



Strategic Plan (Vision and Strategy)
January 2020 Update

Agenda

- Mission and Vision
- Background
- 20 year Vision Graphic
- Vision Graphic Narrative
- Lines of Effort Discussion:
 - #1 – Five Pillars
 - #2 - Community Partnerships
 - #3 – Community Action Boards
 - #4 - Financial Sustainability
- Current state and next steps



UWS Vision & Mission

Vision

Upstate Warrior Solution exists to restore our warriors with a sense of purpose, and to empower the community to be responsive to our warriors and their families.

Mission

Connect warriors and their families to resources and opportunities,

Lead warriors through the process of self-empowerment

Inspire members of the community to embrace local warriors and their family members as valued neighbors and friends.

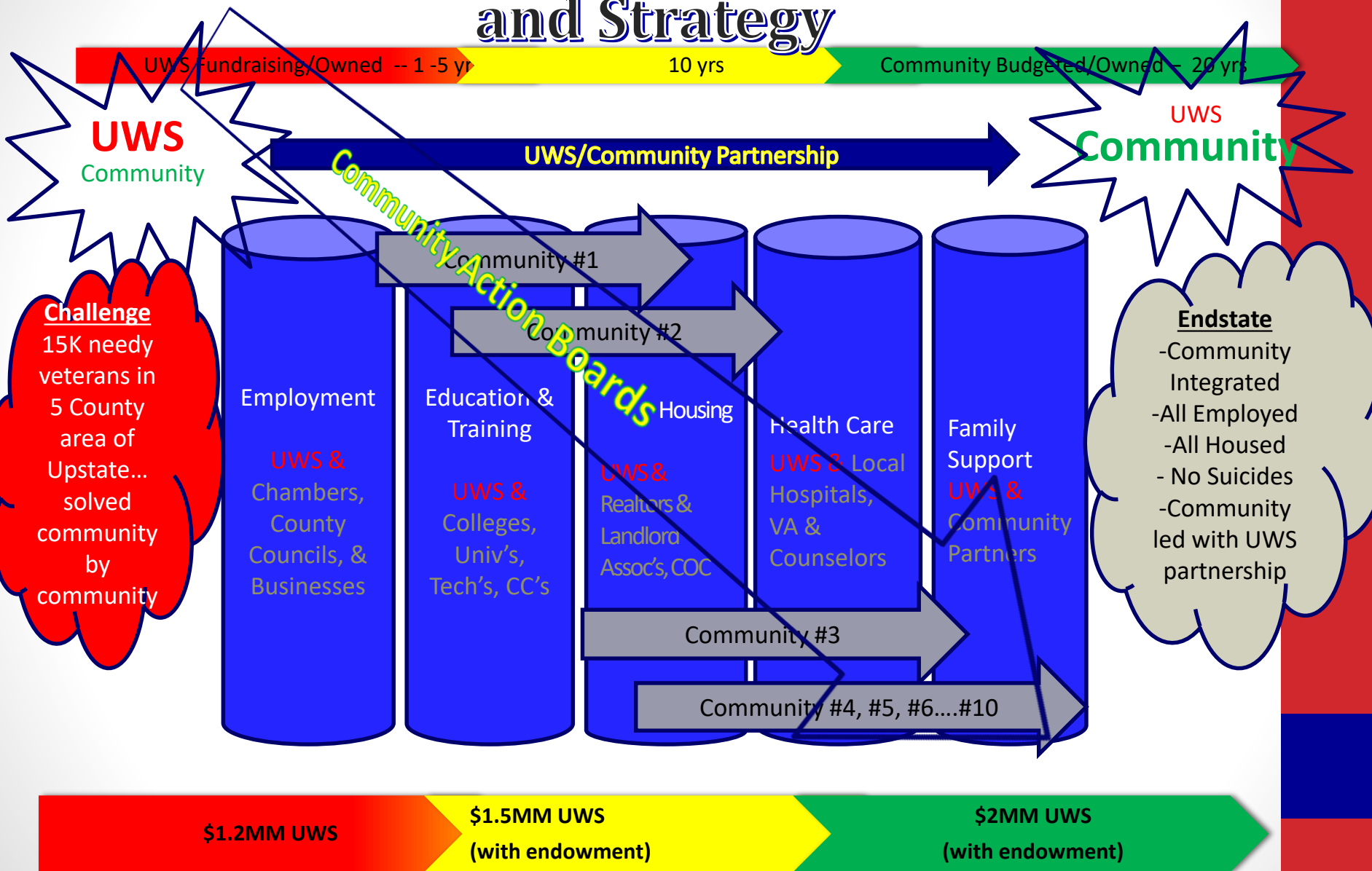


UWS Background

- Formed in 2012, all volunteer organization until 2014 serving (5) Upstate SC Counties – Greenville, Spartanburg, Pickens, Anderson, Oconee
- Seed funding in 2014 allowed hiring of initial staff and build out of operation in Greenville based HQ
- Spartanburg and Tri-County (Clemson) offices opened in 2016
- Strong governance Board of Directors and local fundraising efforts
- 2020 status – 18 staff (13 full time, 5 part time) & \$1.3MM operating budget
 - Org serving 100+ unique warriors per month
 - 50% post-9/11, 50% pre-9/11, 1.3 needs per warrior
- (8) formal community partnerships with MOUs, 30+ informal



Upstate Warrior Solution Vision and Strategy



Vision Graphic Narrative

This graphic represents the UWS vision for the future and serves as our organizational strategic planning model. Four lines of effort are represented and will be detailed in the following slides:

1. Five Pillars – Employment, Education, Housing, Healthcare, and Family Support. These pillars are the foundation to our UWS mission and operational work, and can only be accomplished with key community partners.
2. Community Partnerships – Currently, UWS partnerships are forming but are still “UWS owned” for the most part. As partnerships are formalized and working well, partners will embrace the mission and warrior issues will become “Community owned.”
3. Community Action Boards (CAB) – CABs are currently county based and are comprised of leaders in the community who can help get the work done at the local level.
4. Financial Stability – Currently, UWS is responsible for funding the majority of this effort, and primarily with private dollars. Over time, UWS will be a facilitator and community partners will fund this work, allowing UWS to remain a relatively small organization (less than 15 employees and under \$2MM budget)

Key Concept:

Initial state = UWS Leading/Owning, Community supporting

End state = Community Leading/Owning, UWS supporting

(Role reversed over 20 year period)



Line of Effort #1 – Five Pillars

- These five pillars are foundational to a warrior's transition and well-being, and the need is great – over 15K warriors in the Upstate needing support. The UWS team ranks them in this order:
 1. Employment
 2. Education
 3. Housing
 4. Healthcare
 5. Family Support

Combined UWS/Community Partner teams work everyday with warriors and their families on issues within these pillars, and we can only do this work well with efficient and effective community partnerships.

Key concept – Employment is the first priority, everything else is dependent on a warrior's successful employment and rediscovery of occupational purpose



Line of Effort #2 - Community Partnerships

- Community partnerships are key to this “Community Integration” model working. Current partnerships are rather informal, but work is being done to formalize these relationships with:
 - Memorandums of Understanding (MOUs)
 - Shared data and database access/referrals
 - Monthly team case coordination
 - Stakeholder strategy sessions
 - Partner seats on Community Action Boards (CAB)
- Partnerships must be developed with organizations and institutions that see the value of collaboration, and also have a significant warrior population within the institution, or warrior clients

Key concept – Community Partners have to have the desire to get in the game and play team ball.



Line of Effort #3 - Community Action Boards

- CABs are foundational to the execution of this vision – puts local operational leaders in the right place for the best purpose. CAB oversight is by community members, not staff. UWS Governance Board members provide liaison support to the Board of Directors and help develop new relationships.
- Currently, CABs are at the county level, but municipalities may be a CAB platform in the future
- Currently, UWS is employing four county based CABs, with the future CAB count to be unlimited

Key Concept – CABs get the right leaders in place to help the UWS team get things done in the community.



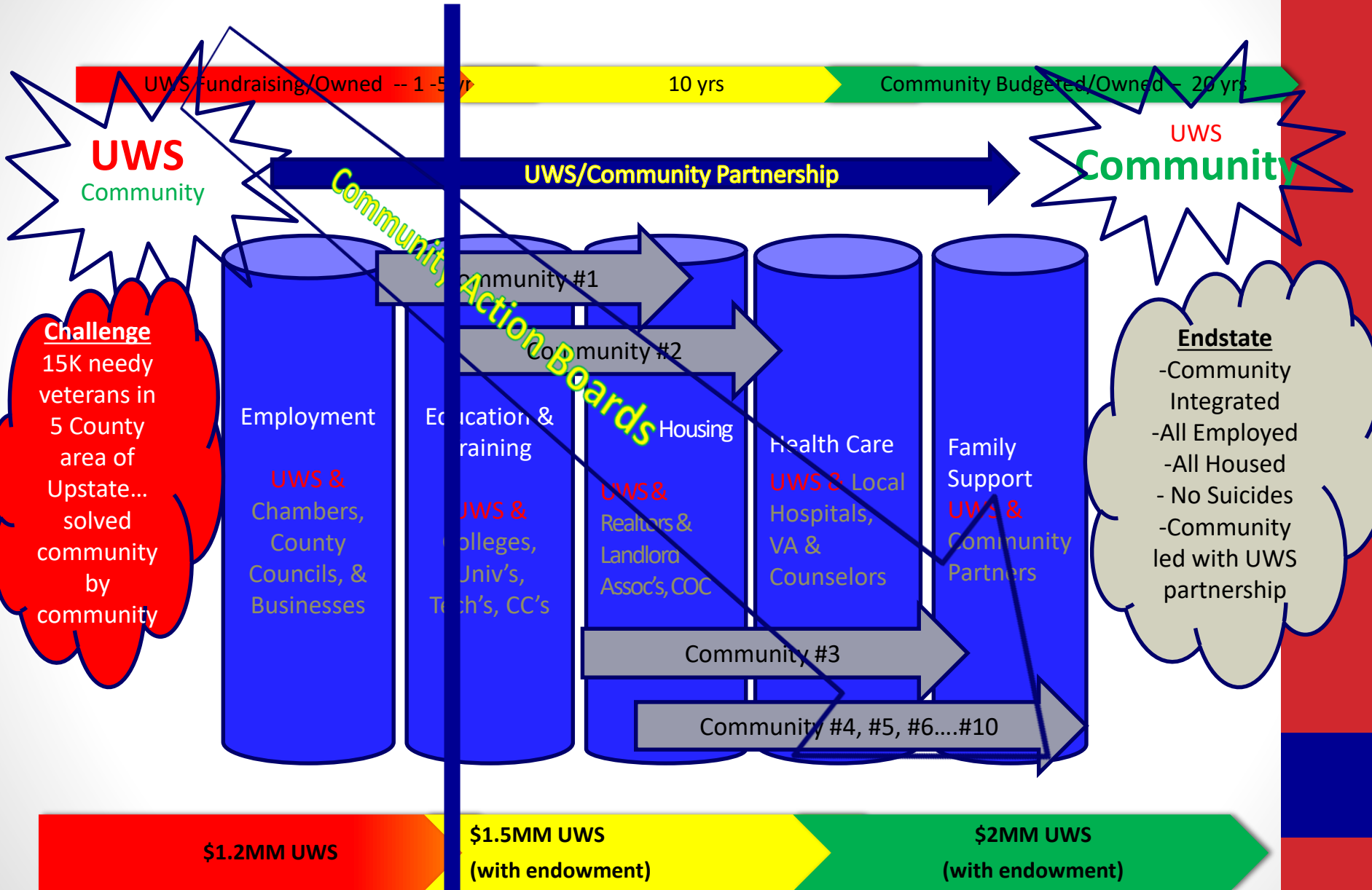
Line of Effort #4 - Financial Sustainability

- Currently, UWS is a \$1.2MM organization with no endowment
- Board of Directors vision is UWS will remain small and less than \$2MM operational budget. Current funding is private dollars with minimal government funding
- Endowments started at all three Upstate Community Foundations will supplement operational budgets, allow funds raised locally to stay local, and give CABs a platform to raise funds and develop innovative ways to fund Community Partners and projects

Key Concept – UWS does not become a large fundraising organization, but remains small and is supported by Community Foundation based endowments



Current State - January 2020



Critical Steps for 2020

- Five Pillars – define UWS Career Services staff section and key community partnerships
- Community Partners – develop formal MOUs with (2) Employment and (2) Education partners
- Community Action Boards – build Anderson County CAB
- Financial – establish endowment funds at Spartanburg County Foundation and Greenville Community Foundation

