



SERVING OUR POST-9/11 VETERANS

A TOOLKIT FOR FUNDERS



THE BUSH INSTITUTE

AT THE

GEORGE W. BUSH PRESIDENTIAL CENTER

SYRACUSE UNIVERSITY'S INSTITUTE FOR VETERANS AND MILITARY FAMILIES (IVMF) HAS BEEN CONTRACTED TO SUPPORT THE GEORGE W. BUSH INSTITUTE'S RESEARCH TO SERVE AND EMPOWER OUR POST-9/11 VETERANS & MILITARY FAMILIES.



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I. INTRODUCTION

The nature of all-volunteer military service during a time of extended war results in a civilian-military divide. That divide makes transition a challenge for all veterans as well as the employers that want to hire them, the universities that want to educate them, and the families and communities that want to reintegrate them. The Bush Institute believes helping members of the military successfully re-enter civilian life is a national responsibility beyond government. The larger public also stands to greatly benefit not only from improving their quality of life, but from veterans becoming in our communities, the kind of productive people they were in the military. Just as they have been leaders in uniform, with the right transition, our post-9/11 veterans can continue to be leaders in their communities, innovative entrepreneurs, and valuable employees. Non-profit organizations that serve veterans, the funders of those organizations, and the communities in which veterans live are a critical part of the transition. They all set the conditions for a successful re-entry and fill a critical 'services gap' at the national, regional, and (predominantly) community level.

Today, more than 45,000 non-profit organizations serve U.S. military veterans and their families. Some of these non-profits have long traditions of service to veterans, while a great many others are young organizations or new to serving veterans. All of these organizations deliver a broad array of services and supports to veterans and their families, ranging from wellness and housing services, to employment and educational assistance. As this 'sea of goodwill' evolves and matures, there has been an ever-increasing focus toward understanding the means and the mechanisms by which veteran-serving non-profits (VSNP) can become more effective and make greater and sustained impact.

This focus stems partly from the recognition and practical need for non-profit organizations to act as good stewards of philanthropic resources, particularly in the face of an increasingly constrained environment for resources. The focus also comes from the imperative that veteran-serving organizations create the conditions that will institutionalize the delivery of sustainable high quality, high-impact services for veterans and their families necessary for a successful transition and reintegration into civilian life.

To help meet these objectives, the George W. Bush Institute (Bush Institute) partnered with the Institute for Veterans and Military Families (IVMF) to conduct an in-depth study of leading service delivery represented across a sample of 25 veteran- and military family-serving not-for-profit organizations (VSNPs) across the United States. The 25 represent a sample of veteran-serving, not-for-profit organizations operating in the United States. The purpose of the study was to identify leading practices uniquely relevant to serving veterans and their families in a way that advances the efficiency, effectiveness, and impact objectives of VSNP service providers and funders, and benefits the nation's veterans and their families. A separate report highlights findings from that in-depth study of leading service-delivery practices.

Organizations, veterans, and funders need to act upon these findings. To that end, the Bush Institute and IVMF have assembled a series of practical toolkits. The goal of these toolkits is to help non-profits, and the funders who support them, assess their strengths and weaknesses and inform them about effective strategies. These toolkits are a way to help VSNP organizations develop and sustain their work in that marketplace. Among other things, the strategies can help them focus their objectives. These toolkits are also offered as a way to empower funders.

The funder-non-profit organization relationship is best viewed as a partnership designed to achieve mutually beneficial goals. Most funders view their resources as best designed to achieve social or economic good (i.e. improved health and well-being or economic empowerment) and strictly define their giving in terms of uniquely-developed funding strategies deployed and refined over time. To the non-profit organization, the benefits generally translate to the means by which to deliver resources and services to achieve the social or economic good itself. In the veterans' space, that relationship often exists within a paradox of sorts, whereby funders lack mature and well-defined veteran-specific strategies and therefore search in earnest for exactly what social and/or economic good can be best-achieved through their often limited resources. On the non-profit organizational side of the relationship, the reality reflects immature understanding and appreciation of funders' giving strategies in general and even less so when it comes to a veteran-specific component within the funder's giving strategy itself. The result often reflects poorly defined and organized funding matched by poorly defined and organized efforts to secure that funding.

This particular toolkit, created for the funder community, is designed to help inform and shape the funding strategies of individual and institutional donors as they identify which actors in the veteran-serving non-profit landscape to support. This tool begins with a discussion of common methods for determining funding strategies, as well as current shortfalls and misunderstandings between funders and actors in the veteran's services landscape. The toolkit then presents an assessment tool that funders may use when evaluating organizations for potential selection as grantees or recipients of funding. While the toolkit addresses some elements of organizational effectiveness, the focus of the evaluation tool is upon veteran differentiators and the elements specific to serving the veteran population. The tool includes an annex that summarizes existing resources funders can use to inform their giving strategies regarding generic non-profit efficiency and effectiveness. Finally, it includes an annex which addresses elements of service delivery unique to the community of organizations serving veterans and their families, including the implications for funders as they design their giving strategies and determine how their resources can best shape the issues most pressing to the veteran community.

II. KEY CONSIDERATIONS FOR ASSESSING IMPACT OF VETERAN-SERVING ORGANIZATIONS

Today's funders want to understand how the non-profit "does business" before giving time, money, or materials, and there is a very real public desire for transparency among non-profit operations. This has resulted in the generation of due diligence tools, services, and other means to establish the legitimacy, transparency, and efficiency of non-profits so that a donor can know that their gifts will be put to good use. This has become particularly important in the veteran-serving non-profit space, as one positive indicator of the support our nation's military and veterans received is the considerable attention and resourcing to veteran-serving non-profits over the past decade.

Based on a review of available funder-specific tools (discussed in Appendix I), there are some common elements of interest from a funder's perspective: financial efficiency and sustainability, transparency, governance, leadership, and results.

While the emphasis has traditionally been on determining fiscal accountability and efficiency measures, funders are beginning to ask for outcome and impact measures to help guide decision-making. Veteran-serving non-profits must define their desired outcomes, how those outcomes should be measured, and evaluate performance against the desired outcomes in order to identify their strengths and areas for improvement.

As potential funders learn the spectrum of non-profit results and measurement indicators of those results, the funder must understand and define the impact they themselves seek to shape on behalf of veterans and military families and align their intentions and resources accordingly. Many organizations are still working to determine impact and outcomes beyond simple outputs and develop ideal measurements that make sense for what they do. Some organizations surveyed in the Bush Institute study inherently "knew" that they were having an impact but had great difficulty articulating this in a qualitative and quantitative way. Whether this is presented by a discussion of program outcomes in the annual report, testimonials on a website, or the illustration of a dashboard of metrics in a grant proposal, organizations must be able to demonstrate that their effective use of time and resources has resulted in a sustainable positive change for their communities. They recognized that funders want a more concrete way to measure the return on their investment than a "feel good" story resulting from the service they delivered. This is where the value of both measurement and feedback come in; the combination of quantitative and qualitative information can help organizations make a compelling case for their successes. As such, a funder's impact evaluation should consider quantitative and qualitative information about program outcomes, from reliable internal and external sources. Funders must be demanding, yet at the same time understand that the social impact they seek for veterans takes time, presence, patience and persistence.

Shortcomings in measurement and evaluation correlated with the research team's finding that the lack of availability of non-program directed funding, and the push for high program-to-administration expense ratios, often lead to decreased investment in the organizational infrastructure necessary to support continuous innovation and organizational improvement. This funding shortcoming correlates with organizational shortcomings in areas such as measurement and evaluation, continuous innovation, communications, and awareness-building. Funders should balance these considerations when designing giving strategies and making giving decisions.

Many veteran-serving non-profits are still maturing as organizations, and often their maturity level is driven by the sophistication of their funders. Many of these organizations were founded in the wake of the terrorist attacks on September 11, 2001 and were founded for specific, narrow purposes. With the influx of service members returning from deployments overseas, many of these organizations had to rapidly build capacity to meet their needs – and many did not expect to be “in business” 13 years later. Some organizations have not had been able to devote significant time or resources to strategy or professional development and as such are not far along the organizational maturity spectrum. The research team noted that while expertise in the issues and concerns unique to veterans and their families was generally high across the organizations studied, they were generally immature with regard to processes, practices, and efficiencies, regardless of age. There is an opportunity for funders to lead those organizations they support further along the organizational development spectrum.

Veteran-serving non-profits need the flexibility to trade on their near term financial efficiency in the interests of advancing organizational maturity. In order to make appropriate investments in their people, processes, systems and structures, they may need to spend more on administrative expenses in one year over the next, compromising program-to-administration cost ratios in the process. While financial benchmarks are good to consult as a rule of thumb, they should be considered in context and, like any investment, no partnering or funding decision should be made solely on a financial ratio calculation.

So what does an effective veteran-serving non-profit look like? There are inherent challenges associated with the assumption that effective organizations – as defined by process and outcome metrics alone – are simultaneously those that create enduring social value and market-based impact.¹ It’s often the case that while an organization can be ‘effective’ as measured by outcome accountability alone, it’s another thing entirely to design and enact processes and structures such that the *outcomes* are most optimally aligned with both goals and objectives as appropriate to the organization and mission, and simultaneously with the needs and expectations of the veteran/military family member. This is because the social, economic, and wellness needs – and also cultural nuances – of the constituency typically served by the non-profit community are often complex, inter-connected, and chronic. *This situation is very much characteristic of the environment in which veteran-serving organizations function and provide services.* To deliver meaningful impact in the veteran’s space, an organization must not simply meet standards of organizational effectiveness, but also must demonstrate mastery of a set of veteran-specific competencies and themes.

High-performing veteran-serving non-profit organizations are those that:

1) Demonstrate organizational effectiveness themes and elements (embedded within organizational structures and process), appropriate to best support outcome accountability given the organization’s stage of development; and,

2) Adapt and customize organizational processes, practices, culture, and models of service-delivery in ways that incorporate process and practice themes demonstrated by extant research to correlate with advancing social, economic, and wellness concerns of veterans and their families.

“Insights Informing the Concerns of Post-9/11 Veterans and Families” leveraged research and data-driven scholarship, as a means to suggest themes of focus and actionable prescriptions most strongly aligned with the objective of advancing the social, economic, and wellness situation of post-9/11 veterans and their

¹ Cameron, K. & Whetten, D. (1996). Organizational Effectiveness and Quality: The Second Generation. Higher Education: Handbook of Theory and Research, Vol. XI.

families – and as specifically related to positively impacting the areas of employment, health and wellness, family, education, female veterans, and housing. In the end, this effort identified nine themes most strongly and broadly impactful, as related to the post-service experience of veterans and their families. These themes are as follows:

Community Connectedness represents the degree to which, or methods by which, an organization's program and service delivery model supports a comprehensive reintegration strategy through connection to the web of various social supports provided by the broader community. The most impactful veteran-serving organizations are those that enact and leverage partnerships and service-delivery collaborations with complementary providers.

Social Connectedness represents the degree to which, or methods by which, an organization purposefully advances societal engagement in the concerns of those who have served by thorough efforts to increase the community's understanding of the military/veteran experience and efforts to connect veterans and their families with members of the broader community. The most impactful veteran-serving organizations are those that recognize that robust and community-connected relationships are key to post-transition well-being, and therefore act to cultivate such relationships for the veterans they serve.

Independent Sector Engagement represents the degree to which, or methods by which, an organization utilizes collaborative strategies across sectors – private industry, NGOs, philanthropy – in support of their efforts to serve veterans. The most impactful veteran-serving organizations are those that view funder partnerships as symbiotic and collaborative, and that leverage (beyond simply funding) the knowledge and expertise of funding partners to improve their own internal processes and systems.

Veteran Programming Differentiation represents the degree by which, or methods by which, an organization differentiates its program and service delivery model based on varying needs within subsections of the post-9/11 cohort (women veterans, veterans with disabilities, etc.). The most impactful veteran-serving organizations are those that acknowledge and embrace the inherent differences between veterans, and incorporate those differences into the organization's process, practice, and service-delivery.

Women Veterans Efforts represents the degree to which, or methods by which, an organization's programs identify and address the distinct set of challenges faced by women veterans during their military service, and the consequences resulting from that service. The most impactful veteran-serving organizations acknowledge and act to embrace differentiated service-delivery in support of these unique concerns of women veterans.

Reintegration with Family represents the degree to which, or methods by which, an organization identifies post-9/11 veterans' family-related reintegration challenges and tailors its programming and service delivery model to meet these needs. The most impactful veteran-serving organizations are those that acknowledge and incorporate a focus on family, in the context of process, practice, and service-delivery.

Education & Employment represents the degree to which, or methods by which, an organization identifies securing employment and advancing education as seminal concerns of post-9/11 veterans and ensures that its programs, services, and/or integrated support network advances these concerns

for veterans it serves. The most impactful veteran-serving organizations are those that understand that education and employment are the foundation of a successful transition, and act to advance educational and vocational opportunity for the veterans they serve (directly, or indirectly through partnership).

Media Engagement represents the degree to which, or methods by which, an organization leverages media to tell the stories of its mission and its veterans, and to bridge the civilian-military divide by raising awareness of veterans' issues. The most impactful veteran-serving organizations are those that understand that the media represents an opportunity to inform that narrative that is both the veteran and the veteran-serving organization, and act on that opportunity to cultivate a positive narrative in service to both parties.

Life-Course Transition represents the degree to which, or methods by which, an organization's programs and services ensure that veterans and their families are adequately prepared for post-service life, such as readying them to make informed decisions, related to transition, employment, education, family concerns, and community reintegration. The most impactful veteran-serving organizations are those that recognize that transition from military service spans multiple social, economic, and wellness concerns, and as such adopt a whole-of-the-person approach to service-delivery.

Four of the nine themes – community connectedness, social connectedness, independent sector involvement, and veteran programming differentiation – to be most strongly aligned with impactful social, economic, and wellness outcomes. In other words, the most effective and impactful organizations were those that purposefully designed and aligned organizational structures, processes, and service-delivery practices in such a way as to:

- 1) *Purposefully leverage partnership and collaboration strategies, to expand network of resources available to the veteran (community connectedness).*
- 2) *Engage in practices positioned to building enduring connection for the veteran, to the communities in which they live and work (social connectedness).*
- 3) *Enact funder partnerships as symbiotic and collaborative, and that leverage (beyond simply funding) the knowledge and expertise of funding partners to improve their own internal processes and systems (independent sector involvement).*
- 4) *Acknowledge and embrace the inherent differences between veterans, and incorporate those differences into the organization's process, practice, and service-delivery (veteran programming differentiation).*

Themes related to serving women veteran, family transition, and education and employment are seen as sub-categories of veteran programming differentiation. Organizations that demonstrate adept capability at responding to unique needs of specific veterans or cohorts within the veteran communities are also often experts at identifying the unique needs of women veterans and their families. Media is related to, though not unified with, the theme of social connectedness as it contains an element of bridging the civilian-military divide. These themes, while important for all organizations to consider, also came to be viewed as most applicable to certain segments of the service population. Finally, the theme of life-course transition was found to be perhaps most difficult for organizations to operationalize as very few surveyed had access to service members prior to the point of transition.

III. VETERAN-SPECIFIC THEMATIC CONSIDERATIONS FOR FUNDERS

COMMUNITY CONNECTEDNESS

Theme Overview

While coordinated and effective policies and programs are critical at the national level, research highlights the primacy of need for robust supportive services in local communities where veterans will ultimately relocate. In these communities, the interactions between federal, state, and local government programs and services such as the Department of Veterans Affairs (VA), Department of Labor Veterans Employment and Training Service (DOL VETS), state workforce development agencies, public and private training and education programs, housing agencies, family support services, counseling centers, and other various public and not-for-profit entities form the complex “on the ground” web of supportive services with which returning veterans and their families interact.

Research supports the notion that the costs of healthcare and veteran benefits will continue to rise in the future, and community-based preventive health services, reintegration, employment, and family supports may prevent this unsustainable rise in costs at significantly lower present costs, and simultaneously improve the post-service life course of veterans. Thus, comprehensive community engagement not only helps to mitigate important fiscal challenges, but successful “wraparound” services and effectively “welcoming” veterans home in their local community also supports important psychosocial needs critical to veterans’ transition home.

As a means to interpret this concept through the lens by which organizations serving the community of veterans and military families operationalize strategies to develop and participate in such holistic strategies, the Bush Institute team established the strategic theme known as “community connectedness”, defined as “the degree to which, or methods by which, an organization’s program and service delivery model supports a comprehensive reintegration strategy through connection to the web of various social supports provided by the broader community.” Within this strategic theme, the Bush Institute sought to identify and understand the level of the 25 identified VSOs’ integration into these broader networks of providers in their communities, as well as their methods and strategies for doing so.

The Bush Institute and its research partners explored the formal or informal nature of relationships and partnerships with other VSOs, community health providers, government services, private sector entities, etc., all toward supporting their direct service delivery models (as opposed to strategic partnerships supporting the survival and advancement of the organization as a whole). In addition, the research team explored the nature of VSOs’ strategies (or lack thereof) for developing their partnerships and goals for maintaining and developing these in the future. As with each strategic theme analyzed, due to the broad and varying characteristics of organizations which fell under this study, it is not surprising that the manner in which this strategic theme was operationalized varied widely across organizations, though certain patterns did emerge.

Summary of Conclusions

The most impactful veteran-serving organizations are those that enact and leverage partnerships and service-delivery collaborations with complementary providers.

While partnering relationships are arguably important across the non-profit landscape, such relationships are particularly critical for veteran-serving organizations – specifically because veterans in needs of services and supports typically demonstrate multiple areas of need. However, this principle appears applicable on a sliding scale; that is, for those organizations serving veterans in the direst of circumstances, a robust referral network is strongly related to impactful service-delivery. For those serving veterans in less critical circumstances (those simply needing assistance with job coaching, for example), the ability to enact and leverage organizational partnerships is less critical. Further, for community-based providers, programming is enhanced as a function of collaboration with other, community-connected providers.

Further Discussion: Trends and Observations in the Field

The Bush Institute research team's site visits yielded several important findings regarding the notion of integrated services and the thematic construct of community connectedness across the veterans' services landscape. First, among those serving veterans and their families, both at the leadership and programmatic staff levels, there seems to be a general consensus to the assertion that while government resources are critical, community-based resources are where transition truly occurs and essentially serve as the resources which "make or break" a veteran's transition home. Additionally, research in the field confirms a generally universal agreement that veterans experience multiple and confounding issues, and that veteran-serving organizations bear at least some level of responsibility for the ability to refer them to other resources – whether they feel this as a moral responsibility or have simply learned this as a practical necessity arising out of requests coming from the veterans and family members that they serve.

Among organizations surveyed, despite a broad cross section of service categories (wellness, housing, employment, etc.) and focus levels (national, regional, local) represented, organizations tended to fall into three general groupings with regard to this thematic construct of community connectedness.

Community Leaders. The first group of organizations had the strongest focus on this theme, serving as leaders within their communities and hubs of their local networks of veterans' services. These organizations tended to be older, more historically established within their communities, or associated with a national brand-name organization with enough resources to support a broad-based networking and collaboration strategy. These organizations' leaders were sometimes seen as bedrocks of the local veterans' services community, and these individuals tended to have a vision not only for their organization but for the community in which they operated and how that community related to its veterans, as well as some ability (whether financial resources, convening ability, or political capital) to implement that vision.

Active Participants. The second group of organizations were active participants in networks and sought to partner with others to complement the services they provided to their clients. While they may or may not have outreach staff specifically dedicated to collaboration, they understood and valued the networks and communities they operated in and worked within the resource constraints of their organizations to maximize their ability to collaborate. These organizations may attend consortia

meetings, participate in communities of practice or collective impact networks, and may or may not establish Memoranda of Understanding (MOUs) with their partners. For those organizations in this category which were operating in communities without established networks of veteran-service providers, leaders actively sought to develop their own formal or informal networks. Referrals between these organizations may be formal or informal (involving structured or non-structured processes).

Minimal Focus. The third group of organizations, for multiple reasons, had less of a focus on community connectedness, and some even possessed no intention of fitting within a community-based framework. Some organizations determined that they have (and desire) a narrow expertise and that given either resource constraints or organizational strategy, it is best for their staff to remain focused on excellence within their mission area rather than to focus on multiple categories of need for the veterans they serve. Other organizations rely heavily on volunteers who are unqualified to assess veteran need and thus it would be irresponsible to trust them with helping a veteran navigate to other veterans' services. Whatever the reason, despite these organizations' lack of strong focus on connectedness to other organizations, they often have at least minimal resource guides for their staff to inform them as to available resources for critical needs that their veterans may have.

Among organizations which demonstrate a focus on community connectedness, a range of common practices emerged as methods of operationalizing the desire to partner and integrate into an organization's community. The following serves as a non-exhaustive sampling of practices observed in the field.

Memoranda of Understanding (MOUs). Development of formalized memoranda of understanding between organizations to establish expectations for the relationships as well as processes for referrals, communication systems, periodic meeting schedules, and periodic review and/or assessment of the status and value of the relationship. Some organizations in this study viewed a responsibility to their formal partners to ensure that their partnerships provided a "return on investment" – if each partner is willing to invest time and resources to meaningfully work together, the relationship must be fruitful and valuable. If not, upon periodic review, the relationship would be terminated.

Community Coalitions. Participation in or facilitation of community partner meetings or coalitions, whether veteran-focused or not. Examples of this include HUD-organized Continuums of Care, consortia sponsored by the United Way, coalitions of employers seeking to hire veterans, coalitions of educators seeking to advance leading practices within their institutions, etc.

Complementary Partnerships. Formal (small) coalitions of organizations, each with complementary services – homelessness and workforce development providers partnering together, for example, sometimes jointly filing for grants, such that these organizations with complementary services almost operate as one. In at least one case, the collective group of complementary organizations appeared to be so important that the focus seemed more on the collective than the individual. Conversations with organizational leadership about activities, budgets, staff structures, etc., primarily included references to the group of organizations rather than simply focusing on the individual.

Formalized Referral Networks. Participation in community-wide formalized referral networks or collective impact strategies (such as those supported by referral-management technology), a relatively new and emergent leading practice in the field of veterans' services. Multiple organizations visited have joined such externally-managed referral networks designed to optimize collaboration and formalize referrals.

Communities of Practice. Participation in or leadership of communities of practice (such as those surrounding the VA's SSVF program, observed by the Bush Institute team in Houston, New York State, and New England) which facilitate collective knowledge sharing and development among organizations. Organizations participating in communities of practice train each other to support professional development and capacity building, benefiting from each other's individual skillsets and unique expertise, and elevate the performance of all similar organizations within the community.

Specified Outreach Staff. Establishing a specific position for community outreach, collaboration, and partnership with/connection to other organizations and the VA. While many organizations are heavily resource-constrained, those who designate at least one staff member's sole responsibilities as identifying complementary areas of need for their clients, seeking out the right partners for the organization, identifying a sole point of contact at partner organizations, and managing collaboration, tend to be the most successful at integrating into the community and producing successful outcomes for their clients.

Internal Referral Capacity. Internally creating an integrated web of support. Some very large social services organizations which serve veterans as a component of their broader service population contain such a broad spectrum of services that they are, in a sense, "community connected" in and of themselves. One organization visited provides a network of services through programs and at locations across multiple counties across which veterans and family members served by its SSVF program can be referred for any number of issues which may accompany the homelessness challenges that the SSVF team is working to overcome.

VA Stand Downs. Participation in VA-sponsored "Stand Down" events which bring a host of community providers together to mass resources in one place for veterans on specific days of the year, to temporarily place all resources in one geographic location as well as to raise veterans' awareness of the breadth of resources available to them. Outside of the "Stand Down" model, some large or highly prominent organizations provide space within their physical footprint in which other providers can "rotate through" on a regular basis, serving as a virtual "Stand Down" location, year-round.

Veterans Courts. Connection to veterans courts which seek to treat underlying issues to veteran crime rather than simply pursue punitive action without remediation. These courts often involve participation of numerous providers, who are consulted regarding the best course of action. While courts vary across counties and states, generally organizations either provide an outreach individual who is responsible to liaise with the court on a regular basis, or the court understands the network of organizations in the community and calls on individual organizations as it deems necessary.

Community Resource Guides. Provision of resource handbooks for case managers, volunteers, and reception staff such that each staff member understands the breadth of the organization's community-based network and, while perhaps not able/qualified to assess need and provide referrals, can potentially answer basic questions for inquiring veterans.

Further Insights

Acknowledging the breadth of types of organizations included in the study, some characteristics of organizations appeared to drive the desire or need to collaborate. Perhaps predictably, collaboration for programmatic rather than strategic purposes seems more critical for more community-based organizations as compared to those with a more national focus. Brick and mortar operations where a homeless veteran can walk through the door have much less ability to be territorial – they cannot afford to refuse to partner with a “competitor” if that means forgoing the ability to place a homeless veteran in a bed the same day he or she walks in the door, for example. The critical need for an organization to collaborate, therefore, is almost directly proportional to the critical nature of the needs of the veterans which an organization serves.

Additionally, the research team identified that one driver of collaboration was not only the notion that veterans often have multiple and confounding issues, but that organizations recognize the interrelated nature of the issues relative to the specific mission of their organization. In practice, an organization may understand that while a veteran may be coming to them seeking emergency financial assistance, there is likely a background cause to the veteran’s financial instability (mental health challenges, for example), and thus it is irresponsible of the organization not to identify a set of partners to treat the underlying causes of this instability (both for the goodwill of the veteran and, from a practical perspective, to prevent the veteran from seeking further assistance in the future). Likewise, the financial services organization may understand that financial instability may cause a host of other issues (such as family instability or further decreased mental or physical health), in this case potentially placing a moral burden on the organization to partner to treat the secondary or tertiary effects of the issues they are treating.

Implications for Funders

The degree to which an organization values and exhibits “community connectedness” in its design and practice serving returning veterans and their families is directly proportional to the organization’s ability to address the multitude of needs presented by returning veterans and their families. Speaking primarily to efficiency, veteran and military family-facing non-profit organizations that have sustainable, well-designed and formal relationships with other non-profit organizations and entities in their communities exhibit something of a “shared services” arrangement out of a belief that their specific service delivery system can be improved upon through the complementary services and resources available through other, differently-organized non-profit organizations. Key to the funder’s concerns would be not only the degree of “connectedness,” but its targeted relevance to the documented needs of returning veterans and their families. Funders should evaluate carefully the breadth and depth of the organization’s “community connectedness” as services, resources and care specific to returning veterans and their families can be enhanced through these relationships to provide more inclusive, holistic approaches thus offering potential for greater impact through the use of their resources. When compared with the fragmented service delivery systems underpinning most human services, the veterans non-profit space should be viewed as even more immature and generational (i.e. Korea, Vietnam, Iraq, etc.) than any organizational capacity in most communities, as each period of armed conflict has produced its own unique genre of non-profit organizations to address their specific needs. Funders of veteran and military family-facing non-profit organizations have a unique opportunity to shape more inclusive and therefore more effective, non-profit organizational performance by valuing increasing degrees of “community connectedness” from potential applicants seeking support from funders.

SOCIAL CONNECTEDNESS

Theme Summary

Review, analysis, and thought leadership spanning multiple issue areas highlights how and why – for those who have not served – military culture, training, and traditions are experienced as unfamiliar, foreign, and inaccessible. The consequence is a socio-cultural divide that mitigates robust and enduring relationships between veterans/families and non-veterans/families. This social and cultural distance between post-9/11 veterans and the great majority of Americans who did not serve in uniform since 2001, described as the civilian-military divide, represents a pervasive barrier to meaningfully advancing the post-service lives of OEF/OIF/OND veterans and their families – broadly marginalizing and undermining ‘whole-of-the-nation’ engagement in the concerns of those who have served.

Just a few representations of how this cultural chasm impacts the concerns of veterans include: 1) in education (not persisting in higher education, based on feelings of “not fitting in,” and veterans citing a profound lack of understanding among faculty, administrators, and non-veteran students related to the unique challenges facing veterans in an educational setting as a barrier to educational attainment); 2) in wellness (caregivers, social workers, and clinical care providers demonstrated to be not culturally competent related to the service experiences of veterans, in turn negatively impacts the willingness of veterans to seek and persist in a treatment setting); 3) in employment (pervasive misconceptions among employers related to the service experiences of veterans – and the implications of that service – are demonstrated by research to represent persistent barriers to the recruitment, hiring, and advancement of veterans in the workforce). Importantly, the civilian-military divide represents a “double-edged sword,” in that the social isolation and a lack of understanding of the military experience represented by the American public, serves to create a situation where otherwise well-meaning individuals and organizations act in support of veterans in ways that are misguided and misplaced relative to the most pressing concerns of the community.

As a means to interpret this concept through the lens by which organizations serving the community of veterans and military families operationalize strategies to bridge this civilian-military divide, the Bush Institute team established the strategic theme known as “social connectedness”, defined as: “the degree to which, or methods by which, an organization purposefully advances societal engagement in the concerns of those who have served by thorough efforts to increase the community’s understanding of the military/veteran experience and efforts to connect veterans and their families with members of the broader community.” Beginning with whether or not organizations identified the existence of a civilian-military divide as a concern relevant to them, the research team also sought to understand what strategies organizations employed to educate non-veterans (members of the community, other service providers, employers, law enforcement officials, etc.) about the strengths, challenges, issues, and concerns of veterans and their families, and to integrate veterans and their families into their communities or to foster the development of supportive and meaningful relationships therein. Researchers also sought to understand what strategies organizations employed to address the corollary problem – that those who served may have a difficult time understanding how civilian society works and how the culture is governed by different principles and value systems than those they may have been familiar with in the military – in order to ensure that bridging the civilian-military divide was not wholly viewed as the civilian community’s responsibility.

Summary of Conclusions

The most impactful veteran-serving organizations are those that recognize that robust and community-connected relationships are key to post-transition well-being, and therefore act to cultivate such relationships for the veterans they serve.

The experience of social isolation among veterans is insidious, and has far-reaching implications. While some organizations are explicitly designed to bridge the civilian-military divide, many of the most impactful purposefully incorporate mechanisms to advance social and community connections for (and between) veterans and non-veterans, as a byproduct of their service-delivery models. For example, the most impactful employment-focused organizations are those that realize that bridging this divide is a key component of their success – helping employers understand the value of veterans, and helping veterans understand how to fit into the workplace.

Further Discussion: Trends and Observations in the Field

Examination and analysis of 25 organizations providing services to veterans and military families has yielded a range of methods and opportunities for these organizations to advance societal understanding of the veterans they serve. However, the research team has identified that deliberate, strategic efforts to bridge this civilian-military divide in a manner which will transform and empower potential outcomes for those served are rare as compared to broader, (well-intentioned) non-strategic efforts to “get people involved,” which may not yield a transformational effect on veterans as much as simply to give their existence exposure to the general public. This nuance is fine, yet important – where one group of organizations’ efforts to bridge the divide affects outcomes for veterans through shaping perceptions in their communities, whereas the second organizations’ efforts likely draw attention to veterans but are not strategically intended to shape perceptions in such a manner as to alter outcomes.

An important element driving this finding is that organizations have limited resources to dedicate to the areas of highest priority, so while educating the general public might be on an ideal list of organizational goals, unless doing so is central to the organization’s mission, or the organization has significant enough capacity to undertake projects specifically designed for bridging the civilian-military divide in a meaningful way, it is unlikely that these organizations will expend resources on doing so. As such, many organizations do not deliberately work to bridge the civilian-military divide as a stated aspect of their mission, but in executing their day-to-day activities, it becomes evident that their work is resulting in such an outcome. A third grouping of organizations is found not to bridge an informational gap – that is, to advance meaningful engagement and understanding between veterans and non-veterans – but to bridge an awareness gap, providing short-term opportunities for members of the general public to engage with the mission of the organization in a “low-touch” manner, such as volunteering or donating. These three groups are explained in further detail below:

Deliberate Relationship Builders. These organizations have consciously identified a divide between the civilian and military/veteran populations and have established efforts to bridge this divide, through a number of methods. Some organizations have been entirely designed around this concept, focused on integrating veterans into their communities, connecting them with non-veterans through teamwork (such as through volunteer or fitness activities), seeking to build interpersonal trust and relationships between the two communities at an individual level. Other organizations have identified “friction points” in society, where civilians’ lack of understanding for military/veterans’ concerns lead to degraded service quality (in physical or behavioral health, or in social services for

example), heightened danger during interactions with law enforcement officials, ineffective sentencing and treatment programs sanctioned in courts, decreased educational and employment outcomes, and generally increased stresses and challenges for veterans in day-to-day life. These organizations create training programs to work with relevant parties mentioned above to improve processes and quality of veterans' engagement with services, or work to improve local law enforcement's awareness of their programs such that the organization might be notified of disturbances or issues prior to legal action being taken with a veteran enrolled in one of their programs.

Finally, as a critical element of their mission, many employment-focused organizations deliberately identify and work to bridge this divide through education and relationship building, on both sides of the employment equation: both the employer and the veteran seeking employment. While developing networks of employers willing to hire veterans, these organizations spend considerable effort teaching companies the value, or business case, of hiring veterans, as well as working to dispel myths, stigmas, and stereotypes associated with the veteran experience. In addition, while many organizations work with veterans to translate their military experience into language that civilian employers can understand (in the context of both resume writing and interview preparation), several work with veterans to view themselves through the civilian employment lens, as to how they would behave in their new civilian roles. These organizations encourage veterans to introduce themselves to their new coworkers and integrate themselves into the team, as well as to work to develop an image within their new companies as "John, my coworker", as opposed to solely (or primarily) "John, the veteran". These organizations also work with employees and companies through potential leadership challenges, as some former military leaders can be rigid or "short" in communication with their new team members; organizations such as these coach their veterans to understand and employ new, "softer" leadership techniques to which their civilian co-workers might better respond.

Secondary Relationship Builders. A second category of organizations has not explicitly set out to design programming intended to bridge the civilian-military divide, but through its regular programming, has learned that this secondary effect exists. Potentially, these organizations, having identified this secondary effect, have taken efforts to expand upon it for the good of their veterans or for veterans in general, but "bridging the divide" is still not the primary focus of the organization's programming.

Public Mobilizers. A third category of organizations serves to bridge the divide not through consistent or thorough engagement between the civilian and military populations, but through activating, motivating, or harnessing the general public's goodwill for the military/veteran community. These organizations provide "one-time", public displays of support for veterans and their families, such as hosting holiday celebrations, marching in parades, setting up displays or booths at large public fairs, producing public service announcements, garnering media attention, hosting fundraising events, giving way homes at high-profile concerts or sporting events, or hosting public displays of support in airports or at professional sporting events which serve to draw public attention to the military and veteran community. These organizations also offer "low-touch" volunteer opportunities, such as serving a Thanksgiving meal on a military base, mailing care packages, writing letters to deployed service members, donating money or goods, etc. These displays of support and opportunities for engagement are not necessarily educational in nature and therefore do not serve the purpose of bridging the "informational divide" regarding public understanding of the military/veteran experience, including the strengths, issues, and challenges contained therein, but rather these displays bridge an "awareness divide", by continuing to remind the American public that our military is at war and our veterans are returning home. Some of these organizations are able to use high-volume, low-touch connections to the civilian community to translate public goodwill into financial resources which help sustain the organization in lieu of other grant funding.

Further Insights

A common challenge for organizations seeking to affect the civilian-military divide is the lack of a tangible or concrete metric to determine the true impact of their efforts. While employment-focused organizations could potentially use the metric of number of veterans employed as a proxy for their efforts to educate employers, the impact of their education and outreach efforts on the mindset of an HR executive or front-line hiring manager is difficult to determine. Likewise, organizations seeking to integrate veterans into their communities, build teamwork, and increase understanding between veterans and non-veterans may use event attendance or chapter membership as a proxy for success, but the level of meaningful engagement between veteran and non-veteran members, or the impact that their organization has had on civilian society as a whole is ambiguous at best. Ultimately, it is up to the organizations most focused on impacting this divide – those the research team has labeled “deliberate relationship builders” – to identify the best metrics which will determine their success. For “secondary relationship builders” and others, it is unlikely that this effect of this programming would be measured at all. In short, the concept of impacting societal awareness and consciousness of military and veterans’ issues – while worthy of effort – is nebulous, and success is difficult to define.

When discussing the notion of bridging the civilian-military divide through incorporating non-veterans into an organization’s mission, it is important to discuss the potential for selection bias, which could mitigate the “bridging” impact of said involvement. As mentioned above, many organizations bridge the civilian-military divide by incorporating volunteers into their operations; likewise, one might argue that through the act of fundraising, organizations also can bridge this divide by affording non- -veterans a way to engage in the work of supporting veterans and their families. Throughout conversations with leaders, staff, and volunteers across the surveyed organizations, however, it became evident that many volunteers and individual donors are motivated to become involved with veteran-serving organizations due to a personal connection with the cause – perhaps a parent or sibling has served in the military, or the individual is a veteran themselves. As a result, the strength of the assertion that through volunteer and donor support, the organization is bridging a divide is somewhat mitigated, because the volunteers and donors already sit on the “informed” and “engaged” side of the divide. While volunteer outreach coordinators and development staff could use these two organizational functions as outreach efforts to intentionally seek volunteers and donors not already connected to the military (and thus bridge the divide), such efforts would likely be an inefficient use of limited resources better directed toward the critical needs of the organization. In practice, veterans services at the organizations surveyed are mostly delivered by professionals and volunteers who have some connection to (and therefore prior awareness of) military and veterans’ issues, and are financially supported by donors who have the same.

Finally, it should be noted that an entire category of organizations which was not included in this study exists solely to help veterans share their stories with the public, and these organizations perhaps perform one of the most direct methods of bridging the civilian-military divide. Organizations which encourage veterans to express themselves through art, music, poetry, writing, any other expressive medium, or oral history projects in museums and online, all seek to increase engagement of non-veterans with the military experience. As above, while there is a potential selection bias for those non-veterans who choose to engage with these projects – in that these individuals are likely at least somewhat aware of the strengths, issues, and challenges related to our nation’s veterans and military families – there still exists potential for these efforts to inform the broader general public and to have some effect on the civilian-military divide.

Implications for Funders

As the research team noted in its findings, few organizations serving the needs of returning veterans and their families possess the resources needed to establish and sustain a dedicated effort aimed at educating the general public to better bridge the civilian-military divide in a meaningful way. Without support from funders, it is unlikely that these organizations will expend resources on doing so. As such, many organizations do not deliberately work to bridge the civilian-military divide as a stated aspect of their mission, but in executing their day-to-day activities, it appears many are trying. The opportunity for longer-term, sustainable efforts aimed at closing the distance between society's misperceptions of military service and its effects and those who serve might best be viewed as an economical use of any funder's resources whose giving strategy includes initiatives which include public education campaigns promoting broader health and well-being in segments of American society. Research team findings support such inclusion of the veteran subpopulation within those efforts in an integrated and more holistic sense.

While longer-term in its goal, the funding opportunity to help shape the narrative around the myriad of issues impacting returning veterans and their families presents a measurable approach to achieving greater degrees of "social connectedness" in any community by evaluating the effects and impacts public education can have on the community's members. The research team identified programmatic opportunities to align degrees of "social connectedness" by establishing efforts to bring the continuum of veteran experiences together in a "sum of the parts" initiative. One way for that to occur is for higher-performing veterans to work with less-fortunate veterans to first bridge the "military-to-military" divide resident within the "civilian-military" divide. Examples include monthly business luncheons being run in communities aimed at connecting mature, veteran-owned/operated business leaders and capacity with less-mature, veteran-owned and operated business leaders and capacity to ensure more opportunities across the spectrum of veteran-owned and operated businesses. Public discussion forums and campaigns round out the research team's observations of impactful opportunities for funders to establish and support efforts to bridge the civilian-military divide to ensure more successful transition and reintegration of returning veterans and their families.

INDEPENDENT SECTOR ENGAGEMENT

Theme Overview

Both academic research and the insights and opinions of national experts suggest a significant and enduring role for the independent sector (private industry, NGOs, philanthropy) in advancing the social, economic, and wellness concerns of post-9/11 veterans and their families. However, previous research conducted by the George W. Bush Institute and partners revealed that the efforts of this sector have been largely uncoordinated, fragmented, uninformed by research, lack transparency and accountability, and are devoid of robust performance evaluation and assessment, thus marginalizing and undermining its legitimacy and potential. Worse, constrained resources have created an increasingly competitive community of organizations, making effective collaborations few and far between, despite the fact that research and expert opinion tell us that 'success' can only be realized based on collaborative strategies that include expanded public-private partnerships, cross-sector industry collaborations, enhanced coordination and knowledge sharing between not-for-profit organizations serving veterans and their families. In the face of waning public attention (and therefore financial) support, it will become increasingly critical for organizations to not only demonstrate transparency, accountability, efficacy,

and efficiency, but also to collaborate effectively to achieve greater gains on behalf of the nation's post-9/11 veterans and their families. If the independent sector does not learn to do more with less over the coming years, this generation of veterans stands to suffer the consequences of the independent sector's failures.

In the context of this study, the Bush Institute research team sought to understand the current state of independent sector collaboration as it translated on the ground to non-profits serving veterans and their families. The research team created the theme "independent sector involvement", defined as: "the degree to which, or methods by which, an organization utilizes collaborative strategies across sectors private industry, NGOs, philanthropy in support of their efforts to serve veterans." Broadly, researchers sought to understand the extent and nature of collaborative partnerships existing among the landscape of organizations serving this community, as well as to define the level of importance of these collaborations to the survival and/or success to the organizations themselves. Different than the strategic theme "community connectedness", the partnerships examined in this section do not focus on execution of programming – that is, they do not establish a network of referrals or care for the veterans being served. The partnerships being examined in this section serve to support the survival of the organizations and the advancement of their mission, and are strategic in nature.

Summary of Conclusions

The most impactful veteran-serving organizations are those that view funder partnerships as symbiotic and collaborative, and that leverage (beyond simply funding) the knowledge and expertise of funding partners to improve their own internal processes and systems.

Organizations serving veterans should look to the independent sector for more than just donation checks. While financial support is critical, private sector and philanthropic partners can help non-profits obtain supplies and volunteers, but most importantly, can help them innovate through the provision of pro-bono services, consulting, and service on boards, helping them design cutting edge business models, data and measurement systems, and communications platforms, to say the least. These types of strategic collaborations can empower non-profits to higher levels of performance and overcome resource and human capital constraints.

Further Discussion: Trends and Observations in the Field

Trends across the landscape of non-profit organizations serving veterans and their families consistently reveal a pattern of reliance upon strategic relationships with the private and philanthropic sectors, as well as each other. Whether for financial support, supplies, pro bono services, advice and consultation, serving as consumers of veterans trained by non-profits, or serving as partners sharing complementary services, these partnerships have proven critical enablers of organizational success, providing non-profits with resources and expertise to which they would not have otherwise had access.

While government funding forms the core of our nation's social safety net for veterans, this support generally extends only so far as non-profits providing housing/homelessness, workforce development, and substance abuse assistance. For those not receiving funding from VA SSVF grants, HUD VASH vouchers, DOL HVRP grants, SAMHSA veterans support or Department of Defense contracts, securing private sector or philanthropic funding is necessary for survival. Among organizations included in this study, the most nationally-prominent generally courted the same set of veteran-focused foundations, corporations, and financial institutions for support – the Bob Woodruff Foundation, Newman's Own Foundation, Walmart Foundation, JPMorgan Chase, Bank of America,

WellsFargo, etc. – though these corporate and foundation dollars at times found their way to local, community based non-profits as well. More commonly, however, community-based non-profits competed for funding from local family foundations or local corporations, each of which would have a greater commitment to their specific constituency of veterans. Two organizations included in this study – Hire Heroes USA and the Steven and Alexandria Cohen Military Family Clinic – were founded by a major founding benefactor (MedAssets, and Steven and Alexandria Cohen, respectively), then added additional funding sources throughout the development of the organization. These major initial gifts gave the organizations the flexibility to establish themselves without the need to fight for survival and the ability to pursue further funding sources.

In addition to relying upon the independent sector for funding opportunities, those non-profits whose operations require significant amounts of supplies – to support homeless shelters, care packages, or respite centers at airports – relied heavily upon private sector supporters for materiel support. Soldiers' Angels relies upon key support from several corporations which provide monetary and/or donations of supplies, warehouse space, shipping capabilities, as well as employee volunteers. SA is the charity of choice for Mary Kay, which provides items that are included in hygiene kits. Harry & David provides trail mix, also used in care packages. Other corporate supporters include Books-A-Million/Barnes & Noble, Walmart, Girl Scouts of America, Pepsi, Wells Fargo, and American Express. Three Hots and a Cot described their networked supply system wherein large quantities of items – such as food, bedding, and construction supplies – are donated to their organization, and the network of similar non-profits in the surrounding area trade their surplus to ensure that each has what is required. Volunteers at USO of Illinois recounted the daily process of picking up food and supplies from local businesses to sustain USO centers at Chicago's airports and on Naval Station Great Lakes. Whether at large scale or small, it became clear that without donations of such supplies from private sector partners, each of these organizations would not be able to sustain their operations.

Private sector partners also provide a range of pro bono services which support non-profit operations and service delivery. Seeking to better understand the population it served but not having the research and evaluation capability to do so, Team Red, White, and Blue partnered with leading management consulting firm McKinsey & Co. to conduct a broad-reaching survey of its members. Through the Google Reach Program, Swords to Plowshares had two Google employees visit their offices as volunteers to update Swords' communications platforms, Google Analytics, Google AdWords, and assist with search engine optimization. This partnership helped Swords assess their brand, web, and social media presence and instill tracking mechanisms to assess performance. Swords has also benefitted from extensive partnerships with local law firms to expand its legal services capacities through pro bono support. Finally, several employment providers noted that private sector partners have volunteered to conduct mock interviews with their clients, which serve as a more effective means of job search preparation than having a student's regular instructors participate. In all of these instances, non-profits have leveraged private sector expertise to augment, enhance, or establish an organizational expertise necessary to ensure strong outcomes for their clients.

Similar to pro bono support, non-profits often draw on private sector expertise for advice and consultation. Organizations throughout this study noted that their boards were mostly comprised of local private sector leaders who could advise them in organizational management and strategy, finance, and communications, aside from their roles in assisting the non-profit with fundraising. In addition, local private sector leaders are at times consulted in the development of employment programs to both assess the need for and efficacy of specific programs and their design. Goodwill Houston has established what it calls its Business Advisory Council,

comprised of local employers, and charged with advising their workforce development programs. Upon development of a new program, Goodwill staff presents the idea to the council for questions and feedback from the private sector perspective, serving as a form of quality assurance element from the “consumers” of the workforce produced by Goodwill’s curriculum. In both of these cases, private sector expertise is leveraged to ensure that not only are the non-profits being run effectively but that, in the case of employment programs, they are doing relevant work which aligns with business interests and is, therefore, in the best interests of the veteran clients themselves.

Employer partnerships are not only necessary for the advisement and development of effective employment programs, but without strategic relationships with the private sector, non-profits advocating for the hiring of veterans and their families would undoubtedly fail. The nation’s largest employers have made significant public commitments to hiring hundreds of thousands of veterans, and any employment focused non-profit must build relationships to leverage this demand on behalf of their veterans. However, this may be more difficult for community-based non-profits, so these organizations must develop their own networks and coalitions. Charlotte Bridge Home, for example, has developed the Charlotte Alliance for Veteran Employment (CAVE), which includes 32 employers across the region interested in hiring veterans. Both national and local organizations, this alliance ensures that employers are trained in effective processes for recruiting veterans, and that they are linked to a pipeline of veterans graduating from Charlotte Bridge Home’s programs. Such a partnership with the private sector is vital to the success of any employment-focused non-profit.

Finally, strategic collaboration between non-profits themselves was also demonstrated to be a critical enabler of success for the organizations included in this study. As non-profits identified strengths in potential partners which they sought to incorporate into their model, or potentially identified weaknesses in their own model which they felt another organization could shore up, partnerships have arisen where complementary strengths serve both organizations well. One clear example of this Give an Hour, which has donated one full-time psychologist to Team Rubicon, which had noted a need for mental health services for its members. This partnership has been so successful that Team Rubicon will fund the position moving forward, and is hoping to expand the program to hire more mental health professionals to distribute throughout the country. Team Rubicon has also identified a need to keep its team members engaged between disaster relief deployments, so the organization has partnered with Habitat for Humanity to participate in home builds to both keep TR members’ skills sharp and maintain their sense of purpose. Likewise, TR has partnered with Team RWB as a further provider of camaraderie and sense of identity which TR members have on deployment but which they may lose between operations, and the loss of which can degrade their mental health. Likewise, Team RWB veterans get exposure to Team Rubicon and are able to participate on deployments, providing them an opportunity to participate in missions they might not have otherwise been aware of. Through this series of strategic relationships, Team Rubicon and its partners each leverage their strengths, expand their reach, and better serve their veterans.

Further Insights

Some non-profit organizations surveyed in this study noted that their relationships with private sector organizations served as a potential source of volunteers, or that their private sector partners and funders continually sought volunteer opportunities within their organizations. However, discussions surrounding the use of volunteers with the majority of non-profits in this study revealed that the average organization requires the skills of consistent volunteers with specific, dedicated skillsets, and that organizations work best with a dedicated volunteer

management strategy, such that large one-time influxes of “unskilled” volunteers are inappropriate for the type of sensitive work that these organizations do. This may, at times, cause friction with funders wishing to volunteer, so relationship management and stewardship is critical.

Implications for Funders

The extent to which funders seek to invest in more collaborative efforts with private industry and NGOs serving returning veterans and their families could prove to be the principle difference between achieving at-scale improvements in service, resources and care available to address their needs or the basis by which veteran and military family-facing non-profit organizations fail to survive at all. Funders are positioned at the nexus of determining the degree to which, or methods by which, non-profit organizations utilize collaborative strategies across sectors including private industry, NGOs, and philanthropy in support of their efforts to serve veterans. Defined as “independent sector involvement” for purposes of this research, these partnerships underpin the advancement of these organizations and ultimately have the potential to shape their success or failure. The research team notes that funders find themselves at an important, reflective moment in time after 14 years of making investments in a sector that remains largely uncoordinated in nature, fragmented in its approaches, uninformed by research, lacking transparency and accountability, and devoid of robust performance evaluation and assessment efforts. Despite funder’s best attempts to address the sector’s shortcomings, its very legitimacy and potential is on the line. Importantly, research members believe an incredible opportunity exists for funders to take stock of the sector’s shortcomings and serve as the means by which more comprehensive, data-driven, coherent, research-based practices are demanded and emerge to address the needs of returning veterans and their families. To seed such transformation, funders will have to become better informed in all these areas and establish the conditions, methods and directed impact that will serve to establish and sustain more meaningful public-private partnerships serving the needs of returning veterans and their families.

VETERAN PROGRAMMING DIFFERENTIATION

Theme Overview

Both research and practice demonstrates the danger in failing to acknowledge inherent differences between the service experience of different cohorts of the veterans’ community – and the implications of those differences on the post-service life course. Both research and the expert opinion of practitioners and thought leaders surveyed by GWBI highlights that the post-service concerns of (for example) women, veterans with disabilities, officers (junior v. senior), enlisted (junior v. senior), etc. are – in some instances and contexts – idiosyncratic to those specific cohorts. Put most simply, broad and sweeping generalizations with regard to the social, economic, and wellness concerns of the population – and strategies to impact those concerns – are inappropriate and limiting.

In the context of applying this concept to the organizations included in this study, the Bush Institute and research partners came to define veteran programming differentiation as: “the degree by which, or methods by which, an organization differentiates its program and service delivery model based on varying needs within subsections of the post-9/11 cohort (women veterans, veterans with disabilities, etc.).” Most simply, veteran programming differentiation refers to certain VSOs that have aptly identified various types of veterans and offered useful, appropriate and meaningful programming for a specific cohort. These VSOs understand that certain veterans require specific and unique programming. They realize that certain issues/concerns may impact one demographic more so than another. Thus, our research team sought to point out varying strengths of a VSO in

dealing with specific cohorts – e.g., veterans with physical disabilities, female veterans, veterans with mental trauma, etc. Further, our research team sought to identify whether or not their unique accommodations based on the cohort has transformed into success, failure, or varied performance. Further, our research team sought to identify key indicators that might make the VSO better understand a specific cohort and, perhaps, what kind of programming to keep, change, or even create.

Summary of Conclusions

The most impactful veteran-serving organizations are those that acknowledge and embrace the inherent differences between veterans, and incorporate those differences into the organization's process, practice, and service-delivery.

Veterans must be treated as individuals, with unique goals, aspirations, challenges, opportunities, and barriers. Designing programs with an “all veterans are the same” mindset not only leads to poor outcomes, but also represents a barrier to program accessibility. Excellence is driven through individual case management, individually designed programming, or individually tailored care. The best veteran-serving organizations respect the broad diversity within the veteran population, and take efforts to tailor their programming as best as possible in response to this diversity.

Further Discussion: Trends and Observations in the Field

In preparation for this study, the research team anticipated discovering a continuum of organizations – some with highly differentiated programming (that is, specific programs designed for specific cohorts) and some which delivered programs for simply the broad veteran population. As the VA, for example, has in some service locations developed OEF/OIF- and women-specific teams, the research team anticipated discovering similarly specified teams or programs emerging in the group of non-profit organizations studied. In the field, the team made the following findings:

- *The broad landscape of veterans services in America remains dominated by the need to serve members of pre-9/11 generations, as demographically these veterans comprise the significant majority. These organizations sometimes formally differentiate programming for women veterans and for post-9/11 veterans, but these cohorts are largely served within the context of programming designed and delivered for the broad category of “veterans”, without regard to service era.*
- *A category of organizations specifically dedicated to serving post-9/11 veterans has emerged, and some of these organizations have formally differentiated programming for women veterans, or veterans with disabilities, though (anecdotally) this is rare. Data generalizable to the universe of non-profit organizations serving post-9/11 veterans is unavailable to make concrete assumptions.*
- *An additional category of organizations specifically dedicated to serving veterans with disabilities has emerged. Not enough of these organizations were included in this study to make reliable assertions about the status of differentiation within.*

An important finding is that formal differentiation of programming such as this often follows the desires of funders and therefore funder-driven eligibility criteria rather than the desire and/or expertise of the organizations providing services. That said, in the few cases where funders had expressed desires to serve specific cohorts, these cohorts were either currently-serving members of the military (where veterans were ineligible), veterans with disabilities, women veterans, or post-9/11 veterans in general. In cases where formal program differentiation

is driven by organizational expertise, it is often because the organizations themselves have proactively (and successfully) sought a funder for the desired program. It seems extremely rare that organizations have the excess internal financial capacity to differentiate (i.e. establish new programs) without external support.

In practice, then, differentiation is often informal, arising from the cultural competency of staff and the hiring of the right human capital within programming constraints directed by funders. While a program may be funded for all veterans, for example, ensuring that a staff is comprised of veterans, some pre- and some post-9/11, some male and some female, may facilitate a uniquely tailored client experience, differentiated though the overall program itself is not. Countless organizations visited noted that they did not differentiate by program, but they strongly felt that they provided differentiated *services* in that they had uniquely tailored case management processes, and were responsive to each individual veteran's specific needs and desires. In some cases, the above-mentioned successful pursuit of funders for differentiated programs has arisen out of demonstration of the value of differentiation which has been created within the environment of broader programs (i.e. a privately-funded women homelessness grant which was inspired by an organization demonstrating the success of a team of women-focused staff within a broader, gender-agnostic, government-funded HVRP program).

Driving differentiation, both formal and informal, are the insights regarding the unique concerns about the varying cohorts within the veteran population. Time and again, the research team heard stories of organizations which learned by trial and error – though, across the nation, generally came to similar conclusions and common practices. For example, acknowledging the prevalence of combat trauma among their clientele, multiple organizations have learned to accommodate stressors in unique and specific ways, such as leaving doors open, preventing loud noises, ensuring the veteran does not sit with their back to the door, etc. Acknowledging the uniquely traumatic experiences faced by many women veterans and their resulting difficulty trusting male veterans and/or potential difficulty trusting male staff, multiple organizations have established women-specific staff and/or set aside spaces within their physical footprint to establish a safe and welcoming environment. Acknowledging the significantly different sets of skills, experiences, and goals relative to the employment situation of post-9/11 veterans as compared to their pre-9/11 counterparts, many organizations have established entirely new and different training protocols, networks of employers, and outreach strategies to accommodate this new population.

These lessons learned from practitioners in the field not only present rich and valuable insights into the practice of serving veterans but also shed light on common characteristics of the veterans themselves. While the research team's goal was to focus on the post-9/11 cohort, as noted above, many of the organizations included in this study serve a majority of pre-9/11 veterans as well, so conversations often illuminated differences between pre- and post-9/11 veterans, which should be accounted for by veteran-serving organizations when either designing services or when training staff to be culturally competent to the population served. Select examples include:

Sensitivity to Age. Broadly, organizations have learned to be sensitive to the environment, culture, and even physical space in which the program is delivered – specifically that it not “feel old”, as younger veterans can be averse to programs that appear dominated by older veterans. One staff member described a scenario in which a young veteran walks into their waiting room, only to find it full of old men, and think to himself or herself, “this isn't for me.”, driving that veteran to seek services elsewhere or not to seek services at all.

Focus of Support. Younger veterans seeking social services tend to struggle with the building blocks of post-service life – education, stable employment, perhaps deployment-related mental health issues,

substance abuse, and subsequent housing challenges – and, as such, their issues tend to need “course correction” such that they can be set on the right path for the future. These are issues which can often be treated or reversed by early intervention strategies. Older veterans seeking social services, however, tend to be dealing with similar issues (employment, mental health, substance abuse, housing, etc.), but these issues are chronic and treatment strategies are likely focused on reduction of severity rather than full-scale rehabilitation.

Employment Strategies. Teams working with veterans seeking education and employment have learned to develop quite different training protocol and strategies for the different generations. Post-9/11 veterans were characterized as having higher technical skillsets and higher (sometimes unrealistic) wage expectations due to their military experience as compared to older generations. These veterans are qualified for better jobs than their older counterparts, and are looking to begin careers rather than simply finding employment, sometimes resulting in higher wage targets for post-9/11 specific employment programs. Conversely, finding employment for the pre-9/11 cohort tends to be focused on simply earning a wage rather than establishing a career and in the modern economy, even this can be challenge. Older veterans, particularly those who have experienced chronic homelessness, have significant challenges working with technology and are sometimes reluctant to ask for help simply because they are embarrassed at their lack of knowledge.

With regard to organizations serving the post-9/11 cohort specifically, differences emerged in service delivery models between the populations of the Active Duty, Guard and Reserve, and veteran populations. During interviews it became evident that there is a growing struggle between resource allocation and impact among programming for these Guard and Reserve Units. The distance of rural and/or Guard/Reserve units from organizations’ headquarters, of one unit from another and of service members from one another add a level of complexity to programming not present with urban and/or Active Duty service members and their families. For rural and/or Guard/Reserve service members and families, organizations can coordinate their programming with drill dates but often do not find their efforts nearly as impactful overall as those for Active Duty service members and families on installations. Organizations serving these populations must develop innovative service delivery models, perhaps requiring virtual tools, or requiring mobile assistance. For example, one SSVF organization visited mentioned a fellow member of the local SSVF community of practice which has no brick and mortar location but rather operates entirely out of mobile vans.

Finally,² conversations with leaders and staff surrounding this concept of differentiation included the identification of broad differences between providing human services to veterans versus providing the same categories of human services to non -veterans. As a result, these conversations also led to the emergence of several insights idiosyncratic of the veteran community such as:

Resistance to Seeking Services. Countless organizations reported a general sense of pride exhibited by all generations – often cited as ingrained in them through the resourcefulness they learned in their military training – which leads them to believe “I’m fine, I don’t need help”, regardless of how dire a situation in which they find themselves. This often leads veterans who *do* seek social services to wait until a point of crisis to do so.

2 Differences between male and female veterans will be addressed in the section of this paper labeled “Women Veteran Efforts”, and the unique challenges for veterans with families will be addressed in the section labeled “Family Reintegration”

Unique Employment Challenges. Veterans at all levels of the military rank structure face unique challenges in communicating their military skills and experiences to employers, as well as overcoming the stigma associated with stereotypes regarding combat trauma and associated mental health challenges such as PTS and depression.

Difficulty Integrating with Non-veterans. Multiple organizations cited some veterans' difficulties navigating cultural differences between military and civilian society. Referred to as "rough edges" or a "chip on their shoulder", some veterans' pride in their service can at times be perceived as disregard for those who have not served or, as stated by one staff member, "Screw you, I don't need to cooperate. I've done my piece." For those veterans in the workforce placed in leadership positions over non-veterans, this can at times lead to impatience with complaints or unequal work ethic, which can sometimes require mediation between an employment services provider, the employer, and the veteran. For other veterans, this can simply lead them to be unwilling to integrate into society, which leads them to isolate themselves and can exacerbate mental health issues. This challenge has led to the rise of some organizations solely focused on connecting veterans with their communities.

Humility and Drive for Service. Demonstrated often in organizations focused on connecting veterans with volunteer opportunities, veterans demonstrate a strong drive to continue giving back to their communities when they return from service, and in that service, to do whatever is asked of them. One organization noted that "I think a lot of people...initially don't like us until they interact with us, and then they go, 'Wow, these guys are hardworking, they are humble, they're respectful.'...The type of warfare that we fought for ten years required young men and women to go into villages and interact with a population of strangers – you know, culturally different, language barriers, and all those things... There's a nuance to walking into somebody else's backyard and saying, 'We'd like to help, and here's how we can do that.'"

Importance of Peer Support and Commitment to one Another. Multiple organizations have cited the notion that veterans respond best to services delivered by other veterans, whether clinicians, case workers, counselors, employment skills trainers, educators, or supervisors. Additionally, veterans experience improved mental health outcomes when connected with each other, and are more willing to seek the services of organizations recommended to them by other veterans, particularly those within their social networks. The inherent bond and trust of the brotherhood and sisterhood of those who have served is abundantly clear and has been leveraged by countless organizations in the design of service delivery models, some of which are referenced below.

Unique Reference to Successful Past. For organizations providing social services to veterans, comparing the delivery of their services to veterans versus non-veterans highlighted a unique opportunity to leverage a veteran's service for success in treatment: every veteran experienced a time in their life when he or she was a productive member of society – their military service. One staff member noted that, "No matter how disorganized the vet has become, almost all of them can relate back to a time when they were part of a functioning organization. And there's an automatic pickup in the step when they get back together with other vets." Not all those who receive social services can point to a moment when they wore a uniform and had the respect of their peers, but veterans can; this is an asset to those serving them. Veterans belong to a brotherhood and a sisterhood and can be reminded of this

no matter how isolated they currently feel. This is a clear differentiation from broader society – when a veteran falls, no matter how far – he or she can be reminded that at one point they stood tall, and for that they can be proud.

Further Insights

Common across organizations, staff and leadership articulated the notion that it takes a special individual to work with veterans. While veterans may be resistant to seeking services, once they walk in the door, the effort to serve them has only just begun. An organization must have a culturally competent staff which can win the trust of veterans in order to be effective. Organizations in the field recommended that any staff member providing direct services to veterans either be a veteran, have experience working with at-risk populations, have lived through some hardship in life or have lived through conflict as a civilian (such as an immigrant from a country which was in conflict). A staff member at Goodwill Houston (who is an immigrant from Bosnia) stated that, “Either you have to have been through something, or you’re just a very compassionate person as it relates to people, caring about their needs, because the veteran...if they see that you’re just in it for a paycheck, they will know. They will know.” This sentiment was echoed by Hire Heroes USA CEO Brian Stann, who describes his thought process regarding hiring as such:

“I can’t just grab a recent college grad who’s really, really smart and then put them on the phone or put them right next to a veteran, because you have to have some life to share with them. You have to have overcome some adversity...They have to have walked a mile in those shoes to have things to share with that veteran...I want people who have been through the wringer a little bit...so that when they have a veteran who’s on the phone with them or sitting in front of them saying, hey, these are some of my barriers to employment, I’ve got this traumatic brain injury, I’ve got this or that, they can share with them their own life experiences, because, again, it’s not just an instructor/student relationship, it’s an actual personal relationship to get this veteran who may have trust issues to trust them and believe in what they’re saying...Every time we do a workshop on a base, initially a lot of the veterans walk in and say, okay, you know, they’ve been to something like this before and they’re kind of doubtful. First class is over and they’re all a little surprised, well, wait a minute, nobody’s ever talked to us like that, nobody’s ever said it like that, and all of a sudden the buy-in starts to happen.”

Implications for Funders

Perhaps the most malleable of themes from a funder's perspective, "veteran programming differentiation" offers funders the best opportunity to tailor their limited resources to their first best use given the continuum of veteran and military family-facing organizations observed. Driven already by funder-unique investment strategies honed since 9/11, many funders have established various differentiation criteria for the successful application of their resources (i.e. serving only post-9/11 veterans, women veterans, etc.). Research team members noted that funders are in large part responsible for many of the more modern forms of "veteran programming differentiation" observed within non-profit organizations serving veterans and their families. Alternatively, non-profit organizations themselves, when seeking to offer specific programming to select sub-populations within the veterans' cohort, did so only after seeking specific funding to build and deploy the differentiated programming itself. Regardless of the source of motivation to differentiate programming, funders remain the important nexus between differentiated resources and services addressing specific needs and generalized services and resources supporting the same.

When viewed through the lens of achieving impact, funders have taken the approach that the easiest pathway and means to having impact in the veterans' space is to invest in differentiated programming specific to certain sub-populations within the veteran and military family cohort. While generally observable in practice, the research team also noted high potential that investments supporting "veteran programming differentiation" revealed unintended fragmentation of services, resources and care (i.e. "we only serve post-9/11 veterans....") as a result of the funding itself. Funders are advised to consider the unintended consequences of their investment strategies when considering specific, targeted criteria for the use of their resources. Designing investment opportunities that complement other, predominantly public, funding sources (i.e. federal and state government resources) could increase services, resources and care beyond the limits of imposed funding and program eligibility restrictions and best-position the funder's limited resources against documented needs of returning veterans and their families. Research team members observed ample opportunity for funders to add additional value to non-profit organizations within this context. Lastly, funders may want to consider strongly the opportunity to provide innovative approaches within that same context as a means to offering alternatively-designed forms of treatment, services and resources alongside more established forms of the same without isolating and fragmenting funded programming efforts themselves.

WOMEN VETERAN EFFORTS

Theme Overview

While serving in the US Military, women veterans face unique, gender-based threats to their mental health – in addition to the potential for PTS resulting from combat exposure, women veterans are also often subject to Military Sexual Trauma, which is further linked to PTS, depression, and substance abuse. Women veterans are often more socially isolated than their male counterparts when returning home, and this lack of social support is consistently noted in research as a significant factor in determining a female veteran's successful transition. Women often bear the burden of being the primary caregiver within their family, sometimes as single mothers, as women veterans face higher rates of divorce. Women veterans are often underserved as compared to male veterans, less likely to self-identify as veterans, less likely to participate in veteran programs, and less likely to be acknowledged for their military service due to incorrect societal perceptions regarding modern roles in combat. Women veterans represent a growing percentage of the veteran population, both as a result of increasing

numbers of women serving, and due to the deaths of older, predominantly male veterans. Further definition of the issues facing this demographic of veterans is critical, as are efforts to mitigate the long-lasting consequences of poor post-service outcomes.

Seeking to confirm these assertions and explore methods by which organizations in the field operationalize responses to them, the Bush Institute research team and partners created the strategic theme “women veteran efforts”, defined as “the degree to which, or methods by which, an organization’s programs identify and address the distinct set of challenges faced by women veterans during their military service, and the consequences resulting from that service.” Researchers sought to understand unique challenges faced by organizations seeking to serve women veterans and strategies employed to overcome these challenges, as well as differences in the ways that women veterans engaged with organizations, staff members, and programs, and similarities or differences in outcomes from programs as compared to their male veteran counterparts.

Summary of Conclusions

The most impactful veteran-serving organizations acknowledge and act to embrace differentiated service-delivery in support of the unique concerns of women veterans.

Most are aware of the unique and challenging aspects of military service as a woman – including, but not limited to, military sexual trauma, societal misperceptions about service, family care needs, and challenges regarding identity after service. Those serving women veterans in the direst of circumstances need to be the most aware of these challenges and adapt their services as such. All providers, however, need to welcome women veterans into their services at every step, from marketing materials, to creating a welcoming environment and ensuring positive outcomes.

Further Discussion: Trends and Observations in the Field

As expected, the research team confirmed research-based assertions regarding the unique challenges facing women veterans. Leaders of organizations in the field consistently echoed the same set of characteristics and difficulties relative to this subsection of the veteran population: women veterans are stated to be far more likely to be primary caregivers of children than their male counterparts; less likely than men to self-identify as veterans; more geographically dispersed than male veterans; more likely to suffer from domestic violence and struggle with financial independence; and more likely to have been the victims of military sexual trauma. As stated by Irina Komarovskaya, Clinical Director of the Steven and Alexandria Cohen Military Family Clinic at the NYU Langone Medical Center, “Because of MST, [these women] have tremendous mistrust of the military and also the VA, and they would not go for any services anywhere else.” This notion was expressed nearly unanimously at organizations across the country.

As a result of these challenges and the resulting mistrust of veterans services, outreach to women veterans can be extremely difficult, and may require a female staff member specifically to conduct outreach efforts. Brian Murphy, also of the Cohen Center, states that “[The center will] send my wife [who also works here] to events instead of me if it’s a women’s event. We’re obviously cognizant of that. It’s like, ‘Hey, some guy in a jacket is talking to me. Great.’ It might not be appealing to some women, especially anyone who has ever suffered any kind of sexual assault in the military or something. That might be additional trauma. I might look like that guy [who harmed them], or just in general my appearance – or she just doesn’t want to talk to another guy about this

stuff.” As stated by Mr. Murphy, not only do women prefer to be served by other women and it is perhaps more attractive to be approached for outreach by other women, but having a male veteran conducting outreach could actually be damaging to an organization’s efforts, as it could bring up traumatic memories.

Partly due to the above-cited mistrust of veterans’ organizations, but partly due to their common status as caregivers, organizations also noted female veterans’ resistance to seeking social services generally. Several organizations indicated that women veterans would often avoid social services until their circumstances were significantly problematic. Representatives hypothesized that due to fear of losing their children and a stigma attached to some homeless facilities (that they can be unsafe), women veterans often viewed reaching out for help as a last resort. Female veterans were cited as more likely than males to seek out other resources such as family members or friends as long as possible, or likely to develop significant rituals of survival prior to seeking services. One staff member at Goodwill Industries of Houston described one such veteran’s daily routine for herself and her children: “She would take her children from the car to McDonald’s, they would wash up, and she would dress them for school. She knew that Kroger marked down certain things at the end of the day. She would go in with her food stamp card, she would buy these things. They would sleep in the car...She just had a system and she didn’t want to ask anybody for anything. Then when she realized, ‘These people are really here to help me,’ she’s been very, very successful. She got a \$60,000 a year job.”

The challenge of building trust does not end once female veterans walk into an organization, however, and requires a welcoming environment and warm client interactions. Entering a waiting room full of male veterans can often leave female veterans feeling unwelcome, if not unsafe, so several organizations surveyed have adapted separate waiting areas for their female clients, if not entirely separate entrances and exits, as well as separate service areas, creating service centers within centers. While the physical locations where social services are delivered can often feel stark and unwelcoming, organizations have learned that in order to effectively serve women veterans, they must ensure that their facilities are warm and inviting, and that interactions with staff convey the same. Leading organizations have made great efforts to hire all-female staff to serve their female clients. While it is nearly impossible to prevent a woman from ever interacting with a man throughout the service delivery process, the men in each organization must be trained to recognize and be sensitive to the unique challenges these women face.

Women veterans’ common status as caregivers often affects service delivery models and outcomes, as their needs tend to be different than male veterans who lack childcare responsibilities. Multiple organizations cited the need to provide child care on-site for mothers in their programs, or for those who could not do so, the need to provide vouchers for off-site care. Additionally, these caregivers tend to have a different focus than their single male counterparts. Where the men in workforce development programs, for example, are sometimes more concerned about matching a career with their skills or their desired professional identity (and therefore are willing to wait for the right opportunity), mothers are more focused on simply getting a job to take care of their family, then working to improve from there toward the end goal of the right career. That said, mothers taking care of children have little room to negotiate on wages if the job they are accepting is not going to provide enough money to support their family, or on the hours of the day they work if they do not have adequate child care options. Due to the difference in priorities between populations (i.e., the need to care for families), one staff member noted that “The females come in a lot more prepared. They’ll have all their documents ready for you. Some of the men, it’ll take three, four, five days to get their stuff...But [the women] have children. I mean they have families...It’s like kids are a motivation.”

Outside of workforce development models, women were cited as generally being more up-front with the challenges they face once actually enrolled in programs. A representative from Give an Hour shared that, “Women tend to — we know this from health in general — have different ways of reporting what’s concerning them or what’s happening, just like men and women talking to a doctor. Women are much more likely to sort of be self-revealing in, ‘I’m anxious, depressed.’ A guy is more likely to say, ‘I’m having trouble concentrating at work,’ or, ‘I can’t sleep,’ or something like that.” It seems to be a general trend that, despite the difficulty in coaxing women into seeking services, resources, and care, once enrolled, these women veterans take their participation very seriously and experience strong outcomes.

A final difficulty facing organizations serving women veterans is simply a consequence of demographics. As women veterans make up such a small subset of the population served – estimated at roughly 5-10 percent of those currently seeking services at the organizations included in this study – it can be difficult and/or inefficient to set aside resources and facilities specific to their care. For example, though Swords to Plowshares wishes to have greater capacity to house women, they can’t afford to set aside a certain quota of units for them if the units are going to sit unused. In response, Swords may simply identify organizations where women veterans may receive services but may not have self-identified as veterans, and train these organizations to ask “have you ever served in the US Military?” Many of these organizations have been surprised to find that the number of positive responses have been very high and that the impact of Swords’ training has been accordingly significant. Other organizations, such as Goodwill Houston, simply have difficulty referring women veterans to transitional housing in the community for the same reason – lack of available units. Most are only for men and, given the women’s history with MST, they will simply not be housed there. In response, Goodwill has established a special partnership with Titan Management, an agency which provides temporary housing for female veterans with children. Additionally, due to the lack of shelters for women, when a female veteran walks in, Goodwill staff automatically puts her in a hotel for the first seven days until a longer-term solution can be brokered, whereas a male veteran can be placed in a shelter. For those organizations which do house women veterans on-site in gender-integrated facilities, the use of security cameras and staff is critical in order to establish some sense of safety in the minds of the women being served.

Due to the rising number of women serving in the military today, the number of women veterans is correspondingly increasing. Organizations serving veterans must adapt their systems, processes, structures, and facilities, to respond accordingly to this increasing demand for services.

Further Insights

While all veterans must redefine a new post-service identity in some way, female veterans often must go through a process of reclaiming or redefining their femininity, as they have spent years – or potentially decades – serving in a male-dominated culture. In such a culture, displaying their femininity could have potentially placed them at risk for, at the very least, unwanted attention, and at worst, sexual harassment or assault. While nearly all female veterans must go through this process to at least some extent, those female veterans who are or have been homeless have faced such intense personal struggles that they have not had such an opportunity. For its female veterans, Goodwill Houston established a relationship with a local makeup company and, through the Women of Worth program, provided makeovers. As a staff member noted, “It might be not anything to me or to you, but to a person who hasn’t gotten their hair done in months — for one of the ladies, they cut her hair. They did her face. It was just phenomenal to see. Somebody [who staff member Zeljka Mijic] knows owns every King Dollar in the

city of Houston, and she gave the ladies all of these wraps. She gave everybody who came a wrap. She had a professional photographer and a red carpet. Who does that? Who gets to do that? So these people felt so uplifted. They each got a bag, and it had makeup in it, and lip-gloss.” While those serving male veterans may take into account other forms of establishing personal relationships with their clients, considerations such as these can set an organization apart in its ability to establish trust and therefore drive positive outcomes with female clients.

Finally, societal misperceptions regarding female roles in combat appear to have affected women veterans’ views of themselves and their service, which can pose a challenge to organizations serving them. While men and women have served alongside each other in combat throughout the conflicts in Iraq and Afghanistan (despite women being allowed assignment in combat billets), society maintains the perception that women are not allowed on the “front lines”. While potentially less of a challenge for female post-9/11 veterans who have seen combat, many female veterans do not consider themselves veterans because of these perceptions, and thus will not self-identify as veterans, even when asked. However, when asked “Have you served in the US Military?”, these same women will answer positively. More research is necessary to understand what contributes to a female veteran’s perception of herself and her veteran status, but organizations in the field should understand the complexity of this perception and adjust outreach efforts accordingly. It is likely more effective to ask the question, “Have you served?”, therefore than “Are you a veteran?” in seeking to identify those who may need assistance.

Implications for Funders

If ever there was an opportunity for impactful investment in the veterans’ space one could logically assume it’s in the area codified as “women veteran efforts.” Based on all available research and insight, funders might logically conclude that they are uniquely positioned to contribute positively to the health and well-being outcomes of women veterans. That assumption – and opportunity – deserves careful analysis if in fact funders are going to be able to generate returns on their actual investments serving women veterans. Funders would be well-advised at this point to study attempts made to attract women in general into better services, care and resources and then apply the unique contextual elements communicated within this body of research to expand upon those initiatives and achieve impact with their resources. Efforts to increase identification of women veterans coupled with presenting more culturally competent and gender-sensitive access to services, resources and care within inclusive systems of the same offer the highest potential to not only reach women veterans, but to address their unique concerns and needs as well. It is difficult to imagine a rate of philanthropic investment in “women veteran efforts” sufficient to warrant distinctively unique approaches addressing only the needs of women veterans when it is assumed that women veterans will comprise roughly 15 percent of the entire veteran population in the years ahead. That said, funders are advised to seek innovative ways to leverage their resources in complementary ways which can add value to addressing the unique needs of women veterans within service, resources and care delivery systems of care for women themselves and in ways which value their unique perspective and position as a result of their military experience.

FAMILY REINTEGRATION

Theme Overview

Issues relating to reintegrating veterans with their families are among the most pressing of concerns for this community. Post-9/11 veterans often face significant family-related transition and reintegration challenges, including redefining family roles, feeling like a guest in their household, and feeling like they lost a connection with spouse, partners, and children. Additional stresses placed on the family due to frequent moves during service – the constant need to rebuild social networks, changes in schools, the need for children to establish new friendships, etc. – can be exacerbated *after* transition from the military, disrupting the familiar “pattern” of PCS moves and the familiar social support network of the military community. A commonly overlooked challenge for military families is not only the transition of the veteran’s identity but also that of the military family – changes to the environment, norms, culture, and behaviors that veterans and their families must undergo to integrate into a new social society outside of the military. Holistic health and wellness begins with stability at home; for those seeking to ensure that post-9/11 veterans survive and flourish in society, the need to address their family-related challenges is imperative.

Seeking to confirm these assertions regarding the unique challenges facing veteran and military families, and to explore methods by which organizations in the field operationalize responses to them, the Bush Institute research team and partners created the strategic theme “family reintegration”, defined as: “the degree to which, or methods by which, an organization identifies post-9/11 veterans’ family-related reintegration challenges and tailors its programming and service delivery model to meet these needs.” The research team sought to understand the range of family-specific or family-related services provided by the landscape of organizations serving veterans, as well as accommodations or alterations made to programs and services delivered to veterans as a result of the issues faced by family members. Finally, the research team sought to identify unique or innovative approaches to serving veterans with family members or the families themselves.

Summary of Conclusions

The most impactful veteran-serving organizations are those that acknowledge and incorporate a focus on family, in the context of process, practice, and service-delivery.

A veteran and his or her family must be treated as one unit – they served together as one, and they transition together as one. The presence of family members during military service and post-transition both complicates the experience – providing additional responsibilities and burdens on the veteran – and enhances the experience – supporting resiliency and providing emotional comfort. Successful organizations learn to support the challenges that veterans’ families bring to the transition process, as well as leverage the strengths that they provide throughout.

Further Discussion: Trends and Observations in the Field

Across the 25 organizations included in this study, nearly every organization seemed to understand the integral and interrelated nature of family issues in the successful reintegration of veterans, acknowledging that healthy relationships at home can form the foundation for emotional and physical health, which then also drive a host of social and economic outcomes outside of the home. The majority of organizations understand both that the family’s situation affects the veteran’s issues – enabling or hindering their success – but also the inverse, that the veteran’s success or challenges (and, by extension, the services that each organization provides) affect the members of

each veteran's family. These organizations acknowledge the stresses that service, transition, unemployment, disability, mental health problems, and incarceration can place on a family. A staff member from Give an Hour explains this phenomenon: "Depression, anxiety, and secondary trauma gets passed on then to the kids and family. So it's like [the service member] comes back with whatever package that is. If they reintegrate successfully, everybody kind of [says], 'Okay,' juggles through that, gets through. If there's some problems that can't be easily resolved, that affects the relationship, and it's the domino... We want them as early as possible, but often it's not till there's been a divorce, or there's been domestic violence, or there's significant substance abuse."

In practice, a broad swath of organizations surveyed in this study referred to their commitment to families, or their "family focused" mission. While some organizations articulating this commitment did provide family-specific programming or supports, several did not, and did not articulate any family-specific accommodations for their veterans. It seemed that their family focus was simply rhetorical and/or conceptual in nature; they understood that the secondary or tertiary effects of the services they provided supported positive outcomes for veterans' families, and thus they made statements like "everything goes back to the family," or "we are a family-driven organization". Organizations which acknowledged the secondary, family-focused effects of the work that they performed – whether actually incorporating families into programming or not – generally tended to focus on issues supporting economic stability, such as workforce development, employment, or financial assistance, noting that financial stability is a critical driver of stress (or lack thereof), and therefore family stability.

For those organizations which *did* provide direct family support programs (either as their sole programming or in support of their primary mission), practices centered around supporting healthy relationships within the home, such as clinically-based PTS or relationship counseling, non-clinical (classroom-based) stress or anger management training, and good parenting techniques, noting that stress transference to children leads to a host of negative outcomes across the child's life course. While staff at these organizations acknowledged the sensitivity of calling someone's parenting skills into question, they look for subtle ways to incorporate elements of parenting training into the broader curriculum. These organizations also tended to provide childcare services on-site or provided vouchers for off-site care, as they understood that the veterans they served would never be able to achieve family stability, healthy relationships, stable employment, or financial independence if the time commitment of attending counseling or programming prevented them from attending appointments or classes due to child care requirements.

As a final note, several organizations offering programming to veterans, such as employment assistance, state that family members are included in their eligibility criteria, but that in practice very few, if not zero, family members were included in their population served. It was unclear as to whether this was due to lack of interest on the part of family members, but it seemed that these few organizations were largely focused on serving veterans, and only included family members in their eligibility criteria as an afterthought. In these cases, it did not seem that deliberate or extensive outreach to family members had been conducted at anywhere near the level of effort that these organizations had dedicated toward reaching veterans. It also did not seem that these organizations viewed this lack of participation by one of their eligible populations as a failure of the organization or as a negative mark as to the organization's performance.

Further Insights

While traditional views of a veteran's downward slide into homelessness tend to focus on antecedents such as unemployment, mental health challenges, and substance abuse, few conversations centered on the series of resources which would have to fail a veteran before he or she eventually ended up on the streets. In noting that women veterans tend to wait longer than men to seek resources, numerous organizations pointed out that women tend to seek the resources of family members and friends as long as possible before admitting the necessity of social services, whereas men tend to resist doing so. One organization, Three Hots and a Cot, asserted that while *many* veterans come with addiction or mental health issues, *nearly all* homeless veterans have become estranged from family members. This organization's assertion is family members serve as a veteran's last line of defense from life on the streets. In this way, reintegration with family is recognized as a crucial issue for homeless veterans, and a necessity for returning them to a healthy life. Three Hots and a Cot employs the services of a chaplain to help facilitate the reunion of families seeking services at their facility, and encourages their veterans to participate in AA and NA meetings hosted on-site to begin the healing process. While the conversation around veteran homelessness tends to include traditional focus areas such as transitional and permanent housing, workforce development, employment, and mental health and substance abuse treatment, Three Hots and a Cot's focus on family healing and reintegration adds a valuable insight to the discussion, as the health of a veteran's family is paramount to their long-term stability.

Implications for Funders

As perhaps the most amorphous of strategic themes included within this body of research, the term "family reintegration" is used to describe "the degree to which, or methods by which, an organization identifies post-9/11 veterans' family-related reintegration challenges and tailors its programming and service delivery model to meet these needs." From a funder's perspective, "family reintegration" sounds more like a task than a method, but it is within the context of developing methodologies to best-serve returning veterans and their families that we find the value in crafting investment strategies considerate of the spectrum of impactful programs and services that contribute to successful "family reintegration." Important to developing those impactful investment strategies is the role science, research and evidence play in determining which methods are known to contribute best to "family reintegration." And here – as the available research provides – is where funders would be best-served looking at the role the social or societal determinants of health and well-being play in contributing to successful "family reintegration." Within that body of research, funders are provided with the evidence-based 'building blocks' of ensuring successful lives – i.e. securing stable and meaningful employment, finding stable and safe housing, gaining access to comprehensive services, maintaining strong relationships with family and friends, etc. – and as a result, are presented with the methods by which their philanthropic resources can achieve impact serving returning veterans and their families. Evidence-based approaches and methodologies are a strong jumping-off point for funders but that's not to suggest they are the only jumping-off point funders should consider. The value of the philanthropic sector's efforts to seed innovation – 'try new things' – can be situated within methodologies supporting "family reintegration" in impactful ways when one considers the breadth and depth of programming approaches supportive of the role the social and societal determinants of health and well-being play in successful "family reintegration."

EDUCATION AND EMPLOYMENT

Theme Summary

Employment and education represent primary concerns of post-9/11 veterans. Importantly, both securing enduring employment and advancing the educational situation of post-9/11 veterans are linked to advancing a broad set of social, economic, and wellness outcomes; that is, securing employment and advancing the educational situation of veterans (particularly proximal to transition from service) serves to positively impact social, economic, and wellness outcomes, both near-term and over the entire life course. Indeed, a veteran's failure to educate him- or herself and, ultimately, find gainful and sustained employment upon transitioning from the military can lead to a detrimental "domino effect" which impacts financial health, family stability, feelings of isolation, mental health outcomes, housing stability, and more.

Through this effort, the Bush Institute research team and partners sought to understand key practices in education and employment among organizations providing these services, but also to understand attitudes among the community of organizations not specifically dedicated to education or employment services regarding these two concerns. As such, the research team designed the strategic theme "Education and Employment", defined as: "the degree to which, or methods by which, an organization identifies securing employment and advancing education as seminal concerns of post-9/11 veterans and ensures that its programs, services, and/or integrated support network advances these concerns for veterans it serves." For those organizations not designed specifically to deliver these types of services, the research team sought to understand if these organizations agreed with the assertion that education and employment are the building blocks, if not the causal nexus, to a successful and prosperous life outside the military environment. If so, the team then sought to identify what these organizations do to integrate this concept into their service delivery model, and what impact this has on the veterans they serve.

Summary of Conclusions

The most impactful veteran-serving organizations are those that understand that education and employment are the foundation of a successful transition, and act to advance educational and vocational opportunity for the veterans they serve (directly, or indirectly through partnership).

"Tough love" – giving veterans a clear sense of the hurdles they face and what they need to accomplish to achieve success – is vital, and organizations providing employment and education services must help veterans help themselves integrate into the workforce as model employees through individualized, high-touch training to give them the confidence they need to succeed. Sitting in the back of a classroom PowerPoint presentation about how to write a resume is simply not enough. All providers serving veterans must understand that employment and education are the bedrock of post-transition success – and supporting these two efforts prevents a host of other negative outcomes, as well as prevents the backslide for those who have already overcome challenges from their past.

Further Discussion: Trends and Observations in the Field

While the research team's intent was to explore the impact of education as well as employment, conversations with organizational leaders and staff focused almost entirely around employment programs and outcomes, and educational programs which were discussed were limited largely to vocational training programs delivered

on-site or at partner educational institutions such as community colleges. Very few organizations discussed encouraging veterans or their family members to pursue higher education (such as a bachelor's or master's degree), as the organizations surveyed tended to provide services to veterans in more immediate need, where veterans in a more stable place in life may be in a better position to take advantage of their education benefits in such a manner.

With regard to attitudes surrounding education and employment, however, those organizations providing employment services and those providing services for veterans suffering from decreased health and wellness broadly agreed that education and employment do indeed serve as the foundation for a successful post-service life. As described below, organizations felt that employment could serve as a preventative measure against a host of negative post-service outcomes, as in the "domino effect" mentioned previously. Organizations included in this study generally fell into one of three groupings:

Those with a Strong and Primary Focus. As part of the research design of this project, the research team intentionally selected several organizations which counted employment as their primary or sole mission focus. Some of these organizations focused on the most disadvantaged veterans in society – those who are homeless, struggling with substance abuse and mental health challenges, and those who are struggling with long-term employment. Other organizations focused on transitioning service members, and while willing to serve all ranks and specialties, found that their target population tended to be younger enlisted (E1-E6) service members, often specifically those who served in combat branches, as they tended to have more difficulty with the transition. It should be noted that, while not included in this study, organizations do exist which – while not explicitly designed to do so – often primarily serve junior and senior officers, as well.

It should also be noted that no organizations were included in this study which explicitly and solely focused on veteran education. While the Military Child Education Coalition was included, this organization will be focused on in the "Reintegration with Family" and "Social Connectedness" sections, as they do not focus on the education of veterans themselves but rather that of military children.

Those Seeing Education and Employment as a Bulwark. A second category of organizations do not provide employment services but count such organizations among their network of potential referral partners. Those who serve homeless veterans, veterans suffering from mental health challenges or substance abuse, or those who may face financial 'insolvency or bankruptcy understand that increased education and sustained employment prevent veterans from falling into these circumstances in the first place. As such, these organizations seek to include education and employment providers in their network of referral partners to prevent recidivism and to increase the overall wellness of the veterans they serve, as they understand the centrality of education and employment to a successful transition.

Those Who are Disconnected from the Process. A third category of organizations do not view education or employment as related to what they do at all. These organizations may list a few education or employment organizations in a resource guide they provide to their veterans, staff, or volunteers, but they do not see these issues as tied to their mission and do not actively provide referrals to organizations providing these services.

Among organizations providing education and employment services as their primary mission, the research team identified a series of leading practices which seemed uniquely suited to identify and mollify "pain points" in the process of transitioning from military service to civilian employment:

High Touch Models. The most successful organizations surveyed in this study worked tirelessly, one-on-one, with each veteran on resume writing skills and interview preparation. The research team identified a pervasive lack of self-confidence among veterans with regard to articulating their value to civilian employers, as well as a discomfort with “selling themselves”, which is associated with the culture of humility about one’s achievements bred in the military. Veterans – particularly junior enlisted – appear to require extensive coaching and mentorship to build the confidence necessary for a successful job search process, and this “life coaching” effort was described to the research team as, at times, exhausting. The best organizations are willing to put in the time to coach their veterans to success.

Provision of “Tough Love”. Both junior and senior veterans and transitioning service members can have unrealistic expectations about earning potential outside of the military as well as the length of time and effort required for the job search process. The most successful organizations are brutally honest with their veterans, providing clear-eyed information about the frustrations often associated with the online job application process and the common experience of having to enter the workforce in a position of lower responsibility and less pay than one’s experience in the military. This “tough love” appeared to be respected and appreciated by the service members and assisted in building trust between the service members and the organizations.

Training to be Civilians, or “Civilianizing”. Following from the above, leading organizations set clear expectations for veterans and transitioning service members regarding the new workplace culture they are about to enter, and the notion that leadership and communication practices common in the military will be ineffective and potentially viewed as offensive or off-putting in the civilian workplace. These organizations inform their veterans that the onus is on them to integrate themselves into the workplace, not the other way around.

Focus on Careers, not Jobs. Many organizations cited the notion that if a veteran is placed in an employment opportunity simply for the sake of earning a paycheck, but the opportunity is not a good fit for his or her skillset or interests, that veteran’s term of employment is likely to be short, and he or she is likely to end up right back at the organization’s doorstep. It is both in the organization’s and the veteran’s interest to identify a satisfying career path for the veteran rather than simply a job. Countless organizations surveyed cited this notion and strove to meet this ideal.

Establishing Networks of Employers/Creating Demand. While organizations cited the strong need to train veterans to communicate their value, translate their skills, and prepare for their new civilian roles (i.e. create an adequate veteran labor supply), nearly every employment-focused organization articulated the need to create demand among employers through cultivating their own network of employer partners in which to place veteran clients. Whether serving homeless veterans – and therefore identifying employers who are willing to take on the risk of veterans with challenging backgrounds – or former senior officers, nearly every organization surveyed spent considerable effort to either fill a database of partners that their veterans could search themselves or identified partners to directly link their veterans to specific opportunities.

Seeking Opportunities in Emerging or Growth Industries. Associated with the above, while many organizations develop networks in their communities, leading organizations intentionally research growth industries to identify opportunities where there will be lasting high-demand for employees. Some

of these organizations even identify specific industry partners and work with local community colleges or other educational institutions to create cohort training programs to place veterans into specific positions upon graduation. This has the added effect of achieving efficiency for the agency, enabling them to place many veterans at once rather than identifying individual training paths for each veteran, hoping to find an employment opportunity on the other end.

Providing Industry Standard Certifications. Also associated with the above, some organizations provide industry-standard certifications for veterans seeking specialized training, such as those in the information technology sector. Some of these veterans may have experience in these fields in the military, but simply lack the necessary certification to get hired by a civilian employer, so the non-profit organization fills this critical gap.

Providing Temporary Employment Opportunities. For some veterans, while living in transitional housing or while attending a job training program, they still need a paycheck to make ends meet. A few organizations surveyed provided temporary employment through contracts they possess during these “bridge” times until the veteran could locate a more permanent opportunity.

When delivering these services, organizations have learned that no two veterans are the same. Differences in rank, military role, gender, and service era all drive service delivery models, strategies for engagement with veterans, and potential outcomes for each individual. Example lessons learned from each population include:

- **Senior vs. Junior Service Members within the Post-9/11 Generation**

Some organizations have identified that senior veterans – senior non-commissioned officers or senior officers – tend to have high expectations regarding the value that civilian employers will place on their military experience and that they will be able to select employment opportunities at will, whereas in reality they most often must learn to translate their skills and sell themselves just like the majority of other veterans in the market. Organizations have learned that they must temper the expectations of these leaders as they enter their job search process.

Conversely, junior enlisted members appear to have an opposite set of concerns surrounding their level of experience and education, and are often concerned about their lack of a college degree. These veterans often require much coaching and encouragement when entering the job search process, such that they learn not to fear not being accepted by a company but rather learn to view the value they bring to a company and be proud of what they have accomplished.

- **Combat vs. Noncombat Roles**

Multiple organizations noted the heightened difficulty for service members who served in combat roles versus those who served in support roles such as logistics, finance, or communications to translate their skills and market their abilities to employers. Combat veterans require more coaching in terms of identifying the soft skills they have learned and demonstrated through their service, despite the fact that they are strong and significant assets to organizations which may consider hiring them.

- **Men vs. Women**

One organization cited the notion that many female veterans are single mothers, while single male veterans tend not have children to care for. As a consequence, male veterans have more freedom

to be patient and discriminating when seeking a “career”, whereas female veterans often accept a “job” in order to make ends meet and provide for their children, and more incrementally work their way toward a more fulfilling career over time.

- **Pre-9/11 vs. Post-9/11**

Numerous organizations noted that the generation gap between pre-9/11 veterans and post-9/11 veterans required their organization to develop completely separate training protocols, employer networks, and wage targets for younger veterans as compared to their older, pre-9/11 clients. This is driven in part by the fact that today’s military is supported by technology to a significantly greater degree than decades ago, and younger service members must be familiar with the use of such systems, making them more highly qualified for today’s economy – and thus marketable for higher-paying jobs.

Organizations also noted that where younger clients are navigating the employment landscape for the first time and thus searching for a meaningful career to match the meaning of their military service, older veterans are likely suffering from long-term employment or layoffs due to structural shifts in the economy and thus may need retraining to simply earn a living wage which will sustain them until retirement.

Further Insights

Multiple organizations expressed frustration that while countless corporations in the United States have made significant veteran hiring commitments, veterans are still struggling to find opportunities at these companies. While CEOs make strong public statements of support for veterans, it appears at times that this does not reach the level of human resources managers, where hiring actually occurs. The research team was told multiple times that they still fight the problems of overcoming stigma of PTSD and other mental health challenges, as well as the difficulty of translating skillsets – or even getting HR professionals to value military experience as on par with a bachelor’s degree. When comparing a fully-qualified non-veteran to a mostly-qualified but trainable veteran, it was suggested, the hiring manager will almost always choose the non-veteran, independent of the company’s stated hiring commitment. Organizations expressed frustration that all it would take is for these hiring managers to take a chance on their veterans and they would be surprised at the value the veteran would bring to the company. In response, several organizations are developing training programs which they hope to market to human resources departments to bridge this information and cultural gap.

As an additional insight, some organizations have identified that certain employment opportunities are a better fit for veterans than others – and that these opportunities are the ones which mirror the military’s career progression systems. Where veterans are used to entering an organization with a set of basic training, then progressing through the ranks of that organization by receiving advanced training at each step, corporations which offer an onboarding and training process, along with iterative training throughout a veteran’s career tend to be a good fit for veterans. Likewise, where in the military a veteran would be welcomed to a new military post by a sponsor or sponsor family, helping him or her get acquainted to the new unit, veterans perform best in organizations with veteran affinity groups with similar processes to integrate them into the company. Organizations providing employment services to veterans would be wise to identify companies which have these procedures and structures and encourage veterans to consider them as potential opportunities, as employment at these organizations would likely increase persistence and satisfaction.

Implications for Funders

Of the thematic opportunities for funders to consider when designing and deploying veteran and military family-facing investment strategies, efforts to fund impactful education and employment approaches, services and resources have proven difficult to largely observe beyond national efforts. When juxtaposed against the relative importance these two themes purport, the research team's discussions with providers revealed a shortage of investment opportunities at the regional and local level to fund what reportedly are the central building blocks of successful transition and reintegration. As such, we note the tremendous opportunity for funders to learn from national-facing efforts to improve upon the education and employment situation of returning veterans and their families and take a more localized, or community-based approach to supporting education and employment goals of the cohort. Recent localized efforts positioning education and employment resources within continuums of services, resources and care perhaps offer funders the investment opportunity they've been looking for. When viewed collectively, these networked approaches are beginning to shape inclusive approaches built solidly around individual organizational contributions in a "sum-of-the-parts" value proposition for communities whereby the contributions of veteran-specific education and employment resources can be introduced at appropriate scale and scope. Difficult to conceive currently beyond very isolated attempts (i.e. campus-by-campus or company-by-company), when combined in more of a systems approach, these same resources can be viewed as value-added propositions and contributory toward broader, measurable investment opportunities for funders. Research is just beginning to shed light on these more social or societal determinants of health and well-being and placement of services and resources aimed to achieve impact oriented on these goals is helping funders find value in developing investment opportunities shaped to value individual organizational contributions (i.e. education and employment-based services) in more systems-based approaches to serving returning veterans and their families.

MEDIA ENGAGEMENT

Theme Overview

More than almost any other story-telling medium, popular media is positioned to play a powerful and enduring role in shaping the cultural narrative that will come to define this generation of veterans. An ongoing dialogue with popular media, focused on leveraging the medium as a means to bridge the civilian-military divide, is essential to whole-of-the-nation engagement in the post-service concerns of OEF/OIF/OND veterans.

In exploring this theme, the team sought to understand the level to which the organizations surveyed established communications infrastructure, the sophistication of their strategies, the methods of outreach and communications and, most importantly, their contribution to or influence on the local and national media's reporting and commentary regarding the veteran and military population.

Summary of Conclusions

The most impactful veteran-serving organizations are those that understand that engagement with the media represents an opportunity to inform and cultivate a positive narrative to both serve both the veteran and the veteran-serving organization parties.

Most non-profit organizations serving veterans lack the resources to meaningfully engage with the media – to tell their stories at all, let alone to influence this narrative broadly. We found that large, nationally-prominent non-profit organizations did tend to have a broader communications capacity, however, and thus a responsibility to

attempt to shape this misleading narrative. Doing so improves outcomes not only for the veterans and families they serve, but also for the entire veteran and military family community.

Further Discussion: Trends and Observations in the Field

One component of the research team's original focus was the 25 surveyed organizations' motivation to shift and capability of informing and transforming the media's hero/victim narrative. However, this also evolved to include learning about communications and media-relations strategies and methods that make organizations successful, hoping to identify ways which might impact service delivery models and outcomes for the veterans themselves.

In terms of relationships with traditional media outlets, few organizations had direct ties or contacts, or possessed the ability to shape a media narrative, as the research team set out to understand. While a few organizations had established relationships with local cable or news outlets to feature a weekly or monthly feature on a veteran they served or a veteran in the community, this was extremely rare. As a research finding, therefore, the ability to counter the media hero/victim narrative on the part of veteran-serving non-profits in a direct way is largely nonexistent. Rather, organizational efforts to do so are primarily driven by communications with donors, the communities the organizations operate in, and other various stakeholder groups through the organization's disparate communications strategies.

Through conversations with leaders in the field, researchers learned that a broad array of communications sophistication exists among organizations serving veterans and their families. While nearly every organization possessed a social media presence of some kind – if not solely out of the sense that “we should” – as well as at least an e-mail or print newsletter for donors, the presence of other communications methods was extremely broad. The research team found that, perhaps predictably, media and communications sophistication are generally (though not exclusively) correlated to the financial strength of an organization along with, at times, its national prominence (as opposed to its community-based nature). The most sophisticated organizations appear to have a robust communications and media relations strategy, including some or all of the following: a staff member specifically dedicated to media relations, communications, social media, or outreach; differentiation of messaging to various stakeholder audiences, such as donors, partners, and the veterans the organization serves; and differentiation of messaging content and style through the various media types – print, television, web, social media, direct mail, e-mail etc.

The most sophisticated organizations surveyed leverage one strategy (social media, e-mail, op-eds, national news) on a national scale for strategic purposes (positioning themselves as a thought leader, using communications for stewardship/fundraising, or leveraging their platforms to develop partnerships), and a separate strategy (using print and local media, for example) for “tactical” purposes such as outreach to veterans and advertising for enrollment in specific programming. Additionally, in the effort to position themselves as leaders in the field, more sophisticated organizations sometimes disseminate emerging research and news stories associated with their practice (veterans homelessness, health and wellness, or employment, for example), along with the more common distributions of organizational announcements, newsletters, and event information. Further seeking to position themselves as thought leaders, CEOs and presidents of some nationally-prominent organizations have authored opinion pieces in outlets such as the *New York Times*, *Washington Post*, *Wall Street Journal*, or *Huffington Post*, while some community-based organizations have columns in local papers – each advocating for support for veterans issues, if not for their organizations specifically.

Varying levels of sophistication exist with regard to web presence – both in design, use, and management. While some organizations use their websites for informational purposes only (to describe programming, eligibility criteria, list key leaders, and board members, etc.), others have the functionality necessary to enroll participants through their website, as well as accept donations, and field web-based queries. Following from the discussion above regarding thought leadership, some organizations host blogs on their websites which discuss veterans issues broadly, or which feature testimonials from the veterans they serve. Several organizations discussed the use of analytics to track volume, origins, and patterns of web traffic, though, again, this generally correlated with level of funding and reach of the organizations as a proxy for level of communications sophistication.

In addition to the strategies referenced above, a few common challenges emerged among the set of organizations reviewed. In concert with the notion of sophistication being correlated with funding, countless organizations expressed frustration at the tension between allocating resources between administrative costs (which they viewed as including communications infrastructure) and programmatic costs. While many grants establish restrictions regarding administrative cost ratios, numerous organizations expressed the belief that the ability to invest in greater communications infrastructure would bolster their fundraising ability, as they would have greater capacity to articulate the good work they were doing and the success stories of their veterans. In fact, as a response to resource constraints early in their organization's development, Team Rubicon described their deliberate choice to invest in a communications team prior to hiring a development team, and has focused significant attention on articulating their story. This decision has generated a significant enough return on their investment that they have only recently – four years later – hired a development team.

A second frustration arose out of the sheer prevalence of actors in the veterans' services landscape. Organizations expressed a constant need to build brand awareness and to "rise above the noise" of the countless thousands of other non-profit organizations seeking to provide services to the same population of veterans. With scores of employment organizations sharing similar names – including the words "Hero" and "Hired" for example – it can be incredibly difficult for organizations to set themselves apart as those who provide expert advice and high-quality services. Without a robust communications infrastructure and significant resources to dedicate to a media and communications effort, great organizations appear almost indistinguishable to veterans from those which provide low-quality services. These same organizations fear changing their names to set them apart because they do have years of brand recognition with their stakeholders which they fear they would lose. This challenge is, therefore, damaging to both veterans and those wishing to serve them.

Further Insights

While likely applicable to many organizations, Hire Heroes USA described to the research team a different type of communications challenge – the tension of finding the "right amount" of outreach to expand awareness among funders but not overwhelm themselves with demand among veterans. While this may seem counterintuitive, this organization seeks to provide a high-touch model and can only handle a certain number of veterans per week without, they feel, degrading the quality of services they provide. In order to expand the number of veterans they could provide these services to, they would need to increase outreach to attract new donors – but this outreach could increase demand to a point they could not handle. COO Nate Smith describes: "We have avoided marketing campaigns because we don't want a slew of veterans coming to us that we can't help. But at the same time, there needs to be awareness out there so people identify that you're an organization they want to fund."

Implications for Funders

Best-viewed as an enabling “tool” within the toolkit itself, the opportunity for funders to support veteran and military family-facing non-profit organizational use of the media cannot be overstated; the question becomes “how best to do so?” From the research team’s perspective, the strategic opportunity to help shape a positive narrative around the post-service life course of veterans and their family members is appealing but lacks a compelling, common agenda by which to build measurable impact around. Non-profit providers serving veterans and their families describe themselves within the current boundaries of what they do in their communities (i.e. “we’re helping to end veteran homelessness,” “we’re helping address the high rate of veteran unemployment in our community – we find veterans jobs”) rather than incorporating that simple message within more strategic and broader messaging attempts and use of media itself. Our message to funders is rather simple: in attempts to develop sound strategy to support veteran and military family-facing efforts in communities, asking that a portion of their resources be used to communicate and engage positively with members of that community should be central to the use of resources made available by the funder.

LIFE-COURSE TRANSITION

Theme Overview

Research indicates that post-9/11 veterans – particularly the youngest veterans – are generally unprepared for the transition from military to civilian life. Results from a survey of national thought leaders indicate the need for further improvement of DoD’s Transition Assistance Program (TAP), suggesting that post-9/11 veterans have not been adequately prepared to make informed decisions related to employment, education, family concerns, and community reintegration. While a great many veterans eventually make successful transitions, the consequences for those who do not are severe (including unemployment, homelessness, significant financial hardship, poorer health outcomes, and even suicide).

As responsibility for management and execution of the TAP program falls with the federal government, the research team sought to understand the role of the community of non-profit organizations serving veterans and their families in preparing veterans for the transition alongside the role of the government. Toward this end, the research team created the strategic theme “transition to civilian life”, defined as “the degree to which, or methods by which, an organization’s programs and services ensure that veterans and their families are adequately prepared for post-service life, such as readying them to make informed decisions, related to transition, employment, education, family concerns, and community reintegration.” The research team explored the ability of non-profit organizations to affect the transition, causes and contributors to a successful or unsuccessful transition, and effects of an unsuccessful transition on the services that organizations provide, so as to inform services and resources provided at the point of transition.

Summary of Conclusions

The most impactful veteran-serving organizations are those that recognize that transition from military service spans multiple social, economic, and wellness concerns, and as such adopt a whole-of-the-person approach to service-delivery.

Incredibly few organizations profiled were engaged with clients prior to their transition from military service – but almost all indicated the critical need for such engagement. The reality of this space is that most veteran-serving organizations serve the purpose of addressing a ‘failed’ transition – dealing with the fallout once poorly-prepared and ill-informed veterans and their families fall on hardship when facing the realities of post-service life. A major lesson learned through this process was that the wealth of knowledge acquired by the organizations surveyed through years or decades of “picking up the pieces,” could be leveraged by the federal government toward designing a better transition process, but no process currently exists to do so.

Further Discussion: Trends and Observations in the Field

Representatives and leaders from organizations surveyed consistently and strongly indicated that they felt the transition to civilian life should occur *before* service members leave the military, and the great majority of organizations felt that they were not positioned to impact service members at or before the point of transition due to lack of access to service members at this stage of life. Many organizations stated their belief that the Transition Assistance Program (TAP) is inadequate, and some have either established relationships on local bases with TAP managers to either inform them of their services or to gain access to students to inform them of their services directly. Several of those organizations who haven’t gained access are seeking to do so. While so many organizations included in this study were not positioned to serve veterans at or prior to the point of transition, they were able to provide considerable insight into the components necessary to prepare service members for a successful and smooth transition to civilian life. Those rare organizations which do have access to service members on military installations would benefit from the insights gained during this review.

Broadly, these comments supported the notion that veterans suffer from a lack of adequate information to make critical decisions when making the transition. Guidance on choosing to pursue higher education in preparation for the job search process, as opposed to immediately seeking employment; deciding what course of study to pursue and what institution to select; and how to finance one’s education (depending on GI Bill eligibility) would be critically beneficial. Throughout this study, many organizations have encountered veterans who either lack necessary educational credentials for the employment they seek, have pursued majors which leave them ill-prepared for seeking employment, or have spent considerable sums of money at institutions which either lack accreditation or are poorly regarded among the employer community.

Additionally, organizations noted the need for employment counseling which would support placing veterans in sustainable, satisfying careers rather than simply wage-paying jobs, as the cycle of turnover in unsatisfying positions fails to provide long-term stability which veterans need. Such counseling could involve vocational aptitude and interest assessments as well as mentorship opportunities with professionals in potential fields of interest. Additionally, to avoid the pitfall of veterans making post-service choices based solely on geography, career counseling was suggested to include labor market analysis to coach veterans on economic possibilities in their geographic areas of interest, such that they have realistic expectations as to what industries are available and how difficult it may be to get hired, given their relevant levels of experience. Homelessness providers

included in this study noted a consistent trend of veterans coming to their cities with the general impression that there were jobs to be had (based on hearsay from their peers), only to find significant barriers to entry in the local labor market. After months of job searching and depleting their resources, these veterans found themselves on the streets and seeking services from homelessness providers.

Further, organizations recommended that veterans be provided with financial assessments, counseling, and training prior to transition. Such resources would inform veterans of the differences in financial obligations of service and post-service life, assess service members' current financial position, and provide them with training as to how to manage their finances so as to enable financial stability post-transition. Provided early enough prior to separation from the military, such training would enable veterans the opportunity to adjust spending habits and place themselves on a more stable financial footing in advance of their transition. Organizations consistently noted that veterans are surprised by the slew of additional costs associated with civilian life which the typical military family living on-base does not face, as well as the financial downfall associated with failure to plan for these costs. Additionally, where the military adjusts pay, indexing to cost of living, when service members are reassigned to more expensive locales, service members often were found by organizations to be surprised by the financial impact of making geographic decisions without accounting for cost of living. Of note, one non-profit included in this study – Operation Homefront – provides these services, as described below.

To enable all of the above, organizations emphasized the need for service members to be provided with extensive pre-transition counseling regarding their awareness of and assistance in applying for federal benefits. Whether understanding their eligibility for health care at the Department of Veterans Affairs, applying for disability compensation, or taking advantage of the Post-9/11 GI Bill (among many other benefits), ensuring that transitioning service members have a thorough understanding of the robust system of support provided by the federal government was deemed critical by organizations in the effort to enable their post-service stability and success.

The need for all of the above cited information and preparation to support effective decisions is supported by a common set of unrealistic or uninformed expectations held by veterans and noted by countless organizations included in this study. Multiple organizations cited the challenges that their veterans faced and described the notion that not only did these former service members feel that they were more valued within the military – because they were getting paid considerably more – but that in the civilian world they had lost access to the commissary, the gym on base, on-post housing, etc., which were resources they had come to rely upon. Through her own transition experience, one veteran staff member described the drastic contrast of having everything provided by the military to having to survive outside of such a robust support system: "I was like, 'God, I need my commissary.' I went to the gym for free. I didn't pay a gym membership. I mean, we went to the movies for free, the soccer was on base, the Girl Scouts, the Boy Scouts, and the school was on base. So my kids have never ridden public transportation."

For many veterans, particularly career service members, accepting a civilian job will mean a decrease in income compared to what they received in the military. This requires additional career counseling until the service member is ready to lower their expectations in regards to income. There is also a need for career counseling to learn job application skills (e.g., preparing a resume, learning interviewing skills, having an appropriate wardrobe). One staff member noted, "The people that we see are ill-prepared. They just weren't [ready]. I talk to guys every day all day that say, 'I just didn't know it was going to be this hard. They said, 'Just go, get out there, and you'll find a job. There are plenty of intervention programs out there. There are plenty of folks out there to

help you. Go get your job.” And it’s not. It’s a culture shock. They get frustrated really easy. If it’s not there in a week, they’re frustrated.”

Organizations noted that this set of assumptions that their clients have when leaving the military – that certain things will be provided to them, that they will get higher wages than they really will, or that finding employment will be easier than it turns out to be – also carries over to making assumptions about interpersonal and legal relationships which can be financially damaging. One staff member described the culture of trusting one’s command when they ask a service member to sign a document, and how that trust can fail a veteran later in life: “When you’re getting ready to deploy, you’re filling out how many sheets of paper? So those guys are signing. A lot of the company commanders are saying, ‘Hey, hurry up and sign this. Sign the care plan.’ They just put whatever because they don’t really [think about it] — every time you go to medical or something you’re just accustomed to signing documents and just sending it back. You can trust that in the military because you have that S1 or somebody that’s going to take care of the paperwork. So you know that it’s going to be taken care of. But in the civilian sector I tell these guys, ‘Guys, you’ve got to read. You can’t just assume that these folks have got your best interests at heart. You’ve got to take responsibility and take ownership.’”

This notion of being blindsided by civilian culture can leave many veterans feeling culturally and socially isolated. Numerous organizations described the challenge of veterans having to redefine their identity in the civilian world, removed from the norms, ideals, rituals, and values that they once held so dear, as well as the team they once felt so strongly a part of – the military as a whole. Dr. Irina Komarovskaya of the Steven and Alexandria Cohen Military Family Clinic explains: “I think a big [transition] is kind of the social transition, because in the military people are very, very closely knit together, and you have a really strong support system. You have your buddies, and you know people are going to be there for you no matter what. I think when a lot of vets come out, we hear a lot that they feel very alone and sort of isolated in the way we interact together [as civilians]; there’s a lot more personal distance. I think that is a big one that comes up for them – it’s a different culture. And it can never be replaced really. A lot of times, time after time it’s just this longing for that connection, but it really can never be replaced.” This notion is echoed by organizations like Team Rubicon and Team Red, White, and Blue, both of which serve as proxies for the team- and values-based cultures that veterans had to leave behind when departing military service. This problem with identity and social disconnection cannot be eliminated, but could potentially be mitigated by coaching veterans to be aware that it is coming and ensuring that as they make choices about where to move after service, they pick a location where they have strong social supports as well as a positive economic outlook.

Finally, organizations articulated concerns that the transition process begins too close to a service member’s actual separation date from the military, as by the time the process occurs, service members are so eager to leave that they pay little to no attention in TAP classes and fail to make adequate preparation. This rush to leave starts in motion a series of hasty decisions which have avoidable consequences, potentially leading veterans down a path-dependent road toward serious trouble. Organizations noted that, while the amount of time varies for each individual veteran, for those who end up seeking the assistance of social services, (anecdotally) this process takes roughly 3-5 years to unfold. Those who reach out to these organizations often do so at a time of great need (homelessness, danger of homelessness, etc.), rather than doing so when problems begin.

Additional Insights

Hire Heroes USA CEO Brian Stann articulated the notion that an effective transition, particularly into stable employment, can fulfill a veteran's need for a sense of mission, making him or her feel like a contributing member of society, helping them to move on with their life, and supporting a host of other health and wellness outcomes. His comments are worth inclusion here:

“When the transition fails, that’s when veterans go off to dark places. When they go back home or they’re out there alone, they leave, they’re no longer in that recovery unit, their brothers and sisters are gone, they’re on their own, they can’t pay their bills, they don’t have any responsibility anymore, their self-esteem goes down, and now we’ve got 22 veterans a day taking their own lives. I mean, it’s unbelievable and then you’ve got substance abuse, alcoholism, and all these self-medicating ways to deal with the problems. A lot of those things go away when that transition is effective and you go from, ‘Hey, here’s my mission now’ to ‘Wow, I’ve got this whole new mountain to climb. I’ve got this new job,’ — we all get excited for new opportunities. You get re-motivated, reinvigorated, and when you can create that for them and effectively have the transition, these other things go away. Their injuries no longer define them. Their combat deployments no longer define them.

We run into a lot of veterans now who haven’t deployed in eight years but it’s still all they talk about. It’s what defines them. Every day they wear a different t-shirt about, ‘Hey, I served so you should shut the F up,’ and you know what I mean, this kind of thing. They haven’t found anything else yet that they can grab onto. And there’s nothing wrong with being proud of your service, that’s great, but if the only thing that’s going to define you is that you were a combat veteran, sometimes that can lead to a very narrow life in anger, that chip on your shoulder, and that effective transition can get rid of all of that and gain the perspective you need to live a great life. I mean, what we’re ultimately trying to do is see these men and women through so they can live the American dream that they fought for.”

Implications for Funders

Making the “transition to civilian life” assumes a degree of individual preparation goes into the physical act of separating from military service; hence the use of the word, “transition,” implying something of an orderly progression from military service to post-military service life. In striking comparison, the act of separating from military services might be more factually phrased as simply “ending military life,” for the facts reveal a majority of returning veterans believe they are unprepared for their “transition to civilian life.” For community-based non-profit organizations attempting to assist service members with “transition,” their “transition to civilian life” is widely assumed to begin once individual service members have already separated from military service. For funders, attempting to support service members’ successful “transition to civilian life” through impactful investment in non-profit organizational programming designed to help them has largely proven to be “easier said, than done.” Transition is principally the government’s responsibility to affect; therefore, few funders have even attempted to develop impactful investment strategies oriented on “transition,” opting instead to focus on investment opportunities which begin with helping recently *transitioned* veterans and their families. That’s not to suggest some haven’t tried; they have, but with little impact to show based on those efforts. Whereas philanthropy has attempted to team with government to support returning veterans’ “transition to civilian life,” government as a partner in supporting that “transition” has proven elusive. As a means of re-framing the philanthropic interest in seeing the nation’s veterans successfully “transition to civilian life,” the research team suggests two emerging opportunities for funders: The first would be for the philanthropic community to serve as a funder of increased measurement and evaluation of efforts underway between the non-profit sector and government to demonstrate sufficient return on investment to form and sustain impactful public/private partnerships. Measuring outcomes – through thoughtful, well-designed Measurement and Evaluation – is the first step in creating impact. Secondly, the research team suggests that funders can play an increasingly important role in supporting further research itself into the pre-determinants of successful “transition to civilian life.”

APPENDIX I. EXISTING NON-PROFIT EVALUATION TOOLS

There are a variety of ways that funders can gather information to make award decisions. Presented below are of some of the available resources and tools available to assist funders with assessing generic organizational efficiency, effectiveness and performance. The last two organizations do specialize in veteran-serving non-profits.

NON-PROFIT DATABASES AND RATING SYSTEMS

GuideStar

GuideStar is both an 501(c)(3) organization and an online database of non-profit organizations. GuideStar collects information about non-profits and houses that information on a website, from which various functionalities can be accessed free of charge or via paid membership. Their mission is to bring transparency to the non-profit space by allowing users to benchmark, view compensation information and verify the legitimacy of organizations, all of which could be very useful to funders, but for grant makers in particular. GuideStar online allows funders to perform necessary pre-grant due diligence, such as examining required filings (IRS Form 990s) and audit reports. Information such as the organization's structure, including board members and key personnel, are all available in one place, via online search. In addition, GuideStar allows users to compare charities' financial data, fiscal years, missions, executive salaries and other data in a side-by-side format. Users can also review charities based on personal knowledge of the organization, as well as information about impact. This information is obtained by surveying thought leaders in the non-profit space in a manner similar to the Delphi method of forecasting. While thought leaders cannot respond to surveys for the organizations in which they work, the method of obtaining the impact feedback is still something of an "insider's" perspective; survey participants are people already working in the space and not necessarily the people served. A paid membership is required to access certain functionalities, including access to searches that allow funders to verify current charitable status and other things such as executive compensation reports.

American Institute of Philanthropists/Charity Watch

Charity Watch (formerly the American Institute of Philanthropists) is a 501(c)(3) organization that considers itself to be a "charity watchdog," or an organization whose purpose is to protect donors from illegitimate or in some cases highly inefficient charities. Charity Watch reviews financial data such as financial statements, audit reports, and IRS Form 990s to determine financial (in)efficiency. Their review considers metrics such as years of available assets, cost to raise \$100 and percentage of funds spent on charitable purpose. The willingness of the non-profits to provide documentation is also considered in review. Charity Watch's primary strength is that their system is easy to understand. Star ratings are assigned that could help guide a donation decision. Charity Watch's list of rated non-profits can only be accessed for a fee. One of the organization's goals is to expose those that are highly inefficient or even fraudulent. Finally, they focus almost entirely on financial efficiency measures, which are insufficient alone to make informed donation decisions.

Charity Navigator

Charity Navigator is both a non-profit quality designation and a non-profit itself. The goal of Charity Navigator is to evaluate the financial health of 501(c)(3) non-profit organizations and to assist funders and donors in making informed decisions about how and where to spend their money. Organizations are defined by one of 34 major “causes” – such as animal rights or homelessness. CN then reviews the organization and gives them a rating, meant to be indicative of the organization’s financial health. The star rating system is easy for the average person to understand. It should be noted that more often than not, the organizations themselves do not initiate the evaluation, which could be interpreted as a plus for the funder, since CN is an independent third party and the evaluation was not initiated or paid for by the organization.

Recently, the organization unveiled Charity Navigator 3.0, which evaluates organizations along three metrics:

- *Financial* – This area deals largely with use of resources and financial growth. CN considers various ratios to determine the organization’s efficiency and capacity. Charity Navigator acknowledges that different types of organizations have different types of costs. For example, museums have higher administrative costs than other charities. CN has defined ranges for organization types that it uses to account for such variations. This is one of the primary strengths of CN that is not necessarily shared by the other tools discussed here.
- *Accountability & Transparency* – CN distinguishes between “accountability” and “transparency” by defining accountability as the willingness to explain actions to shareholders while transparency is the willingness to make critical information available. CN evaluates the clarity of fundraising materials, public availability of information and ease of access to that information. They use the Form 990 and the organization’s public website to determine the governance structure of the organization (independent board, etc.), results of financial statement audits (“clean” audit opinions) and other information that would suggest good management of the organization.
- *Results Reporting* – CN 3.0 adds a third dimension from the previous evaluation methodology: Results Reporting. The goal is to see charities tracking and reporting on outcomes, showing donors that they are meeting their objectives with the money they’ve received. CN acknowledges that many charities are just in the beginning stages of doing this, and are struggling to define metrics and outcomes. As such, the plan is to collect this information as it becomes available, with a target of beginning ratings in this area in 2016.

Charity Navigator only evaluates organizations that file Form 990s, and excludes the following types of organizations from review:

- *Private Foundations*
- *501(c)(4) non-profits*
- *Organizations that file Form 990-EZ*
- *Organizations with less than 7 years of Form 990s*
- *Charities that receive most of their funds from government grants*
- *Organizations not registered with the IRS*

These scope restrictions rule out some of the very new non-profit organizations that have only been operating for a few years, as well as organizations with larger, government-funded programs. Some of these organizations could be just as likely to be impactful as older, privately funded 501(c)(3) organizations and are also likely competing for the donor's dollar, despite their age or their funding mix.

Approximately 7,000 charities are currently rated by CN, while it is estimated that there are nearly 2.3 *million* charities in the United States.

STANDARDS, AWARDS, AND ENDOWMENTS

Better Business Bureau Wise Giving Alliance

The Better Business Bureau Wise Giving Alliance (BBB-WGA) established a set of 20 standards in 2003 to assist donors in identifying charitable organizations to donate to. It provides general guidelines that could be applied to any non-profit in areas such as oversight and financial accountability. These standards are non-profit specific and, though intended for use by donors and grant-making organizations, could be useful to non-profits seeking to improve their operations. BBB-WGA standards emphasize strong management, verifiable information that should be readily available to donors and the organization's operating effectiveness, which is defined by the organization's own metrics. The standards are broken into the following sections:

- *Governance and Oversight* – This section of the standards seeks to ensure that the volunteer board is active, independent and free of self-dealing.
- *Measuring Effectiveness* – This section seeks to ensure that an organization has defined, measurable goals and objectives in place and a defined process in place to evaluate the success and impact of its program(s) in fulfilling the goals and objectives of the organization and that it also identifies ways to address any deficiencies.
- *Finances* – This section of the standards seeks to ensure that the charity spends its funds honestly, prudently and in accordance with statements made in fund raising appeals.
- *Fundraising and Informational Materials* – This section of the standards seeks to ensure that a charity's representations to the public are accurate, complete and respectful.

A potential limitation of the standards is that they do provide a "one-size fits all" approach to due diligence, which may not adequately account for differences between costs in program areas. For example, a housing organization may spend more administratively than a workforce development organization, but the same efficiency standard is applied to both. BBB-WGA addresses this, however, by also being an accreditation service. They perform the evaluation according to these standards and provide indicators of whether standards were met, not met, or there was insufficient evidence to determine the organization's status in that area.

Still, the lack of accreditation could be misleading, as the process is initiated by the non-profit itself. Should a non-profit choose not to seek accreditation, or not have the resources to expend in obtaining accreditation, they may be passed over by funders even though their organizations could be as worthy as an accredited organization.

Malcolm Baldrige National Quality Award

The Malcolm Baldrige National Quality Award (MBNQA) is an annual, Congressional award typically made to three organizations in one of six fields for their dedication to quality. While it is not necessarily a due diligence “tool”, accreditation and awards are certainly things that a funder might consider in their research. The elements identified here are used to determine award recipients and could serve as criteria that might be considered in a funding decision. The eligible fields include manufacturing, services, small businesses, education, healthcare and non-profits. The strength of the MBNQA criteria is that they identify two separate measures: measurement, analysis, and knowledge management and business/organizational performance results. Measurement, analysis and knowledge management focus on how an organization uses data to support their work, while business/organizational performance refer to how an organization compares to its competitors, using governance, customer satisfaction, finances, etc. as metrics.

- *Leadership* – This is representative of both the leadership of the organization and the organization’s role in the community at large.
- *Strategic Planning* – The process of establishing an organization’s objectives and plans to meet those objectives.
- *Customer and Market Focus* – This is the way the organization establishes and maintains relationships with customers and its reputation in the marketplace.
- *Measurement, Analysis and Knowledge Management* – This considers whether the organization gathers and evaluates feedback to improve its operations, as well as whether the organization uses data for performance management processes.
- *Human Resource Focus* – This focuses on motivating and empowering the organization’s workforce.
- *Process Management* – This includes the design and management of key processes in the organization.
- *Business/Organizational Performance Results* – This criterion considers performance the areas of customer satisfaction, finances, human resources, supplier and partner performance, operations, governance and social responsibility, and how the organization measures against the competition.

Though the award is given to a variety of industries, there are typically only 1-2 recipients in each category per year, if any.

VETERAN-SPECIFIC ENDOWMENTS

Call of Duty Endowment Seal of Distinction

The “Seal of Distinction” is actually an unrestricted grant award and an endorsement from the Call of Duty Endowment (CODE). Only veteran-serving organizations with emphasis on employment may apply. The elements identified here are used by the Endowment to measure organizational effectiveness and identify award recipients. Criteria for selection have a financial and operating effectiveness emphasis and include volume of placements as a key metric. All applicants for the award are subject to independent verification by an accounting firm. While this is a grant and endorsement from a funding organization, it is included here as an example of funding criteria used by an organization in the field.

- *Placements* – Number of veterans placed in jobs for the period of consideration.
- *Performance* – As defined by the organization's metrics.
- *Cost* – Average cost to place each veteran in a job.

The CODE Seal of Distinction can be a plus to donors that are only interested in supporting organizations with employment focus, but given the relative youth of the award (2013 was the first year awards were given), there are not likely to be many options. In addition, there is not much transparency into what criteria are considered in awarding the Seal. What information is available about the criteria implies that considerations are focused on outputs rather than outcomes, which is not a balanced approach.

The Bob Woodruff Foundation

The Bob Woodruff Foundation (BWF) is a national non-profit dedicated to ensuring that post-9/11 injured service members, veterans and their families are thriving long after they return home. A national organization with grassroots reach, the Bob Woodruff Foundation complements the work of the federal government — navigating a maze of more than 40,000 non-profits providing services to veterans to find, fund and shape innovative solutions that help veterans have successful futures. Through its charitable investment program, the Foundation tackles the tough issues veterans, families, caregivers and communities can face: from rehabilitation and recovery to education and employment to quality of life...deploying funds and effecting solutions where help is needed. The Bob Woodruff Foundation “navigates a maze of more than **40,000 non-profits** to find, fund and shape innovative programs in communities where our vets, their families and caregivers live and work. “ The Bob Woodruff Foundation is dedicated to ensuring injured service members, veterans and their families are thriving long after they return home. BWF focuses on solutions in **three** areas: Rehabilitation and Recovery, Education and Employment and Quality of Life.

REVIEW SITES

In addition to the tools discussed above, there are numerous review sites available. Sites like Great Non-profits, Charity Checker, and the Giving Library allow non-profits to post profiles, solicit donations, and be rated on the quality of their services. These sites rely on reviews from clients to highlight the strengths and weaknesses of each organization, which is both a strength and limitation of the system. It can often be difficult to get people who have received services to take the extra step to provide feedback on those services. Larger, better known non-profits appear more likely to receive reviews, leaving smaller non-profits without an external perspective on their performance. However when they do, it can be extremely valuable and help make the case for needed improvements to an organization's operations, or for why someone might consider funding that organization, despite less favorable comparisons of efficiency measures to counterparts.