

## Cultivating veteran communities

### Building collaborative networks to support military family transitions

The transition from civilian life to military life requires the government to provide support structures for the intake, processing, training, and employment of military men and women. The same holds true for veterans' transition back to civilian life upon completion of military service. Although some veterans are eligible for benefits through the U.S. Department of Veterans Affairs (VA), many require housing, employment, health and wellness, and education assistance in their civilian communities. Even after years of extended military conflict and a sea of goodwill toward veterans, communities still struggle to find ways of building sustainable support models for veterans and their families as they transition back to civilian life.



To fill this gap, veteran collaboratives ("collaboratives") have sprung up across the country. These organizations are skilled at developing and sustaining community-centered partnerships. Collaboratives are usually nonprofit organizations led by veterans that focus on identifying the needs of their regional veteran populations and connecting veterans with the resources they need to transition back to the community.

The goal of this report is to provide insights to inspire other communities to develop or refine their collaborative models, build relationships with other collaboratives, and eventually connect more proactively with federal agencies (e.g., U.S. Department of Defense (DOD)) to create a warm hand-off of veterans from the federal government to the community.

Six leading collaboratives from across the country contributed to this white paper. Their experiences in convening, mobilizing, connecting, and scaling their operations will enable current and aspiring collaboratives to understand how to develop their own service and partner networks to align to the needs of local veterans and their families. Each collaborative was interviewed independently of the others, resulting in a mosaic of perspectives that, when considered collectively, provide a road map for success. The six collaboratives are:

- **Tristate Veterans Community Alliance**, Cincinnati, Ohio
- **Mt. Carmel Veterans Service Center**, Colorado Springs, Colorado
- **Combined Arms**, Houston, Texas
- **Greater Boston Veterans Collaborative**, Boston, Massachusetts
- **Military and Veterans Success Center**, Glendale, Arizona
- **San Diego Military Family Collaborative**, San Diego, California

This report outlines four phases that collectively represent one perspective in the collaborative life-cycle.

**Phase 1: Convening.** Introduce the concept of creating a collaborative to assess the needs of veterans and military families in the region, the existing services available to them, and the relevant partners to engage. This involves establishing the outline of a common agenda between the collaborative, its partners, and the community.

**Phase 2: Mobilizing.** Convert data and its related insights into a tangible plan of action. Implement that plan by mobilizing the organization and strategically aligning resources to begin to accomplish its mission.

**Phase 3: Connecting.** Refine initial processes and policies and align people and organizations to evolve and strengthen necessary infrastructures in preparation for continued expansion.

**Phase 4: Scaling.** Develop economies of scale and influence legislation to align veteran needs to national resources and networks, thereby enabling upstream influence of public and private partnerships and creating a seamless hand off from military to civilian life.



A variety of frameworks can be used to define the ways in which collaboration takes place within and between organizations. These frameworks are particularly useful for organizations that focus on identifying, prioritizing, and operationalizing collaboration-building activities. This white paper utilizes the following two frameworks:

The **Collective Impact Framework** by John Kania and Mark Kramer, both Managing Directors at FSG, illuminates five key elements of collective impact: common agenda, consistent results measurement, mutually reinforcing activities, continuous communication, and backbone organizations.

The **Network Impact Framework** by [networkimpact.org](http://networkimpact.org), a network and social change organization, identifies three dimensions, or pillars, for evaluating networks: connectivity, health, and results. This framework looks specifically at the membership, structure, resources, infrastructure, advantages, and outcomes of networks.

**Phase 1: Convening: Introduce the concept of creating a veterans collaborative to assess the needs of veterans and military families in the region, the existing services available to them, and the relevant partners to engage.**

**Overview**

During this initial phase, veteran and community leaders assemble the collaborative, review available data, and conduct targeted outreach to other community leaders in the region. The collaborative begins to assess the needs of veterans in its region, as well as gains consensus on what services to provide, what community partners to engage, and, ultimately, what the structure of the collaborative will look like. This process usually requires 2-4 planning cycles over the course of 2-4 months.

This section describes actions that convening leaders should consider to jump-start their efforts. By the end of this phase, the convening body should decide on whether an existing organization is fit to be the collaborative hub or if a new independent organization should be established. Additionally, the new collaborative should establish clear mission and vision statements, appoint a leadership team, gain community buy-in, and reach out to an initial cadre of community partners.

**Regional demographics**

The collaborative hub should be a neutral and natural leader in the veteran space. Ideally, the hub should be led by veterans, since they are the most credible to the hub's customer base and can provide accurate insights into the challenges facing the regional veteran population. The mantra "for veterans, by veterans" is used across several leading collaboratives.

Next, convening leaders should evaluate the demographics of veterans and military families in the region. There are a variety of data sources available, but the VA is generally the most common, comprehensive, and widely used. The VA can provide data from more than 150 local and regional VA medical centers across the United States. Additional data sources that can provide context to the veterans in a demographic region include census data, which can be filtered down to the city and regional levels, as well as local and regional studies often available online. Depending on the degree of sophistication of other nonprofits in the region, they may also have data on the veterans they serve.

Over time, as data sources are identified and further conversations are held with community stakeholders, the convening leaders will begin to understand the priority needs of veterans in the region. Although most leading

collaboratives agree there should be some focus on job placement, other areas to consider include community involvement of and housing for veterans at risk for homelessness. A robust services portfolio should prioritize services based on both the needs of the veterans in the region and the availability of partners who can address those needs. Once established, collaboratives usually provide services across four areas:

- Employment
- Education
- Health and wellness
- Community engagement

The convening process should also involve conducting a regional assessment to identify areas of focus for veterans in the region. Data and practical evidence suggest that focusing on employment and community engagement opportunities are more critical in the early stages of the veteran's transition.

**Identifying advisors**

After conducting a regional assessment, deciding upon its structural alignment, and choosing a hub organization (or newly created hub organization), the collaborative should identify a team of advisors who can act in both formal and informal capacities.

Formal advisors are likely to hold positions on the collaborative's governing board. These advisors typically exhibit three primary traits: they can commit time and expertise to the organization; they are advocates for the organization and its mission; and they are veterans themselves or directly serve veterans as part of their professions. The governing boards of leading collaborative have three common types of members: veterans, leaders of other nonprofits, and business leaders.

Informal advisors include individuals or businesses that exhibit some of the traits of formal advisors, but are unable to fully dedicate themselves to the collaborative's mission. Examples of informal advisors include businesses, investors, Veteran Service Organizations (VSOs), veterans, existing service members, politicians, and staff members at other nonprofits.

**Building consensus**

A newly formed collaborative needs to build consensus and trust among stakeholders and veterans in the region. To accomplish this goal, the collaborative should share its story and articulate its vision for supporting veterans, their families, and partner organizations. Collectively, this story and vision are the collaborative's opportunity to convince community stakeholders that its value proposition is sound. Questions collaboratives should consider when developing their stories and vision include:

- What does our collaborative do that is different and valuable?
- How does our collaborative address the needs of veterans and their families?
- How does our collaborative draw attention to and provide value for our community partners to serve veterans more completely?
- Who do we not engage with regarding veterans' needs (e.g., active military base commanders, national guard), and how can we reach that constituency?

Engaging with community stakeholders to share its value proposition enables the collaborative to validate its research, confirm the capabilities of its governing board, and solidify its understanding of the services it should provide and the support infrastructure required.

### Phase outcomes

Conducting the activities will enable the collaborative to:

- Understand the challenges faced by the veterans in the region.
- Identify the right mix of individuals who will form the formal board of advisors as well as individuals who will be integral, but informal advisors
- Develop a consensus-driven vision and mission around a common agenda

It is important to note that there is no single way to convene a collaborative. Veteran needs and community partner interests, however, must be front and center as the collaborative convenes.



## Phase 2: Mobilizing. Convert data and its related insights into a tangible plan of action. Implement that plan by mobilizing the organization and strategically aligning resources to begin to accomplish its mission.

### Overview

As the collaborative continues to define its mission and understands the challenges that veterans and military families in the region face, it will need to mobilize its plan into action. To do this effectively, the collaborative must focus on three core activities:

- Collect and analyze data
- Identify governance and hiring needs
- Secure start-up funding

### Collect and analyze data

Leading collaboratives track data to understand whether their activities affect the success of veterans in the ways

they intended. To enable this, collaboratives make investments in technology, such as a customer management systems, or leverage specific third-party services, such as those that connect job seekers directly to employers based on skill matching.

Robust relationship management platforms can capture large quantities of data in customized ways. If licensed and designed appropriately, these systems can reduce the need to duplicate data analysis between collaboratives and their community partners. If data is collected with the end in mind, measuring the success of interventions and transitions will be easier to do.

Depending on the advice of legal counsel, it may be necessary to implement data-sharing or nondisclosure agreements to mitigate risk. Veterans, if aware of the services the collaborative provides and their potential benefits, may opt to provide consent to disclose their personal information. It is important for the collaborative to be transparent with veterans and partners about how their data will be used and how it can enable more effective monitoring during the transition process.

### Identify governance and hiring needs

When a collaborative is first established, decisions are made by its founders based on advice from its board of advisors. As the collaborative matures, decisions tend to be made at the board level with input from the founders. New perspectives and energy continue to power the mission and vision of the board as its members rotate out. Although input from community partners and informal advisors is welcomed, it is important to balance the size of the board so that it is neither too small nor too big. Leading collaboratives typically have 10 to 14 members on their advisory boards.

Collaboratives may also elect to hire staff during this phase. In looking at historical decisions made by collaboratives, there are two common hiring paths. The path chosen will depend on the skill set needed for the particular services being offered and, in some cases, the need to legitimize the collaborative's functions (e.g., certified mental health professionals).

On the first path, a collaborative will focus on infrastructure. Typically, its first hires will be technology and marketing specialists who can set up the collaborative's website, establish a brand, and build case management infrastructure.

On the second path, a collaborative will focus on hiring support staff, volunteers, and certified professionals, such as those supporting mental health. By identifying professionally certified staff early on, the services offered will mature faster and veterans and their families will benefit from having early access. Volunteers may



transition to part-time or full-time compensated positions as the collaborative matures and funding is identified.



### Secure start-up funding

As with any enterprise, securing funding to support operations is vital. Leading collaboratives are often funded through a combination of mechanisms depending on a wide variety of factors, such as the financial position of its potential donor base, the alignment of its service portfolio with the needs of the community, the ability to sell its mission and vision, and the success of its engagement strategy. Evidence suggests that leading collaboratives start with seed funding from a few select donors and then try to raise money through grants, ongoing relationships with strategic investors, income from the provision of services (e.g., co-working), and public donations.

Due to the unpredictable nature of the traditional funding model, leading collaboratives have started to look to the endowment model. This requires the collaborative to be very efficient at raising funds to cover both current operating expenses and the savings goals needed to reach its endowment target. If a collaborative reached an endowment of \$5 million, based on an annual rate of return of 3 percent, net of expenses, the collaborative could spin off \$150,000 per year to support its operations.

### Phase outcomes

Mobilizing is the phase in which the collaborative fully develops its core identity. In the same way a teenager begins to pursue his or her passions and interests, a collaborative begins to align its resources to its mission and vision. By focusing on tracking data, securing reliable and consistent sources of funding, building an internal infrastructure of systems and individuals, and consistently delivering high quality services and support to veterans and their families, the collaborative will build the trust of the community, which will enable it to more efficiently and effectively provide services.

The activities that mobilize the collaborative include:

- Tracking and reporting on meaningful data that describes and predicts the needs of veterans and their families
- Defining the collaborative's governance structure, and hire staff and volunteers
- Educating stakeholders on the collaborative's overall goals

The collaborative may face resistance from potentially unexpected individuals and organizations. Thus, it is essential to focus on developing a consensus-driven mission and vision during the convening phase. Although there is no defined timeframe for the mobilizing phase, leading collaboratives typically spend one to two years formally mobilizing their organizations.



### Phase 3: Connecting. Refine initial processes and policies and align people and organizations to evolve and strengthen necessary infrastructures in preparation for continued expansion.

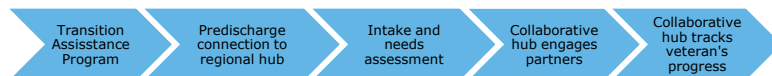
#### Overview

The collaborative will grow along with the quantity of veterans, military families, and partners in the community; thus, the collaboratives' infrastructure needs will also grow. As a result, formal marketing budgets will become required, and performance reporting will become a necessity rather than a nice-to-have feature. Additionally, the collaborative needs to make strategic investments to ensure its partner network can continue to align on strategic plans, deliver organized and efficient services, and remain in continuous communication. In some cases, contracts and other traditional business formalities may become necessary.

#### Value chain position

From the moment a veteran leaves the military and returns into civilian life, he or she begins a transition process. The VA, DOD, VSOs, other government agencies, and nongovernmental nonprofit groups such as collaboratives offer veterans a series of value-adding activities to make their transitions easy and successful. Each sequential activity adds incrementally more value to the veteran and his or her family. These activities and the value they create are referred to as the "veteran value chain."

#### Veteran value chain



A variety of entities take part in the veteran value chain. Early in the process, the VA, the DOD, and the U.S. Department of Labor (DOL) are usually involved, and later in the process, local universities and a myriad of VSOs often come into play. Necessary hand-offs of the veteran's case take place throughout the value chain, as no single entity owns the entire value chain. The outcomes of these hand-offs are optimized when downstream entities are permitted to engage with the transitioning veteran as soon as possible. Current federal limitations on data sharing between federal and private organizations hinder this proactive outreach. Thus, a collaborative must consider how vertically integrated it can be within the value chain, as well as how closely it wants to partner with other collaboratives (i.e., horizontal integration).



Collaboratives should strive to be as vertically and horizontally integrated as possible. Both methods of alignment make the collaborative more robust and capable of adjusting to the needs of the veteran community. Further, where a collaborative positions itself along the veteran value chain helps determine which partners are necessary to maintain that position.

### Attracting partners

At this point in the life of the collaborative, it is important to maximize the number of veterans engaged with the collaborative and its partners. The process of building a partner network is not without challenges, however. Collaboratives may face resistance in expanding their reach. Examples include:

- Federal agencies (e.g., VA, DOD, DOL) concerned about sharing data and legal constraints with public and private partnerships
- Perceptions by politicians who believe the DOD or VA should be providing these services
- Fellow VSOs who perceive increased competition for funding

These critical stakeholders — the government, politicians, and other nonprofits — have much to gain from the existence of collaboratives. Thus, the collaborative must clearly address these concerns early on to establish trust. The burden of proof rests with the collaborative. Over time, as the collaborative demonstrates its commitment to building partnerships, these barriers will dissipate. A collaborative that proves itself to be a neutral convener capable of building credibility, providing needed resources and support, and delivering data-driven results will be able to surmount these challenges more easily.

The concept of branding is often considered more prevalent in traditional corporate settings. However, managing brand and perception within the collaborative space is also important. Leading collaboratives enhance their brands by demonstrating their competency in the following areas:

- Raising funds, providing funding referrals, and providing authorized data and support to partners who are writing grants
- Making investments that partners may not be able to make (e.g., purchasing shareable technology platforms)
- Building relationships and networks at the national political level in order to have more direct exposure to national and regional influencers
- Enabling partners to have a proactive understanding of who is transitioning out of the military

As important as it is to build a robust cadre of reliable partners, it is equally important to ensure their values align with those of the collaborative. Some collaboratives ask partners to sign memoranda of agreement (MOA) or nonsolicitation clauses to support this goal. It is perfectly acceptable to resist short-term growth to ensure long-term value alignment. This filtering process is an art, not a science. The role of the board of advisors becomes very important during this period.

### Common agenda

Onboarding new partners is just one part of the equation. These organizations and the collaborative could still retain their individual identities, aims, and perspectives. Over time, as the collaborative's influence expands in the region, broader alignment on how services are delivered, data is used, and communities are engaged will enable economies of scale. The bigger the collaborative's network becomes, the smaller the world in which it operates becomes, enabling it to be more nimble. As this transformation takes place, a common agenda acts as the glue for the collaborative and its partners.

## Performance metrics

An overlooked aspect of operating a collaborative is capturing, tracking, and reporting on data to enable the collaborative and its partners to monitor the effectiveness of their programs and justify long-term funding. These metrics can be used as evidence that the collaborative is capable of making sustained changes for veterans and their families in the region that it serves. When applying for grants, securing additional funding, and proposing changes with partners, these metrics are integral to the discussions.

Measuring performance can also be valuable in identifying partners and/or services that warrant further review. In some cases, a collaborative may determine that turnaround times for providing services are not fast enough. With the appropriate data, the collaborative can identify potential risks with partners, as well as ways to provide partners with additional support. The data can also cause the collaborative to part ways with a partner.

Leading collaboratives track the following key performance indicators (KPIs):

1. Time of response from referral to action
2. Timely engagement following the veterans end of time in service (ETS)
3. Action plan milestones (e.g., completion of goals)
4. Touchpoints with veterans (e.g., follow-up contacts)
5. Services provided (e.g., training, counseling)

Working with partners to develop a comprehensive list of KPIs helps secure buy-in and ensures accountability. Collaboratives cannot effectively hold partners accountable (and vice versa) if KPIs are developed in isolation without appropriate engagement with partners.

## Phase outcomes

As with other phases, collaboratives may pursue activities in the Connecting phase differently. In truth, this phase is never fully complete. However, collaboratives often requires two years to complete the bulk of activities.

Expanding the partner network, value chain positioning, building brand awareness, and developing performance metrics through the lens of a common agenda improves accountability and transparency. Collaboratives have also found these actions often lead to continuous improvement.



Convening

Mobilizing

Connecting

Scaling

**Phase 4: Scaling. Develop economies of scale and influencing legislation to align veteran needs to national resources and networks, thereby enabling upstream influence of public and private partnerships and creating a seamless handoff from military to civilian life.**

## Overview

Scaling is the final phase in building a sustainable collaborative. This phase requires the collaborative to move away from its work as a unilateral and internally focused regional service provider to become part of a horizontal region-to-region network that advocates for veterans' transitions nationally in order to build vertical integration with the federal government. Once a collaborative has developed resources to support continuous improvement efforts, it can consider how its existing relationships and networks can scale to meet the needs of the broader veteran and military family population across the United States, as well as become a regional and national voice for that population.

## Horizontal integration

As a collaborative matures and builds its internal value proposition and sustainability model within its designated region, it should be developing data-sharing processes and engaging in data sharing among regions to ensure horizontal transitions of veterans who move between regions are successful. Additionally, the collaborative should begin developing best practices and sharing learning opportunities horizontally with other regional VSOs and collaboratives. This will ensure that out-processing veterans from the military and in-processing veterans into the community are regionally consistent. Furthermore, committing to continuous improvement and sharing resources is also vital to the sustainability of the collaborative's mission.

### **Importance of data sharing**

If collaboratives can align on a series of KPIs for veteran transitions, they can begin to standardize ways of reporting on and referring veterans to similar organizations across regions. This will enable continuity in supporting the needs of veterans and their families as they move from region to region. Data warehouses that link regional veteran data with information from other systems can offer insights and linkages to support that would be impossible in isolation, as well as enable best practices to be identified and shared.

### **Importance of best practices and resource sharing**

Sharing best practices is at the heart of the collaborative's success in aligning resources. This alignment improves services and helps ensure that each veteran and military family has a successful transition. Sharing best practices should be integral to the relationships among regional collaboratives. Although individual collaboratives can improve their unilateral models faster while remaining isolated, the larger group does not benefit until alignment is reached by sharing best practices.

In short, the relevance of a collaborative is based on its connection to a network of service providers who share a common mission to improve the entire veteran transition system, particularly the series of activities performed by public and private entities to help veterans and their families move from the military world to the civilian world. Thus, it is not possible for a successful collaborative to operate in a vacuum as it will not address veterans' transition issues at the national level.

Sharing and reallocating resources across a network of collaboratives is another important part of a successful system. Given that veterans' geographic location upon returning to civilian life tends to be a decision they make prior to leaving the military, the competition for veterans within a region seems irrelevant. Instead, it is necessary to focus on building a thriving network of collaboratives that can enable each other to provide the best services possible by sharing their resources and best practices. This will ensure the survival of the whole network.

Currently, leading collaboratives are discussing ways to convene nationally to better learn from and support each other. Such a convention is critical for maintaining the consistency, progress, and relevance of the collaborative model. Practical options include an annual conference, quarterly webinars, and site visits. These conventions should also include periodic updates with federal stakeholders, including the DOD, DOL, and VA. These updates should include reviews of performance against established KPIs, cross-network best practices, and demonstrations of how a collective national effort with seamless horizontal integration can help ensure successful veteran transitions. It is important for the governmental

pitchers (e.g., the DOD, DOL, VA, and politicians) to understand and react to feedback from the nation's communities of catchers (e.g., collaboratives). Over time, consistent performance in this manner will enable better collaboration between collaboratives and government entities further upstream in the veteran value chain.

### **Vertical integration**

Finally, it is important for collaboratives to be a voice for the veterans in their region and nationally. Communicating regional or national needs also provides a voice for partner organizations by validating their unique value proposition, services, and sustainability needs.

Leaders at regional collaboratives should provide points of view on topics related to veterans and their families, as well as participate in legislative discussions that benefit the needs of veterans. Consequently, these leaders should stay current on the evolving needs of their veteran populations.

The final stage of vertical integration is to build a more seamless partnership with DOD military installations to ensure a successful hand off of veteran cases from the military to civilian world.

### **Phase outcomes**

Collaboratives should be well established with strong buy-in in their regions prior to the scaling phase. Based on current collaborative best practices, it usually takes two to three years from the convening phase to the connecting phase before a collaborative has built a strong enough brand and body of knowledge to represent a region. It is imperative that a collaborative keep in mind its two primary customers throughout the scaling phase: (1) veterans and their families and (2) their partner organizations. Lastly, collaboratives should continue to advocate for their mission and the value proposition of the national collaborative network.

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