

LINCOLN COMMUNITY
FOUNDATION



VETERAN SUPPORT INITIATIVE:

**A community based model to
meet the needs of service
members and their families**

Presented by
Lincoln Community Foundation
Lincoln, Nebraska
for the
Council on Foundations
2011 Fall Conference

ACKNOWLEDGEMENTS

A great debt of gratitude is owed to every one of the contributing participants. Their willingness to share expertise and insight has been inspiring. The Lincoln Community Foundation thanks the following organizations and individuals for making this report possible:

Nancy Berglass, Principal, Berglass Consulting

Council on Foundations: Idea Lab Grant

Mary Jalonick, President, The Dallas Foundation

Ronald J. Lockard, McKinney, TX

Roger Lempke, Lt. Gen (NE, ret.), Lincoln, NE

Anne Moses, Non-Profit Consultant

Sandie Palomo-Gonzalez, Assistant Vice President, Grants and Programs, San Antonio Area Foundation

Mark Pritchett, Vice President for Community Investment, Gulf Coast Community Foundation

Col. David Sutherland, Special Assistant to the Chairman of the Joint Chiefs of Staff, U.S. Department of Defense and Officers Tony Forbes and Kimberly Mitchell

Tracy Tousey, Program Director, The Community Foundation in Jacksonville

Francesca Rattray, Vice President, San Antonio Area Foundation Center for Nonprofit Support

Barbara Bartle, President, Lincoln Community Foundation

Sarah Peetz, Vice President for Community Outreach, Lincoln Community Foundation

Trish Reimer, Donor Relations Coordinator, Lincoln Community Foundation

California Community Foundation

San Antonio Area Foundation

Dallas Foundation

Permian Basin Area Foundation

Community Foundation in Jacksonville

Gulf Coast Community Foundation

The Miami Foundation

Lincoln Community Foundation

EXECUTIVE SUMMARY

For the past ten years, America's military service members, Guard, and Reserves have been at war. Stop-loss policies have created multiple deployment cycles that have taxed family members of service members as well as the service members themselves, creating an array of family issues that do not abate when soldiers return home. While government programs are tasked with meeting the needs of OIF/OEF current and former service members, they alone cannot meet the needs, nor are they designed to serve the families of service members, who have deployment-related issues of their own. It is therefore incumbent upon America's communities to ensure that the men and women who volunteered for military service make a successful transition home, once that service is complete.

Why Community Foundations are best equipped to lead this effort

Community foundations, which are at the intersection of public, private, and philanthropic sectors, are best positioned to develop local solutions to this growing national challenge. Tasked with addressing complex issues in a local context, community foundations have extensive on-the-ground intelligence about community needs and resources and the ability to convene the major public, private, and philanthropic agents in a given region. Their flexibility and nimbleness allows community foundations to pursue cross-sector solutions, engage citizens, and marshal the needed resources to improve communities and provide opportunity for all, including our nation's military veterans and their families.

History, context, process

It is in this context that the Lincoln Community Foundation was funded by the Council on Foundations to develop the Veteran Support Initiative: a replication model for community foundation-led collaboratives that seek to improve the circumstances of Operation Iraqi Freedom/Operation Enduring Freedom (OIF/OEF) service members and their families, as they transition home from war.

The Veteran Support Initiative leverages the experience of the Iraq Afghanistan Deployment Impact Fund (IADIF), a donor-advised fund of the California Community Foundation, as well as the TRIAD and BRAIVE Funds, which were funded by IADIF to develop and implement community foundation collaboratives to meet the needs of OIF/OEF service members in Texas and Florida. Leaders of IADIF, and members of the TRIAD and BRAIVE funds (the San Antonio Area Foundation, the Dallas Foundation, the Permian Basin Foundation, The Miami Foundation, the Gulf Coast Community Foundation, and the Community Foundation of Jacksonville) provided extensive information, and participated in a day-long meeting in San Antonio, Texas, for the purpose of informing the replication model documented in this report.

RECOMMENDATIONS

What follows are recommendations for future collaborative efforts between community foundations seeking to impact the circumstances of military service members and their families on a regional basis.

1. Learn about military and veteran issues in your community. Community Foundations embarking on a collaborative effort to support military service members and their families must understand the demographic characteristics and issues facing service

members and their families in their particular region, as well as the factors that impede and facilitate service provision. To do that:

- Gather facts, figures, and data on the following to understand the lay of the land;
- Understand and define the target population in your specific region;
- Establish strong relationships with key military and veteran stakeholders who can inform and support your initiative;
- Build an Advisory Committee that includes key military stakeholders to develop strategy and guide process;
- Orient your Advisory Committee en masse to create common expectations and disseminate information;
- Assess the needs of military and veteran families in your region to prioritize funding areas;
- Find out what services are already available and where the gaps are;
- Ensure you are adequately staffed to become and remain continually educated.

2. Develop strategy to guide your work. While grant making is a powerful way to meet the needs of OIF/OEF service members in your community, there are other ways your collaborative can make positive change without funding. To that end, consider alternative ways to impact systemic change and enhance direct service grant making, including:

- Develop a non grant-making strategy to foster systemic change, assessing what methods your collaborative can employ and when;
- Develop a grant making strategy to guide your work, and that can adapt to shifting priorities and landscape changes;
- Plan for the future of your collaboration from the outset by developing a thoughtful exit strategy that identifies your goals, what success might look like, and how to achieve that success.

3. Invest in military/veteran-centered grant-making initiatives. Develop a grant making effort that is above all culturally competent and keeps the veteran and his or her family at the center of all decision-making.

- Consider staged grant making or a demonstration project at the outset of your funding initiative to test and evaluate your effort;
- Send your request for proposals out to the broadest possible network to seek out grassroots organizations you may not know of;
- Thoroughly assess prospective grantees for cultural competence, the single most important criteria of a successful military/veteran service provider;
- Take calculated, thoughtful risks in your grant making as innovative, untested organizations may be the most able to reach and serve this population;
- Provide regular, frequent, and constant monitoring from the moment grants are made to help grantees successfully reach and serve their client base;
- Create a network of grantees by convening them on a regular basis to establish relationships, share resources, learn from each other, and share best practices.

4. Collaborate with grant makers and other stakeholders. For those with the resources and capacity to do so, working in collaboration with a network of community foundations facilitates grantee participation, helps divide the work, facilitates data collection and sharing, and enhances non grant-making objectives. Best practices in collaboration include:

- Leverage collective assets to share and collect information whenever possible;

- Create unified logistical processes to facilitate grant making and assessment of applicants;
- Establish basic practices and a point person to maintain collaboration over time.

5. Plan for sustainability. While financial sustainability of collaborative funds is an ideal, sustainability of funding may not be feasible. Assess whether your donors can be persuaded to contribute to a fund that explicitly seeks to meet the needs of service members in your community. For those planning for long-term financial sustainability, here are some ways to enhance that effort:

- Educate donors from the outset about OIF/OEF needs and how community funds are the most efficient providers of support;
- Use your collaborative's stature to leverage outside resources from public, private, and philanthropic sectors;
- Use convenings and technical assistance to promote sustainability of your grantees beyond grant making efforts.

CONCLUSION

Now, more than ever, meeting the needs of returning OIF/OEF service members and their families is a national imperative: not only is it our duty to serve those who have sacrificed to serve us, but by ensuring these soldiers successful transition to civilian life, America benefits from the strength, courage, and talent that compelled these veterans to serve. No national entities are better positioned to lead this effort than community foundations, which have both the status and intellectual capital to lead the way, and can benefit from the elevated status in their communities as they do so.

**COUNCIL ON FOUNDATIONS
IDEA LAB GRANT
2010-2011**

Veteran Support Initiative

INTRODUCTION

The wars in Iraq and Afghanistan (Operation Iraqi Freedom and Operation Enduring Freedom or OIF/OEF), have demanded unprecedented service from all armed services (Army, Air Force, Navy, Marines) and all components of the military (active duty, reservists, and Guard). War is dynamic, and, by extension, the needs facing these service members present an equally vast and dynamic target, embedded in a perpetually changing economic, social, and policy landscape.

While government programs are tasked with meeting the needs of OIF/OEF current and former service members, they alone cannot meet the needs, nor are they designed to serve the families of service members, who have deployment-related issues of their own. Service members and veterans return to families and communities, not government programs. It is therefore incumbent upon communities around the country to help the men and women who have served our country make a successful transition home, once that service is complete.

History and Context

The genesis of this effort sprang from a donor-advised fund at the California Community Foundation, which established the Iraq Afghanistan Deployment Impact Fund (IADIF) to make grants to organizations across the country to improve the circumstances of OIF/OEF veterans and their families. IADIF operated under the donor's mandate that the funding be quickly distributed. IADIF ultimately distributed \$243 million to 53 new and established organizations across the United States, becoming the largest single private grant making initiative in history directed at the military population.

Among the grants made by IADIF was an innovative effort that funded two regional community foundation-led collaboratives to develop and implement local grant making initiatives to meet the needs of OIF/OEF veterans and their families in their communities. The Texas Resources for Iraq-Afghanistan Deployment (TRIAD) Fund and the Florida BRAIVE Fund were each made up of three community foundations that spanned both states. TRIAD and BRAIVE respectively received \$26,000,000 and \$15,000,000 from IADIF.

TRIAD and BRAIVE operated under a funding imperative from IADIF requiring them to distribute funds quickly limiting how much time participating foundations could dedicate to education or long term sustainability planning. Despite these restrictions, both funds were immensely successful in disseminating their funds to 145 organizations across the state of Texas and 23 across the state of Florida. By the end of 2011, TRIAD and BRAIVE will have fulfilled their missions, allocating all of their IADIF funding.

Process

In this context the Council on Foundations Idea Lab Grant awarded a \$17,500 grant to the Lincoln Community Foundation, Lincoln Nebraska, in partnership with IADIF, to develop the Veteran Support Initiative. The Veteran Support Initiative is a replication model for community foundation-led collaboratives, like TRIAD and BRAIVE, that seeks to improve the circumstances of OIF/OEF service members and their families, as they transition home from war.

The Veteran Support Initiative leveraged the experience of IADIF, TRIAD and BRAIVE. Leaders of all seven participating community foundations (IADIF: the San Antonio Area Foundation, the Dallas Foundation, the Permian Basin Foundation, The Miami Foundation,

the Gulf Coast Community Foundation, and the Community Foundation of Jacksonville) provided extensive information, and participated in a day-long meeting in San Antonio, Texas, for the purpose of informing the replication model documented in this report.

THE VETERAN SUPPORT INITIATIVE: A BLUEPRINT FOR A COMMUNITY BASED MODEL TO MEET THE NEEDS OF OIF/OEF VETERANS

The Veteran Support Initiative leverages the unique position of community foundations to build collective will, foster communication, and mobilize resources to meet the needs of OIF/OEF service members and their families. In fact, communities already have many resources to address the issues faced by our nation's service members as they return home. What is lacking is a structure to organize and coordinate these resources, so they are most useful and accessible to those in need. The Veteran Support Initiative provides a template for community foundations to harness and coordinate these resources and build bridges between existing community assets and stakeholders who share a common goal.

Why Community Foundations are best suited to lead this effort

Community foundations are uniquely poised to develop local solutions to this growing national challenge.

- ***Community foundations have an in-depth understanding of local issues and resources.*** Tasked with addressing complex issues in a local context, community foundations have extensive on-the-ground intelligence about community needs and community resources.
- ***Community foundations have built lasting relationships with local leaders.*** Because they have cross-sector relationships with government entities and leaders, private sector, and established grassroots non-government organizations, community foundations are well-positioned to educate the community and build collective will.
- ***Community foundations have convening power.*** Because of their unique position, community foundations are increasingly adopting a civic engagement role, taking the lead on convening the major public, private, and philanthropic agents in a given region.
- ***Community foundations have a unique position in the philanthropic community.*** Their flexibility and nimbleness allows community foundations to pursue cross-sector solutions, engage citizens, and marshal the needed resources to improve communities and provide opportunity for all, including our nation's military veterans and their families.

Benefits of such a model

The Veteran Support Initiative is based on a simple goal: all service members and their families successfully and completely transition to civilian life in their home communities. The Veteran Support Initiative provides a template for marshalling resources to create the following:

- Coordinated access to seamless, culturally competent care that keeps the service member and his/her family at the nexus of all decision-making;
- Thoughtful and intelligent resource allocation and mobilization to address unmet needs without duplication of services;
- Active communication and partnerships between public and private organizations that seek to help OIF/OEF veterans transition to civilian life.

Requirements of duplicating this model

Implementing an initiative this ambitious requires a great deal of time and commitment over a sustained period of time. At a minimum, duplicating this model requires the following:

- An organizational stakeholder able to take leadership on this effort;
- Partnership between the military and veteran community and other stakeholders;
- Willingness to meet on a regular basis to assess and discuss ways to improve the reintegration of OIF/OEF military veterans and their families into civilian life.

Structure of this report

What follows are recommendations for future collaborative efforts between community foundations seeking to impact the circumstances of military service members and their families on a regional basis. This report is organized into five sections; each contains a set of recommendations and best practices to guide this important work.



BECOME INFORMED

Identify needs, Identify resources, and Understand military

STRATEGIZE

Develop grantmaking, non-grantmaking strategy or exit strategy

INVEST

Test, evaluate, re-invest

COLLABORATE

Build relationship, share information

PLAN FOR SUSTAINABILITY

Leverage resources and ensure ongoing needs are met

I. BECOME INFORMED ABOUT MILITARY AND VETERAN ISSUES IN YOUR COMMUNITY

Community Foundations embarking on a collaborative effort to support military service members and their families may know little or nothing about their circumstances and needs at the outset. It is imperative that the collaborative dedicate time and resources to acquire the quantitative and qualitative information needed to inform your strategy and process, incorporate experience into refined efforts along the way, and form relationships with key military and veteran leaders to vet and inform your initiative.

Gather facts, figures, and data on the following to understand the lay of the land.

Participating funders in a grant making collaborative in support of OIF/OEF veterans need to understand basic demographic and geographic characteristics of the population to inform a thoughtful grant making effort. This must be done in advance of disbursing funds.

Quantitative information can be gathered from sources such as the Iraq Afghanistan Veterans of American (IAVA), the RAND Corporation, the state Governor or Adjutant General's offices, Department of Defense (DoD) circulars, or Freedom of Information Act requests. Information to gather includes:

- Number of active military, Guard, Reserve and veterans in your geographic region;
- Where veterans, Reserve, and Guard live and geographic considerations;
- Location and statistics pertaining to military bases in the region;
- What resources and services for veterans, military members and families, already exist in the community;
- What funding opportunities directed to the military population already exist in your community.

Define your population. Based on your initial research, determine which segments of the military (and it may be multiple segments) your initiative will reach: active duty, Guard/Reserve, veterans, or retired military. Each of these groups may face different issues and have different resources already available to them. Active duty members, for example, often live on or near a military installation and have the support of other military families as well as access to resources. Reservists or members of the Guard, on the other hand, may live in isolation and be far removed from other military families, their unit headquarters and other resources. Understand the differences between each military sub-population and the different methods needed to reach each.

Establish relationships with military. Military families are proud of the sacrifice and commitment they have made to protect and serve this country. The military has a unique culture, characterized by a reciprocal sense of duty to take care of their service members. In this context, military families and service members may be less likely to seek outside help. Therefore, establishing your credibility as someone who listens, wants to learn, and tries to address issues, as defined by service members, their families and veterans, is critical to building relationship with military leaders. To do this, collaboratives must invest time up front by:

- Visiting military installations;
- Meeting with military commanders and other key stakeholders;
- Asking for information, input, and guidance;
- Acknowledging you are there to help by providing their current and former service members with resources;
- Inviting key military members to serve on an Advisory Committee

Build an Advisory Committee as you embark on your project. As you learn about facts and issues regarding OIF/OEF veterans in your community, create an Advisory Committee of 10 to 15 people who can introduce you to military members, veterans, and other local organizations. The Advisory Committee can make recommendations for training and education and may also assist in reviewing grants and provide input as your initiative develops.

The Advisory Committee is not necessarily a grant making body (although it can be, depending on what works best for your foundation), but its members should provide the following functions:

- Networking and connections;
- Visibility to the issue;
- Policy and program experience;
- Fundraising assistance;
- *Geographic* representation from different parts of your community.

Advisory Committee members can include representatives from:

- Military;
- Veterans groups;
- Non-profits (although not potential grantees)
- Relevant government programs;
- Philanthropic organizations;
- Corporations;
- Community members;
- Other relevant stakeholders.

In terms of engaging military personnel, a community foundation collaborative should try to involve both officers and enlisted personnel on the advisory committee, but should be sensitive to status differences between the two. In addition, it is important to recruit military personnel who represent the types of people you will be serving in your community. If, for instance, you have multiple military installations in your region, then it is a good idea to recruit active duty military to serve on your committee. If your community consists primarily of Guard, Reserves, and veterans, then enlist members of those communities to participate.

Train and Educate the Advisory Committee. Your Advisory Committee will include representatives from a number of fields and industries that may have little or no experience with the military or philanthropic work. Provide your Committee with an orientation to the nature of your work, educating them about military cultural competence and the fact that this initiative requires a level of risk-taking in their grant making that they may not be accustomed to. Use this orientation to stress the importance of keeping the service member and his/her family at the center of all decision making.

Assess needs of military and veteran families to set grant making funding priorities. To prioritize funding areas, gather information about the most pressing needs for veterans and their families. This may or may not require primary research. For instance, in some locations, State support services for Guard and Reserves may already have conducted a needs assessment. If this information is not already available, here are some ways to collect it:

- Get existing research on the needs of OIF/OEF veterans in similar areas or nationally (from a source like the RAND Corporation or IAVA) and check those findings with key military and other stakeholders in your region;

- Interview key military leaders and veteran groups in the state;
- Enlist the cooperation of local Guard and Reserve commanders to conduct a primary needs assessment.

Find out what services are already available. Community foundations are well positioned to leverage their networks to identify existing services for OIF/OEF veterans and their families. This information can be collected in the following ways:

- Poll existing grantees who are already serving veterans as part of their existing client base to find out what services they provide
- Ask smaller local community foundations if their grantees already serve veterans;
- Hold community forums with community based organizations and representatives from government organizations (like the Veterans Administration or Vet Centers) who work in fields that veterans may touch.

Ensure you are adequately staffed to become and remain continually educated. Learning about the circumstances and needs of military and veteran families in your region is a time consuming and ongoing process that requires great attention to detail and a focus on building and maintaining relationships. Every person you speak with will likely refer you to several more individuals, and you will need to follow up on all leads – not only to learn more, but also to establish your organization's credibility. Continuity is key – especially with the military – both for institutional knowledge and relationship building. So ensure that your collaborative has a point person, be it a staff member, consultant, or reliable volunteer, who is tasked with handling this important piece of the work.

II. DEVELOP STRATEGY TO GUIDE YOUR WORK

Making grants to enhance or develop effective services is a powerful way to help meet the needs of OIF/OEF service members in your community. There are, however, other ways your collaborative can make positive change in the absence of or before you have access to grant making monies. To that end, your collaborative should engage in strategic consideration of other objectives that could impact systemic change and ultimately enhance direct service grant making.

Develop a non-grantmaking strategy to foster systemic change. With the members of your collaborative, collectively decide what this initiative will and will not seek to accomplish. Ultimately, you should consult with your Advisory Committee members. Ask them to provide feedback and recommendations. Questions to consider include:

- How are we trying to create more systemic change? What is the systemic change you hope to create?
- If so, what methods will we employ to do so?
- Which members of the collaborative will take the lead on which task?

Although a formal grant making strategy is ideal, your collaborative can launch an effort to improve the lives of OIF/OEF service members and their families in the absence of a formal grants budget. Consider the following sequenced activities to impact systemic change:

- Build bridges between organizations serving veterans: by convening organizations that serve veterans, your collaborative can create relationships that facilitate information sharing and even case management for veterans and their families.
- Strengthen infrastructure among organizations serving veterans: community foundations can provide technical assistance to organizations that are relatively young, to help promote their sustainability, and to more established organizations who may not have the cultural competence to serve a military/veteran population.
- Build public awareness of issues among citizenry and the private sector: a press strategy can build public and private support for the challenges faced by military, veterans and their families, ultimately drawing increased resources to the organizations meeting those needs.
- Encourage community involvement: community foundations can educate the philanthropic community, private sector, and populace to encourage involvement in the issues, as long as they have a defined call to action.
- Advocate for policy change: community foundations can educate legislators and policy makers, helping to draw more attention and funding to the area.

Develop a grant making strategy that guides your work. The needs of OIF/OEF service members and their families are perpetually shifting, particularly as the draw down of troops occurs. Therefore, while strategy is important, it is also important to identify a set of core strategic principles to guide your grant-making activities. Questions to consider include:

- Will you fund direct services or other kinds of work?
- How will you tailor your grant making to meet the shifting population and needs in your community?

- What is your tolerance for grant making to newer, less developed organizations, and how will you balance that against the need to reach a new population of veterans?
- How will you keep a veteran-centric approach at the core of your grant making efforts?

Plan for the future of your collaboration from the outset by developing a thoughtful exit strategy. Whether your goal for the collaborative is spending down available grant monies, developing a public awareness strategy, or embarking on a policy agenda, consider what your long term plans are from the outset, and make sure to address those goals in the context of potentially competing community interests your foundation wants to address. If long-term sustainability of the fund is not a goal, or is not feasible, develop an exit strategy at the start of the grant making process to ensure that you meet your goals, be they investment related or not. Key questions to guide your exit strategy are:

1. What are the goals for your grant making and non-grant making related efforts?
2. What does success look like for your investment(s)?
3. If your efforts have not yet yielded the desired outcomes, what additional investments, if any, will ensure your success as defined above?

For instance, if your foundation is making grants but cannot sustain a long-term financial investment strategy, one exit strategy might be to ensure that the organizations in which you invested are financially sustainable, by providing technical assistance or capacity building support along the way.

III. INVEST IN GRANTMAKING INITIATIVES

In order to reach this population of OIF/OEF veterans, your collaborative may need to take risks in your grant making, funding newer and smaller, grassroots organizations than those in which foundations typically invest. In that context, military cultural competence is an important factor in an agency's ability to serve veterans. Recognize that potential grantees may be operating outside their traditional comfort zone or yours – either because they have not yet served veterans or because they have nascent organizational infrastructure. Then plan for ways to support your grantees throughout their work.

Consider staged grant making or a demonstration project at the outset of your funding initiative. Consider running a pilot grant making program in a pre-determined geographic area, with careful evaluation of your efforts. This will allow your community foundation to move money and assess results relatively quickly, spend time building relationships in other areas, then apply lessons from that experience to your wider scale funding efforts. As always, involve the Advisory Committee in assessing all information and results from this pilot grants program.

Once you have established funding priorities, cast a broad net when seeking proposals. How you receive or screen proposals is less important than the scope of your reach. Your call for proposals should be sent to the broadest possible audience of stakeholders including:

- Current and former grantees;
- Known nonprofit organizations across your region who touch on any of the issues prioritized by your initiative;
- Military personnel involved in your region who may be familiar with nonprofit agencies serving military families
- Anyone else you spoke with in the course of your research.

At the outset of your initiative, responsive grant making is advised. More directive grant making should occur when you have learned from existing grants about what works, have observed where the underserved areas and needs remain, and know the lay of the land well enough to ask an agency to meet a specific need in an underserved area.

Assess for cultural competence. The ability to effectively reach and serve veterans is one of the most important criteria by which to assess prospective grantees. Size and sustainability of an organization does not guarantee its success in reaching a veteran population; grassroots organizations by and for veterans may have more success on that level. Cultural competence becomes critical for organizations providing mental health services, where veterans may be reluctant to seek service to begin with, and where the stakes are relatively high since a negative experience may keep a veteran from further seeking mental health services.

Collaboratives should actively request information on how prospective grantees will address issues of cultural competence, and assess applicants in the following ways:

- Pay extra attention to how seriously applicants address cultural competence; look for organizations that can articulate a thoughtful plan to address this issue and that know where their deficiencies lie.
- Conduct site visits and meet the leadership of organizations *before* you make a grant, in order to assess their thoughtfulness and commitment to this issue.

- Be willing to invest in training around cultural competences for your grantees from quality providers like the Center for Deployment Psychology, or other grantees that already have this expertise, and can provide guidance on cultural issues for military and veteran families.

Take calculated, thoughtful risks in your grant making. Because there are so few established organizations already serving OIF/OEF veterans and their families, funders seeking to reach this population have no choice but to invest in organizations that may not be as sustainable as those you traditionally fund. Find those grassroots organizations that are poised for success – those who are capable of using technical assistance and who have evidence of strong board governance – then coach those organizations to sustainability. At the outset, make sure your investments in these agencies won't overwhelm grant recipients. Grants that are too large could increase an agency's capacity more rapidly than they can handle.

Provide regular, frequent, and constant monitoring from the moment grants are made. Because many of your grants will be made to less established agencies or larger organizations that may have no track record of serving veterans, reporting requirements will be more frequent than what you would typically request, especially at the outset of the grant. Focus less on formal reporting and more on conversation with grantees, to facilitate coaching and technical assistance around reaching and serving their client base.

Create a network of grantees. Community foundations have tremendous convening power. When you make grants, convene your grantees on a regular basis to enable them to establish relationships, share resources, learn from each other, and share best practices. Some ways to do that include:

- Create a listserv of grantees and encourage its use to explicitly facilitate referrals between agencies;
- Hold statewide (or regional) grantee meetings once a year;
- Hold smaller geographic-specific grantee meetings two or three times a year (dictated by the frequency with which your collaborative issues a new wave of grants), to encourage networking among grantees and to provide them with technical assistance;
- Use webinars to complement in-person meetings, provide technical assistance, and create additional opportunities for networking among grantees;
- Consider pairing smaller, grassroots organizations that are by and for veterans with larger organizations who may lack cultural competence to facilitate sharing of service-related and institutional best practices.

IV. COLLABORATE WITH GRANTMAKERS AND OTHER STAKEHOLDERS

For community foundations that have the resources and capacity, collaboration among participating foundations enhances grant making and other strategic efforts. Working in collaboration provides the following assets:

- Makes it easier for grantees to navigate the application process and system, especially if the foundations are using a shared application;
- Leverages participant foundation resources by dividing the work;
- Enhances information sharing among grantees;
- Facilitates state/region wide data collection;
- Facilitates non-grant making objectives like building awareness, policy advocacy, bridge-building.

There are, however, factors that make collaboration more challenging.

- Collaboration is time consuming, adding another level of work;
- Leadership personalities and cultural differences in participating foundations can make it challenging to bring boards and CEOs into the collaborative process.

You will need to assess the culture of your organization as well as external factors impacting your particular foundation in order to determine the extent to which you can collaborate or cooperate with the other participating foundations in your region. The following provides best practices for community foundations seeking to work together.

Leverage collective assets by sharing information whenever possible.

Representatives from each of the participating community foundations should jointly:

- Visit statewide military and related contacts to inform them of your fund and learn from them;
- Conduct joint strategic planning at the outset to build relationships and set the foundation for collaboration;
- Divide the workload by expertise to leverage individual assets (for instance, one foundation can be in charge of gathering data, one can locate or conduct needs assessments, one can take charge on convenings, one can lead communications and the collaborative effort in general).

Create unified logistical processes to facilitate grant making and assessment of applicants. Presenting a unified front to your region will help enhance your vision and mission, and provide clarity and navigational ease for both prospective applicants and grantees. Ways to achieve this include:

- Create a unified collaborative website that defines the mission, vision, and geographic boundaries of your initiative (see www.triadfund.org and www.floridabrave.org for examples);
- Develop unified proposal and reporting systems and outcomes measurements across participating community foundations;
- Determine if your collaborative wants an outside evaluator, and if so, consider cross-foundation evaluation.

Establish basic practices to maintain collaboration over time. Collaborations leverage the collective assets of the participating members, but they also require management. If the participating community foundations in your region seek to collaborate, it is helpful to establish a collaboration systems point person, who manages the effort, and organizes regular phone calls and other forms of contact to share best practices and make mid-course corrections.

V. PLAN FOR SUSTAINABILITY

The needs of OIF/OEF veterans and their families are likely to endure long beyond the duration of these wars, already in their tenth year. Therefore, financial sustainability of collaborative funds should be the goal. Sustainability of funding may or may not be feasible in your region. Your community foundation collaborative will need to assess whether donors in your region will contribute to a fund that explicitly seeks to meet the needs of service members in your community. If you determine that a continual investment fund is not feasible or desirable, develop the appropriate exit strategy as described in Section II of this report. If you are planning for long-term financial sustainability, here are some ways to enhance that effort.

Educate donors from the outset. Creating a new initiative for veterans adds an additional issue area to a long list of already established issue areas in a given community. Donors to your foundation must be actively and regularly educated and engaged in this effort on two levels: (1) they need information about the pressing needs of the OIF/OEF population and the paucity of available services; (2) they need to be educated about why community funds provide a more efficient and less duplicative way to support these organizations. Some ways to do that include:

- Take donors on site visits to grantees;
- Providing early and constant donor education and materials including data on the needs of military families and the results of your investments;
- Invite donors to meet with prominent military leaders , who can make the case for the need in compelling and personal ways;
- Recruit prominent military and veteran representatives to serve on your foundation's Board of Directors, where they can advocate for continued financial support.

Use your collaborative's stature to leverage outside resources. Whether or not your goal is to establish long-term financial sustainability of your fund, or to draw more resources to the organizations you fund, you can use your community foundation's stature to bring outside resources to meet veteran needs in your community. Community foundations have relationships with public officials and other foundations. When possible, leverage those relationships to provide education around veterans' issues and advocate for dedication of other resources to address these issues. Examples of ways to do this include:

- Educate legislators who can sponsor bills to create new revenue streams dedicated to military and veterans (ie: Texas created a state lottery scratch off ticket, the proceeds of which fund organizations serving service members, veterans, and their families);
- Partner with corporations who can commit funding or employment opportunities to veterans in your community;
- Attempt to create giving circles that include representatives from corporate foundations, private philanthropy, and community foundations;
- Integrate service members and veterans as a distinct sub-population in other community foundation issue areas, thereby ensuring that resources are dedicated to meet their needs.

Continue to promote sustainability of your grantees beyond grant making efforts.

Even in the absence of continued grant making funds, your community foundation collaborative can use discretionary funding to promote the sustainable impact of your investments.

- Work with the board of your non-profit grantees to garner endowments, planned giving contributions, or donor designated funds for military veterans;
- Provide ongoing technical assistance and convenings to facilitate sharing of resources;
- Convene other foundations and donors to keep these issues in the forefront of your community awareness.

CONCLUSION

Now, more than ever, meeting the needs of returning OIF/OEF service members and their families is a national imperative: not only is it our duty to serve those who have sacrificed to serve us, but by ensuring these service members successful transition to civilian life, America benefits from the strength, courage, and talent that compelled these veterans to serve. No national entities are better positioned to lead this effort than community foundations, which have both the influence and intellectual capital to lead the way, and can benefit from the elevated status in their communities as they do so.

RESOURCES

Articles

- *America's Duty: The Imperative for a New Approach to Warrior and Veteran Care*, a 2010 policy brief by IADIF Director Nancy Berglass, for the Center for a New American Security.
http://www.cnas.org/files/documents/publications/CNAS_AmericasDuty_Berglass_0.pdf
- *Supporting Our Troops, Veterans and their Families*, highlights from a report on the Iraq Afghanistan Deployment Impact Fund (IADIF) of the California Community Foundation
<https://www.calfund.org/document.doc?id=359>
- *Collateral Damage: Floridians coping with the Aftermath of War*, report on the Florida initiative addressing the urgent needs of military personnel and their families impacted by deployment to Afghanistan and/or Iraq.
<http://www.gulfcoastcf.org/news/2011/03/01/new-study-collateral-damage-of-war-on-florida-families/>
- *Sea of Goodwill: Matching the Donor to the Need*, report of Major John W. Copeland and Colonel David W. Sutherland, Office of the Chairman of the Joint Chiefs of Staff Warrior and Family Support.
http://www.lcf.org/about_us/publications

Web Sites

- *Office of Joint Chiefs of Staff*: resources for military support.
<http://www.jcs.mil/>
- *Wounded Warrior Care Project*: a community based model bringing together government and community leaders to maximize resources and provide support for our wounded warriors, veterans and their families.
<http://csrawwcp.org/>