each aspect of its model drives better outcomes for its clients.

More Than Wheels learned that the affiliate model resulted in differing levels of financial education that each local agency offered to its client. Additionally, its own data showed that its success came from the consistent quality of counseling provided by its consultants. *More Than Wheels* concluded that if it were to maintain the quality of learning throughout an affiliate network, it would either need to provide extensive training to the affiliates or offer the lessons themselves.

Ways to Work also learned about the effectiveness of various components of its program model. For example, one of *More Than Wheels*' challenges of scaling was the difficulty of acquiring a high volume of clients. Ways to Work could solve this challenge by counseling former clients who already had cars to help them improve their financial IQ, repair credit, and prepare to apply for a bigger loan and move up to a better car. Building on this knowledge, the organization launched a nine-month, three-phase pilot program in 2011 with seven of its affiliate agencies across the country. The loans range from $10,000 to $15,000, with the terms ranging between 48 and 60 months.

Performance Measurement

Although both organizations are committed to performance measurement and have similar expectations for outcomes for their clients, *More Than Wheels* and Ways to Work discovered some differences (See Figure 6). Both organizations looked at credit scores, employment, and income. However, *More Than Wheels* placed a greater emphasis on health and environmental outcomes while Ways to Work considered access to mainstream financial services as one of its key indicators.

Figure 5: Key Performance Measurement Indicators

MORE THAN WHEELS	WAYS TO WORK
Credit score	Credit score
Annual increase in credit scores	Credit score improvement
Lengths of employment	Employment stability/advancement
Monthly wages	Income and self-sufficiency
Disposable income	Incremental education/job training
Access to health care	Access to mainstream financial services
Gallons of gasoline used	Child care
Carbon emissions	Quality of life
Improvements in health and well being	

These differences were particularly helpful to *More Than Wheels* in understanding the relationship between performance measurement and the primary aims of its work. *More Than Wheels*, whose mission focuses on credit improvement and long-term behavior change, re-established that the outcomes essential to its mission included improvement in work, family life, and financial health related outcomes. The organization was then able to isolate the factors that it considered essential to driving these outcomes: screening process, quality of consultant, expertise in the car market, credit repair counseling, and long-term relationship with clients.

INSIGHT

Comparing key performance measurement indicators can enable organizations to clarify factors that drive success for indicators that are most important

Ultimately, this realization helped *More Than Wheels* to conclude that its approach to scaling impact would have to retain the same quality of service offered by its consultants, and the same level of care when it came to credit repair counseling. Subsequently, *More Than Wheels* shifted away from its original affiliate model toward a partnership model. Through this approach, *More Than Wheels* would partner with human service organizations whose clients need affordable cars to offer its unique credit repair counseling and financial education webinars.

Financial Models

The organizations also looked closely at revenue streams, organizational budgets, and financial statements (See Figure 6).

Figure 6: Sources of Revenue by Organization

MORE THAN WHEELS	WAYS TO WORK
Earned fees	Earned income from lending operations
Foundation grants	Income from idle funds management
Corporate grants	Foundation and federal grants
NH Community Development Finance Authority tax credit program	Debt capital/Investments for loan capital from corporate foundations

The differences in sources of revenue resulted from differing approaches to raising and spending organizational revenue. Ways to Work required its local organizations to be fully responsible for raising the money needed to be self-sustaining. The local loan offices originated the loans and took responsibility for the defaults. They also took responsibility for their own budgeting, with the support of the national office.

More Than Wheels fundraises at both the national and local levels. Through this central structure, the organization guaranteed the loans and covered the defaults when necessary. Its organizational budget accounted for costs of both the central and branch sites.

This part of the learning process led *More Than Wheels* to search for ways in which it could modify the affiliate structure to reduce costs while maintaining quality. As it moved to a partnership model, this provided new fundraising support and in-kind services. Thus, it was possible for *More Than Wheels* to increase its numbers served

INSIGHT

Comparing financial models can enable organizations to identify cost-reducing mechanisms and new revenue streams that can be adapted to still reflect their own approach.

without having to acquire a client base in new communities or incur the cost of having to set up new offices. As a result of these partnerships and a grant, *More Than Wheels* expects to lower its cost per client by 40 percent.

Toward A Framework For Collaborative Learning

More Than Wheels and Ways to Work entered their conversations to explore a potential merger. However, they exited the conversations with something else: an improved understanding of how to grow their organizations based on the challenges that had led them to consider a merger in the first place. From this experience emerges a framework for collaborative learning that can be modeled after the structure of merger conversations. This framework removes the challenges associated with merger conversations since it does not require aligning financial resources, missions, program structures, or culture. Instead, it enables organizations to focus on the challenges they are facing and learn from each other about how to address them. There are four key phases in this process:

Figure 7: Four Phases of Collaborative Learning

PHASE I – ASSESSMENT OF NEED: The first step to successful collaborative learning involves determining whether engaging in such a process will be beneficial. Organizations should articulate the challenges they are facing and assess whether getting an inside look into another organization will give them a better chance of overcoming those challenges. Organizations should keep in mind that they will also have to share information about themselves. Successful collaborative learning relies heavily on the ability of organizations to identify gaps in their own knowledge, assess whether or not collaborative learning is the right approach, and identify one or two potential organizations to exchange information with based on their needs.

PHASE II – ESTABLISHMENT OF TRUST AND FACILITATION BY A NEUTRAL THIRD PARTY: The next step in successful collaborative learning requires organizations to build trust through conversations and the development of a scope of work. This usually begins with the signing of a non-disclosure agreement. A facilitator is crucial for this phase to work. The facilitator can guide both organizations in establishing goals that would make their in-depth learning valuable, while walking them through the process of developing a collaborative learning scope of work.

PHASE III – IN-DEPTH EXCHANGE AND ANALYSIS OF KNOWLEDGE: At this stage, the facilitator can help the organizations share in-depth information about client profiles, program models, financial models, and key measures of success. This sets collaborative learning apart from more general knowledge sharing in a few ways. First, in collaborative learning, the sharing of information is bidirectional and dictated by the specific needs of the other organizations via a structured process. This means that both organizations can choose what information they want to learn and what data they would like to analyze—thus moving the learning beyond a simple dissemination of best practices. Second, this process allows for comprehensive conversations, where both organizations become deeply immersed in the details of each other's model in a way not achievable through current forms of knowledge sharing.

PHASE IV – APPLICATION OF KNOWLEDGE TO CHALLENGES FACED: The last step of collaborative learning involves applying the knowledge gained to the challenges originally identified. This could take the form of the organizations leadership going back and discussing each challenge and how they might approach it based on the new information gained. It also is an opportunity to see if any knowledge could be applied to other areas of the organization.

Conclusion

Collaborative learning provides a unique opportunity for nonprofit organizations to engage with each other in ways that will grow their organizations and lead to better outcomes. It can serve as an alternative to merger discussions that, more often than not, do not lead to an actual merger.

Collaborative learning is also a cost-effective way for funders to build the capacity of their grantees. As funders consider ways to support their grantees, they can bring together organizations that may benefit from collaborative learning and also fund the process. This is similar to the case of *More Than Wheels* and Ways to Work, where funders provided them the initial resources they needed to explore a merger together.

Ultimately, collaborative learning is a resource-efficient way for organizations working on similar social issues to help each other amplify their impact more quickly. In today's resource-strapped environment, it is an option that provides the benefits of in-depth knowledge exchange similar to that of merger conversations, without having to overcome the organizational and cultural challenges of mergers. Organizations that are willing to share and learn with similar organizations will benefit from facing the challenges of scaling impact collaboratively.

About the Robert Wood Johnson Foundation

The Robert Wood Johnson Foundation focuses on the pressing health and health care issues facing our country. As the nation's largest philanthropy devoted exclusively to health and health care, the Foundation works with a diverse group of organizations and individuals to identify solutions and achieve comprehensive, measurable, and timely change.

For 40 years the Foundation has brought experience, commitment, and a rigorous, balanced approach to the problems that affect the health and health care of those it serves. When it comes to helping Americans lead healthier lives and get the care they need, the Foundation expects to make a difference in your lifetime.

For more information, visit www.rwjf.org. Follow the Foundation on Twitter at www.rwjf.org/twitter or on Facebook at www.rwjf.org/facebook.

About Root Cause

Root Cause is a nonprofit research and consulting firm that partners with nonprofits, philanthropy, government, and business to improve organizational and program performance and accelerate solutions to today's toughest social issues.

We pursue our work through four initiatives:

1. **ROOT CAUSE CONSULTING:** Our consulting practice offers an array of strategy, measurement, and financial sustainability services designed to foster social innovation, improve program performance, and spread what works.

2. **SOCIAL IMPACT RESEARCH:** Social Impact Research (SIR) conducts independent research on social issues and analyzes the performance of organizations and programs. This research provides actionable information to nonprofits and donors to help them make strategic decisions about creating and investing in social impact.

3. **SOCIAL INNOVATION FORUM:** The Social Innovation Forum works to create a social impact market that distributes resources to organizations based on performance. Each year, the Social Innovation Forum works with a cohort of organizations to introduce them to funders. This yearly process accelerates the organizations' social impact and educates funders on investing in social innovation.

4. **IDEA LAB:** Through our work with our clients and partners, we identify needs and draw on our experience to develop frameworks, methodologies, how-to guides, white papers, and special projects to share our knowledge and help to shape the future of social problem solving.

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