



**AMERICA'S
WARRIOR
PARTNERSHIP**

1190 Interstate Parkway
Augusta, GA 30909

AmericasWarriorPartnership.Org

706-434-1708

Board of Directors

Tim McClain, Chairman

Ron Thomas, Vice Chairman

John G. Vonglis, Treasurer

Edward Marshall, Secretary

Jim Lorraine, President

Honorable Thomas G. Bowman, 7TH Deputy
Secretary, U.S. Department of Veterans Affairs

Clint Bruce

Peter J. Bunce

David P. Fridovich, Lt. Gen. (Ret) U.S. Army

Sal Giunta, SSG
MOH Recipient

Paul Hatch

Jim Hull

Jeremy King

Kate Migliaro

Clint Romesha, SSG
MOH Recipient

Lewis Runnion

Emeritus

Pete Caye, Jr.

W. Thomas Matthews

Jay Town

Mentor Founder

Col Leo K. Thorsness, USAF Ret.
MoH Recipient
1932 - 2017

Charlie Hall
UpState Warrior Solutions
3 Caledon Court, Suite A-2
Greenville, SC 29615

Oct. 31, 2019

RE: AWP Community Integration Audit Results

Dear Mr. Hall,

America's Warrior Partnership has completed Upstate Warrior Solution's (UWS) program and financial audit for Year 5 of the Community Integration Initiative. The audit considered supportive services delivered to the warrior population (veterans, veteran family members, and their caregivers) as well as growth and development of your organization in the community since inception.

It is evident that UWS has become the leader in the upstate South Carolina's veteran space due to its involvement in multiple outreach activities as well consistent collaboration with partnering agencies to coordinate supportive services.

Your organization's score on the annual Community Integration audit is 97%. This score represents the excellent efforts and support UWS is providing warriors in its community.

Please review the notes and recommendations of best practices compiled in the Community Integration Comprehensive Audit.

We appreciate the dedication Upstate Warrior Solution has demonstrated to the warrior community.

Direct questions you may have to Kaitlin Cashwell,
kcashwell@americaswarriorpartnership.org or (706) 504-6672.

Sincerely,

Kaitlin Cashwell
Director of Community Integration



UPSTATE WARRIOR SOLUTION COMPREHENSIVE AUDIT - YEAR 5 EXECUTIVE SUMMARY

INTRODUCTION

America's Warrior Partnership (AWP) is pleased to assist Upstate Warrior Solution (UWS) in monitoring and improving its Community Integration Program through our Comprehensive Program Audit. This audit examines the use of UWS's program funding, the program's alignment to the Community Integration model, and the organization's deliverables for 2019. Our conclusions include recommendations that are shared best practices and have been proven to support AWP's Community Integration model.

SCOPE & PROCEDURE

All questions asked during the audit are to assist the reviewer in understanding the organization's program more fully and/or to identify issues that, if not properly addressed, could result in deficient performance. Each audit question received a score between 0-2, with 0 describing no evidence seen, 1 representing minimum expectations were met, and 2 represents best practices have been demonstrated. A weighted scoring system, calculated by the importance of each section, is used to derive the final score.

All files examined during this audit were randomly selected from both open and closed cases. Additionally, an expanded sampling of files were examined to aid in determining whether concerns were isolated events or represent systemic problems.

America's Warrior Partnership has found that Upstate Warrior Solution's program is in alignment with our guidelines and is progressing according to the agreed upon objectives. The following are the scores obtained from each section.

ASSESSMENTS

A. PROGRAM PROGRESS = 4 out of 4

UWS is in its 5th year as a Community Integration Affiliate providing holistic support to warriors, their family members, and caregivers throughout their catchment area by coordinating assistance from partners and local providers. According to Upstate Warrior Solution's 2019 Program Development Plan, they should engage 100 new warriors each month. UWS is achieving their monthly goal by averaging 105 new warriors each month. Approximately 68 of the 105 warrior added each month are post-9/11 warriors.

Recommendation: Work alongside partners and make sure they understand the correct way to share a case and add contacts in the Partner Portal. Consider a referral link that directly connects into WarriorServe® for organizations who are not using the Partner Portal.

B. OVERALL MANAGEMENT SYSTEM / STRUCTURE = 15 out of 16

Upstate Warrior Solution's policies and standard operating procedures are generally up to date, thorough, and reflect the growth and development of the organization. All staff, interns, and fellows are supervised and evaluated according to their written policy.

Recommendation: Continue to review and update job descriptions as specialist or job responsibilities change. Always update the job descriptions when new jobs are posted.

C. OUTREACH AND TARGETING = 11 out of 14

Upstate Warrior Solution is appropriately targeting to all eras of warriors across all demographics. The variety of their on-going activities and joint outreach events show their commitment to veterans in their catchment areas. They are using the mass emailing capabilities of WarriorServe® as a solution to information distribution.

ASSESSMENTS

Recommendation: Upstate Warrior Solution should track contact referrals in more detail by entering a Lead Source Organization along with the Lead Source. Additionally, by using the campaign feature, UWS can tie their mass email abilities and track the success of outreach at partners' events. Tracking events and Lead Source Organizations will help determine which activities and partners are most effective in terms of outreach.

D. CONSUMER ELIGIBILITY = Scored 26 out of 26

Notes on the case files of Up State Warrior Solution adequately document consumer eligibility. UWS utilizes the case close reasons and has added a case outcome field to WarriorServe®. Notes and activities documented within WarriorServe® provide documentation of warriors' goals and the outcome of these goals.

Recommendation: Review policy and procedure for documentation with all advocates. Utilize the work-flow that notifies a new case owner by email when they receive a new case to eliminate cases falling through the crack when fellows and interns rotate.

E. CASE COORDINATION OF SUPPORTIVE SERVICES = 20 out of 22

Upstate Warrior Solution consistently obtains eligibility and enters the gathered data into WarriorServe® along with background notes, case coordination efforts, and case closure information. Additionally, they have instituted weekly case audits and advocates check-ins to give feedback and examine their caseload. This attention to service is reflected in the positive comments from the warriors they serve.

Recommendation: Document all follow-up calls; including follow-up calls for non-critical cases. If Upstate Warrior Solution fails to follow-up with warriors who have been given a list of referrals, they run the risk that bad service from referred organizations will contaminate the positive reputation of Upstate Warrior Solution. Knowing a warrior means knowing if they used any of the resources provided and if their need has been resolved.

F. FINANCIAL MANAGEMENT AND COST ALLOWABILITY = 24 out of 24

Overall Upstate Warrior Solution continues to demonstrate appropriate management of their finances.

Recommendation: Review the financial policies and procedures with relevant staff on an annual basis to ensure they are up-to-date and continue to meet the ever-changing needs of the organization.

G. POLICY AND PROCEDURES = 10 out of 10

Upstate Warrior Solution's policies and procedures are in compliance with program requirements and assist in the achievement of their program's goals. There is evidence that the policy and procedures are communicated to staff and periodically reviewed.

Recommendation- America's Warrior Partnership would be happy to assist in setting up a web-based intake form with a release that can be digitally signed and links to UWS's WarriorServe® instance. Implementing this type of webform will save time on data entry.

Weighted Audit Score = 97

CONCLUSION

Upstate Warrior Solution continues to grow in its reputation as the lead organization for veteran support in the upstate. This leadership is demonstrated by Upstate Warriors Solution's creation of three area-based Community Action Boards. Fellowships opportunities for UWS now extend into local for-profit businesses as well as local colleges and universities. Their positive reputation reflects the excellent efforts and support UWS has provided the warriors in their community.