2019-2020 Combined Arms Consulting Capstone Team
The Bush School of Government and Public Service, Texas A&M University
Advisor: William Brown

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The **Bush School**
OF GOVERNMENT & PUBLIC SERVICE
TEXAS A&M UNIVERSITY ★

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About the Project
This project aims to provide Combined Arms with a report that substantiates their model, gives an honest appraisal of the support service they offer member organizations, and gives an analysis of the markets Combined Arms plans to expand to, Dallas, Tarrant, and Bexar Counties.

The Mission
The capstone team provides valuable, research-driven recommendations for Combined Arms to substantiate their veteran service model and achieve their goal of expansion throughout the state of Texas.

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Glossary

Definitions for the purposes of this report include:

Backbone organization	the support infrastructure for a collective impact initiative that functions to guide vision and strategy, support aligned activities, establish shared measurement practices, cultivate community engagement, advance policy, and mobilize resources
The capstone team	authors of the report; the team of Master of Public Service and Administration students at the Bush School of Government and Public Service
Combined Arms leadership team	the collective whole of Combined Arms staff that have supervisory roles, such as the CEO, Systems Director, Coordinated Services Manager, and Technology Project Manager as examples
Combined Arms Mission Statement	"To unite the community to accelerate the impact of veterans on Texas."
Member organization	an organization that is part of the Combined Arms network of organizations; a member organization has been formally vetted by Combined Arms and offers resources or services (in varying capacities) to veterans
Referral	the act of referring a veteran to receive resources and support (1) by Combined Arms to a member organization, (2) by a member organization to Combined Arms, or (3) by a member organization to another member organization
Replication	refers to the transfer of a tested concept, a pilot project, or a small enterprise to another location to repeat success elsewhere.
Scaling	refers to taking a concept or project and expanding it to serve more people, generate more revenue or any other objectives an organization may have

Support Services	a term that broadly encompasses the client referrals, technology, shared workspace, advertising/marketing, professional development, and networking opportunities Combined Arms provides its member organizations
Theory of Change	a method for planning, participating, and evaluation that can be used by organizations to promote social change
Veteran activation statistics	A metric collected by Combined Arms which sums the number of veterans who engage in the Combined Arms system through veteran profile creations, event RSVPs, and Echolink referrals
Veteran engagement	a member organization within the Combined Arms network-initiated contact with a veteran to offer resources or services; this happens after a veteran initiates contact with a member organization through a Combined Arms assessment
Veteran profiles	A secure online profile page that allows veterans to safely engage with Combined Arms' programs, events, and needs assessments
Veteran service model	the collaboration model developed and utilized by Combined Arms
Veteran service organization	an organization that provides support to and for veterans; this encompasses organizations that offer direct services as well as organizations that offer indirect support to veterans through funding and advocacy
Veteran service provider	an organization that provides direct services or resources to veterans that fall into service categories such as career services, mental wellness, financial assistance, legal assistance, volunteer engagement, fitness, education services, veteran benefits assistance, and homelessness assistance as examples

Executive Summary

Overview

The Bush School of Government and Public Service graduate students at Texas A&M University worked with Combined Arms, Houston, from September 2019 through April 2020 to provide research-driven recommendations to substantiate the service model and facilitate expansion. The report consists of three components. First is a case summary that provides an objective assessment of the Combined Arms veteran service model, substantiated with academic literature, interviews with member organization, and the Combined Arms leadership team. Section two provides a detailed analysis of the services Combined Arms offers to the member organizations and explores which are perceived as the most beneficial. The report also investigates how Combined Arms' 2019 budget aligns with the services that are valued by the member organizations. Section three provides information on veterans and the services available to veterans in Dallas, Tarrant, and Bexar counties as an initial exploration of the expansion opportunities in these regions.

Section 1: Case Study

The Case Summary describes what Combined Arms does to alleviate the problems that veterans face with receiving timely and quality services upon their transition to civilian life. Combined Arms coordinates and supports a network of member organizations to expedite the process of veteran engagement with service providers to ultimately, positively impact the lives of veterans.

Combined Arms Veteran Service Model summary:

Veterans Transitioning	The model starts with the veteran. Nearly half of post-9/11 veterans experience difficulty transitioning to civilian life; they require services and resources.
Client Acquisition	Combined Arms attracts and gathers veteran clients into the Combined Arms system with site visits to military bases, advertising and marketing, and events. This phase of the model emphasizes the "no wrong door approach" because Veterans can gain access to the Combined Arms system through Combined Arms, any of their member organizations, or attendance to an event.
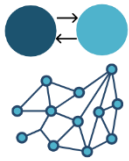
| | Referrals | Referrals to and between organizations occur, facilitated by technology (Salesforce and Echolink mobile App). Referrals are a critical component of the model, with many of the interviewed member organizations identifying the value of referrals between member organizations. |

Referrals to and between organizations occur, facilitated by technology (Salesforce and Echolink mobile App). Referrals are a critical component of the model, with many of the interviewed member organizations identifying the value of referrals between member organizations.

Veteran Engagement

Combined Arms coordinates 72 member organizations that provide over 400 services. Expedited veteran engagement is facilitated by the accountability mechanisms of Combined Arms, which includes a vetting process for member organizations, tracking response time, and tracking outcomes.

Program Outcomes

Member organizations provide services, such as career services or mental wellness, that have an impact on veterans' lives (also known as program outcomes).

Combined Arms (their veteran service model) increase the capacity of member organizations to focus on their mission and achieve positive outcomes for veterans. Facilitating and supporting collaboration among member organizations plays a role in every function of Combined Arms. The Case Summary will go into greater detail on the characteristics of the veteran service model and highlight some defining features that member organizations value.

Section 2: Analysis of Support Services

The analysis investigated the services that Combined Arms offers to member organizations, and used data from member organizations, to determine which services were most beneficial. Also, the analysis aligned Combined Arms' 2019 budget with the support services that the member organizations deemed as the most valuable.

The analysis found:
- Client referrals are the most important support service for the majority of surveyed member organizations.
- Combined Arms spent almost half, or about $820,000, of their budget on supporting member organizations through client referrals, technology services, and a variety of other services.

- Combined Arms invests approximately $116 per veteran referral measured by the veterans activated into the network through completed veteran profiles, member organization to member organization referrals (Echolink), and event RSVPs.
- Member organizations strongly identified with the core mission of Combined Arms, with approximately 96% of respondents either agreeing or strongly agreeing that there was an alignment between their mission and Combined Arms' mission statement.

Section 3: Market Analysis

Data was gathered on veteran demographics, current philanthropic giving, and potential partners operating in Dallas, Tarrant, and Bexar Counties, then available data was compared to information from the current service area of Combined Arms (Harris county).

Home to over 1.5 million veterans, Texas is projected to be the number one state in the country for veterans very soon. Much of the demographic data we retrieved for Dallas, Tarrant, and Bexar Counties is consistent with state and national averages; however, there are a few unique data points:
- Although national trends indicate an increase in female veterans in the future, veterans across the state and nation are overwhelmingly male. The county with the highest percentage of female veterans is Bexar County, with 14.5% compared to 9%-12% for the other counties researched.
- Regarding age and period of service, Bexar and Tarrant Counties skew younger and have a larger percentage of Gulf War I and Gulf War II era veterans than Dallas and Harris County.
- There is no discernable difference in veteran's education or veterans' disability ratings across all four counties.

Regarding the current state of philanthropic giving, our data showed that many veteran service organizations are operating in Dallas, Tarrant, and Bexar counties; however, the extent to which they collaborate is uncertain. Interviews with representatives of several veteran service organizations in Dallas, Tarrant, and Bexar Counties revealed that many organizations in these markets do collaborate but not to a large extent. Coordination for services does appear to be lacking amongst veteran service organizations in both markets.

Section 1: Case Summary

Introduction

Combined Arms is a nonprofit organization, based in Houston, that connects public and nonprofit organizations to accelerate veterans' transition to civilian life. They do this by uniting and coordinating a network of organizations that provide resources, services, advocacy, and funds for veterans. Combined Arms' primary client is the transitioning veteran, whose positive outcomes fulfill the organization's purpose. Their secondary client is the member organizations that provide services to veterans and comprise their network of public and nonprofit organizations.

Combined Arms began their mission in Houston and are now looking to expand their impact across the state of Texas by replicating their veteran service model in Travis, Dallas, Tarrant, El Paso, and Bexar Counties. The capstone team was tasked with substantiating Combined Arms' veteran service model to facilitate this expansion. This process involved the critical assessment of the logic and features of the model, advised by the Combined Arms leadership team, the objective assessments of the capstone team, the incorporation of current academic literature, and the input from Combined Arms' network of member organizations.

Overall, the model acts as a blueprint that captures what Combined Arms does to bring about the intended outcome of quicker transitions for veterans (relative to a transition without Combined Arms). This blueprint could also be used to attain desired results in new locations.

The capstone team's analysis of the model will strengthen the utility and credibility of Combined Arms' functions. Additionally, it will showcase the value of Combined Arms to stakeholders, such as potential member organizations in new locations, or entrepreneurs in search of a template for community solutions.

Data Sources

A compilation of mostly qualitative data was collected and analyzed to support the conclusions drawn in the Case Study.

Interviews

Interviews were conducted with a representative from eight member organizations that partner with Combined Arms. The selected organizations offer health and wellness services, transitional services, financial services, housing services, mental health services, community involvement opportunities, and leadership and professional development to veterans (and their families in some cases) in the Houston area. Member organization interview responses informed our analysis of the model.

Our interviewees were chosen using stratified random sampling. First, we divided the member organizations into quartiles or strata based on the number of referrals they receive, then randomly selected two organizations from each quartile. This process was conducted three more times to provide three sets of backup contacts if our first organization was not responsive. We believed that this approach would reduce the risk of bias and sampling error because the selection was random, and organizations at each referral level (stratum) were represented. Our team discussed simple random sampling and selecting the top-performing organizations as possible options but concluded that these methods would not be effective in producing an unbiased evaluation. Stratified random sampling was accomplished using R with the R function set.seed(x) being used before randomly generating the numbers to ensure reproducibility. As part of this function, random numbers were used for the "x" argument. Two machines with different Operating Systems were used, macOS and Chrome OS, so set.seed() may produce varying results.

Interviewees were emailed a script that explained the purpose of the interview and provided a list of the questions we planned to ask. Interviews ranged from 10 to 30 minutes. Interviews were also recorded for note-taking purposes in cases where the interviewee gave consent. Interviews were then transcribed to analyze common themes and to identify critical insights. A full list of interview questions can be found in Appendix A.

Other Sources of Data

Because of the nature of the Case Study, several other sources outside of the academic literature contributed to the analysis of the Combined Arms veteran service model.

Meetings with Combined Arms Leadership Team
Throughout this project, members of the capstone team met with the Combined Arms leadership team to discuss the creation, the operations, and the vision of Combined Arms. These conversations also covered budgetary information, defining terms, and any other questions the capstone team had. Key points of contact were the CEO of Combined Arms, the Systems Director, and the Technology Project Manager.

Combined Arms Site Visit
The capstone team traveled to Combined Arms headquarters in Houston to see firsthand the technology platform, Salesforce (a web-based client-relationship management tool), at work. During the time in Houston, the capstone team got to tour the facility and ask questions of staff members that were influential in understanding the Combined Arms veteran service model.

<u>2019 Combined Arms Convening</u>
Several members of the capstone team attended the 2019 Combined Arms Convening in Houston to collect information on services that Combined Arms offers member organizations.

<u>Combined Arms' Website</u>
The Combined Arms website was used to collect essential data on the services Combined Arms offers, the member organizations that partnered with Combined Arms, the mission, vision, and goals of Combined Arms, and other influential information concerning Combined Arms' operations.

<u>Various Proprietary Documents</u>
The Combined Arms leadership team provided private documents, such as their work plan, internal presentations, and other internal documents, to give the capstone team insight into the internal operations of Combined Arms.

<u>Veteran Testimonials</u>
Veterans from the Houston area were interviewed on their experience with the transition from military to civilian life. These interviews provided insight into the veteran experience of transitioning in Houston as well as veteran opinions on how an organization like Combined Arms could help.

The Problem

The Struggles of Veteran Transition

Veterans have a difficult transition to civilian life. The transition from military members to civilians involves more than a simple change of jobs. It involves a change in almost every aspect of a veteran's life, including their financial status, the place they call home, and the support system around them. While some service members make the transition with relative ease, a 2019 report by the Pew Research Center found that roughly 1 in 4 veterans experienced difficulty adjusting to civilian life (Pew Research Center, 2019). This figure jumps for post-9/11 veterans, in which nearly half (48%) report somewhat or very difficult transitions to civilian life after their military service (Pew Research Center, 2019).

Veterans who served in combat are significantly more likely to say their readjustment experience was challenging (Pew Research Center, 2019). This challenge may be due to their perceived inability to relate to their peers who have never experienced combat or other emotionally traumatic or distressing experiences (Zogas, 2017). Only half of the veterans surveyed by the Pew Research Center said that "they were well prepared for the transition to civilian life." In

contrast, the other half (45%) said that "the military did not prepare them too well or at all" (Pew Research Center, 2019).

When service members return home, they are often unaware of the existing programs available to them (Pew Research Center, 2011). This lack of adequate support systems may further exacerbate veterans' difficult transition to civilian life.

Fragmentation Among Veteran Service Providers

Fragmentation is the proliferation of organizations working in isolation and conducting similar or overlapping services for the same clientele (Dolan, 1990). Fragmentation negatively impacts veterans and service providers. For veterans, fragmentation among service providers inhibits their ability to quickly access appropriate services that help with their difficult transition to civilian life. In Texas alone, there are 2,364 veteran service providers registered with the IRS (GuideStar, 2015). Without an organization like Combined Arms that acts as a single point of entry for services, veterans must devote more time and energy to navigate high volumes of organizations to access quality services.

> *"If I would have known about Combined Arms and what they do, it would have been much less stressful for me whenever I arrived in Houston. It's hard to imagine an organization like Combined Arms that will do all of the leg work to connect veterans to all sorts of resources in Houston free of charge."*
>
> *-David B., Houston area veteran*

For service providers, fragmentation results in redundancies in programs and the inefficient allocation of resources that negatively impact the quality and cost of the services being provided.

Redundancies in programs occur when organizations are unaware of other agencies in the area providing similar services to the same population. These organizations usually compete for funding, lessening the extent of their impact (relative to if they worked together and pooled their resources).

Additionally, organizations working in isolation may attempt to meet every veteran's need, which reduces the quality of their services. Organizations usually have a primary function that they do exceptionally well, whether it be employment, housing, or mental health. However, social issues, including veteran transitions, are complex and require a variety of services that no one organization can accommodate. Therefore, when an organization branches out in an attempt to meet every veteran's need, they risk unintentionally weakening the impact of their core functions and creating sub-par programs (B. Escobedo, personal communication, Feb. 10, 2020). The economic theory of comparative advantage can explain this phenomenon. Comparative

advantage theory states an organization should provide the services that they do most efficiently (least opportunity cost relative to other organizations) while avoiding what they do least efficiently. In this instance, comparative theory suggests that organizations attempt to branch out and offer services other than their core functions when another organization could provide that service at a lower opportunity cost (Gupta, n.d.). Organizations are better off fulfilling their unique mission without trying to treat the whole veteran. Attempting to treat the whole veteran has the potential to lower the quality of their services and weaken their core functions.

In Texas, the recent increase of veteran centered nonprofits has amplified the issue of fragmentation. After America's large-scale deployment of service members to Afghanistan and Iraq, the U.S. began to see the largest wave of combat-wounded veterans returning to communities since Vietnam. This large-scale return prompted the creation of nonprofits nationwide that were devoted to meeting the needs of returning veterans. From 2001 to 2013, the number of nonprofits that were registered with the IRS as veteran service providers saw a tremendous increase across the nation, especially in Texas. Between 2012 and 2015, the number of veteran service providers in Texas grew from 1,314 to 2,364, an increase of approximately 45% within three years (GuideStar, 2015; Brown, Jo, & Anderson 2013).

Ultimately, fragmentation creates problems for both veterans and service providers by exacerbating inefficiencies, creating redundant programs, and inadvertently producing sub-par programs that do not meet veterans' needs. Instead, fragmentation should be combatted through the collaboration of veteran service providers.

The Solution

Collaboration

The antidote to fragmentation is collaboration. Traditionally, nonprofits work in isolation to find and fund a solution embodied within a single organization. This approach is well suited for technical problems, in which the problem is well-defined, and the answer is known in advance (e.g., building a hospital) (Kania & Kramer, 2013). However, most social issues are complex and dynamic. Additionally, the competitive nature of organizations working in isolation leads to the fragmentation of services, which has negative impacts on service providers and the clientele they serve (Goldstein, 2017). Ultimately, isolated approaches are not the most effective method to solve complex social issues.

Collaboration and coordination among organizations have steadily increased over the past two decades to overcome the challenges brought forth by fragmentation and to address the complex issues that exceed the capacity of individual organizations (Armstrong et al., 2016). Although collaborative relationships between organizations have always existed, they have only been

studied empirically since the 1980s. A review of the literature shows that there is no unified definition of collaboration. However, the literature describes collaboration as the joint effort between organizations toward a mutual goal that no single organization could achieve working unilaterally (Guo & Acar, 2005; Wood & Gray, 1991). Collaboration is facilitated through various mechanisms of information exchange, resource sharing, and organizational restructuring (Proulx, Hager, & Klein, 2014; Khom, La Piana, & Gowdy, 2000). Collaborative relationships take on many forms, based on the organization's purpose, goals, and environment. Lastly, there has been abundant research on why nonprofits collaborate, the outcomes of collaboration, and the types of collaborative relationships. However, there has been less literature on the process, or the black box, of collaboration (Gazley & Guo, 2015).

<u>Benefits of Collaboration</u>
Organizations choose to collaborate to acquire resources, improve the efficiency of operations and services, foster innovation, and ultimately enhance the program's impact (B. Escobedo, personal communication, Feb. 10, 2020).

Resource Acquisition
The resource dependency theory states that organizations with scarce resources or unstable resource environments collaborate with other organizations to receive tangible benefits (such as funding) or intangible benefits (such as information, visibility, or legitimacy) (Guo & Acar, 2005). The drawback to higher resource acquisition, however, is the loss of autonomy for the participating organizations (Murray, 1998).

Increased Efficiency
Collaboration is also beneficial to improve the administrative and programmatic efficiency of participating organizations. One cause of inefficiency is fragmentation among service providers, which results in the inefficient allocation of resources and redundancies in programs that negatively impact the quality and cost of the services being provided. Combatting fragmentation to increase efficiency requires the coordination and management of resources and services rather than the acquisition of additional resources, as in the resource dependency theory.

Innovation
Organizations that have complementary knowledge can combine their specific strengths to develop new ideas, products, or services faster than either partner could have on their own (De Man & Duysters, 2005). Collaboration across geographic location, department, and skillsets bring new opinions and solutions that may not have been seen before. This diversity of stakeholders fosters innovation in issue areas that are often complex and ever-changing.

Impact
Organizations strive for increased resource acquisition, efficiency, and innovation to ultimately improve their program's impact and outcomes for their target population (Rossi, Lipsey, & Henry, 2018). Research has shown that collaborating organizations achieve higher levels of performance by having access to financial support, supplies, volunteers, ideas, communication platforms, and data, among many other resources, that may otherwise not be available to them (Bush Institute, 2015). Lastly, greater resource acquisition, efficiency, and innovation may help to widen an organization's impact geographically.

Models of Collaboration
Collaborative models can be structured in a variety of ways, depending on the organization's purpose, goals, and environment. A review of the literature identified models of collaboration that resembled Combined Arms' functions.

Parent-Subsidiary Structure
Khom, La Piana, and Gowdy (2000) coined the term "parent-subsidiary structure" for the creation of a new organization to oversee the administrative functions and programmatic services of the participating organizations. The visibility and identity of the original organizations often remain intact (Khom, La Piana, & Gowdy, 2000). This model's defining feature is the improved administrative and programmatic efficiency of participating organizations (Khom, La Piana, & Gowdy, 2000).

Confederation Model
Similar to the parent-subsidiary structure is the "confederation" model outlined by Proulx, Hagar, and Klein (2014). A confederation model is an umbrella organization that provides services, coordination, and support to various participating organizations. This type of collaboration is meant to create order out of fragmentation. Participating organizations gain increased exposure as their brand expands beyond their original local community. They also have the benefit of increased stability, as they receive support and services from the umbrella organization. Lastly, confederations allow for the coordination of activities and services across regions (Proulx, Hagar, & Klein, 2014). This model emphasizes greater resource acquisition and efficiency for participating organizations.

Collective Impact
Collective impact initiatives involve a centralized infrastructure, called a backbone organization, and a structured process that leads to a common agenda, shared measurement systems, continuous communication, and mutually reinforcing activities among all participants (Kania & Kramer, 2011). It is defined as the commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem (Kania & Kramer, 2011). This

model produces all the benefits of collaboration, such as greater resource acquisition, efficiency, and innovation, in order to improve a program's impact.

Resource Acquisition and Innovation

Collective impact initiatives increase resource acquisition, mostly in the form of information and knowledge, for participating organizations through continuous communication. Organizations participating in a collective impact usually hold monthly or even bi-weekly meetings to learn from each other and solve problems together. Additionally, continuous communication, coupled with the diversity of participants, cultivates an environment for innovation.

Increased Efficiency

Collective impact also increases efficiency by creating order out of fragmentation with mutually reinforcing activities. Collective impact relies on a broad, diverse group of actors working together to undertake a specific set of activities that supports and is coordinated with the actions of others. Each participants' efforts must fit into an overarching plan for their combined efforts to succeed. This plan ensures that there are no redundancies in services and organizations can allocate their resources to the programs that they excel in, rather than spreading themselves too thin trying to address all the aspects of a complex problem.

What Makes Collective Impact Unique

The collective impact model is unique because it emphasizes working on a single set of goals, measured in the same way to achieve large-scale social change. Collective impact involves a common agenda, a shared understanding of the problem, and a joint approach to solving it based on agreed-upon actions. From there, a shared measurement system is necessary to chart how the success of the common agenda will be assessed.

Collective impact builds infrastructure into its model, called a backbone organization, to support and manage the entire initiative. The table below shows the activities of a backbone organization and some sample functions that a backbone organization may undertake.

Figure 1.1 Backbone Activities and Sample Functions

Backbone Activities	Sample Functions
Guide vision and strategy: sharing common goals and strategies with stakeholders to continually align the initiative's common agenda	Build a common understanding of the problem Serve as a thought leader/standard-bearer for the initiative Ensure common agenda is updated as needed as the strategy unfolds
Support aligned activities: coordinating and communicating activities with stakeholders to support collective learning and action	Coordinate and facilitate partners' continuous communication and collaboration (e.g., run task force meetings) Recruit and convene partners and key external stakeholders Seek out opportunities for alignment with other efforts Ensure task forces are being data-driven
Establish shared measurement practices: coordinating the sharing of data to establish a shared measurement practice that could be used to refine organizations' approaches and strategies	Collect, analyze, interpret, and report data Catalyze or develop shared measurement systems Provide technical assistance for building partners' data capacity
Build public will: building trust among stakeholders and helping them feel empowered to act on the issue	Create a sense of urgency and articulate a call to action Support community member engagement activities Produce and manage communications (e.g., news releases, reports)
Advance policy: continually communicating common goals to initiate policy changes	Advocate for an aligned policy agenda Stay on top of policy developments that impact

	the effort
Mobilize funding: securing funding to support the initiative's activity	Mobilize and align public and private resources to support the initiative's goals (and the backbone itself)

(Turner et al., 2012; Collective Impact Forum, n.d.)

These six activities provide value to the participating organizations and support the overall collective impact initiative. They also act as life-cycle stages that backbone organizations go through as they mature.

In conclusion, collaboration provides benefits to participating organizations with resource acquisition, increased efficiency, and greater innovation. Collaboration also provides benefits to the clientele of participating organizations through the enhanced program impact and outcomes.

Combined Arms Veteran Service Model

Combined Arms utilizes a unique collaboration model that is tailored to their mission: "To unite the community to accelerate the impact of veterans on Texas" (Combined Arms, About Us, 2020). They create order out of fragmentation by providing a single point of entry for veterans and coordinating the activities of a diverse set of member organizations.

Combined Arms manages, coordinates, and supports a network of member organizations to achieve its mission of accelerating the transition of veterans. They expedite the process of veteran engagement with a service provider by acquiring veteran clients and providing mechanisms for referrals to and between organizations. This referral process is facilitated by technology and peer-to-peer networking amongst member organizations, while accountability measures and shared resources facilitate member organizations' engagement with veterans.

Once veterans engage with the service provider, member organizations step in to provide services that have an impact on veterans' lives (also known as program outcomes). Additionally, Combined Arms provides mechanisms for collaboration that facilitate and support the entire model. Figure 1.1 below outlines this process (known as the Combined Arms veteran service model).

Figure 1.2 Combined Arms Veteran Service Model
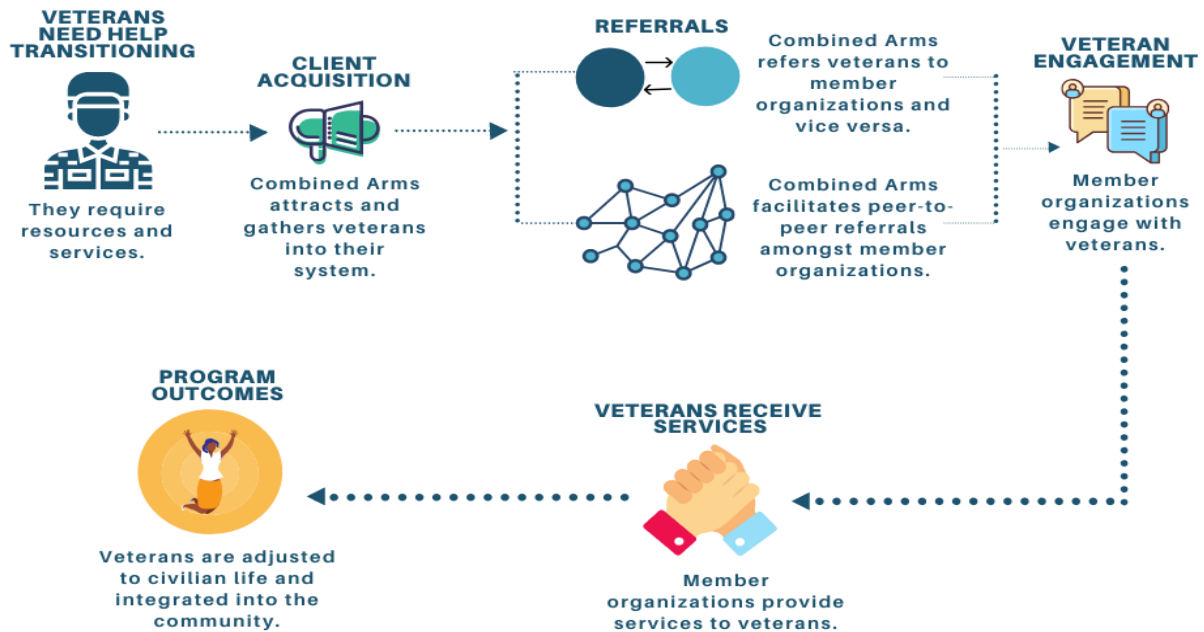
Each step of the model is explained in detail below.

VETERANS NEED HELP TRANSITIONING

The model begins with the veteran. Veterans need help transitioning to civilian life and require services and resources. Combined Arms must work to attract and bring in veteran clients to connect them with organizations that address their difficult transition.

CLIENT ACQUISITION

Next, Combined Arms works to attract and bring in new veteran clients to their organization, a process known as client acquisition. A prospective client must gain awareness about the organization, be interested enough to consider using the services, and finally decide to be a client. Combined Arms as a "one-stop-shop" for veteran resources is the primary motivation for veterans to become a client. This way, they do not have to navigate the large pool of veteran resources during a stressful transition period.

Actively funneling in veterans into the Combined Arms system allows Combined Arms to facilitate a faster transition for more veterans. Additionally, member organizations gain the advantage of an outside organization, gathering clients on their behalf. Client Acquisition allows member organizations to focus more on their mission and less on outreach. There are various ways in which Combined Arms acquires veteran clients for member organizations.

Site Visits to Military Bases
Combined Arms visits military bases to funnel veterans into their system before their transition. They inform veterans of Combined Arms, and by extension, the available resources in the area.

Advertising and Marketing
Combined Arms advertising and marketing target service members, veterans, potential member organizations, and funders through:
- E-mail distribution and geographic targeting
- Social media posts, boosts, Google Analytics, and targeted ads
- Direct mail campaigns
- Roadshow sign-ups
- Connections with local businesses, corporations, and city officials

Combined Arms offers free, indirect advertising and marketing for its member organizations that increase their visibility. Member organizations' logos and events are often displayed on the Combined Arms' website (Combined Arms Work Plan, pg. 33).

> Several of the membership organizations interviewed mentioned the marketing and connection that Combined Arms brings to their organization. If Combined Arms were not around, several organizations would lose "a significant outlet or a way to reach veterans in the area."
>
> Smaller membership organizations that were interviewed mentioned that before partnering with Combined Arms, they reached veterans through word of mouth or small marketing campaigns. Through Combined Arms, a more "systematic approach" arose on how to reach veterans. Combined Arms allowed for "another voice, another amplifying voice to get the word out" about their organization and the services they offer. Additionally, Combined Arms' partnerships with more extensive, nationally recognized organizations allow smaller organizations to get their name out to a larger veteran audience. Overall, Combined Arms uses their name recognition to "amplify the outreach" of smaller local membership organizations to the broader veteran community.

Combined Arms advertises events put on by or in collaboration with member organizations. Veterans are invited to create a profile to join the Combined Arms network of services when they RSVP to events. In 2019, Combined Arms received 2,428 RSVPs to events. Veterans engagement with Combined Arms through RSVPS emphasizes the "no wrong door approach" in which veterans can approach either Combined Arms or member organizations to gain access to the Combined Arms network of services (J. Boerstler, personal conversation, April 2020).
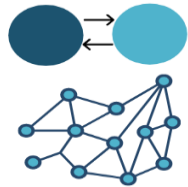
REFERRALS

After Combined Arms attracts and gathers veteran clients into the Combined Arms system, referrals to and between organizations occur.

> Not only does Combined Arms refer veterans to member organizations, but member organizations also refer veterans to other member organizations or back to Combined Arms for other services. As one member organization characterized in an interview, the relationship with Combined Arms is "not only a one-way street in terms of referrals but a back and forth."

Technology
One of the primary goals of Combined Arms is to be a one-stop-shop for veterans seeking resources. According to their website, their technology "[creates] pathways for [veterans] to access resources based on exactly what vets asked for, leaving the outdated model of "'services in silos' behind" (Combined Arms, About Us, 2020). Combined Arms uses Salesforce (a web-based client-relationship management tool) and Echolink (a mobile app) to refer veteran clients to and between member organizations for specific services, as identified in a client's assessment(s). Combined Arms primarily uses Salesforce as the platform to refer clients to member organizations. In contrast, member organizations primarily use Echolink to refer clients to other organizations in the Combined Arms network or back to Combined Arms. The use of technology allows Combined Arms to manage member organizations' interactions with potential veteran clients.

To become a part of the Combined Arms system, veterans must create a secure profile in Salesforce with their contact information. Then they have the option to complete an assessment(s) that identifies which organizations offer their needed resource(s). Lastly, member

organizations receive the veteran's name and contact information to reach out to them within 96 hours. However, the average response time for member organizations is around 50 hours. Combined Arms has referred 17,313 cases to over 400 resources since 2017 (Combined Arms work plan, pg. 45).

> Member organizations have spoken of the ease of referring veterans to other organizations within Combined Arms. This technology allows veteran service providers to "truly focus on [their] mission, and if someone knocks on [their] door in error, or needs another service or support beyond [their] scope, [they] have a place to send them" according to an interviewed organization.

> Some organizations mentioned how the technology provided by Combined Arms (i.e., Echolink mobile app) allowed for the immediate connection of a veteran to the services they needed. Through the Echolink App, "[we] have immediate access to info… If we have a referral, we are made aware of that referral today." A simple search using the mobile app enables member organizations to find necessary services they do not offer and promote those organizations to veterans who need those services. Furthermore, veteran service providers can connect veterans to other services wherever they are. One member organization said, "if I am out in the field and meet with a veteran… I can refer on my phone to the Combined Arms mobile app and connect the veteran" via Echolink.

VETERAN ENGAGEMENT

After member organizations receive referrals from Combined Arms or other organizations in the Combined Arms network, member organizations have the responsibility of reaching out to veterans. Combined Arms started with six founding member organizations and currently has 72 member organizations providing various services to meet a variety of veteran needs during their transition to civilian life and beyond. The network of member organizations, composed of government agencies and nonprofit organizations, is continually growing as Combined Arms seeks out additional resources to expand their impact on veterans. One of the central assumptions of the Combined Arms' model is that quicker connections to high-quality services and the accountability built into the process will accelerate veterans' transition processes. Therefore, it is imperative that Combined Arms' network of member organizations are legitimate, trustworthy, and held accountable for their efforts to reach veterans. Combined Arms addresses this with a structured vetting process for member organizations and by tracking accountability measures.

Vetting Process for Member Organizations

Organizations must pass the vetting process that Combined Arms created with KPMG International to become an official member organization in the Combined Arms network. This vetting process is integral to the success and survival of the organization. Veterans are counting on receiving high-quality services during difficult times. Additionally, the bad reputation of one member organization could compromise the entire network. This type of accountability has implications for client acquisition, funders, and potential organizations that Combined Arms may want to recruit for the network. Lastly, this vetting process may help to increase organizational legitimacy, which may lead to tangible benefits down the line, such as funding and referrals (Proulx, Hager, & Klein, 2014).

The vetting process evaluates a nonprofit organization's financials, governance, programmatic outcomes, and impact, and fit within the network based on veteran client demand for services. The process also conducts searches for any pending litigation filed or adverse social media claims that have been made against the nonprofit organization. The vetting tool then provides a weighted total score based on the collection of this data. Lastly, the organization must pass a 2/3 majority vote by the Board of Directors to be accepted as a member organization.

Accountability Measures

Combined Arms has designed a system that encourages quick response times and accountability. This accountability makes Combined Arms different from a resource library, such as 211, that gives out organizations' contact information to clients, expecting the client to reach out to the agency.

Combined Arms facilitates prompt responses to veterans by tracking accountability measures. Tracking accountability is done with technology that allows Combined Arms to track response time and case outcomes. In order to partner with Combined Arms, member organizations must be committed to the utilization of Combined Arms' technology and, by extension, to being held accountable for response times and outcomes. These accountability measures increase the chance that veterans are serviced more often and quicker.

Tracking Response Time

Combined Arms tracks response time of organizations in Salesforce to incentivize faster response times so veterans will be served quicker. Member organizations can compare their response time to other member organizations' response time. The average response time for member organizations is around 50 hours.

Tracking Outcomes

Veteran outcomes are also tracked in Salesforce with a dynamic menu that changes based on the services provided by each member organization. For example, an outcome for an organization

that provides career services may be "Started a new job." Member organizations update the status of their cases on Salesforce with levels of action:

(1) Initiated — veteran initiated contact with a member organization

(2) In Process — member organization reached out to veteran (veteran engagement)

(3) Established — organization received a response from the veteran

(4) Closed — there was either:

(a) Successful Connection with the veteran,

(b) No Response from the veteran,

(c) the veteran was Referred to Another Service, or

(d) the member organization was Unable to Provide Services

VETERANS RECEIVE SERVICES

Once Combined Arms facilitates the member organization's engagement with the veteran, member organizations step in to provide services that have an impact on veterans' lives (also known as program outcomes).

Although Combined Arms' mission statement focuses on accelerating the transition period for veterans, they offer more than that by assisting all veterans regardless of when they exited the military. Additionally, many of the member organizations within the Combined Arms network are not exclusively for transitioning veterans.

Core Services

Because Combined Arms focuses on transitioning veterans in their mission statement, we characterized core services as the services that veterans typically need upon their return to civilian life. Member organizations provide the following primary service categories:

- *Essential:* homeless services, financial resources, and veteran benefits
- *Professional:* career services such as job placement, LinkedIn coaching, career mentoring, professional networking, resume writing, professional attire, and interview coaching. This category also includes educational resources and growth and success classes.
- *Entrepreneurship:* with over 2.2 million veteran-owned businesses in Texas and 25% of transitioning service members wanting to start a business, Combined Arms has garnered a diverse and experienced group of startup service providers and small business supporters. These organizations rally behind veteran entrepreneurship and give veterans the tools they need to start their own business.

A veteran cannot survive or thrive in society without basic human needs and a source of income. That is why these needs must be met before anything else. Professional services are the number one requested assistance from Combined Arms. With 1 in 3 veterans requesting assistance from career services, Combined Arms has referred over 6,800 veterans since 2019 to career service member organizations (Combined Arms, 2020). Essential services, such as housing and financial assistance, are essential resources needed to survive. However, there are significantly fewer requests for these services.

Integration into Community

After basic needs are met, veterans can focus on social interactions and community. It can be challenging for veterans to meet new, like-minded people whenever they have moved to a new city, have little free time, or have been deployed away from home for an extended period. To help veterans socialize and become part of the community, member organizations provide the following resource category:

- *Community:* connecting veterans to volunteer organizations and social events. Examples of social events provided to veterans by member organizations include sporting events, concerts, family movie nights, sober events, faith-based groups, happy hours, LGBT groups, and military spouse groups, among many others.

Combined Arms' second-most referred resource is social connections. As of 2019, Combined Arms has referred over 1,600 veterans to member organizations that have connected them to community-centered events.

Additionally, Combined Arms manages various personal and professionally based community groups of veterans that have transitioned to civilian life. Examples of such groups include:

- *Veterans in Energy:* a group focused on providing professional and networking opportunities for those in the industry, and those looking to enter the industry
- *LGBTQ Veterans:* a group that provides support and connectivity to the LGBTQ community, as well as recognize their contributions
- *Veteran Christians:* a group allowing veterans and civilians the opportunity to experience their journey of faith together by connecting members of the Christian community with prayer groups, lunches, and support
- *Combined Arms Women Veteran Group*: a group that identifies and engages with women veterans, recognizing their unique experiences, and providing an opportunity for support and connection

Ongoing Support

Lastly, Combined Arms provides ongoing support for veterans regardless of where they are in post-military lives. Veterans can still access the Combined Arms portal to receive services from member organizations. Member organizations provide ongoing support with the service category:

- *Wellness:* physical fitness classes, mental health programs, and alternative therapies

This ongoing support function would include all preceding categories of services for existing clients who are no longer transitioning or veterans who are accessing Combined Arms' services for the first time.

Social Workers

Combined Arms provides veterans with an Intake Team, composed of Licensed Clinical Social Workers (LCSW) and Master level social worker interns, that conduct assessments with critical clients via phone or in person. Critical clients are those who are unable to use the online system to self-assess. The inability to self-assess could be due to not having access to the internet (typically homeless population), not having computer skills (typically elderly population), experiencing mental distress, or not having the cognitive ability to do so (typically traumatic brain injuries). The Intake Team also responds to cases assigned to them by member organizations of clients who need financial assistance, mental health support, housing, or unique needs. Lastly, the Intake Team follows up with clients who have scored less than 13 points on the World Health Organization's 5 Wellbeing Index, are homeless, or request the assistance of the Intake Team. The Intake Team manages about 20% of the cases that go through Combined Arms' assessments. Besides the community groups for veterans, this is the only other "direct service" that Combined Arms offers to veterans.

Shared Resources

Combined Arms also provides shared resources that cut costs for member organizations and allow them to direct more resources towards their programming and mission:

- *Storage Facility* — The headquarters building of Combined Arms provides space for partnering organizations to store supplies and equipment free of charge, which assists member organizations while eliminating some overhead costs associated with daily operations.
- *Shared Workspace (Regional Coordinating Center)*— The Combined Arms headquarters building, located in Houston, provides a workspace for member organizations to conduct daily operational activities either free of charge or at a discounted rate.
- *Computer and Printing Services* — Combined Arms offers computer and printing services free of charge to all member organizations at their headquarters building, which assists member organizations with eliminating overhead costs.
- *Gym Access* — Located inside Combined Arms headquarters is a fitness facility that offers veterans a variety of fitness classes, including CrossFit, Boxing, Yoga, Brazilian Jiu-Jitsu, strength training, and several other fitness programs free of charge.
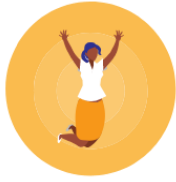
PROGRAM OUTCOMES

Ideally, once Combined Arms provides mechanisms for veteran engagement by funneling veterans into the Combined Arms system and referring them to appropriate organizations, member organizations can provide services and impact veteran lives. According to Combined Arms' mission statement, their ideal outcome would be to accelerate the transition time for veterans so that veterans have the resources that they need, a source of income, and community support quicker than they would have without an organization like Combined Arms.

Public Relations and Advocacy
Although Combined Arms is not providing services to the veteran or even the member organization at this point, they are still engaging in public relations and advocacy to improve veteran outcomes. Combined Arms wants to change how the U.S. deals with veteran transitions. They want to shift from a fragmented, decentralized approach to a centralized community-based approach. This approach requires connecting with veterans early in their transition experience through federal agencies, such as the Department of Defense, Department of Veterans Affairs, and Department of Labor, to make veterans aware of Combined Arms, a one-stop-shop for resources and services. Lastly, Combined Arms wants to shift some of the burdens of transitioning from the veteran to the community. Instead of relying solely on the veteran, community-based organizations would share accountability for the integration of veterans because of the social and economic benefits that veterans bring to the community.

The Role of Collaboration

Collaboration facilitates and enhances the entire veteran service model. Collaboration between member organizations facilitates peer-to-peer referrals and networking. It also helps to foster innovation through shared information and ideas. Combined Arms purposely creates mechanisms for collaboration to reap these benefits.

> Some member organizations emphasized the importance of collaboration in allowing them to focus on their mission. Combined Arms "allows us not to get bogged down in every mission/service that could be needed and support our defined population." Partnership with an organization like Combined Arms allows veteran service organizations to stay true to their mission without spreading their finances or staff too thin.
>
> Combined Arms connects 72 member organizations; through this connection, member organizations can see what one another is doing in the community and get involved in different areas outside of their targeted population. One member organization referenced Combined Arms advertising a member organization giving Christmas trees to veterans and stated, "if we had not gotten the email from Combined Arms, we would not have known about it [the opportunity]."

Mechanisms for Collaboration

Combined Arms seeks to accelerate the transition of veterans through increased collaboration in the community. They have several mechanisms for facilitating organizational collaboration to encourage the transfer of knowledge and build trust amongst member organizations.

Collaboration Committees

Combined Arms has seven collaboration committees composed of representatives from member organizations, based on the services they provide: Professional Growth, Essential Services, Wellness, Social Impact, Education, Caregiver, and Special Immigrant Visa committees. The committees are tasked with meeting quarterly to create new, innovative strategies and solutions through collective problem-solving.

One example of the impact that these committees have on the veteran community is evident through the work of the Professional Growth Collaboration Committee. This committee discovered that veterans reintegrating in the Harris County must be placed in a job that pays at least $16.50 per hour with benefits, or they were essentially condemning the veteran to poverty (based on the cost of living in Houston). Through the efforts of this committee, Combined Arms now requires member organizations to place veterans into careers that pay at least $16.50 per hour with benefits. Otherwise, they will not receive referrals from Combined Arms (B. Escobedo, personal communication, Feb. 10, 2020; Combined Arms 2019 report). This requirement has resulted in the placement of over 1,034 veterans in new careers, with a median starting salary of $60,050 (Combined Arms, 2020).

Professional Networking

Combined Arms provides many opportunities for professional networking between member organizations through their socials, committees, and annual Convening. These events allow member organizations to learn about other organizations' services and processes.

> A few selected member organizations mentioned collaboration with Combined Arms' leadership and staff; however, it seemed as if the connections made between member organizations were more influential. One member organization mentioned the mentorship they had received from Combined Arms leadership, and a few others mentioned the importance of leadership conferences hosted by Combined Arms.

Professional Development

Combined Arms provides funding for employees within their member network to attend professional development classes applicable to serving the veteran community.

Shared Workspace (Regional Coordinating Center)

Around 16 nonprofits and government agencies are housed at the Regional Coordinating Center. Additionally, there are meeting spaces for organizations that are not housed within the Regional Coordinating Center to meet and interact as needed. A shared workspace allows for intentional, collaborative interactions among service providers.

Conclusion

Combined Arms utilizes a unique collaboration model that is tailored to their environment and mission. The capstone team's objective analysis, with input from academic literature, the Combined Arms leadership team, and member organization interviews culminated in an explanation of Combined Arms' veteran service model and its defining features:

(1) <u>Combined Arms fosters collaboration while maintaining member organizations' autonomy.</u> Usually, a drawback of collaboration is the loss of autonomy for participating organizations (Murray, 1998). However, Combined Arms has found a way to foster collaboration while still maintaining member organizations' autonomy. By allowing member organizations to pursue the functions tailored to their unique mission, Combined Arms supports the diversity of services that are needed to support the "whole veteran." This strengthens the entire network of member organizations by allowing them to focus on their mission and by providing many options for referrals to other organizations in the network.

> Combined Arms' diverse network of organizations allows service providers to "sleep better at night, knowing Combined Arms is around" to provide options for any unmet needs that a veteran may have.

(2) <u>Member organizations cite referrals to and between organizations as an important function of Combined Arms.</u>

> Member organizations have spoken of the ease of referring veterans to other organizations within the Combined Arms network. According to an interviewed organization, the ease of referring veterans to other organizations "allows us [member organizations] not to get bogged down in every mission/service that could be needed and support our defined population". Another organization said "the Combined Arms portal has been absolutely valuable. We see that as an asset to the organization because it allows us to provide immediate access to a wide range of resources for families."

(3) <u>One truly unique aspect of the veteran service model is Combined Arms' emphasis on organizational accountability.</u> Although Combined Arms gives organizations the autonomy to reach out to the veteran on their own timeline, they encourage and incentivize quicker responses by tracking and displaying organizations' response times to the network of member organizations. This approach to organizational accountability aligns with their long-term goal of changing the way communities deal with transitioning veterans. Combined Arms wants to shift some of the burdens of transitioning from the veteran to the community. Instead of relying solely on the veteran, community-based organizations would share accountability for the integration of veterans because of the social and economic benefits that veterans bring to the community.

(4) <u>The "no wrong door approach" is a critical feature of the veteran service model.</u> Not only can veterans gain access to the Combined Arms system through them, but veterans can also enter the system through any member organization in the network. This concept is known as the "no wrong door" approach.

> Some member organizations referred to it as a "two-way relationship." This relationship allows for all the member organizations to benefit from the marketing and veteran influx of any individual veteran service providers partnering with Combined Arms.

Overall, the functions of Combined Arms (their veteran service model) increase the capacity of member organizations to focus on their mission and achieve positive outcomes for veterans. Additionally, academic literature suggests that the utilization of the model results in greater efficiency, resource acquisition, and innovation for member organizations.

The critical analysis of the capstone team has provided substantial evidence to conclude that Combined Arms' veteran service model adds value to member organizations and veterans. Furthermore, the model is nuanced enough for replication to new locations.

Section 2: Analysis of Support Services

Introduction

Purpose

The primary purpose of the Analysis of Support Services is to help determine which services Combined Arms offers to the member organizations are most beneficial. Support services is a term that broadly encompasses client referrals, technology, shared workspace, advertising/marketing, professional development, and networking opportunities Combined Arms provides its member organizations. The Analysis of Support Services builds off of Section 1, which conducted a systematic overview of the functions of Combined Arms through a description of their veteran service model. These functions could also be seen as services that an organization receives when partnering with Combined Arms. This section attempts to discern the utility of these services, or whether they are perceived as beneficial to member organizations. The capstone team has compiled this report by analyzing both the monetary and non-monetary benefits that a member organization has access to in the partnership.

A member organization survey and a series of member organization interviews provided insight on what services the partners themselves see as most valuable. Additionally, the capstone team analyzed the Combined Arms' 2019 budget to determine the number of financial resources allocated to support member organizations. Ultimately, the support services analysis provides a comprehensive look at the incentives that organizations have to join the Combined Arms network of member organizations.

Background

The support service analysis was influenced, in part, by conversations with the Combined Arms leadership team, who described the hurdles they face when meeting with potential stakeholders in other Texas cities. One challenge they described occurs when potential partners see Combined Arms as a threat to the previously existing nonprofits in the area, rather than an enhancement to their operations. This analysis of support services shows the positive contributions that Combined Arms brings to existing veteran service organizations and, therefore, can be used as a tool to inform potential partners in new cities.

Research Questions

<u>Primary Research Question</u>
"What services are perceived as most beneficial by the partner organizations?"

<u>Secondary Research Questions</u>
The secondary research questions addressed in this report are as follows:

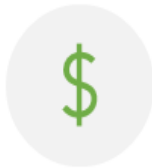What is the distribution of support services selected as "most important" by member organizations?

Is there variation by the types of services organizations offer and their preference for support services?

To what degree do member organizations agree Combined Arms positively impacts their organizational outcomes?

What are the costs of a client referral?

Are financial resources allocated proportionally to top-ranked services?

What changes do member organizations desire to see from Combined Arms?

Key Takeaways

(1) <u>Client referrals are the most essential support service identified by member organizations</u>.

(2) <u>In 2019, Combined Arms spent nearly half (47%), or approximately $820,000, of their budget towards supporting member organizations</u> through client referrals, technology services, professional networking/development, shared workspace services, and marketing/advertising.

(3) <u>Combined Arms invests approximately $116 per veteran referral</u> measured by the veterans activated into the network through completed veteran profiles, member organization to member organization referrals (Echolink), and event RSVPs.

(4) <u>Member organizations strongly identify with the mission of Combined Arms.</u> The member organization survey showed that 96% of respondents either agreed or strongly agreed there was an alignment between their mission statement and Combined Arms' mission statement.

Data Sources

The Member Organization Survey (MOS)

The member organization survey was created by the Capstone Team and distributed through Qualtrics, Inc. Utilizing Qualtrics helped ensure member organizations maintain their anonymity, thus reducing the potential for bias if respondents knew their email address was being recorded by the Combined Arms leadership team or the Capstone Team directly.

The full version of the survey can be referenced in Appendix B of this report.

<u>Survey Distribution</u>
As discussed in section one of the report, Combined Arms currently has 72 member organizations in their expanding network. At the time the survey was created and implemented, our capstone team used the most recent member organization contact list available, which totaled 56 member organizations according to Combined Arms internal documents.

The 2018 member organization contact list provided by Combined Arms leadership team was utilized to distribute the survey to 49 active email addresses. The Combined Arms leadership team included contacts' email addresses, which determined the first receiver of the survey questions. Email recipients were instructed to forward the survey to someone else in their organization if they knew there was a better contact person that could answer questions about the Combined Arms partnership. Only one completed survey was requested from each member organization to avoid double counting and organizational representation bias.

<u>Timeline and Response Rate</u>
The first round of email surveys was distributed on Monday, February 3, 2020. Several reminder emails were sent out by the capstone team during the survey window period to recipients. Combined Arms' leadership team sent out a final survey reminder to recipients on February 17, 2020. The survey officially concluded on Friday, February 21, 2020. The response rate to the survey was 26 organizations (n=26) out of 49 survey recipients. This response rate represents approximately 53% of Combined Arm's member organizations.

<u>Survey Question Design</u>
Twenty potential questions could be answered in the survey, although some questions were not revealed if the survey respondent answered in a way that did not trigger a follow-up question.

The survey questions were grouped by their purpose: (1) organizational characteristics, (2) ranking support services, (3) impact of Combined Arms, and (4) feedback for Combined Arms.

(1) Identifying Organizational Characteristics
The first two survey questions aimed to identify the general characteristics of the member organization responding to the survey.

The first survey question asked representatives to select all the various types of services that their organization provides to veterans in collaboration with Combined Arms:
- ☐ Community: volunteer opportunities, social events
- ☐ Wellness: health services, physical fitness, mental wellness, alternative therapy programs
- ☐ Professional: employment programs, education resources, growth & success (professional development), career transition services, business attire, networking
- ☐ Essential: housing services, financial assistance, veteran's benefits, legal services
- ☐ Entrepreneurship

This question allowed the capstone team to identify survey trends by service type. The types of organizations were grouped according to Combined Arms' website terminology and from feedback received from Combined Arms' leadership team.

The second question provided a sliding scale with values ranging from zero to one hundred percent and asked representatives, "Approximately what percentage of your clients are veterans?" The purpose of this question is to see if there are trends in survey responses by the level of organizational resources devoted to veteran services.

(2) Ranking Support Services
The third survey question aims to identify the most valuable support services Combined Arms offers, as identified by the member organizations. In this effort, survey respondents were asked to rank their top five support services. For each survey respondent, the order that the support services appeared on their screen was randomized to reduce the bias of selection by sequential reading order. The support service options were listed as follows.

Rank the top 5 support services Combined Arms provides to your organization. (1 = most important, 2 = second most important...)

- ☐ Echolink platform/app
- ☐ Salesforce
- ☐ Client Referrals
- ☐ Professional networking
- ☐ Professional development
- ☐ Shared workspace at Combined Arms headquarters
- ☐ Storage facility at Combined Arms headquarters
- ☐ Computer and printing services
- ☐ Gym access at Combined Arms headquarters
- ☐ Collaboration Committee meetings
- ☐ Increased organizational recognition
- ☐ Advertising & marketing

(3) Impact of Combined Arms Questions (Likert Scale)

The next eight survey questions (Numbers 4-11, Appendix B) used a 6-point ordinal Likert scale to determine (a) the impact that Combined Arms had on organizational outcomes and (b) what degree of benefit member organizations saw from Combined Arms through support services. Support Service categories are client referrals, technology use, accountability measures, collaboration with other member organizations, organizational recognition, and access to resources.

The six options presented to respondents were "Strongly Disagree," "Disagree," "Neutral," "Agree," "Strongly Agree," and "No Answer." These responses were coded from 1 to 5 for "Strongly Disagree" to "Strongly Agree," and 0 for "No Answer." The scale included the "No Answer" option to best gauge the range of opinions, including no opinion. Some of the Likert scale questions had an optional follow-up text box for respondents who would want to explain their answers.

(4) Feedback for Combined Arms

Four open-ended questions were included in the survey. Three of these questions (Numbers 7,10, and 11, Appendix B) were optional follow-up questions that were placed to give respondents the ability to provide additional information for questions that could have varying explanations. These questions addressed the benefits gained as part of maintaining a relationship with Combined Arms and the effectiveness of referring to other organizations in the network.

The last open-ended question in the survey (Number 14, Appendix B) was also optional but standalone. This question provided a space for respondents to provide anonymous feedback on potential ways they would like to see Combined Arms improve in the future.

The 2019 Combined Arms Budget Documents

The Combined Arms leadership team provided a complete line-item breakdown of the organization's 2019 financial budget for analysis. In 2019, Combined Arms' budgeted expenditures totaled $1,751,926. This total includes spending across broad categories such as marketing, events, operations, personnel, and travel. The budget contained data for the entire year, January to December 2019.

<u>Budget Document Review Process</u>
Identifying Budget Items Related to Member Organization Support Services
The goal of the capstone team was to identify line-items in the budget that tangibly impact the member organizations. Thus, the apparent expenditures to include in the review were line-items exclusively benefiting member organizations: for instance, a professional development event for partnering organizations. For this analysis, the capstone team also included budget line-items that mutually benefited both the member organizations and Combined Arms operations. For instance, the rent for the regional coordinating center in Houston benefits Combined Arms as a place for veterans to walk in and receive services and benefits member organizations as a co-working office space.

Underlying Assumptions for Budget Analysis
The inclusion of budget items, both exclusively and broadly for member organizations, is an underlying assumption of this budget analysis. Given the time and resource constraints of the capstone team's analysis, both types of expenditures (explicitly for member organizations or partially accessible to member organizations) were included. Further analysis could be extended to make a more granular distinction for what percentage of member organizations utilize each expenditure item.

Classifying Line-Items for Specific Support Services
After reviewing the budget, the next step was to allocate line-items to specific support service categories from the member organization survey. Combined Arms categorized their budget line-items through various spreadsheet tabs, as shown in Figure 2.1: technology, professional services, staff, events, training, marketing, building, assets, and miscellaneous.

Figure 2.1 utilizes the classification categories taken from Survey Question #3 (Appendix B), which are identifiable in the table's blue subheadings. The two support service categories from the member organization survey that are exceptions to this rule are "Client Referrals" and "Increased Organizational Recognition."
- Client Referrals: The amount of money spent per client referral is a summation of several different support service expenditure items analyzed in its section of the report.

- Increased Organizational Recognition: The level of increased awareness and organizational legitimacy gained through the Combined Arms network is included with the Marketing and Advertising category in subsequent budgeting analysis.

Final Notes for the Budget Review Process
- Nearly 60% of Combined Arms' overall 2019 budget is personnel expenditures. Therefore, it was determined that Combined Arms' staff members would be included in this analysis. Portions of staff members' salaries were allocated to various support services as determined by their roles. The personnel costs can be found bolded in the line-items of Figure 2.1. The personnel expenditures may only reflect a certain number of months if the position was not filled for part of the year 2019.
- Combined Arms' fixed assets were used to calculate the "Computer and Printing Services" category as well as the "Gym Access at the Combined Arms Headquarters." It should be noted that capital assets are not the same as business expenditures; however, those dollar amounts capture the value that member organizations receive from having access to those supports; thus, these amounts were included in the analysis.

Figure 2.1 Combined Arms 2019 Budget, Support Service Category Assignments

Support Service Category Assignment (budget tab)	Spending or Asset Value Per Year
ECHOLINK PLATFORM/APP	
Echolink/Salesforce App (technology tab)	$36,000
Total	**$36,000**
SALESFORCE	
Azimuth Cloud Services for Salesforce (professional services tab)	$38,100
Salesforce (technology tab)	$12,600
Technology Manager (staff tab) **(6 months in 2019): 90% * $29,712	$26,740
Total	**$77,440**
PROFESSIONAL NETWORKING	
The Convening & 10-year Celebration - career label (events tab)	$16,000

Events Manager (staff tab) **(8 months in 2019): $40,000 * 90%	$36,000
Total	**$52,000**
PROFESSIONAL DEVELOPMENT	
Leadership Houston (training tab)	$4,000
Combined Arms Partner Training (events tab)	$1,800
LEADRice (unassigned tab)	$45,000
Total	**$50,800**
SHARED WORKSPACE (Combined Arms Headquarters)	
Internet (building tab)	$9,084
Rent or Lease (building tab)	$287,724
Repair & Maintenance (building tab)	$1,200
Security (building tab)	$5,712
Telephone (building tab)	$6,660
Coffee (misc. tab)	$2,940
Filtered Water (misc. tab)	$936
First Aid Service (misc. tab)	$2,316
Total	**$316,572**
STORAGE FACILITY (Combined Arms Headquarters)	
Storage (building tab)	$8,820
Total	**$8,820**
COMPUTER AND PRINTING SERVICES	
Fixed Assets - Computers and Technologies (assets tab)	$19,738
Office Supplies (misc. tab)	$2,220
Office Manager (staff tab) **(8 months in 2019): $40,000 * 50%	$20,000
Total	**$41,958**
COLLABORATION COMMITTEE MEETINGS	
Calendy - Meeting Schedule (technology tab)	$375

Collaboration (training tab)	$1,500
Collaboration Meetings - career label (events tab)	$2,400
Operations Manager/Coordinator (staff tab) **(full year in 2019): 30% * 6$6,834	$20,050
Total	**$24,325**
ADVERTISING AND MARKETING	
GoDaddy - Web Hosting (technology tab)	$579
MailChimp - Newsletter Distribution (technology tab)	$1,048
Hubspot - Newsletter and Social Media Distribution (technology tab)	$7,200
SproutSocial - Social Media Distribution (technology tab)	$188
External Marketing: Advocacy (marketing tab)	$4,368
External Marketing: Christians (marketing tab)	$3,736
External Marketing: Eagle (marketing tab)	$6,536
External Marketing: Energy (marketing tab)	$5,612
External Marketing: Families (marketing tab)	$3,736
External Marketing: LGBT (marketing tab)	$3,624
External Marketing: Parents (marketing tab)	$8,236
External Marketing: Police (marketing tab)	$1,800
External Marketing: Spouses (marketing tab)	$3,736
External Marketing: Technology (marketing tab)	$3,624
External Marketing: VRG Forum (marketing tab)	$3,112
Marketing Manager (staff tab) **(full year in 2019): 85% * $60,000	$51,000
Social Media Coordinator (staff tab) **(4 months in 2019): 100% * $6,400	$6,400
CEO (marketing component) (staff tab) **(full year in 2019): 10% * $135,000	$13,500
COO (marketing component) (staff tab) **(full year in 2019): 10% * $110,000	$11,000

CDO (marketing component) (staff tab) **(full year in 2019): 10% * $110,000	$11,000
Total	**$150,035**

Grand Total Spent on Member Organization Support Services in 2019: **$819, 909**

Most Important Support Services

Research question: What is the distribution of support services selected as "most important" by member organizations?

Findings
Member organizations ranked client referrals as the most important support service that Combined Arms provides. Increased organizational recognition, Professional Networking, Committee meetings, and Shared Workspace were also identified as important support services based on member organization rankings.

*** This finding was determined using two methods of analysis.**

Method 1 (Broad Scope)

The first method examined the top 5 support services for member organizations. Method 1 is also referred to as the broad scope because it records all the rankings (1st-5th) and tallies them equally. As shown below in Figure 2.2, Method 1 tracked the number of times a support service was ranked anywhere in the top 5 by member organizations.

Figure 2.2 Method 1: Top 5 Support Services
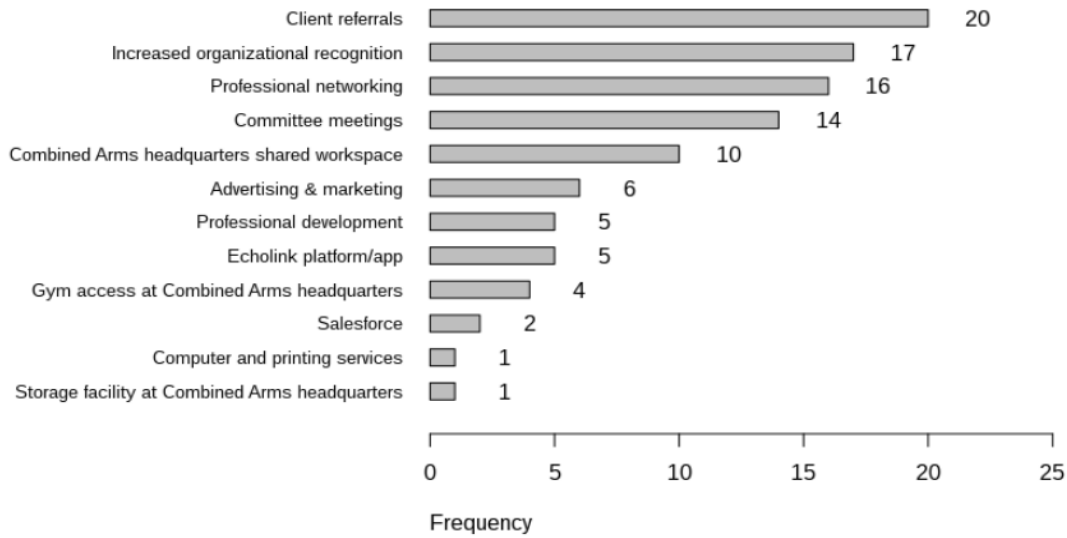
"Client referrals" was the most mentioned support service with 20 occurrences. This service was closely followed by "Increased organizational recognition" at 17 occurrences and "Professional networking" at 16 occurrences. "Committee meetings" appeared 14 times, and "Combined Arms headquarters shared workspace" appeared ten times. All other support services appeared six times or fewer.

Method 2 (Narrow Scope)

The second method showcases which support service that member organizations characterized as the most important. Method 2, shown below in Figure 2.3, is referred to as the narrow scope because it only tracks the number of times a support service was ranked number 1, or most important, by a member organization.

Figure 2.3 Method 2: Support Service Ranked as First Choice
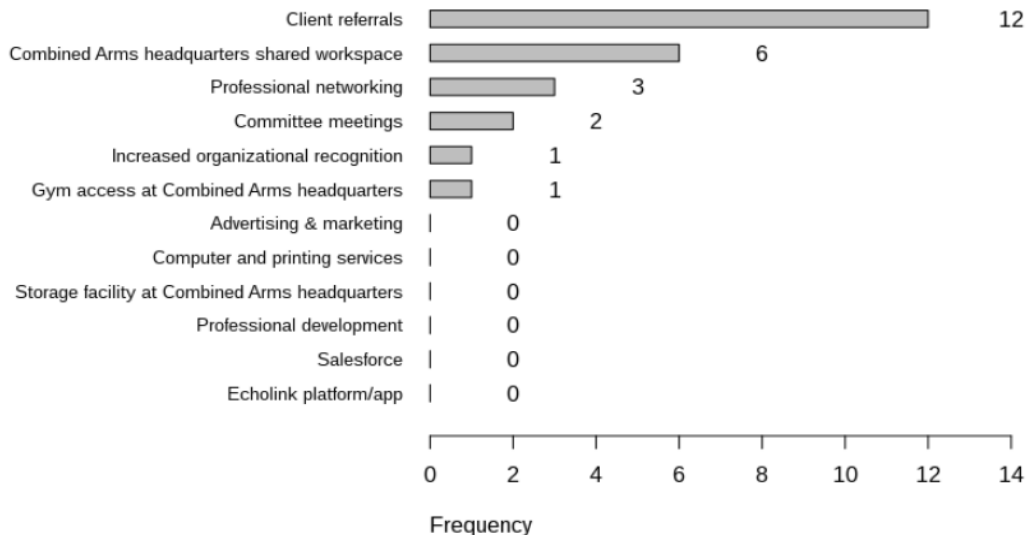
Once again, "Client referrals" stood out above all other support services at 12 occurrences. This result aligns with our assumption that member organizations ultimately care about the number of referrals they can get through joining the Combined Arms network. "Combined Arms headquarters shared workspace" ranked second-highest at six occurrences despite it being the fifth-highest response using Method 1. These findings suggest the shared workspace was seen as the most important service for the majority (6 out of 10) of member organizations that ranked the shared workspace in their top 5. For a breakdown of the ranking order frequencies by support service, see Appendix D.

Across methods 1 and 2, client referrals were an important support service that Combined Arms provides member organizations. Interestingly, increased organizational recognition, Professional networking, Committee meetings, and Shared workspace were also identified as important across methods 1 and 2, albeit in different orders. Figure 2.4 summarizes the most important support services by method analysis.

Figure 2.4 Most Important Support Services

Most Important Support Services	
Ranked in the Top 5 (Method 1)	**Ranked as Number 1 (Method 2)**
1 Client Referrals	**1** Client Referrals
2 Increased Organizational Recognition	**2** Shared Workspace
3 Professional Networking	**3** Professional Networking
4 Committee Meetings	**4** Committee Meetings
5 Shared Workspace	**5** Increased Organizational Recognition & Gym Access

Therefore, we can conclude that the most important support services that Combined Arms provides to member organizations are client referrals. However, member organizations also identified Increased organizational recognition, Professional networking, Committee meetings, and Shared workspace as top support services.

Data Limitations
In the third survey question, which informed this analysis, some respondents were able to move past the prompt without ranking all five of their most important support services. To further explain, out of the 25 survey respondents for this question, the majority, 17 of them, ranked their

top five support services as prompted. There were, however, eight survey respondents who did not rank all five, some indicating their top one, two, or three support services. While this was not the intention of the capstone team, some survey respondents may have been purposeful in selecting only one, two, or three top support services. Possibly some organizations only had a few support services that their organization benefited from most directly. Another possibility is that some organizations wanted to emphasize their number one support service received above all the other support service offerings. Regardless, there are still useful insights this survey question provides as we attempt to rank the most important support services.

Variation by Types of Services Member Organizations Offer

Research question: Is there variation by the types of services organizations offer and their preference for support services?

Findings
Although there are slight variations between the types of services that organizations offer and their preference for support services, there is not enough for a substantial conclusion.

In the member organization survey, respondents self-identified the type(s) of services they offer to veterans as:
- Community: Volunteer opportunities, social events
- Wellness: Health services, physical fitness, mental wellness, alternative therapy programs
- Professional: Employment programs, education resources, growth & success (professional development), career transition services, business attire, networking
- Essential: Housing services, financial assistance, veteran's benefits, legal services
- Entrepreneurship

Some organizations offered a combination of different service types, with very few offering solely one service type.

The number one most important support service was tracked for each type of service. Because many organizations offer a combination of service types, specific organizations were represented in multiple groupings. For example, any organization that identified with the Community type was included for the analysis of the Community type. Although this method of grouping is

susceptible to "double counting," it was the most effective method of grouping to ensure that all organizations were represented.

Interestingly, "Client referrals" were the most important support service for the Professional and Essential groups, but not for the Community and Wellness groups. The Community group valued "Combined Arms headquarters shared workspace" more than "Client referrals" by 1, whereas the Wellness group had a tie between "Client referrals" and "Professional networking." It makes sense that the organizations that offer Community services to veterans identified the shared workspace as their most important support service provided by Combined Arms because of the space to hold events. For graphs associated with this analysis, see Appendix E.

Impacting Member Organizational Outcomes

Research question: To what degree do member organizations agree Combined Arms positively impacts their organizational outcomes?

Findings
(1) Partnering organizations strongly identify with the mission of Combined Arms
(2) Mixed reactions on whether Combined Arms' technology helps member organizations serve veterans more efficiently
(3) Member organizations see partnering with Combined Arms as an asset, not an essential element of their organization
(4) Combined Arms facilitates collaboration like a backbone organization in a collective impact model through collaboration committee engagement
(5) The organizational scorecard received mixed reviews for motivating organizations to be more proactive to reach out to clients

Partnering organizations strongly identify with the mission of Combined Arms

A vast majority (23/24) of survey respondents said they either agreed or strongly agreed there was alignment between their organization's mission to the Combined Arms mission: "To unite the community to accelerate the impact of veterans on Texas."

Mixed reactions on whether Combined Arms' technology helps member organizations serve veterans more efficiently

When asked if the technology helps member organizations serve veterans more efficiently, 11/25 respondents said they either agree or strongly agree. A greater portion (12/25) said that they were either neutral or disagreed that the technology helped them increase their service efficiency for veterans.

This finding may seem surprising at first since technology is a critical component of what makes Combined Arms method unique. However, it is possible that member organizations see the technology as more of an asset to the Combined Arms business model and not so essential for the partners' operational efficiency. The technology is driven towards getting those clients/referrals, and less for improving efficiency in how the organizations serve veterans.

> **Member organizations see partnering with Combined Arms as an asset, not an essential element of their organization**

Survey respondents were asked if their organization would be negatively affected if their partnership with Combined Arms were to end today; a majority (16/25) said they were either neutral, or disagreed with that sentiment.

This finding is not inherently negative, rather an indication that member organizations have kept their autonomy while partnering and receiving support from Combined Arms.

> **Combined Arms facilitates collaboration like a backbone organization in a collective impact model through collaboration committee engagement**

The vast majority of respondents (92%) said they meet with Combined Arms Leadership on an annual basis or more; a majority of respondents found the meetings beneficial for networking, organizational outcomes, and seeing unseen solutions.

The organizational scorecard received mixed-reviews for motivating organizations to be more proactive to reach out to clients

Approximately half of survey respondents (48%) agreed that the scorecard helps with accountability; 24% were neutral and 24% disagree. Combined Arms model features an organizational scorecard which aims to keep members accountable to each other and the veteran by posting response times for others to see.

As mentioned in Section One, the idea behind posting response times is to help motivate organizations to be proactive and reach out to clients more quickly. Something Combined Arms is already doing to address this finding is to provide financial rewards and incentives that may further motivate organizations to be more proactive in reaching out to clients as quickly as possible in the future.

Statistical Breakdown

The findings above were drawn from the member organization survey. Most of the member organization survey consisted of questions that used a 6-point ordinal Likert scale to determine (1) the impact that Combined Arms had on organizational outcomes and (2) what degree of benefit member organizations saw from Combined Arms support services. The summary statistics for these questions are shown in Figure 2.5:

Figure 2.5 Likert Scale Question Statistics

Question #	N	Standard Deviation	Median
4. Partnering with Combined Arms helps my organization serve more veterans.			
4	25	0.841	4
5. The technology provided by Combined Arms helps my organization serve veterans more efficiently.			
5	23	0.988	3
6. The goals of my organization align with Combined Arms' mission.			
6	24	0.588	4.5
7. Partnering with Combined Arms benefits my organization in ways that would otherwise not be available.			

7	25	1.08	4

8. The Accountability Scorecard makes my organization more proactive in reaching out to clients.

8	24	1.204	3.5

9. Combined Arms has helped increase the recognition of my organization within the veteran community.

9	25	1.262	4

10. My organization would be negatively affected if our partnership with Combined Arms were to end.

10	25	1.052	3

11. Partnering has enabled my organization to refer veterans to other organizations more effectively.

11	25	0.978	4

Questions 4, 6, 7, 9, and 11 had median values of 4, which meant that the median response to these questions was "Agree." Questions 5, 8, and 10 had median values of 3, which translated to "Neutral." The standard deviations show the amount of variability in the responses to each question and can help identify where respondents had deviating opinions. Question 6 had the lowest standard deviation at 0.588. Most respondents seem to agree or strongly agree with the statement that their organization's goals align with Combined Arms' mission. Questions 8 and 9 had the two highest standard deviations at 1.204 and 1.262, respectively. It appears that there is some variance in how respondents feel about the effectiveness of the Accountability Scorecard and whether partnering with Combined Arms has increased their own organization's recognition within the veteran community.

The summary statistics show the median values for these questions without the effect of the "No Answer" responses. Therefore, some questions have fewer observations than others because the "No Answer" was removed from the analysis. For more information on this methodology, see Appendix G.

Data Limitations
It is essential to mention that Likert scale responses are not necessarily equal in value. More specifically, unlike interval data, a "Strongly Agree" response is not equidistant from an "Agree" response even if they are coded as such (Sullivan & Artino, 2013). We must be cognizant and cautious when attempting to derive insights from questions that rely on the Likert scale.

Determining the cost of a Client Referral

Research Question: What are the costs of a client referral?

Findings
Combined Arms invests $116 per veteran in an effort to actively bring clients into the system for referrals. This dollar amount was determined through the 2019 budget analysis and veteran activation statistics provided by Combined Arms. In 2019, Combined Arms activated 7,094 veterans into the system as measured by summing veteran profile creations, event RSVPs, and Echolink referrals.

Financial Cost of a Referral

Unique Financial Analysis

As determined previously in the member organization survey (MSO), the most important support service member organizations receive are client referrals through the Combined Arms network. When thinking about what goes into making a client referral, all the support services lend themselves to client acquisition. Client referrals use the technology that facilitates the connections, marketing and advertising that draws veterans into the network, the shared workspace for events, and professional networking that makes the member organizations more aware of partnership opportunities. The interconnection of all of these support services is what makes the client referrals support service unique; it incorporates elements of all the support service categories. Therefore, determining the financial value of a referral deserves analysis separate from the other services in the survey.

Two Methods of Analysis

(1) Client Activation Method: According to Figure 2.6 below, in 2019, Combined Arms activated 7,094 veterans into their network, measured by summing veteran profile creations, event RSVPs, and Echolink referrals. Using the 2019 total of $819,909 spent on support services, we divided that amount by the number of veteran clients referred to the Combined Arms network.

$819,909 / 7,094 "client activations" (Event RSVP/Veteran Profiles/Echolink) = **$116/veteran**

Figure 2.6 2019 Total Veteran Activations
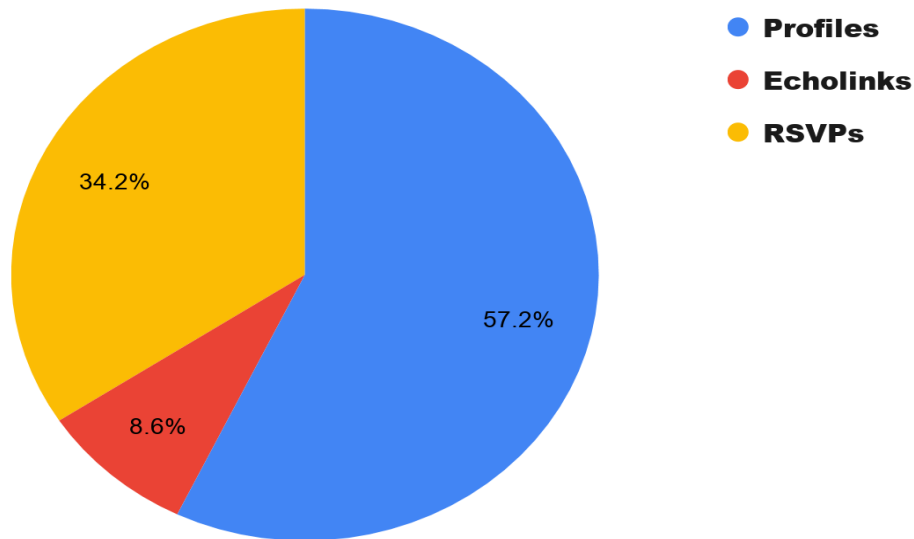
(2) Individual Cases Generated Method: This method differs from the client activations method described earlier because it analyzes the number of individual veteran cases referred to the member organizations through veteran profiles and Echolink. The RSVP category is not included in this analysis because not all veterans who RSVP to an event are referred to a member organization as a client (not all veteran RSVPs have a profile, see data limitations).

Combined Arms reported that in 2019 they had 6,786 individual cases referred to member organizations through their veteran profiles and Echolink platforms. It should be noted that some veterans had several case referrals; for instance, one veteran can get referred to a community service organization and a wellness organization. Therefore, the individual cases generated method captures this reality.

$819,909/ 6,786 "individual veteran cases referred" (Veteran Profiles/Echolink) = **$121/ case number**

Data Limitations

There are data limitations on this analysis because of how Combined Arms calculates a client activation. According to Combined Arms, when a veteran RSVPs to an event, they are sent a link to create a veteran profile; however, it is unnecessary to complete a profile to attend the event. Given the method that Combined Arms uses for counting veteran activations, there is some overlap between the RSVP counts and veterans who also created profiles. Further analysis from Combined Arms could account for those statistics in the future.

Analyzing Budget Priorities with Most Important Services

Research Question: Are financial resources allocated proportionally to top-ranked services?

Findings
Nearly half (47%) of Combined Arms' 2019 overall budget expenditures support the member organizations; additionally, the shared workspace services receive a majority of that funding (approximately $430,000, or 52%).

Nearly half (47%) of Combined Arms' 2019 overall budget expenditures support the member organizations; additionally, the shared workspace services receive a majority of that funding (approximately $430,000, or 52%).

As discussed in Section One, Combined Arms' veteran service model addresses issues of fragmentation in veteran service delivery. Our preliminary budget review shows Combined Arms allocates almost half of its budget (47%) towards support services that improve the quality of their network to combat fragmentation.

Total spent on Member Organization Support Services in 2019/ Combined Arms Total Expenditures = $819,909 / $1,751,926 = **47%**

Considering the additional costs that Combined Arms takes on with funding event programming for veterans and the expenses required to maintain its organizational operations, this number demonstrates Combined Arms' commitment towards collaboration and resource sharing among veteran service providers.

Proportional Analysis
Next, the capstone team looked at whether financial resources are allocated proportionally to top-ranked services identified from the MOS. Because our member organization survey had approximately half of the member organizations represented, the capstone team cannot say with certainty whether the budget is allocated proportionally to services most desired by member organizations (see data limitations).

As mentioned earlier in the report, in 2019, Combined Arms spent approximately $820,000 on support services that benefit member organizations. The following table shows the breakdown of

support services offered by Combined Arms into four major categories: (1) technology, (2) shared workspace services, (3) advertising/marketing and organizational recognition, and (4) professional development/networking.

It should also be noted; as mentioned in the previous research question, client referrals are not included in this breakdown. Client referrals are unique in that they involve all the spending categories and therefore are exempt from this type of proportional analysis.

Figure 2.7 Combined Arms 2019 Support Services Budget; Four Simplified Service Categories

Support Service Categories Reclassified	Spending or Asset Value per year
TECNOLOGY SUPPORT SERVICES	
Echolink/Salesforce App (technology tab)	$36,000
Salesforce	$77,440
Subtotal	**$113,440**
SHARED WORKSPACE SERVICES	
Shared Workspace at Combined Arms Headquarters	$316,572
Computer and Printing Services	$41,958
Storage Facility at Combined Arms Headquarters	$8,820
Gym Access at Combined Arms Headquarters	$61,959
Subtotal	**$429,309**
ADVERTISING/MARKETING AND INCREASED ORGANIZATIONAL RECOGNITION	
Advertising and Marketing	$150,035
Organizational Recognition	Non-monetary (captured above)
Subtotal	**$150,035**
PROFESSIONAL DEVELOPMENT/NETWORKING SERVICES	
Professional Networking	$52,000
Professional Development	$50,800
Collaboration Committee Meetings	$24,325
Subtotal	**$127,125**
Grand Total Spent on Member Org Support Services: $819,909	

Figure 2.8 below shows the percentage of Combined Arms' resources that are allocated to the various support service categories. The pie chart depicts that the shared workspace at Combined Arms headquarters in Houston takes up the majority (52.2%) of their total support service spending followed by Advertising/Marketing/Organizational Recognition (18.2%), Professional Development/Networking (15.8%), and Technology (13.8%).

Figure 2.8 Percentage of Budget Allocated to Support Service (2019)
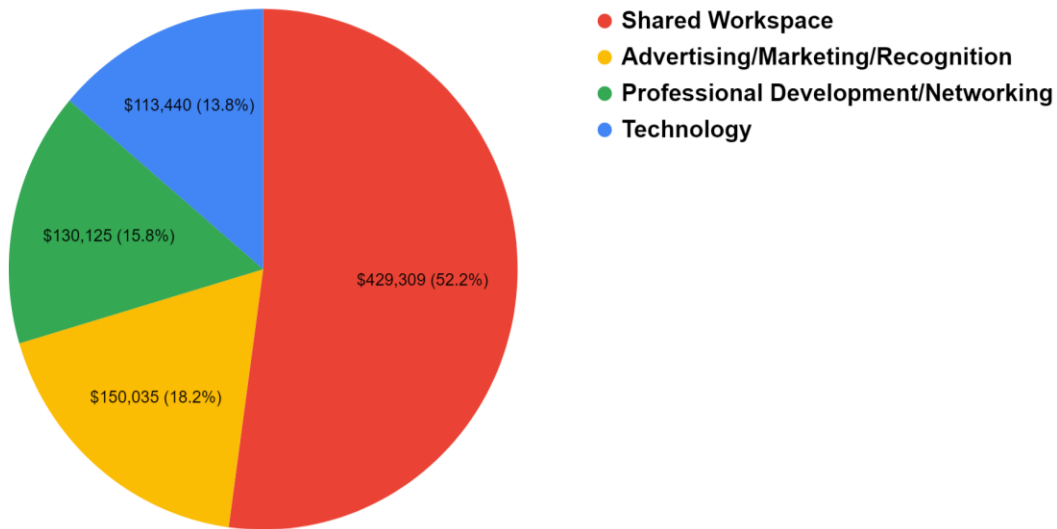
The next figure shows the percentage of Combined Arms' member organizations that selected the various support services in their top five most important services (besides the unique client referrals). The pie chart depicts the results of "Method 1: Broad Scope" described earlier in the report. According to Figure 2.9, 43% of votes were for professional development and networking opportunities, followed by Advertising & Marketing/Organizational Recognition (28.4%), Shared Workspace (19.8%), and Technology (8.6%).

Figure 2.9 Votes Cast for Most Important Support Service (Method 1)
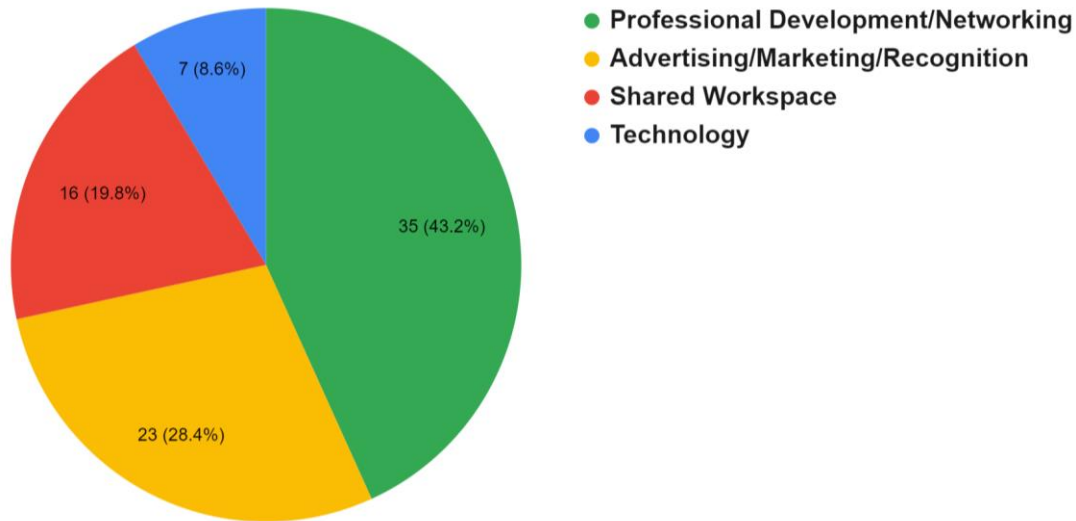
Lastly, Figure 2.10 below shows the side-by-side comparison for the percentage of the budget allocation versus the most important service selection. There appears to be a gap between the shared workspace support services rankings versus the percentage of the budget spent. However, it should be noted that this category includes major spending items such as the rent for the regional coordinating center in Houston. Overhead costs are the main reason the budget numbers are skewed so high towards the shared workspace category.

Figure 2.10 Percentage of Budget Allocation Compared to Most Important Service Selection (2019)
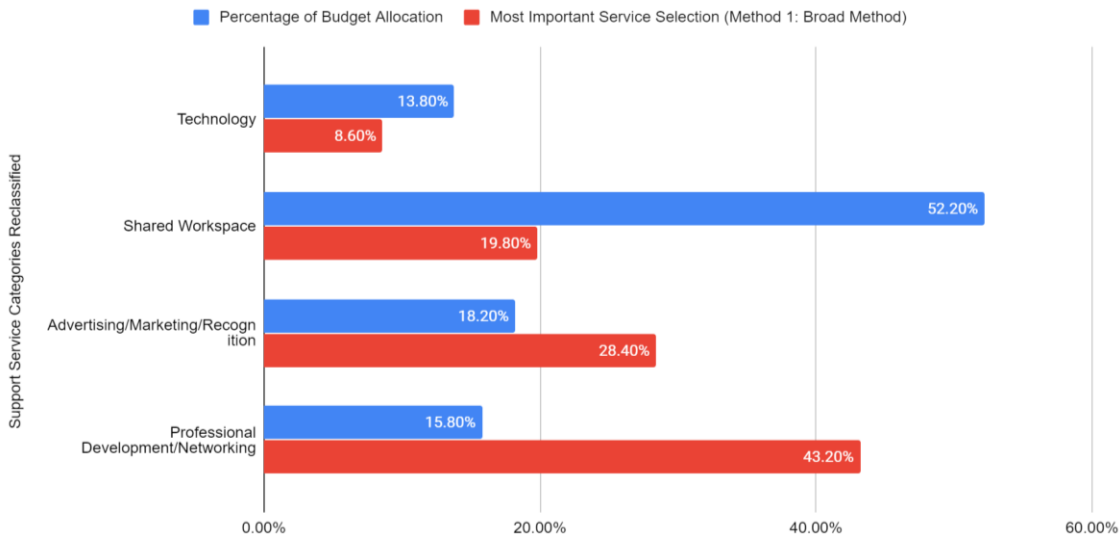
Given the fact that the response rate from the survey represented approximately half of the member organizations, it is difficult to say whether budget spending categories align with the top-ranked services with great certainty. Large expenditure line-items such as the office space rent also skew this analysis heavily towards the shared workspace category.

Recommendations for Combined Arms

> **Research Question:** What changes do member organizations desire to see from Combined Arms?
>
> **Findings**
> (1) Better access to veteran community
> (2) Improved communication
> (3) Increased marketing and advertisement
> (4) Prevention of information silos

Recommendations

Member organizations that were selected for interviews and completed the member organization survey were asked what they would change about Combined Arms. Member organizations' recommendations included better access to the veteran community, increased communication with member organization leadership, and more effective marketing of Combined Arms. Although several recommendations were made, many member organizations said they would change nothing and eagerly anticipated growth.

Better Access to Veteran Profiles
Member organizations suggested several ways that Combined Arms could give their member organizations better access to the veteran community of Houston. One member organization suggested giving member organizations "access to all local veterans registered with Combined Arms and not just the veterans that ask for specific organizations or needs." This access would allow member organizations to reach out to veterans and give them a more holistic description of the services they offer and be more proactive about connecting with veterans.

Communication
Many member organizations suggested better communication on Combined Arms' part with member organizations. Most of the member organizations that suggested this agreed this should

be through the committee and subcommittee process. Recommendations ranged from monthly meetings with subcommittees to inform all other subcommittees of progress, updates, and events to providing member organizations with outcomes from committee meetings. One member organization suggested "adding 'How can I help you?' and 'What ideas do you have?' into their relationship philosophy when working with member organizations." Asking for feedback and allowing two-way communication would increase the impact of Combined Arms because member organizations are operating at a grassroots level. This bottom-up approach allows Combined Arms to get a more hands-on perspective of issues, outcomes, and possible resolutions.

Marketing/Advertising

Member organizations believed that improved advertising by Combined Arms to the veteran community and Harris County would allow growth for all veteran service providers. Several organizations suggested a "better communication of Combined Arms message" to emphasize what Combined Arms is doing for the veteran community. Other member organizations suggested advertising through social media platforms to reach a broader and younger population. Expanding into and actively using social media marketing would allow Combined Arms to share their mission, announce their goals, and show off their member organizations at the click of a button. Another member organization recommended expanding the advertisement of the services offered by smaller niche veteran service organizations on the website. This advertisement would increase the flow of veterans to their organization through their partnership with Combined Arms. Increased publication of niche member organizations would allow these organizations to reach more veterans and share their mission more widely.

Prevent Information Silos

Other organizations suggested better communication with other member organizations to prevent the siloing of information. One organization recommended a simple "quarterly meet and greets… as an internal Combined Arms social" to allow member organizations to share progress, introduce staff, and motivate one another. These meet and greets would allow Combined Arms to more actively support collaboration between member organizations, which was suggested by another member organization. Another member organization suggested mini-seminars or workshops offered by Combined Arms to give member organizations "a pulse… on the veteran service world." These could be simple recordings to give member organizations insight into what is happening in Harris County, services veterans are asking for, and what is popular among veterans during specific periods.

Conclusion

Combined Arms' impact on its member organizations that provide veteran support services in Harris County is evidenced by:

- The variety of support services offered to member organizations in their network (client referrals, technology, shared workspace, advertising/marketing, professional development, and networking opportunities)
- Financial resources dedicated to supporting member organizations ($820,000 in 2019, nearly half of the 2019 budget)
- Feedback from the member organizations who strongly identified client referrals as the most beneficial support service that Combined Arms offers in a survey

As Combined Arms continues to expand throughout the state of Texas, the survey and budget evidence compiled in this section can be used as a showcase for the positive impact Combined Arms has on the veteran service organizations in a region.

Section 3: Market Analysis

Introduction

Because Combined Arms is considering expansion into Dallas, Tarrant, and Bexar Counties, a market analysis was conducted using data on veterans within these three counties. A market analysis was used to gather data from these counties on conditions that affect the marketplace for veteran service delivery. Three market conditions that affect Combined Arms' marketplace are the (1) demographics of those they serve, (2) the current state of philanthropic giving, and (3) potential partners operating in the market.

Before an organization decides to expand, its leadership must consider if they are going to scale their impact or replicate their model. Currently, Combined Arms is scaling to serve Harris County and considering replication to Dallas, Tarrant, and Bexar Counties. Understanding the difference between these two concepts and extensively planning is critical for any organization considering expansion.

Combined Arms targeted several areas that seemed to be large hubs for veteran activity (Dallas, Tarrant, and Bexar Counties). Extensive data collection and research produced demographic data, philanthropic activity, and veteran service provider activity for each targeted area and Texas as a whole. To provide Combined Arms with a comprehensive outlook of the target areas, the capstone team conducted expert interviews with veteran organizations currently operating in the targeted areas and asked their opinions on veteran service provider collaboration.

Expansion

Services for Transitioning Veterans

While the military does an exceptional job at training individuals to be successful in their military careers, it is deficient in training and preparing service members for their reintegration into civilian life (Pew Research Center, 2011). For veterans with specialized military skills relating to combat, the readjustment is even more complicated, with many veterans feeling that the military "failed to adequately provide them with the skills they needed to transition into civilian life" (Pew Research Center, 2011). Challenges for transitioning veterans may include finding employment, needing relocation assistance, finding adequate housing, needing mental health care, educational assistance, and navigating the Veterans Affairs system to acquire the benefits earned from service. A survey by Zogas showed that the top need for Post 9/11veterans was help finding a job, followed by the need for access to education (Zogas, 2017). An additional 56% needed physical healthcare, and 47% needed mental health care (Zogas, 2017).

Scaling & Replication

Scaling refers to taking a concept or project and expanding it to serve more people, generate more revenue, or any other objectives an organization may have (Creech, 2008). Replication refers to the transfer of a tested concept, a pilot project, or a small enterprise to another location to repeat success elsewhere. Scaling or replicating an organization requires a significant amount of planning and groundwork to be successful. The literature identifies six critical considerations for organizations looking to scale or replicate: (1) the proper legal structure for the new location, (2) the location of the new site, (3) the demographics of the new location, (4) the splitting of responsibilities between the new location and the home office, (5) the funding for the new location, and (6) the selection of leadership.

Leadership Selection
The Stanford Social Innovation Review conducted a survey in 2015 of high-performing social entrepreneurs and found that "Hiring senior leaders early is especially critical to an organization's ability to scale. [They] found that the most critical leadership hires to support scale are colleagues who can manage the day-to-day work, thereby freeing up the executive director to focus more on strategy and fundraising" (Janus & Threlfall, 2016). Choosing new leadership is essential for expanding organizations. As such, current leadership should carefully explore possibilities for new leaders, especially with their current employees.

Theory of Change and Flexibility
Before breaking ground on a new site location, an organization should have an influential theory of change or logic model. A theory of change is a method for planning, participating, and evaluation that can be used by organizations to promote social change. Theories of change should identify how the organization will intervene to create the desired change and produce successful outcomes by identifying long-term goals, using backward mapping of a goal, and writing a narrative that explains the organization's logic of its initiative. Organizations should also streamline as much of their program model as possible for ease of replication. The program should "determine the 'minimum specifications' – non-negotiable aspects that must be in place in order to achieve impact. Then, the challenge is to protect the integrity and fidelity of that core model while adapting to local needs, assets, resources, and any signs that certain aspects of the model may need to be modified as it grows" (Partlan, 2017). Jeffrey Bradach writes that "Making the knowledge lodged in an operating model explicit is crucial to being able to transfer the model to new locations" (Bradach, 2003). An operating model is a visual representation of how the organization delivers a service. When the main elements of an organization's operating model are standardized to allow for some flexibility, the organization's chance of succeeding is maximized.

<u>Uniformity</u>

Before replicating, an organization's leadership needs to be on the same page regarding how and why they are replicating. Many people in leadership think that merely agreeing to replicate is enough but, "deciding that your nonprofit *should* replicate is not the same as deciding *to what end* it should replicate. Beyond a common desire to increase impact, Board and staff members often harbor different motivations for opening new sites, and different expectations about what, exactly, 'success' will mean" (Campbell, Taft-Pearman, & Lee, 2008). Organizational leaders need to resolve this quickly before moving forward with their plans to scale or replicate, as it will make the decision-making process for nearly all organizational decisions go much smoother.

<u>Bottom Line</u>

When deciding to scale or replicate, every organization needs to conduct an honest self-appraisal to determine the right path for them, and they should be prepared to do a significant amount of groundwork before opening a new location. Having a robust theory of change is crucial for an organization as it links a program's inputs with outcomes in a way that can be evaluated. Defining and measuring an organization's impact will be an essential component in deciding whether or not to scale. Furthermore, an organization's leadership must agree on why their organization is scaling, not just that it should. Understanding different motivations for scaling early on and coming to an agreement will make the decision-making process much easier moving forward. Finally, after the decision to scale or replicate has been made, new sites must be staffed with competent leadership.

Data Sources

Veteran Demographic Data

The capstone team utilized 2016 veteran demographic data from the Texas Workforce Investment Council (TWIC) to identify trends of veterans specific to Texas, such as their overall number, gender breakdown, racial and ethnic makeup, and educational and income levels.

<u>Data Collected from TWIC Includes:</u>

 (1) The percentage breakdown of veterans in different age ranges, compared to non-
  veterans in Texas.
 (2) Race and ethnicity of veterans in Texas.
 (3) Percentage breakdown of veterans by gender and by period of service.
 (4) The percentage of Texas veterans with service-related disability ratings.
 (5) The percentage of veterans reporting a disability versus non-veterans.
 (6) Percentage of disabilities reported by period of service.

The capstone team also attained more recent veteran demographic data using the 2018 American Community Survey from the U.S. Census Bureau. Whereas the data collected from TWIC gives us information regarding national and state-wide demographic trends, this data will show us demographics at the county level, which will allow Combined Arms to see nuanced differences between Dallas, Tarrant, and Bexar Counties. One important note with the 2018 American Community Survey data is that "Gulf War II" veterans are the same as Post 9/11 veterans.

Data Collected from the American Community Survey Includes:
        (1) Number of veterans by age range and period of service
        (2) Number of veterans by gender
        (3) Educational attainment
        (4) Race and ethnicity
        (5) Number of veterans reporting a disability

Informational Interviews

The capstone team also collected qualitative interview data from selected organizations in our two key markets for future expansion, Dallas, Tarrant, and Bexar Counties. Organizations were selected randomly for an interview based on their status as a direct service nonprofit, charity, state agency, or philanthropic foundation that serves veterans. These organizations were selected from TexVet, a veteran resource database run by the State of Texas in partnership with Texas A&M University. Over a dozen organizations in Dallas, Tarrant, and Bexar Counties were contacted via email from February 10, 2020, through February 21, 2020.

Interview Questions
        (1) How well do you feel that nonprofits are meeting the needs of veterans in the area?
        (2) Do you collaborate with other organizations that serve veterans in [*Dallas County, Tarrant County, or Bexar County*]?
        (3) Do veteran service organizations in [*Dallas County, Tarrant County, or Bexar County*] coordinate services and work together well as partners?
        (4) Do you think partnering with other organizations helps your organization to better serve veterans?
        (5) Would your organization benefit from joining an organization that connects and provides support for organizations serving veterans?

Organizational and Philanthropy Data

While discussing organizations operating in our two key markets, we will be referring to TexVet for a complete list of services offered in Dallas County, Tarrant County, and Bexar County. As

TexVet is the premier source on creating a comprehensive list, we will utilize their data to create a cross-comparison between Dallas, Tarrant, Bexar, and Harris Counties by:

    (1) Listing all organizations from TexVet and categorizing them in groups by service provided. We then split the groups by city and highlighted the organizations that overlap.

    (2) Noting and discussing any trends or similarities and differences between them.

Philanthropic data used for this report is from the Grantsmanship Center and includes the top philanthropic foundations in Harris, Dallas, Tarrant, and Bexar Counties. Thirty-two of the top forty philanthropic organizations in Texas are located either in Harris, Dallas, Tarrant, and Bexar Counties. This data will be useful to get a snapshot of philanthropy in Texas and Dallas, Tarrant, and Bexar Counties specifically.

Demographics of Veterans

Every year, thousands of men and women transition out of the military and join the civilian population. According to the Department of Defense, over 200,000 service members left the U.S. military in 2016, including nearly 23,000 Texas residents (Texas Workforce Investment Council, 2016). According to the Pew Research Center, the percentage of the U.S. population with military experience is on the decline. In 1980, 18% of U.S. adults were veterans compared to just 7% in 2016 (Pew Research Center, 2017). The United States Department of Veteran Affairs (VA) predicts that by 2045, there will be an estimated 12 million veterans in the U.S., which is approximately a 40% decrease from today's numbers (Pew Research Center, 2017).

Furthermore, the demographic profile of veterans is expected to change in the future as well. Currently, roughly nine-in-ten veterans in the U.S. are men. By 2045, the number of female veterans is expected to double to 18% (Pew Research Center, 2017). VA projections also indicate that the veteran population will become younger over time, with 33% of veterans younger than 50 by 2045 (compared to 27% in 2016), and the percentage of veterans ages 50-69 is expected to drop from 39% to 33% (Pew Research Center, 2017).

In order to evaluate the demand for veteran services, it is imperative to know the size of the customer base and what veterans' top needs are. Measurable characteristics of veterans allow service providers to identify and appropriately serve them. Therefore, data on veteran demographics will allow Combined Arms to group veterans by characteristics including age, gender, disability rating, and income to determine the customer base in the areas they decide to expand to. This process will allow Combined Arms to determine the top needs of veterans in those areas as they differ from region to region.

> **Research Question:** What are the demographics of veterans in Texas, Dallas, Tarrant, and Bexar Counties (age, gender, education level, period of service, disability ratings of veterans, percentage claiming certain disabilities versus non-veterans)?

Findings
(1) In 2020, Texas will be home to the largest veteran population in the United States
(2) Of the reviewed counties, Harris County has the largest veteran population
(3) There were no significant differences between Dallas, Tarrant, Bexar, and Harris Counties in age and gender, period of service, education level, and disability status
(4) Race and Ethnicity showed the biggest difference between the four observed counties

Texas

With over 1.5 million veterans, Texas has the second-highest population of veterans in the country. By 2020, Texas is projected to move into the number one spot ahead of California (Harris County Veteran Service Office, 2017). The veteran population in Texas is not evenly distributed across the state. Similar to trends across the United States, counties with large populations tend to have the highest concentration of veterans. In Texas, veterans are clustered in the large metropolitan areas of Bexar, El Paso, Dallas, Harris, Tarrant, and Travis Counties.

Race and Ethnicity

Figure 3.1 Race and Ethnicity of Texas Veterans and Nonveterans (2014)

Race/Ethnicity	Veterans		Nonveterans	
	Number	**Percent**	**Number**	**Percent**
White	1,001,308	66.9%	8,343,361	45.7%
Hispanic	258,933	17.3%	6,645,478	36.4%
African American	194,574	13.0%	2,154,303	11.8%
Other	28,438	1.9%	237,338	1.3%
Asian	13,471	0.9%	876,327	4.8%
Total	1,496,724		876,327	

The veteran population in Texas, as compared to non-veterans, differs in many important ways. As shown in Figure 3.1, there is a much higher percentage of veterans who are non-Hispanic whites (66.9%) as compared to non-veterans (45.7%). Other notable discrepancies in the table include the percentage of Hispanics who serve (17.3%) versus those who do not (36.4%) and the percentage of Asian-Americans who served compared to those who did not (0.9% and 4.8% respectively) (Texas Workforce Investment Council, 2016).

Age and Gender

Figure 3.2 Age of Texas Veterans and Nonveterans (2014)

Age Categories	Veterans	Nonveterans
18 to 34 years	12.2%	35.1%
35 to 54 years	27.0%	36.7%
55 to 64 years	19.6%	14.6%
65 to 74 years	22.8%	8.2%
75 years and over	18.3%	5.4%
Total	1,496,724	18,256,807

Figure 3.3 Male and Female Texas Veterans by Period of Service (2014)

Period of Service	Male		Female		Total
	Number	Percent	Number	Percent	Number
Gulf War Era II	245,487	80.4%	59,845	19.6%	305,332
Gulf War Era I	292,991	83.3%	58,739	16.7%	351,730
Vietnam	501,588	96.3%	19,272	3.7%	520,860
Korea	115,285	97.5%	2,956	2.5%	118,241
World War II	62,107	96.5%	2,253	3.5%	64,359
Other	125,442	92.1%	10,760	7.9%	136,202
Total	1,342,900		153,824		1,496,724

Age and gender also differ widely from veteran to nonveteran populations. As seen in Figure 3.2, veterans overwhelmingly skew towards the older age brackets. Well over half of the veterans (60.7%) in Texas are 55 years old or older. Only 28.2% of nonveterans are 55 years old or older (Texas Workforce Investment Council, 2016). The age discrepancy between veterans and nonveterans is characteristic of veterans of major wars and conflicts such as World War II, The Korean War, and The Vietnam War, all of whom are now over 55 years old. In addition to being

much older than nonveterans, veterans in Texas are also overwhelmingly male. As mentioned earlier, approximately nine-in-ten veterans in the U.S. are male; the statistics in Texas show roughly the same ratio. Figure 3.3 shows that out of the nearly 1.5 million veterans in Texas, only 153,824 are female (10.3%) (Texas Workforce Investment Council, 2016). One trend regarding gender that is noteworthy is the fact that more and more women are joining the military. In World War II, only 3.5% of those who served were female. The percentage of female veterans from the Gulf War Era II (those who served since September 2001) is over five times as many as from WWII. This statistical trend is corroborated by the Pew Research Center, which estimates that the national female veteran percentage will be 18% by 2045 (Pew Research Center, 2017).

Education Level

Figure 3.4 Education Level of Texas Veterans and Nonveterans, 25 and older (2014)

Education Level	Veterans	Nonveterans
Less than high school graduate	6.0%	19.0%
High school graduate (includes equivalency)	23.6%	25.3%
Some college or associate's degree	41.3%	28.0%
Bachelor's degree or higher	29.1%	27.7%
Civilian population age 25 years and over	1,465,557	15,566,932

Veterans, on average, tend to have a higher level of education than their nonveteran counterparts. According to Figure 3.4, nonveterans over the age of 25 are three times as likely not to have graduated from high school compared to veterans (Texas Workforce Investment Council, 2016). This discrepancy could primarily be a result of the U.S. Armed Forces requiring a high school diploma or GED for entrance since the mid to late 1970s (Laurence, 1984). The percentage of those who are high school graduates and those who have a bachelor's degree or higher is approximately the same for veterans and nonveterans. However, the percentage of those with some college or an associate's degree is noticeably higher for veterans (41.3%) as compared to nonveterans (28%).

Disability Rating and Category

Figure 3.5 Texas Veterans with Service-Connected Disability Ratings (2014)

Service-Connected Disability Rating	Number	Percent
0 percent	15,187	4.3%
10 or 20 percent	96,324	27.5%
30 or 40 percent	57,207	16.3%

| 50 or 60 percent	49,029	14.0%
70 to 100 percent	114,567	32.7%
Not reported	17,707	5.1%
Total	350,021	

Disability is another category in which we see stark differences between veterans and nonveterans. Figure 3.5 shows the percentage of veterans with service-connected disability ratings. According to the Texas Workforce Investment Council, roughly 28% of Texas veterans reported having a disability as compared to 13% of nonveterans 18 and older (Texas Workforce Investment Council, 2016). According to Figure 3.5, 46.7% of Texas veterans with a disability rating have a fifty percent disability rating or higher.

Dallas and Tarrant Counties

Representing over 200,000 of the veterans in Texas, Tarrant (Fort Worth), and Dallas (Dallas) Counties are among the most highly populated counties in the state for veterans.

Age and Gender
*Figure 3.6 Veterans by Age Range in Dallas and Tarrant Counties*
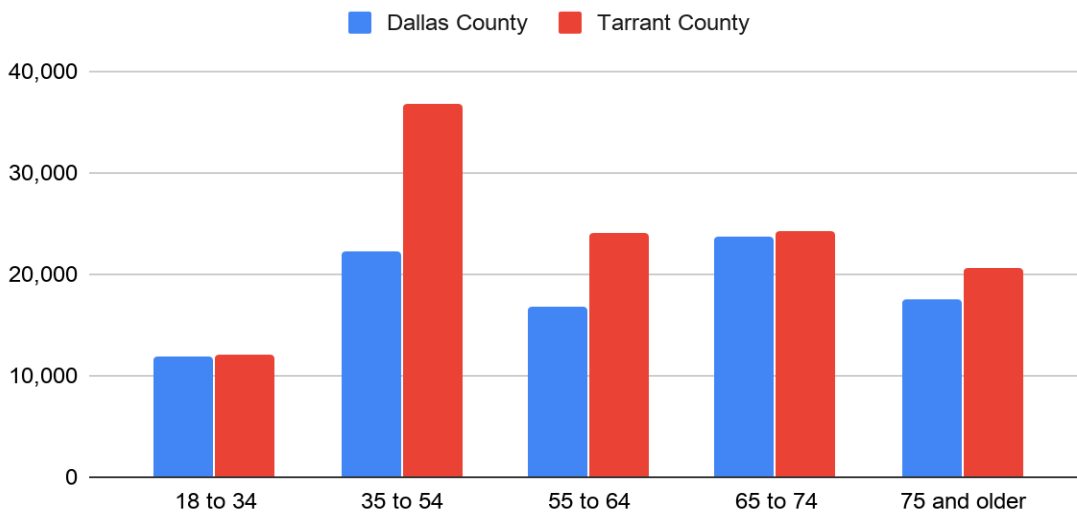
Approximately one-in-seven veterans in Texas live in Dallas and Tarrant Counties. The bar chart above shows the veteran population in Dallas County and Tarrant County by age group. Similar to state and national trends, a majority of veterans in Dallas and Tarrant Counties are male and skew older. According to the 2018 American Community Survey conducted by the U.S. Census Bureau, in Dallas County, 63% of veterans (57,897 individuals) are 55 years old or older; In Tarrant County, the percentage is 59% (69,028 individuals) (U.S. Census Bureau, 2018). In

Dallas County, female veterans make up 9.8% of veterans (9,055 individuals), and in Tarrant County, they make up approximately 12% of veterans (14,047 individuals).

Figure 3.7 Veterans by Period of Service in Dallas and Tarrant Counties
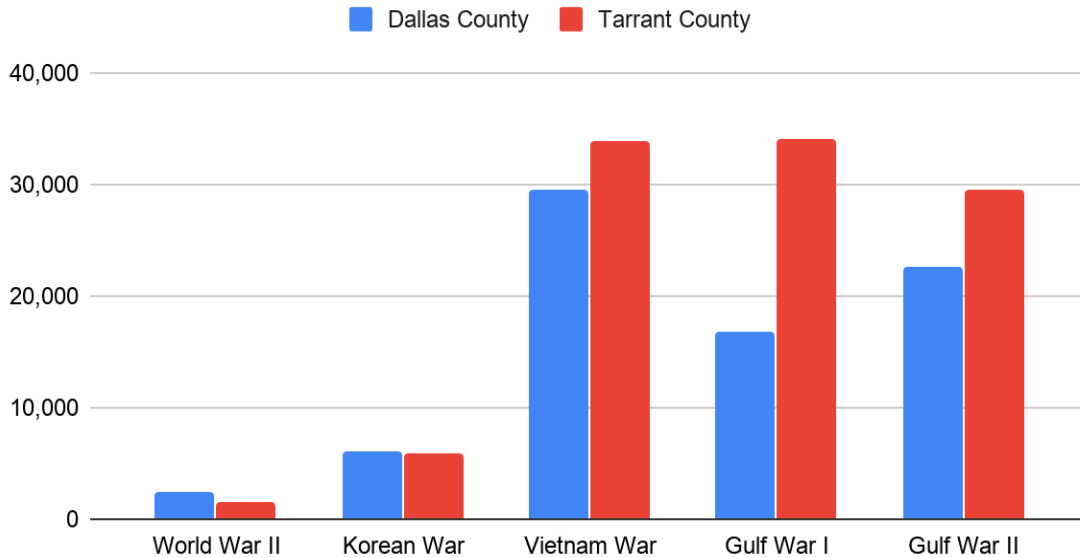
The number of veterans in Dallas County who served by period of service is as follows: 24.6 % served during the Gulf War II era (September 2001 and after), 18.2% served during the Gulf War I era (1990-2001), 32.1% are from the Vietnam War era, 6.6% served during the Korean War era, and 2.7% served in the World War II era (U.S. Census Bureau, 2018). Tarrant County veterans by period of service are as follows: 25.1% served during the Gulf War II era (September 2001 and after), 28.9% served during the Gulf War I era (1990-2001), 28.7% are from the Vietnam War era, 5% served during the Korean War era, and 1.4% served in the World War II era (U.S. Census Bureau, 2018). The number of veterans by period of service in Dallas County and Tarrant County is shown in Figure 3.7 above.

Figure 3.8 Percent of Veterans by Race and Ethnicity in Dallas and Tarrant Counties
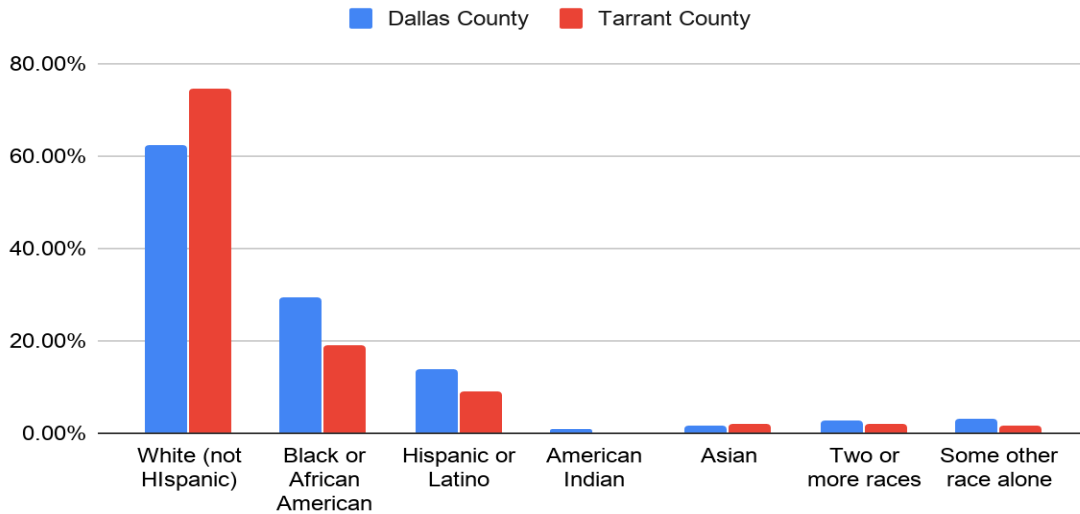
Statewide, Hispanic or Latino veterans make up the second-largest share of veterans; however, in Dallas and Tarrant Counties, the second-largest share of veterans are black or African American. The racial and ethnic breakdown of the 91,991 veterans in Dallas County is as follows: 52.5% are white (non-Hispanic), 29.3% are black or African-American, 13.9% are Hispanic or Latino, 0.8% are American Indian, 1.5% are Asian-American, and 2.7% are two or more races (U.S. Census Bureau, 2018). Of the over 117,000 veterans in Tarrant County, 68.3% are white (non-Hispanic), 19.1% are black or African American, 9.2% are Hispanic or Latino, 1.9% are Asian-American, and 2.1% are two or more races (U.S. Census Bureau, 2018). There is no data for American Indian veterans in Tarrant County. This information is visualized in Figure 3.8.

Education Level

*Figure 3.9 Veterans by Education Level in Dallas and Tarrant Counties*
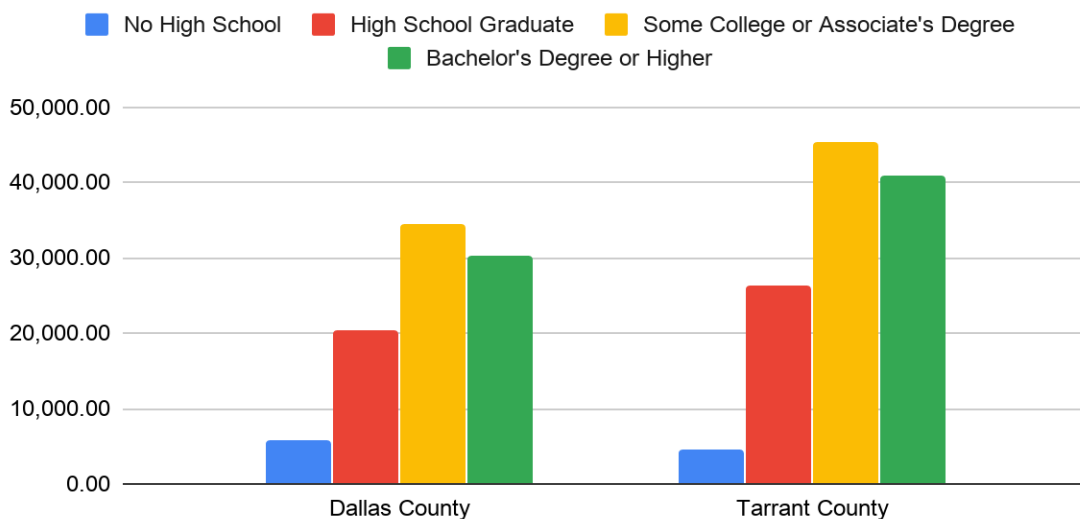
Percentage-wise, both Dallas and Tarrant Counties have a similar breakdown as the state and national average. Of the 91,991 veterans in Dallas County, 6.3% do not have a high school diploma or its equivalent, 22.4% have a high school education only, 38% have some college or an associate's degree, and 33.3% have a bachelor's degree or higher (U.S. Census Bureau, 2018). This is consistent with state and national statistics on the education level of veterans. In Tarrant County, 3.8% of veterans have less than a high school education, 22.5% are high school graduates only, 38.8% have some college or an associate's degree, and 34.9% have a bachelor's degree or higher (U.S. Census Bureau, 2018). Tarrant County has a larger percentage of veterans who have obtained a bachelor's degree or higher than the national average (35% compared to 29%). The number of veterans by education level in both counties is shown in Figure 3.9.

Disability Status

Figure 3.10 Percent of Veterans and Nonveterans Reporting a Disability in Dallas and Tarrant Counties
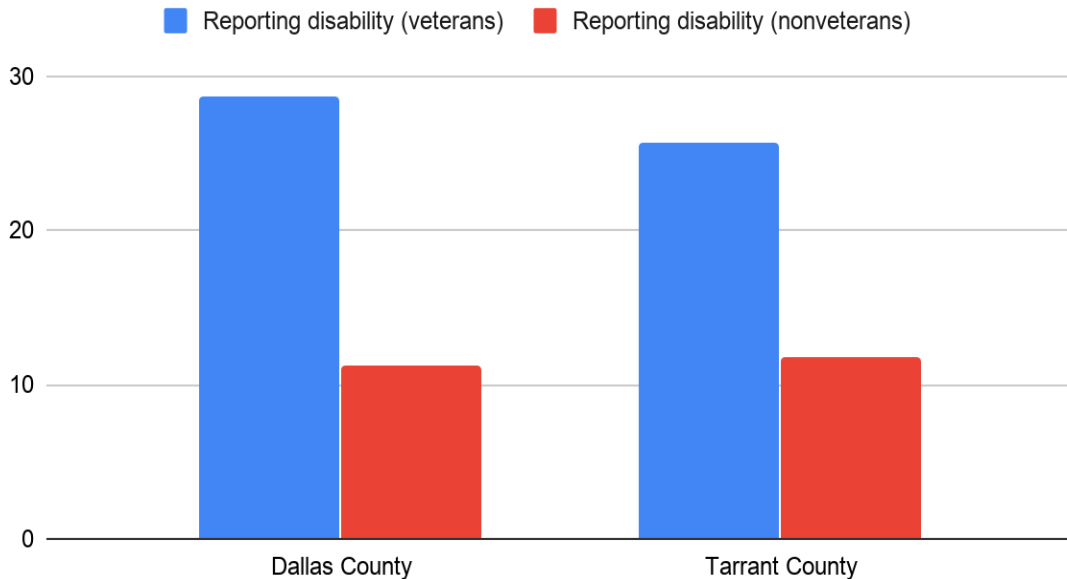
In Dallas County, 26,069 veterans reported having a disability of some kind which is 28.7% of veterans in Dallas County and higher than the percentage of nonveterans in Dallas County who report a disability of any kind (11.3%) (U.S. Census Bureau, 2018). In Tarrant County, 30,038 veterans (or 25.7%) report a disability of some kind. Similar to Dallas County and the state trend, this is a higher rate than nonveterans in Tarrant County (11.8%) (U.S. Census Bureau, 2018). These percentages are expressed in Figure 3.10, and there is a slightly larger percentage of veterans who report a disability in Dallas County than in Tarrant County.

Bexar County

The second most populous county for veterans in Texas, Bexar County, is home to 137,545 veterans, which accounts for just under 10% of all veterans in Texas.

<u>Age and Gender</u>
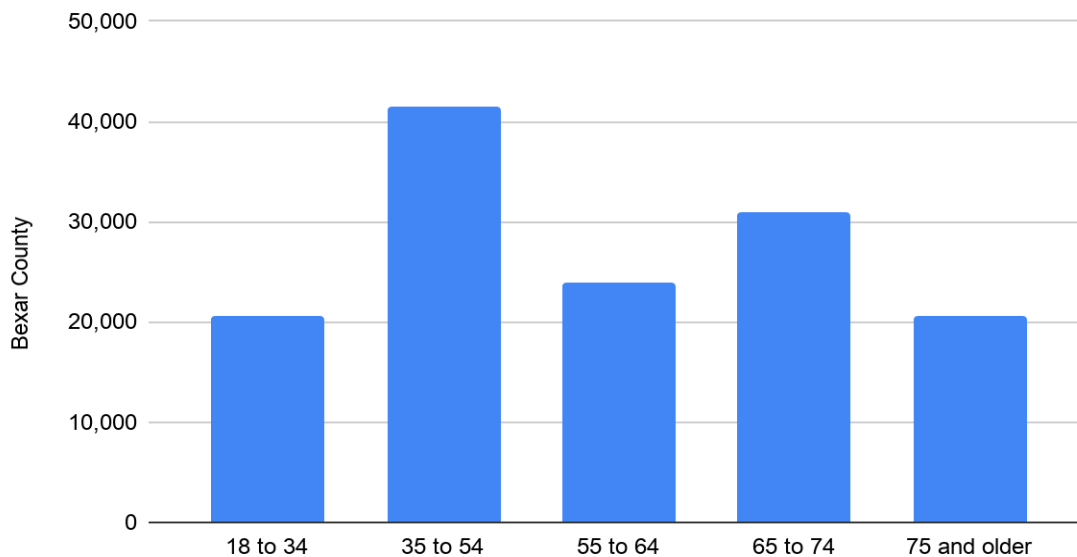*Figure 3.11 Veterans by Age Range in Bexar County*

Figure 3.11 shows the veteran population in Bexar County by age group. Just like the rest of the county, most veterans in Bexar County are male, and the average age is older than nonveterans. According to the 2018 American Community Survey conducted by the U.S. Census Bureau, in Bexar County, 55% of veterans (75,522 individuals) are 55 years old or older. Veterans in Bexar County are, on average, younger than veterans in Dallas and Tarrant Counties. Although many veterans in Bexar County are male, the county has the highest percentage of female veterans across all four counties, at 14.5% (U.S. Census Bureau, 2018).

Period of Service

Figure 3.12 Veterans by Period of Service in Bexar County
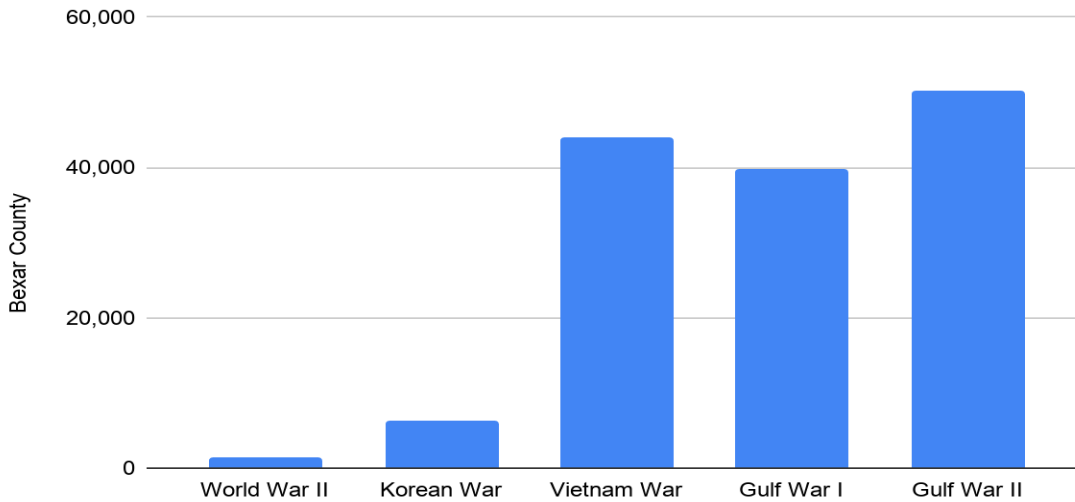
The number of veterans by period of service in Bexar County are as follows: 50,165 (36.5%) served during the Gulf War II era (September 2001 and after), 39,811 (28.9%) served during the Gulf War I era (1990-2001), 43,949 (32%) are from the Vietnam War era, 6,386 (4.6%) served during the Korean War era, and 1,476 (1.1%) served in the World War II era (U.S. Census, 2018). The number of veterans by period of service in Bexar County is expressed in the chart below.

Race and Ethnicity

Figure 3.13 Percent of Veterans by Race and Ethnicity in Bexar County
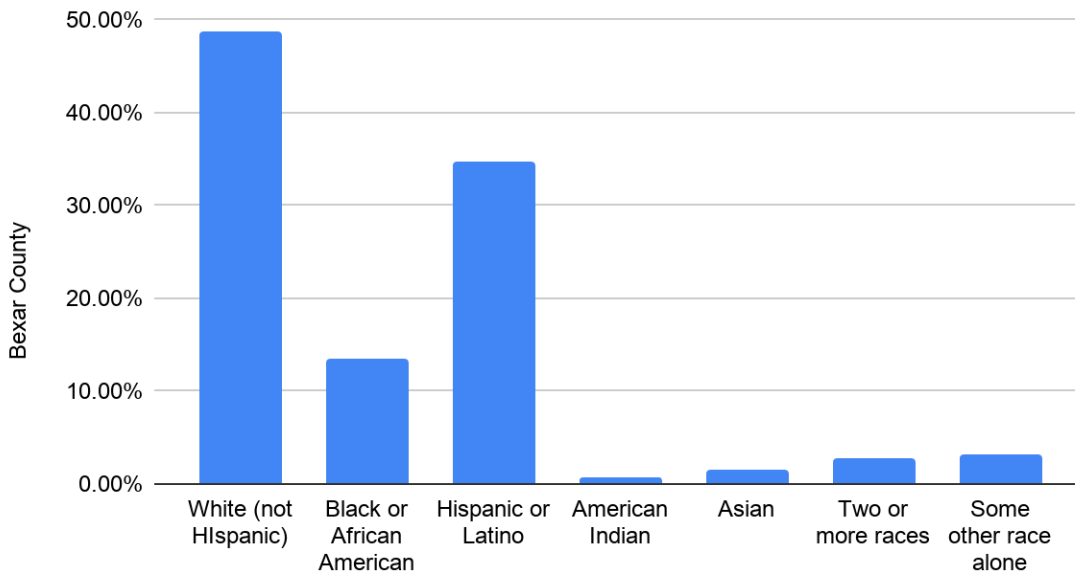
In Bexar County, 167,049 (48.7%) veterans are white (non-Hispanic), 47,667 (34.7%) are Hispanic or Latino, 18,570 (13.5%) are black or African-American, 983 (0.7%) are American Indian, 2,125 (1.5%) are Asian-American, and 3,664 (2.7%) are two or more races (U.S. Census Bureau, 2018). Figure 3.13 shows these numbers.

Education Level

Figure 3.14 Veterans by Education Level in Bexar County
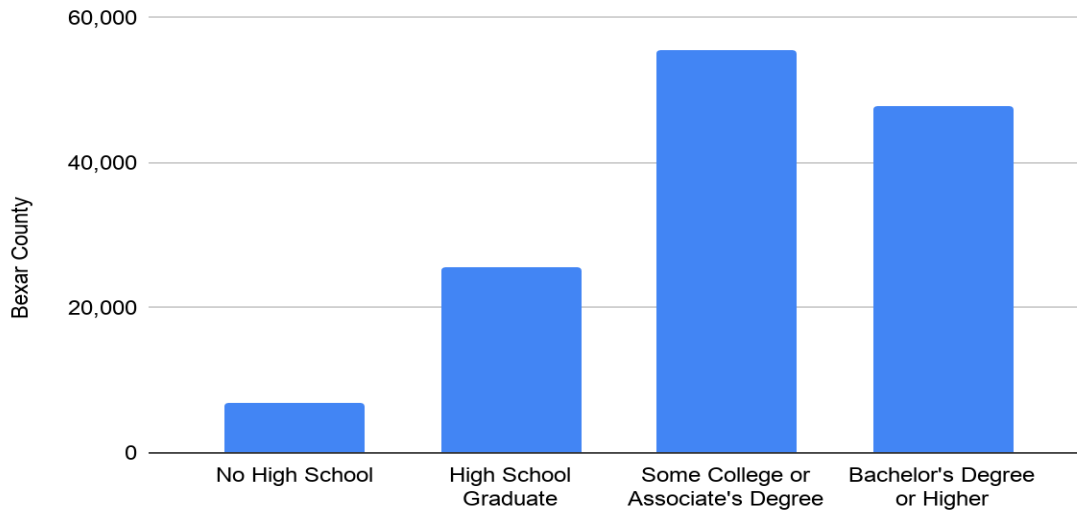
Of the 137,545 veterans in Bexar County, 6,980 (5.1%) have less than a high school education, 25,584 (18.1%) are high school graduates or its equivalent, 55,427 (40.8%) have some college experience or an associate's degree, and 47,833 (35.2%) have a bachelor's degree or higher. Figure 3.14 shows the number of veterans by education level in Bexar County. The breakdown is relatively consistent with state and national averages.

Disability Status

Figure 3.15 Percent of Veterans Versus Nonveterans Reporting a Disability in Bexar County
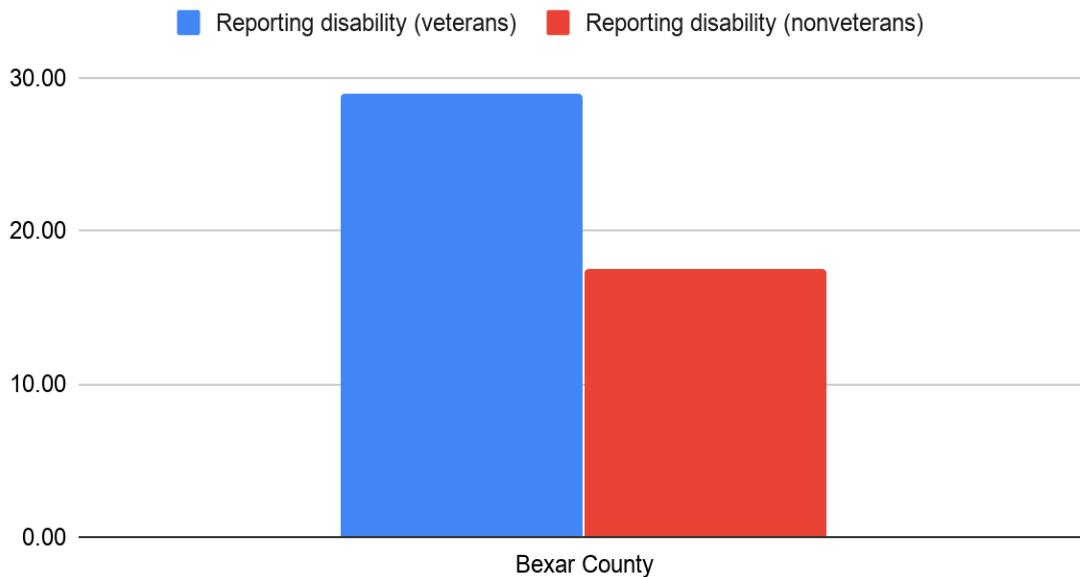
According to the U.S. Census survey, 40,082 veterans in Bexar County report a disability of some kind which is 29%, which is higher than the percentage of nonveterans who report a disability of some kind (17.5%) (U.S. Census Bureau, 2018). Figure 3.15 shows the percentage of veterans reporting a disability of any kind versus nonveterans in Bexar County.

Cross Comparison with Harris County

Harris County, with over 150,000 veterans, is the most populated county in the state of Texas for veterans. Approximately 10% of veterans in Texas reside in Harris County. Because Combined Arms is headquartered in Harris County, the capstone team feels it is pertinent to compare veteran demographics from Harris County with the proposed future markets of Dallas County, Tarrant County, and Bexar County. This comparison will give insight to Combined Arms as to how their current market compares with future markets so they can adjust their expansion strategy accordingly.

Figure 3.16 Number of Veterans by County
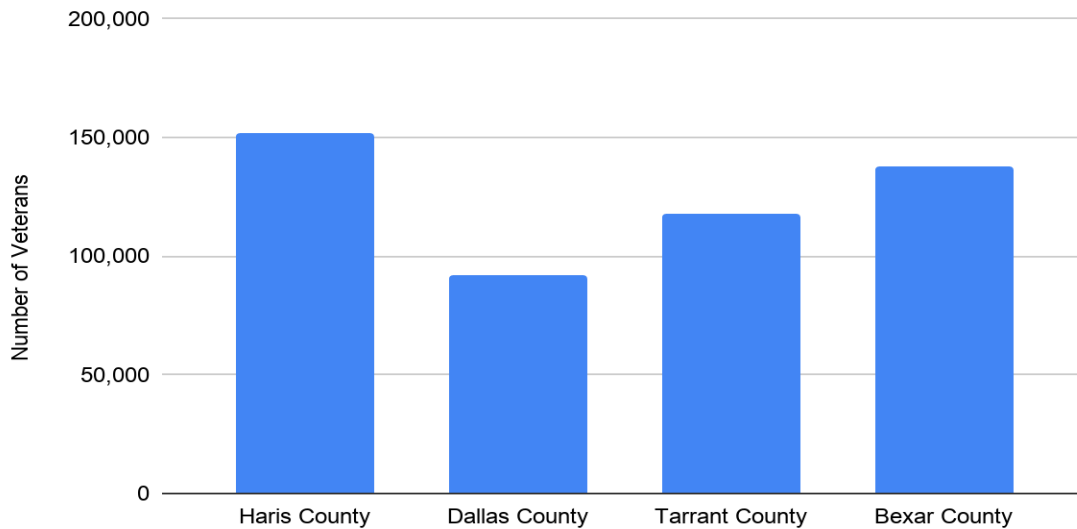
As seen in Figure 3.16, Harris County leads all four counties for the number of veterans, followed by Bexar County, Tarrant County, and Dallas County, respectively. Although Harris County has more veterans than the other counties in terms of numbers, it has the lowest percentage of veterans. Veterans make up 4.4% of veterans in Harris County, 4.7% in Dallas County, 7.7% in Tarrant County, and 9.4% in Bexar County (U.S. Census Bureau, 2018).

Age and Gender

Figure 3.17 Percent of Veterans by Age Range and County
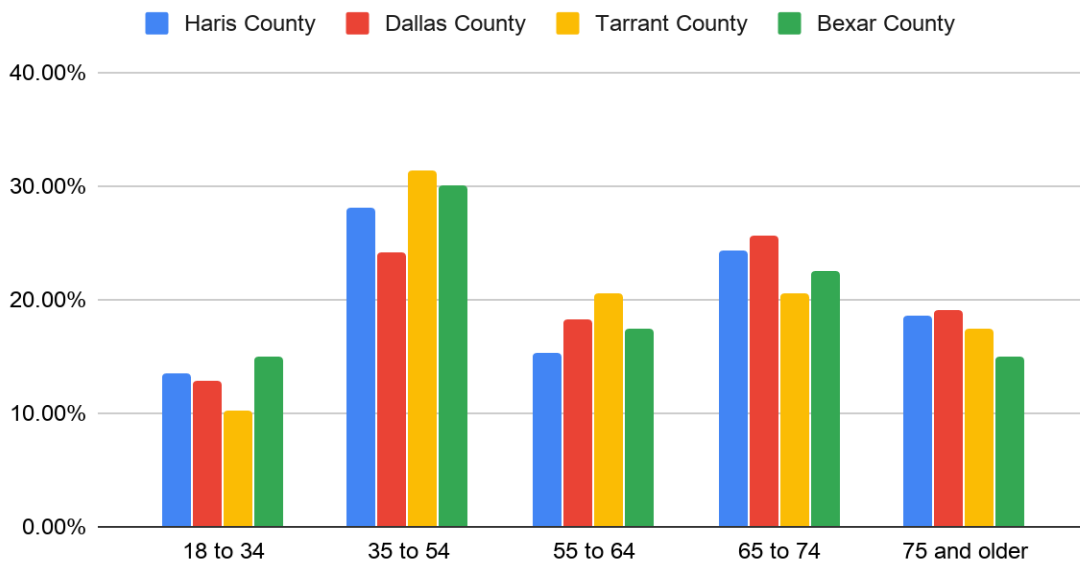
All four counties are consistent with state-wide and national data regarding the age of veterans. Figure 3.17 shows the percentage of veterans by age range in all four counties. Veterans in Dallas County tend to skew slightly older than the other three counties, and veterans in Tarrant

and Bexar Counties tend to skew slightly younger than the average. There are no significant differences in the age range between the Harris County and the Dallas, Tarrant, and Bexar Counties. Regarding gender, many veterans are male in all four counties. The county with the highest percentage of female veterans is Bexar County with 14.5%, and the county with the lowest percentage is Harris County, with just 9% (U.S. Census Bureau, 2018).

Period of Service

Figure 3.18 Percentage of Veterans by Period of Service and County
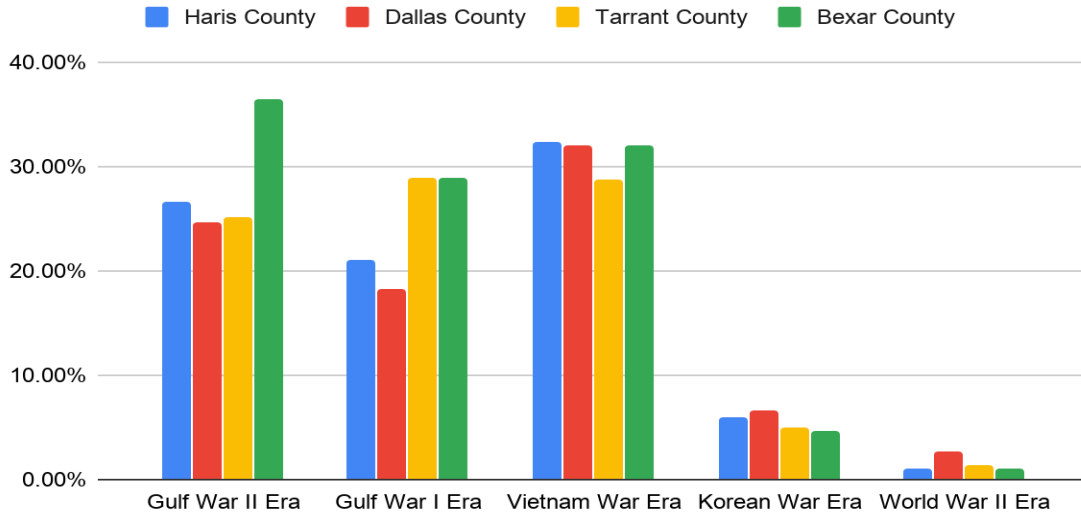
The percentage of veterans who served during the Vietnam War era, the Korean War era, and World War II is consistent across all four counties. When we look at Gulf War I and Gulf War II-era veterans, that is when we see differences. Noticeably, there is a much higher percentage of Gulf War II-era veterans in Bexar County compared to the others (36.5% in Bexar County compared to 24.6%, 25.1%, and 26.6% in Dallas, Tarrant, and Harris Counties respectively). Veterans of the Gulf War I era made up 28.9% of the total veteran population in both Tarrant and Bexar Counties compared to 18.2% in Dallas County and 21.1% in Harris County (U.S. Census Bureau, 2018).

Figure 3.19 Percentage of Veterans by Race and Ethnicity and County
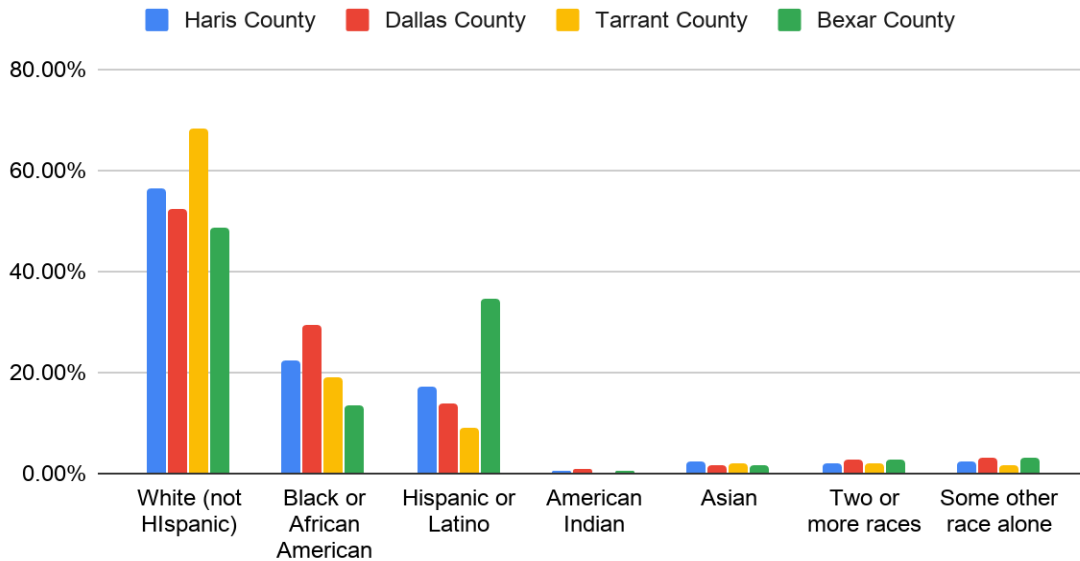
Across all four counties, the racial and ethnic makeup for veterans is somewhat consistent with a few noticeable exceptions. By and large, the three racial and ethnic groups that make up the lion's share of veterans are White (non-Hispanic), Black or African American, and Hispanic or Latino. In Tarrant County, 68.3% of veterans are White (non-Hispanic), which is a substantially higher percentage than the other three counties (56.3% for Harris County, 52.5% for Dallas County, and 48.7% for Bexar County) (U.S. Census Bureau, 2018). The percentage for Tarrant County is much more in line with the state average of 66.9% (Texas Workforce Investment Council, 2016). Another outlier percentage is in Bexar County, where 34.7% of veterans are Hispanic or Latino (U.S. Census Bureau, 2018). Bexar County's Hispanic and Latino population is significantly higher than Harris County (17.2%), Dallas County (13.9%), and Tarrant County (9.2%) (U.S. Census Bureau, 2018). Finally, there is a higher percentage of Black or African American veterans in Dallas County (29.3%) compared to Harris, Tarrant, and Bexar Counties (22.5%, 19.1%, and 13.5%, respectively) (U.S. Census Bureau, 2018).

Figure 3.20 Percentage of Veterans by Education Level and County
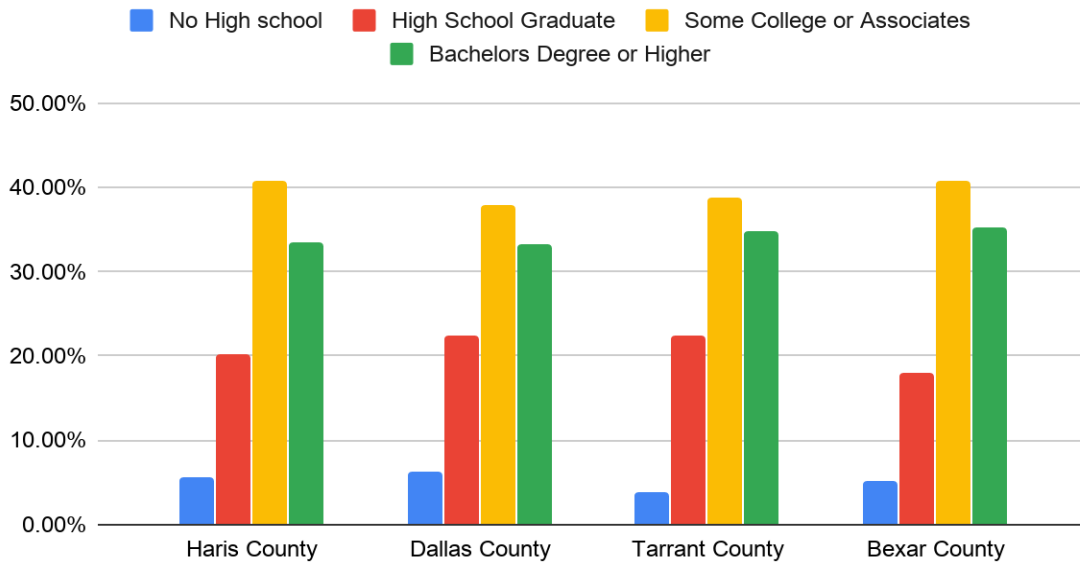
Across all four counties, the education level of veterans is very consistent. There are not any major outliers with the exception of Harris and Bexar Counties having a slightly higher percentage of veterans with some college or an associate's degree (40.7% and 40.8%) compared to Dallas County (38%) and Tarrant County (38.8%)(U.S. Census Bureau, 2018).

Disability Status

Figure 3.21 Percentage of Veterans by Disability Status and County
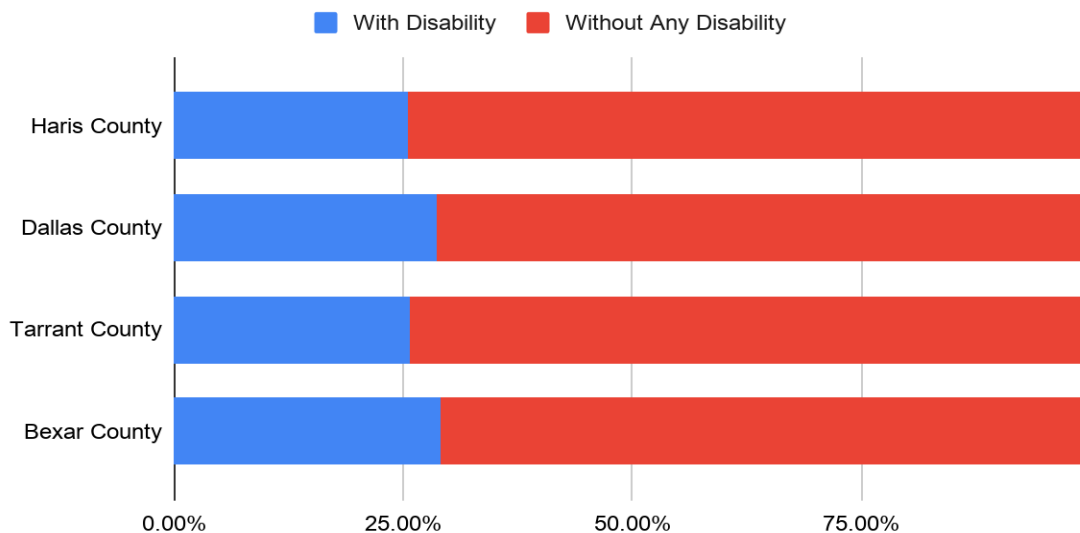
Much like with the education level of veterans, the disability status of veterans in all four counties is similar. The county with the highest percentage of veterans reporting a disability is Bexar County, with 29.2%, followed by Dallas County (28.7%), Tarrant County (25.7%), and

Harris County (25.5%) (U.S. Census Bureau, 2018). Statewide, approximately 28% of veterans report a disability of some kind, so Bexar and Dallas Counties are slightly above average, and Tarrant and Harris Counties are below average (Texas Workforce Investment Council, 2016).

Key Takeaways

Because they are headquartered in Houston, Texas, and are seeking to expand into the Dallas, Tarrant, and Bexar Counties, it will be valuable for Combined Arms to see how the demographics of veterans compare across all three markets. For veteran demographics, we looked at five main areas: age and gender, period of service, race and ethnicity, education level, and disability status. While much of the data is on par with state and national averages, some unique data points need to be discussed.

(1) Veteran Demographics: Texas is home to over 1.5 million veterans and is expected to be the number one state in the country for veterans by 2020, moving ahead of California. Much like the rest of the country, veterans are concentrated mainly in metropolitan areas. From the metropolitan areas we looked at, Harris County has the largest number of veterans with over 150,000, followed by Bexar County with 137,545 veterans, Tarrant County with 117, 889 veterans, and Dallas County with 91,991 veterans.

(2) Age and Gender: As discussed previously, there are no significant differences in age and gender across all four counties. Veterans in Dallas County tend to skew slightly older than the other three counties, and Tarrant and Bexar Counties tend to skew slightly younger. Other than these slight variations, there are no significant differences. However, future trends indicate that veterans will become younger over time. Regarding gender, all four counties have an overwhelmingly male veteran population. However, one data point to note is that Bexar County has the highest percentage of female veterans with 14.5% than the other counties, which range from 9% to approximately 12%. It is also important to note that national trends indicate an increase in female veterans over time.

(3) Period of Service: Much like with age and gender, there are not many noticeable differences in the period of service for veterans across all four counties. One observation, however, is that there is a significantly higher percentage of Gulf War II-era veterans in Bexar County than the other three counties. Both Bexar County and Tarrant County have higher percentages of veterans who served during the Gulf War I era. These statistics are in line with the age trend that shows both of those counties having slightly younger veteran populations than the others.

(4) Race and Ethnicity: This demographic data point is where we saw the most significant differences between the four counties studied. Noticeably, there is a much higher percentage of Hispanic and Latino veterans residing in Bexar County compared to the other three counties.

Over a third of veterans in Bexar County identify as Hispanic or Latino, which is a sharp contrast to the approximately 9% to 17% represented in the other three counties. Dallas County has a higher percentage of Black or African American veterans, with nearly 30%, and Tarrant County has a much higher percentage of White (non-Hispanic) veterans, with nearly 70% in that demographic.

(5) Education: There are no significant differences across all four counties in terms of education level.

(6) Disability Status: This is another data point where there are not many key differences across the four counties. Across all four counties, veterans reporting a disability range from approximately 25% to 30%, with Bexar County having the highest percentage of veterans reporting a disability.

Organizations Operating in These Counties

Research Question: What forms of data are available to measure service delivery in Dallas, Tarrant, and Bexar Counties**?**

Findings
TexVet was used to identify veteran service organizations operating in Dallas, Tarrant, and Bexar Counties. This resource allowed the capstone team to not only identify the area of service the organization operated in but view overlap between counties.

TexVet

The government can provide some services to veterans through Veteran Affairs, but nonprofits make up for the gaps in services. TexVet, a database for identifying veterans and veterans service organizations in Texas, uses eleven service areas to distinguishes services offered by the government and nonprofit organizations.

Below is a description of TexVet's service areas:
      (1) Emergency Funds: organizations that provide short term immediate help to veterans. This category includes housing, food pantries, auto repair, home repair, and case management.
      (2) Food: mostly food pantries, but also organizations that assist eligible people to apply for food stamp benefits.

(3) Transition: organizations that assist veterans in transitioning from military to civilian life. Employment and recruiting service organizations are included in this category.
(4) Mental Health: organizations that offer peer support groups, counseling services, psychiatric treatment, and mentoring.
(5) Youth & Family: organizations that offer mentoring for children of servicemen and women, temporary housing for families whose loved one is at a Veteran Affairs hospital, and relationship building counseling.
(6) Jobs & Business: organizations that offer job placement assistance, job training, resume adjustment, individualized career counseling, and life coaching.
(7) Transportation: assistance with transportation planning, reduced public transit fares, and help with planning trips.
(8) Social: social organizations for veterans. Organizations vary widely and include athletic clubs, service/volunteer-oriented organizations, and social clubs for combat veterans.
(9) Legal: free legal help and veterans' courts that provide alternatives to traditional prosecution for eligible veterans.
(10) Homelessness: housing programs, transition assistance for homeless veterans, and affordable housing programs.
(11) Events: upcoming events for veterans to attend.

Because a nonprofit organization can offer veterans multiple services, a single nonprofit organization can be listed under several service areas. For example, if a food bank included services to help the local homeless population, the organization would appear in both food and homelessness service areas. To identify the number of veteran service organizations operating in each county, veteran service organizations offering more than one services were identified and only counted once.

The TexVet resource pages are organized by county; however, for the following reasons, Dallas and Tarrant Counties were combined.

- Because Dallas and Tarrant Counties form the Dallas-Fort Worth Metroplex, it can be assumed that if Combined Arms were to create a location in this market, they would likely be serving veterans in both counties.
- The proximity of these two metropolitan counties allows for a significant overlap of veteran service organizations. Organizations that are physically in one county serve both counties.

A list of specific veteran service organizations operating in the Dallas, Tarrant, and Bexar Counties can be found in Appendix I.

Research Question: How many veteran service organizations are active in Dallas, Tarrant, and Bexar Counties, and what is the ratio of organizations to veterans in these areas? Additionally, how do the markets differ in programs?

Findings

(1) Dallas and Tarrant Counties has the largest number of veteran service organizations even when population is accounted for

(2) There is overlap of organizations operating in Bexar, Harris, Dallas, and Tarrant Counties

(3) A potential competitor was identified in Dallas and Tarrant Counties, Vetstarts

Dallas and Tarrant Counties

Figure 3.22 Dallas and Tarrant Counties Programs
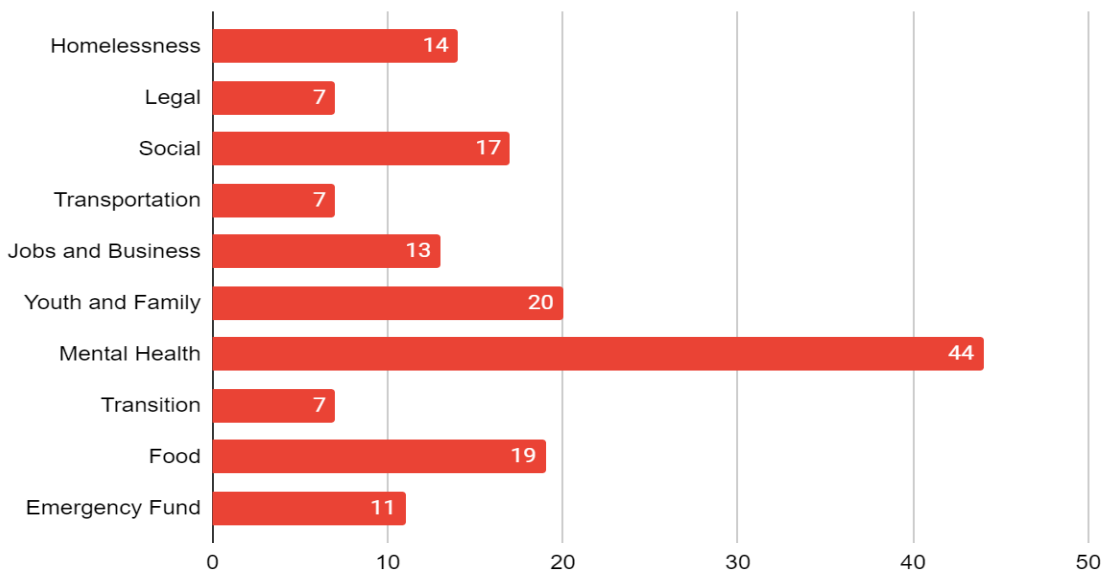

Dallas and Tarrant Counties have 110 unique veteran service organizations offering 159 programs between the two counties. Based on an estimated 208,991 veterans living in Dallas and Tarrant Counties, there is one veteran service organization per 1,899 veterans. Mental health, youth and family, and food services areas are the most prominent services offered in these counties.

Bexar County

Figure 3.23 Bexar County Programs
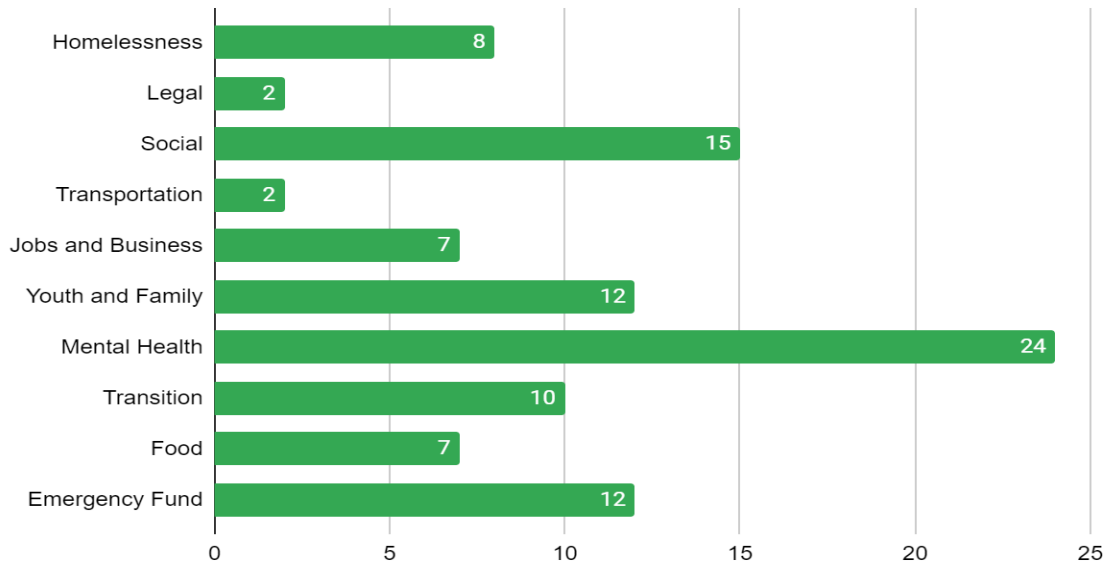
Bexar County has 65 unique veteran service organizations offering 99 programs. Based on an estimated 137,545 veterans living in Bexar County there is one veteran service organization per 2,116 veterans. Mental health, social, emergency fund, and youth and family services are the most prevalent services offered to veterans in this county.
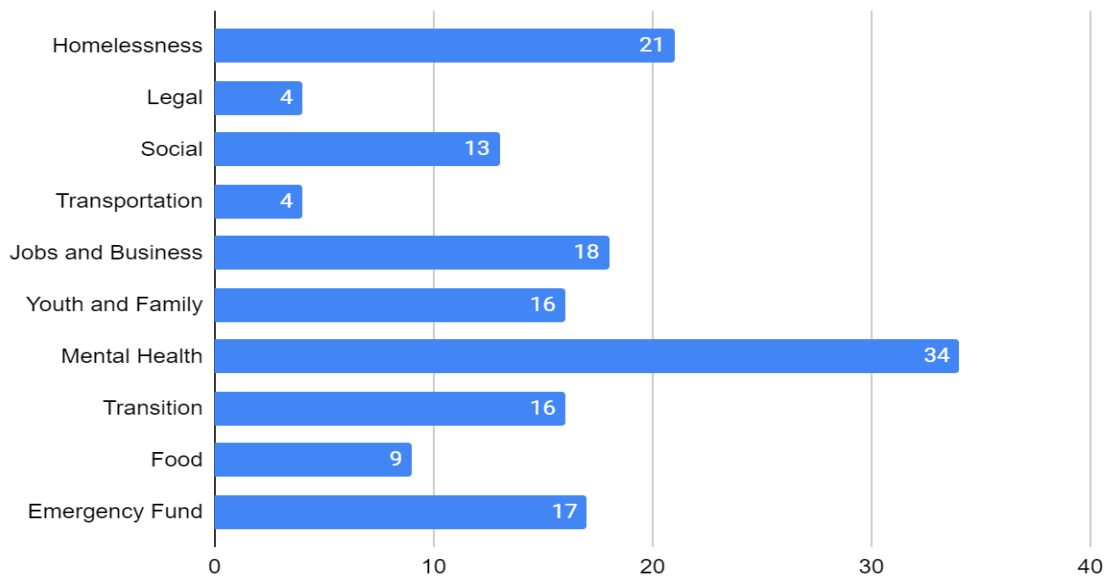
Harris County

Figure 3.24 Harris County Programs

Harris County has 74 unique Veteran Service Organizations offering 152 programs. Based on an estimated 187,235 veterans living in Harris County there is one veteran service organization per

2,520 veterans. The three primary services offered to veterans by number are Mental Health, Homelessness, and Jobs and Business.

Comparison of Markets

Figure 3.25 Comparison of Veteran Service Organizations in All Three Markets

	Total Veteran Service Organizations	Veterans per Veteran Service Organization
Dallas and Tarrant Counties	65	2,116
Bexar County	110	1,899
Harris County	74	2,520

Based upon the total number of veteran service organizations identified in each area, Dallas and Tarrant Counties far exceed the other two areas in the number of organizations serving veterans. Dallas and Tarrant Counties have approximately 32.7% more veteran service organizations than Harris County and 40.9% more than Bexar County.

When the population size is accounted for the difference in the percentage of veteran service organizations in each country becomes much more comparable. Dallas and Tarrant Counties have 24.6% more veteran service organizations per veteran than Harris County and 10.6% more than Bexar County. Although the number of veterans each organization can serve does not capture the full quality of service that the veteran will receive, it can serve as a measure of capacity for the market.

Although the quality of the organization cannot be measured, the services that can be received in all three markets are comparable, which implies that the capacity in Dallas, Tarrant, and Bexar Counties could be comparable to that of Harris County. Unfortunately, without qualitative data on veteran satisfaction with these programs and organizations and quantitative data on the wait times to receive services, this assumption cannot be firmly justified.

An explanation that must be stated for the capacity of Dallas and Tarrant Counties' capacity to serve veterans is the fact that this is two counties combines into one area for this report. Other explanations include, as mentioned above, Dallas and Tarrant Counties have the largest veteran population. The higher demand for veteran service could explain the higher number of veteran service organizations in the area. Also, Dallas and Tarrant Counties have a higher number of nonprofit organizations operating in the area, in general, which could mean that the market has more governmental gaps in service, is more philanthropic, or has a higher capacity to support vulnerable populations. Further analysis would need to done to determine the exact reason for Dallas and Tarrant Counties' higher capacity to serve veterans.

It is interesting to note that the most offered service area in all of the counties is mental health services. Based on the information provided in Section 1, upon transition to civilian life, veterans are looking for services such as help finding a home, financial assistance, setting up veteran benefits, and help with a job search. Mental health services are more of a secondary service to veterans once they have settled into civilian life. The implications of this are unknown, but this could imply that there are more governmental gaps in secondary services for veterans once they have transitioned.

Overlap of Dallas, Tarrant, and Bexar Counties
Several veteran service organizations that partnered with Combined Arms also have affiliates in Dallas, Tarrant, and Bexar Counties. The seven organizations listed below operate in Bexar, Harris, Dallas, and Tarrant Counties.

Figure 3.26 Combined Arms Partners Affiliate Organizations in Identified Markets

Bexar County	Dallas and Tarrant Counties
Dress for Success	Dress for Success
Goodwill	Goodwill
Grace After Fire	Grace After Fire
The Mission Continues	The Mission Continues
Wounded Warrior Project	Wounded Warrior Project
United Service Organization	United Service Organization
Endeavors	Endeavors
Career Gear	

Although an organization's partnership with Combined Arms in Houston does not ensure its affiliates will become a partner, it brings recognition and builds rapport between Combined Arms and other organizations operating in Dallas, Tarrant, and Bexar Counties.

Potential Competitors for Combined Arms
A potential competitor was identified in Dallas and Tarrant Counties. Vetstarts is a veteran service organization that appears to serve as a "one-stop-shop" for veterans looking to transition into successful civilian life. At this point, Vetstarts has made over "4,000 meaningful military connections in the community [and] served 528 veterans & veterans family members" (VetStarts, 2020).

It is currently unclear what kind of relationship Combined Arms and Vetstarts would have considering their similar "one-stop-shop" approach. Regardless, the large veteran population in

Dallas and Tarrant County and Combined Arms operation as a backbone organization, offering few services in house, seems to allow for both organizations to operate in this market.

Interviews and Shortcomings

Research Question: Are veteran service organizations in Dallas, Tarrant, and Bexar Counties collaborating to serve veterans, and is there a desire for collective impact?

Findings
(1) Collaboration is limited in these markets
(2) Communication between organizations and veterans is needed
(3) Collaboration is welcomed but not at the sake of an organization's autonomy

To better understand the current state of veteran service organization's operations in Dallas, Tarrant, and Bexar Counties, interviews were conducted with four nonprofit organizations and foundations in Dallas, Tarrant, and Bexar Counties. The selected organizations were asked five questions (found in the data sources section); under the presumption, they would be kept anonymous. Although a larger sample would have been preferable, useful information was collected from the phone interviews the capstone team was able to conduct.

Unfortunately, many organizations that the capstone tried to get in contact with failed to reply to emails or phone calls. For this reason, secondary and in some cases, tertiary organizations were chosen to be interviewed. This issue made it difficult to get answers from all forms of organizations the capstone team was looking to collect data from.

In order to not influence the future relationship between Combined Arms and the organizations in Dallas, Tarrant, and Bexar Counties, the capstone team refrained from using Combined Arms' name in any correspondence with the organizations in these areas. Because the capstone team was not affiliated with a well-known organization, response rates were quite low.

Interviews
A common theme emerged from the interviews between the two markets. All those interviewed, conveyed a belief that veteran service providers were doing an excellent job in meeting the needs of veterans; however, there was agreement that improvements could be made. One organization noted that [they] "feel that so many Vets don't know about them or know where they can go to get help".

All the interviewed organizations interviewed shared that they collaborated with other nonprofit organizations in the area. The described form of collaboration primarily took the shape of smaller, local organizations partnering with nationally recognized nonprofit organizations. Several organizations mentioned partnerships with Wounded Warrior Project or United Way. The extent of the collaboration in these markets appears to be limited in scale and focus to either one-time events or partnering together to support a specific cause.

Within Dallas, Tarrant, and Bexar Counties, organizations that collaboration between organizations is present but not necessarily affected in its current framework. The form of collaboration often cited was that of monetary support. Unfortunately, there was little mention of collaboration to help veterans get needed resources and service. One interviewed organization stated, "there have been a few times when I call a group only to find they cannot provide the service I am looking for." A prevalent issue that seemed to emerge from the interviews was the impact of a siloing effect on these two markets. Organizations in these areas are so focused on their mission that they do not realize what other organizations have to offer the veterans they serve.

All interviewed organizations seemed to believe that collaboration among veteran service providers was needed within their market. Most of these organizations responded positively to the idea of an organization that could bring together multiple veteran service providers to better serve veterans in their area. There was some concern from several organizations about the idea of an organization like Combined Arms coming to their market. One organization stated that they would only consider "joining an organization like that if it doesn't result in us losing autonomy." This was echoed by another organization.

Result
Based upon these interviews, three general consensuses were formed.
> (1) Currently, collaboration in these markets appears to be with a very limited and focused on singular events or causes.
> (2) Organizations agree there is a need to better communicate amongst themselves and to the veteran community about the services they offer.
> (3) There is a need for collaboration in these markets, but organizations want to keep their autonomy.

The Philanthropic Sector in Texas

> **Research Question:** What is the state of the philanthropic sector in Texas, Dallas, Tarrant, and Bexar Counties?
>
> **Findings**
> Philanthropic trends throughout Texas show that markets are primed for organizations that offer collaboration efforts. Philanthropic giving has risen in recent years in Dallas, Tarrant, and Bexar Counties which further demonstrates the markets readiness for an organization like Combined Arms.

In many regards, major metropolitan hubs in the state of Texas are primed for Combined Arms to establish operations. Philanthropic trends show that many foundations are pooling their money together and collaborating to make a more significant impact. Other trends include an increased interest in diversity and inclusion, more emphasis on data to show impact, an increased focus on evaluating impact, and a growing commitment to building nonprofit capacity (Behrens et al., 2018). Also, the top issues that received the most amount of funding in Texas were human services, followed by health and education (Guenther, 2017).

Texas ranks sixth in the nation for charitable giving, which is higher than any other large state, totaling more than $16 billion (Husock, 2019; Internal Revenue Service, 2015). Much of this charitable giving is credited to the religiosity and immense wealth in the area. Dallas County is among the most charitable cities in the country. In 2018, philanthropists from Dallas County gave almost $100 million to charitable causes, with two-thirds of that money going to local organizations (Fidelity 2019 Giving Report, 2019). According to a report by Fidelity, this represents a 30% increase from 2017 as opposed to the 16% increase nationally (Fidelity 2019 Giving Report, 2019).

Similarly, to Dallas County, philanthropic giving in Bexar County has also been on the rise, with several foundations giving nearly a million dollars annually (Guenther, 2017). Compared to Dallas County, Bexar County has fewer and smaller philanthropic foundations; however, there are still plenty of opportunities for funding. In 2014 alone, nearly 5,000 grants were given in Bexar County, which accounts for over $175 million given to charitable organizations(Guenther, 2017).

According to the Grantsmanship Center, eighteen of the top forty philanthropic organizations in Texas are located in either Dallas, Tarrant, or Bexar Counties (The Grantsmanship Center, n.d.). Bexar County has the most philanthropic organizations listed in the top forty giving foundations

in Texas, followed by Dallas County and then Tarrant County. However, the combined giving of the philanthropic foundations in Dallas County is more than the foundations in Tarrant County and Bexar County combined. The combined annual giving of the six Dallas County foundations is $354,762,106, followed by the four foundations in Tarrant County with $81,342,071 in annual giving. Lastly, the eight foundations in Bexar County with $150,112,069 in annual giving (The Grantsmanship Center, n.d.). Of the top 40 philanthropic foundations in Texas, 14 of them are located in Houston, Texas. All combined, they account for $566,494,856 in annual giving (The Grantsmanship Center, n.d.). Comparatively, Harris County has a much larger philanthropic sector than Dallas, Tarrant, and Bexar Counties.

One example of the work of foundations in these markets is the Dallas Foundation, which managed roughly $420 million in assets (Dallas Foundation, 2018). In 2010 they established the Texas Resources for Iraq-Afghanistan Deployment Fund, which funded 14 veteran service organizations with over $1.2 million.

Conclusion

Combined Arms has established criteria for market expansion, which can be viewed in Appendix J. The most imperative criteria is that the city not be known as a "military town," there must be a large population of veterans in the community, and there must be a "fragmented but engaged" landscape of veteran service providers. After researching the veteran demographics and service providers in the Dallas, Tarrant, and Bexar Counties, we found that both markets meet much of the criteria set by Combined Arms. Neither Dallas, Tarrant, nor Bexar Counties are considered to be "military towns," and all have a dedicated Veteran Affairs office and a Military Veteran Peer Network representative.

Demographically, Dallas, Tarrant, and Bexar Counties are similar to the state and national averages with a few exceptions. Tarrant County has a notably higher percentage of white (non-Hispanic) veterans, while Bexar County has a much larger percentage of Hispanic or Latino veterans than the state and national average. With age, period of service, education level, and those reporting a disability, all three counties are consistent with national averages and those of Houston. Veterans tend to be older, more highly educated, and more likely to report a disability than their nonveteran counterparts.

Our market analysis includes best practices for scaling and replicating an organization, according to academic literature. Topics include the importance of leadership selection, planning, maintaining flexibility while growing, and ensuring that organizational leaders are all in agreement on why an organization is scaling or replicating. Furthermore, measuring an organization's impact is an essential step before deciding to expand. According to the literature,

organizations must have an honest self-appraisal to determine what the right path should be for their organization.

Based on the organizations we studied, and the expert interviews conducted, it is clear that there is potential room for a backbone organization such as Combined Arms to enter both of these markets. Nonprofits are aware of the beneficial effects of collaboration, as well as the limited amount to which they currently participate in such activities. Some obstacles lay ahead, though, particularly with Dallas and Tarrant Counties. As such a massive metroplex, choosing the location for an office (or offices), will be crucial in entering the market. Ensuring that both veterans and nonprofits in Dallas and Tarrant Counties will benefit from the Combined Arms service model is a necessity. However, there is a clear indication that this can be accomplished, and that the Combined Arms mission will ultimately improve both of these unique markets.

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