



UPSTATE WARRIOR SOLUTION COMPREHENSIVE EVALUATION YEAR 6 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 Evaluation. This evaluation examines the use of UWS's program funding, the program's alignment to the Community Integration model, and the organization's deliverables for 2020. 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 evaluation 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 evaluation 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.

A. PROGRAM PROGRESS = 2 out of 2

UWS is in its 6th 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. Due to this year's COVID pandemic, UWS shifted its focus from engaging new warriors to follow-ups with known warriors. UWS was able to connect with 79% of their existing warrior contacts. With these past clients, they focused on closing cases and opening new cases for needs and wants. UWS was able to meet 50% of their outreach goal even with the inability to do traditional in-person outreach by leveraging relationships with hospitals and jails to obtain referrals. UWS has seen an increase with follow-ups in service due to their comprehensive outreach, assisting, and service coordination to current and past clients.

Recommendation: Keep doing what you're doing!

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

UWS policies and standard operating procedures are up to date, thorough, and reflect the growth and development of the organization.

Recommendation: Continue monitoring the Warrior Advocate position for documentation inconsistency. Documentation often gets left out when additional responsibilities are added, and the Warrior Advocate job description has many responsibilities. Remember, documentation is the key to grant acquisition and retention as well as staff accountability.

C. OUTREACH AND TARGETING = 14 out of 14

Upstate Warrior Solution is the lead organization for veterans, veteran family members, and veteran caregivers in the Upstate of South Carolina. They are appropriately targeting to all eras of warriors across all demographics. Operation Prisma Warrior has been a game-changer for UWS in terms of its ability to increase its outreach to a variety of veterans.

ASSESSMENTS

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Recommendation: A Partner referral link can be established through form assembly to ease the burden of data entry in organizations in which partner portals are not utilized.

D. CONSUMER ELIGIBILITY = Scored 25 out of 26

In general, Upstate Warrior Solution's documentation is complete and demonstrates the extraordinary work being done by UWS. Notes on the case files of UWS document consumer eligibility. UWS utilizes the case close reasons and the case outcome fields. In most cases, the documentation found in the contact and case notes has been standardized, and the content is appropriate. However, the documentation in some of this years' cases does not show the same level of consistency that has been demonstrated in the past.

Recommendation: Improve documentation by having Advocates and Fellows add a task each time they place the word "follow-up" in a case note. The Community Integration model entails more than connecting a warrior to a partner for assistance, it requires follow-up to see if the warrior was assisted, making other referrals if necessary, and documenting all of the follow-up activity.

E. CASE COORDINATION OF SUPPORTIVE SERVICES = 19 out of 22

Upstate Warrior Solution continues to provide leadership in the veteran space for the Upstate of South Carolina. They are using the CRM side of WarriorServe® to track partners in addition to veterans, their family members, and caregivers. Using the CRM to track their partners allows UWS to monitor and evaluate partners and the service they provide as well as their interaction with their partners.

Recommendation: Improve follow-up. Have fellows/staff follow-up two weeks after a resource list or a referral is given to another service organization, especially on cases that are opened and closed in one day. This follow-up procedure will help to build a long-term relationship. Serving and creating a trusted relationship with a diverse population is essential for the community integration model's success. When relationships based on trust are built, veterans will seek assistance before the crisis occurs, they will seek advice on volunteer opportunities and ways to give back, and they will spread the word and become an active participant of Upstate Warrior Solution.

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

Overall, Upstate Warrior Solution continues to improve its financial sustainability. They continue to be good stewards of their funds, following appropriate financial policies and procedures to maintain checks and balances. Their annual report for 2019 demonstrated diverse income, with the majority of their cash income coming from grants, individual giving, and corporations.

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.

Recommendations: Create a policy and procedure to utilize the Network when services are exhausted within your community.

Weighted Audit Score = 96

Upstate Warrior Solution continues to be the lead organization for veteran support in the upstate. This leadership is demonstrated by Upstate Warriors Solution's development of a new Community Action Board to cover Anderson and Oconee Counties. Despite Covid, with decreased outreach opportunities, UWS pivoted to conducting wellness check on warriors in their network, engaging community partners, and contacting supporters to update them on their response to the health crisis.

CONCLUSION