



Considerations for a Veterans Philanthropy Sector Agenda 2018 and Beyond

Source: Discussions at the Veterans Philanthropy Exchange Convening, April 26-27, 2017

Introduction

Arising out of a national call-to-action to the philanthropy sector in 2010 to support America's veterans and military families, veterans' philanthropy is considered a relatively nascent field in 2017. This is especially so when compared to foundation counterparts with long histories of funding education, the environment, or the arts. Nonetheless, veterans funders have gleaned valuable lessons and experiences during this time period that they are poised to share, both within the field of philanthropy and external to the field.

Within the sector, veterans' funders can contribute knowledge for important peer learning, help the field mature its work, and catalyze interest in growing this unique investment space. Outside the field, there are valuable lessons to be shared with public stakeholders, academia, and veteran-serving organizations, all with an eye toward improving collective practice, achieving higher quality of services, and insuring relevance in the myriad agendas that come together to support America's veterans and military families.

In April 2017, the Veterans Philanthropy Exchange, a veterans funders' network hosted by the Council on Foundations, devoted a portion of its fifth annual convening to discuss what interests, challenges, and needs might drive a future agenda in veterans' philanthropy. While the deliberation process continues around the idea of a national agenda for the sector, this document summarizes insights and ideas from that recent discussion, and is intended to contribute philanthropic thought for the George W. Bush Institute's Stand-To/National Veterans Convening on June 22-23, 2017.¹

The convening agenda was designed with three objectives in mind: to generate a list of continued funder interests in the arenas of employment, education, and health and wellness, i.e., the issue areas being addressed by the Bush Institute's Stand-To working groups; to generate ideas for how the field can continue to mature and improve its grantmaking effectiveness; and to probe a future agenda for veterans funders. When the results of these discrete discussion threads are braided, a fuller picture of funder interests and potential agenda items take some shape.

¹ (Note: This is not a position statement on behalf of any individual foundation nor speaks for the entire field of philanthropy. It is a synthesis of discussions of 28 veterans funders about what the next phase of veterans philanthropy might look like.)

The insights are sorted into the following areas:

- *Lessons learned from past grantmaking*
- *Challenges that confront funders*
- *Ongoing and emerging areas of interest*
- *Concerns and notable gaps*
- *An emerging agenda for veterans' funders*

These insights have yet to be turned into action steps; they provide a jumping off point for the ongoing work of the Veterans Philanthropy Exchange, a learning and collaboration forum for veterans' funders. To be clear, these lists have not yet been prioritized nor any areas selected for a consensus agenda.

Summary of Insights from the April Convening of the Veterans Philanthropy Exchange

Lessons Learned from Past Grantmaking

- Foundations can be a voice for what works – this can play an important role in policy making.
- Foundations can drive better non-profit accountability, performance benchmarks, and transparency of operations.
- Foundations have donors and boards can be used effectively to leverage public and private sector policy change.
- Failures are important: attempting innovation is important and the learning invaluable.
- High visibility grantees aren't always the best bets. --also look for the hidden performers.
- 2009-2010 was the "wild west" for private funders responding to the crush of requests and proliferation of veteran-serving organizations, leading to an increased understanding that foundations needed better tools and methodologies to screen potential grantees in this unique space.
- All requesters are not equal.
- Organizations that hesitate to collaborate are not good to invest in.
- There are occasions where foundations have to eliminate non-performing grantees at the local level.

Challenges for Funders

- Sharing information and practices within the sector itself.
- Understanding the national landscape when new Administrations arrive in Washington.
- Funders have individual priorities, and question whether and how to collaborate effectively with each other, and with other stakeholders.
- How best to learn from peers, to know which pilots and demonstrations should be funded, and how to solicit and test new ideas.
- Understanding the role of philanthropy since the popular notion is that government cannot "do it all."

- Determining where a funder can add value in the larger scheme of things, such as the in the broad spectrum of the national landscape or in the public agenda.
- How to integrate veterans support into the broader philanthropy sector to increase investment
- How best to use of data for decision making.
- Conducting due diligence to determine competence of grantees to deliver effective services.
- How to connect policy and advocacy for local impact.
- How to change government funding designs.
- Developing grantee scopes of work that insure results.
- Finding suitable definitions of success.
- Identifying appropriate evaluation metrics.
- Bad actors in the charity sector.

Ongoing and Emerging Areas of Interest

Education and Credentialing

- Processes for obtaining credits for licenses/certificates.
- Support of education expenses or training not covered by the GI Bill.
- More effective preparation of veterans for academic success in higher education.
- Assistance to help veterans make informed decisions about what educational pathways exist and how to best use their VA educational benefits.
- Support for relevant credentialing pathways and training for jobs in the knowledge economy, i.e., for jobs of the future.
- The transition process from education to jobs.
- State level credentialing barriers for military spouses and service members.
- Engagement of academia for collaborative work.
- Identification and resolution of legal issues that create barriers to obtaining credentials.
- Exploration of policies to enable achievement of technical certifications prior to separation, while still on base.
- GI bill: monitor use at the State level; State administration practices; facilitation of improved metrics and reporting of the effectiveness of the GI bill.
- Local guidelines promoting best practices.
- A “how to” credentialing across states.
- Programs for spouses of deployed military.
- Scholarships for spouses - “those who wait also serve”
- Models of success.
- Support for veterans resource centers and peer to peer activities on college campus.

Health and Wellness

- Continuation of the momentum to eliminate veterans homelessness.
- Explore “hot topics” that are trending for possible pilot funding
- Identify best practices, including international models.
- Invest in “systems” mapping and coordination efforts.
- Examine the “status-quo” to determine efficacy of approaches
- Leverage existing best practices and trusted providers
- Fund issues that impede access to care, such as transportation.
- Help for veterans and families to navigate providers and services.
- Fund efforts to improve service provider outcome utilizing clinical best practices.
- Fund treatment approaches that address symptoms, such as PTS
- medications and alternative approaches.
- Support co-locations of services within VA hospitals.
- Explore effects of regional disparities in Tricare.
- Agent Orange effects and impact on next generation in families, such as infertility.
- Family care while a veteran is recovering.
- Any research on long term effects of mental and physical wounds of war.
- Health needs of women veterans.
- Support for understanding and defining the life-long role of VA healthcare in a veteran’s life.
- Defining DOD responsibilities in mental health care.
- Supporting efforts to show proof of program effectiveness.
- Pathways to VA reimbursement for philanthropically-incubated therapies and treatment modalities.

Employment

- Incentivize existing workforce organizations, public and private, to collaborate on veterans employment.
- Educate hiring organizations, like recruiters, SHRM members.
- Fund career training, transitional skill support, employability skill development, including resume development, successful job interview techniques, negotiating application processes, etc.
- Assistance with legal barriers impeding successful job search and placement, such as driver’s license restrictions as a result of incarceration status or loss of license for offenses, failed drug tests, etc.
- Examination of military credentialing policies.
- Drive reliable measures of success.
- Promote benchmarks needed to measure quality, effectiveness, and efficiently levels of training and placement services.
- Address issues of underemployment.
- Thought leadership and pilot of alternative transition assistance programs (TAP) that comprehensively address all needs to transition successfully to civilian employment.
- Test opt-in method from TAP to local community resources.

- Efforts to eliminate reverse incentives, like VCX.
- **Employment (con't)**
- Fund deeper dive into employment barriers, factors of unemployment and underemployment, gender difference.
- Learn more about retention challenges.
- Military skills translation to civilian jobs.
- Counseling before leaving the military.
- Building stronger life skills to better support employment performance.
- Addressing individual skills misalignment with labor market demands.
- Employer orientation and training.

Partnerships and Government

- **Veterans Administration**
 - Increase understanding of new VA priorities and policy direction.
 - Disseminate regional VA information to broader philanthropic sector.
 - Build stronger relationships to foster a better understanding of the role of philanthropy across the VA.
- **Department of Defense**
 - Compile and share best practices with DOD TAP leadership.
 - Engage in collaborations with DOD to demonstrate effectiveness of early forward planning.
 - Pilot programs to test a personnel opt-in choice for data sharing between the VA and DOD

Funders' Emerging Areas of Interest

- Network-building across the public, private, and philanthropic sector
- Defining action items to share with the new Administration
- Advocating for rule changes and processes for facilitating the work of foundations with government partners
- Understanding and supporting women veterans' needs
- Storytelling to disseminate effective practices and individual success

Continuing Concerns and Notable Gaps

- Avenue to address poorly designed government programs
- Use of public data sets effectively
- Lack of longitudinal data
- Continuing challenges of identifying where veterans live
- Not all outcome data is equal
- Feedback loops from users of services for continuous improvement of grantee performance

A Veterans Philanthropy Sector Agenda

To be clear, the philanthropic sector is not a monolith nor singularly focused. There are inherent challenges to developing a consensus agenda among independent grantmakers. Grantmakers with deeper interests in veterans and military families might embrace elements of such an agenda, however, the broader foundation sector may or may not engage, nor will all veterans funders necessarily sign on.

Foundations develop their grantmaking priorities based on mission and strategy, and in the case of community foundations, on specific community needs. The sector takes pride in its identification as the *independent* sector, possessing the ability to engage in social innovation, take risks to test with its capital, to make decisions independently, and to exercise grantmaking independent of government interference or dictates.

However, it is safe to assume that the sector strives to be strategic and smart in its grantmaking, no matter what the priority area. Cross-sector efforts to improve services for veterans would be informed by what grantmakers see as *attributes of smart grantmaking*:

- **Strengthening Relationships with Non-Profits.** Grantmakers shape more effective solutions by building relationships with grantees based on trust and tapping the knowledge and perspective of grantees and community members.
- **Supporting Nonprofit Resilience.** Grantmakers enable high-performing nonprofits to focus on long-term mission fulfillment by providing support that is flexible, reliable and contextual, enabling grantees to build critical skills.
- **Learning for Improvement.** Grantmakers use evaluation to continuously learn and improve by partnering with nonprofits to collect and share greater insights about what is or is not working- and why.
- **Collaborating for Greater Impact.** Grantmakers achieve greater impact by partnering with other organizations in pursuit of common goals and providing nonprofits with funding for collaborative efforts.²

With this context of how philanthropy works, the following ideas have bubbled up from the Veterans Philanthropy Exchange convening, and any, or all, might make it onto a future agenda in veterans philanthropy:

- Build the capacity to do better trendspotting and gap identification appropriate for philanthropic response.
- Define and disseminate across the broader philanthropy sector what the role of foundations is in veterans' philanthropy to encourage new grantmaking.
- Develop better capability to share information across the public and private sectors to eliminate duplication of research and data gathering.
- Identify important knowledge gaps exist.

² Grantmakers for Effective Organizations, *The Smarter Grantmaking Playbook*. Retrieved from <https://www.geofunders.org/what-we-offer/the-smarter-grantmaking-playbook>

- Conduct relevant pilots demonstrations and test innovations
- Ramp up interactions with government policymakers, including Congress.
- Promote storytelling about successes and continuing needs of veterans and military families.
- “Step back” to assess learning thus far and use data to educate stakeholders and policymakers about important issues not being addressed.
- Demonstrate to stakeholders how to use data and evidence promote effective service delivery.
- Ramp up support for research and data analysis.
- Promote and actively fund collective impact efforts in communities.
- Increase peer learning on veterans’ issues and solutions within the philanthropy sector.
- Continue supporting public-private partnerships.

There is no consensus at this point. But the discussions have begun. More to come...

On behalf of the Veterans Philanthropy Exchange

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