



# UPSTATE WARRIOR SOLUTION COMPREHENSIVE EVALUATION YEAR 8 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 2022. 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. 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 the Community Integration Model. The following are the scores obtained from each section.

### **A. Mission Alignment = 14 out of 15**

UWS is in its 8th 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. This year UWS stretched its mission to include first responders and their families. As many veterans continue their life of service as first responders, this inclusion aids their mission. Since they already have many partnerships in the community, adding first responders to their mission has not created additional work to find and engage service partners. UWS is a mature program and continues to balance steady growth and quality service delivery. They continue inspiring and leading the community in its strong support for veterans and first responders.

Recommendation: Add specific, measurable, achievable, relevant, and timely (SMART) goals to the 3-5 year strategic plan to align the team and track progress toward community engagement and quality service delivery.

### **B. Measurement and Evaluation Methods = 14 out of 15**

UWS demonstrates the ability to measure and evaluate and utilize the resulting information to improve the Community Integration program's performance. UWS obtains regular input from its veterans/family members/caregivers and the community-level stakeholders to improve its program's performance. By sending surveys when cases are closed with an ad hoc survey, they are able to understand trends in warriors' needs and gaps in order to expand or enhance their programs. Their four Community Action Boards (CABs) are community-specific and are composed of residents, business owners, professionals, first respondents, and various social service agencies dedicated to collectively serving local warriors. This year they have focused a single staff person, the Director of Community Engagement, to lead the CABs in providing consistency and aligning goals.

Recommendation: Create a program logic model to align the team and improve program evaluation efforts across the communities. Creating a logic model is an excellent exercise for growing/evolving teams to ensure everyone is aware of where you are, where you want to go, what resources you have to get there, and what needs to be done to get there.

### **C. Policy = 12 out of 12**

UWS organizational management aid in the achievement of its mission. This year they

## ASSESSMENTS

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updated their handbook to align with the Fox Grant.

Recommendation: Require annual HIPPA Training for electronic records by all program staff.

### **D. CONSUMER ELIGIBILITY = Scored 25 out of 26**

UWS's documentation in WarriorServe® demonstrates the great work being done by UWS. 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. Some documentation in WarriorServe® reveals long time gaps in the relationship when an intern leaves and the new advocate reaches out. Additionally, the reviewer noted some circumstances in which documentation indicated that follow-up was needed. However, no documentation existed that the follow-up was ever completed.

Recommendation: Improve documentation by having Advocates create 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**

UWS continues to provide leadership in the veteran space for the Upstate of South Carolina. UWS is a member of the Upstate Veteran Alliance Network (UVAN) that brings together local veteran providers with VA leadership to gain a better perspective of veteran care at the local level. Additionally, their Community Action Boards in Greenville County, Spartanburg County, Pickens County, and Anderson County continue to bring together residents, business owners, professionals, first-responders, and various social service agencies, all of whom support the collective mission to serve local warriors. UWS is currently developing a CAB in Oconee County.

Recommendation: On cases that are opened and closed in one day, have advocates follow-up two weeks after a resource list or a referral is given to another service organization. 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, the organization continues to improve its financial sustainability. They ended another year with a positive cash flow in 2020, although their total revenue for the year was less than 2019, which is expected due to the COVID-19 pandemic. They continue to be good stewards of their funds, following appropriate financial policies and procedures to maintain checks and balances. Their annual report for 2020 demonstrates 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**

UWS continues to update its policy and procedure manual as necessary. Each employee is notified of the manual when on-boarded. Any changes made to the manual are communicated with employees.

### **Weighted Audit Score = 96**

UWS continues to be the lead organization for veteran support in the upstate. This leadership is demonstrated by Upstate Warriors Solution's leadership roles in the Community Action Boards and UVAN.

UWS continues to refine its policies and procedures to drive long-term engagement, helpline services, and proactive outreach. These efforts have been

## CONCLUSION