Data Citizens with Purpose®

Combined Arms

Project Insights Guide

September 15, 2022

For Better with Data

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Executive Summary

Background

Context	Combined Arms' mission is to unite the community to accelerate the positive impact of veterans in Texas and the US. In doing this, Combined Arms empowers Veterans to be successful civilians through community, wellness, professional, essential and entrepreneurship resources and services. They do this by partnering with 177+ non-profits (member/partner organizations) to support hundreds of thousands of Veterans transitioning out of the Armed Forces, and later in their lives. Combined Arms seeks to understand which of these partnerships and services requested from Veterans are most in demand in comparison to supply, and also aims to understand trends in successful case outcomes as they relate to partner organizations, services requested, connection time, and outreach channel.

Scope	**KPMG will use data from Salesforce, provided by Combined Arms, to perform a data-driven analysis answering the following questions:** 1. What trends, if any, can be observed for successful or unsuccessful case outcomes and connections with data from 2017-2021, as it relates to client outreach channel (email, phone, text), service requested, partner organization, average length of time to reach client, average length of time to initiate a connection, and first connection rates. 2. How are client connections to partner organizations related to services requested and what is the demand vs. supply of these services?

Approach

1 Data Source Identification	2 Data Quality Analysis	3 Data Joining, Cleaning, Filtering	4 Analysis & Modeling	5 Identify Opportunities for Action

KPMG

Data Limitations Impacting Our Analysis

The following corrective actions improved the data quality for most of the proposed analyses:

Data Challenges

Quality Assurance

Specifically, in the CA-TEXAS_cases.csv file, the Original Resource and Original Service were often flip-flopped, but not consistently, in varying contexts with no real pattern of error.

Quality Assurance

Pertaining to the threshold values in resources_offered.csv file, some Connection Resources and Services were either "null" or "0".

Quality Assurance

Specifically, in the CA-TEXAS_cases.csv file, The Connection Type column and Closed Connection Status used to perform the analysis had 89.84 and 47.25 percent null values respectively. Many outreach channels contained more than one communication method. These factors made it difficult to assess which outreach channels were most successful.

Trim or Remove Whitespace

resource_name and resource_service in the resources_offered.csv file had leading and trailing whitespace.

KPMG's Response

Standardization and Rationalization

Removed Original Resource and Original Service and re-joined those into CA-TEXAS_cases.csv via a join to resources offered via Service ID and resource_id; this appeared to address the errant flip-flopping of resources and services.

Standardization and Rationalization

Connection Resources and Connection Services that had either a "null" or "0" value in their threshold metric were removed from analysis. Removed 4,599 records that had a "null" or "0" value for their threshold metric.

Standardization and Rationalization

Filter out the null values and build the analysis based on the available data. The high percentage of null put risk on the analysis accuracy. Removed 19.4K null values from Closed connection status field

Standard of Care

Leading & Trailing whitespace removed with Data Cleanse Tool in Alteryx Workflow.

Summary of Key Takeaways

1 **Successful and Unsuccessful Case Outcomes**

Success Rates were measured to identify the factors which contributed to high Success Rates. Combined Arms has multiple Outreach Channel Types to help connect Veterans to internal and external resources. Examination of these Channel Types showed that In person, Phone calls and text messages were most successful. Prioritizing the use of these methods is highly encouraged for future interactions.

Trending Successful Cases against Cases over time, lead to variations in Success Rate from year to year; especially when Cases increased. Increase in Cases and decrease to Success Rate initially indicates the need for more resources.

Reviewing Success Rates by Partner Organizations detailed that many partnerships may not be currently utilized to their fullest extent. Meaning, these Partner Organizations have a very high Success Rate, but a low Case load. Highly encourage, where applicable, assigning more Cases to Partner Organizations that have historically proven high Success Rates.

3 **Connection of Resources to Services & Service Breakdowns**

Combined Arms does a great job of connecting Veterans to Partner Organizations that not only support their requests, but also align with Services that Partner Organizations provide. Only exceptions noticed were related to missing data, therefore, Combined Arms was force listed as the Connection Resource (~2%).

Cases, especially since 2021, have grown tremendously. Most of that is tied to the increase in Internal Resources, Health & Wellness, Basic Living Needs, Benefits Counseling, Financial Assistance, and others.

2 **Average Time to Connect With Veterans**

Generally speaking, the Average Hours to Engage for Partner Organizations is relatively high. Best practices and guidelines need to be developed and implemented, in an effort to improve the engagement timeline between Partner Organizations and Veterans.

Combined Arms is taking the right approach to reduce the number of hours which it takes to engage. Recent metrics and trends showcase an improvement to engagement timelines when viewing the data by Internal Cases. However, when examining External Cases, the data trend shows an increase, as of late. Ultimately suggesting that there is room for improvement regarding External Partner Organizations.

Reviewing connection trends by First Connection, again Internal Cases (63%) show a much higher First Connection Rate than External Connections (23%). Continuing to suggest room for improvement and implementation of potential guidelines/best practices.

4 **Supply vs. Demand**

While not widespread, exceeding of Connection Resource Thresholds do occur, with instances increasing over the last couple of years (2021-2022).

Most occurrences of Thresholds being exceeded take place in Career Services type Connection Services, as well as Internal Resources (i.e. Combined Arms). Knowing this, there is now a clear path for prioritizing areas for potential threshold expansion conversations, supporting claims for additional internal support, and also prioritize areas where new Partner Organization relationships could be most beneficial to the end clients / Veterans.

KPMG

Q1: Successful Vs. Unsuccessful Trends By Various Factors

Insight Summary: Successful vs. Unsuccessful by Client Outreach Channel

Insight(s):

The analysis covers all the data provided by CA from 2017 to the beginning of 2022

- **Phone Call** has both, a **high Case number (471)**, and **high Success Rate (57.8%)** – on top of Phone Call on its own, **any Outreach Channel** combined **with a Phone Call** tends to result in a **successful connection.**

- **Text Message** has a **Success Rate** of **57.1%**, while **Email** has a **Success Rate** of **31.5%.**

- **In Person** Case Connections have **high rates of success**; however, there are **only 10 Cases** that have an **In Person Outreach Channel** designation.

Actionable Suggestion(s):

- **In Person** Connection Types should be **used when possible**. **Phone Call** and **Text Message** should also be used by Combined Arms due to their **high success rate.**

- If **Email** is used, Combined Arms should **follow up** via **Text Message** or **Phone Call.**

- **Standardizing** the method used to **record** the case **Connection Type** will help ensure **complete** and **accurate** data, leading to a **better understanding** of the **most effective Connection Type.**

- When there is **more than one Outreach Channel** used, Combined Arms could record the **original outreach channel type** and each **outreach channel used to follow up** (ex. first outreach channel, second outreach channel). Combined Arms should also clearly identify which of the outreach channels actually resulted in a successful connection.

Note: *Closed Connection Status (Column AD) and Connection Type (Column AB) from the CA-TEXAS_case file were used for the analysis. The "# of Cases" represents the count of Cases with a populated Outreach Channel, Connection Type, and Closed Connection Status; excluding any null values.*
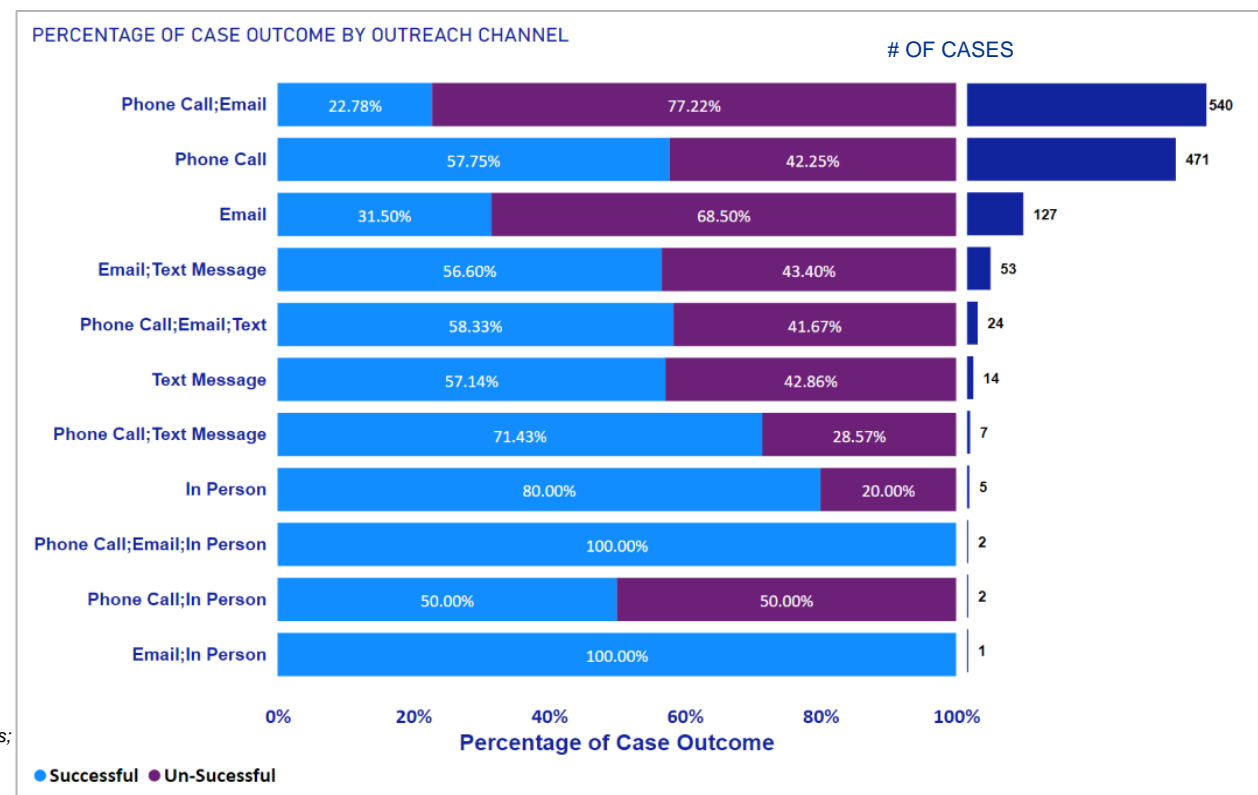
Successful Cases
- Successfully connected with client
- We have already worked with this client

Unsuccessful Cases
- Any other reason
- CAX Closed the connection
- Client never replied to our communications
- Organization never responded to client - CAX took over
- Out of network referral
- Unable to help client referral was inaccurate
- Unable to help client unrealistic expectations
- Unable to help client we referred to another org

*Successful and Unsuccessful definition is applied to slide 9 through slide 14*

PERCENTAGE OF CASE OUTCOME BY OUTREACH CHANNEL — # OF CASES

Outreach Channel	Successful	Un-Successful	# of Cases
Phone Call;Email	22.78%	77.22%	540
Phone Call	57.75%	42.25%	471
Email	31.50%	68.50%	127
Email;Text Message	56.60%	43.40%	53
Phone Call;Email;Text	58.33%	41.67%	24
Text Message	57.14%	42.86%	14
Phone Call;Text Message	71.43%	28.57%	7
In Person	80.00%	20.00%	5
Phone Call;Email;In Person	100.00%		2
Phone Call;In Person	50.00%	50.00%	2
Email;In Person	100.00%		1

Percentage of Case Outcome

● Successful ● Un-Sucessful

Insight Summary: Success Rate Trending

Insight(s):

- During **2017** and **2018**, the **Success Rate was significant**; however, the number of total cases was not large.

- Between **2018** and **2019**, **the number of cases increased significantly**, and the **success rate dropped 37%.** The **Success Rate** has improved slightly during **2020** and **2021.**

- Between **2020** and **2021**, Combined Arms was able to **increase** their Success Rate despite a large increase in the number of cases; however, the success rate **was still lower** than in **2017** and **2018.**

- Examination of year over year changes (Appendix 25-27) detailed that as the number of **Service Categories increased**, the **Success Rate decreased**. The **increased** number **of Service Categories**, **paired** with **swings** in Service Categories **with large case loads** (i.e. Career Services) lead to **declining rates** in early years (2018-2019).

Actionable Suggestion(s):

- The analysis shows that the increase in the **number of cases** affected the **success rate** of the cases; indicating a **need for more resources.**

- In an effort to continue increasing Successful Cases, especially when the overall Cases increase, Combined Arms could consider **building relationships** with **more Partner Organizations** or **collaborating** with **current Partner Organizations** to **increase** their **capacity.**

PERCENTAGE OF SUCCESS RATE BY YEAR
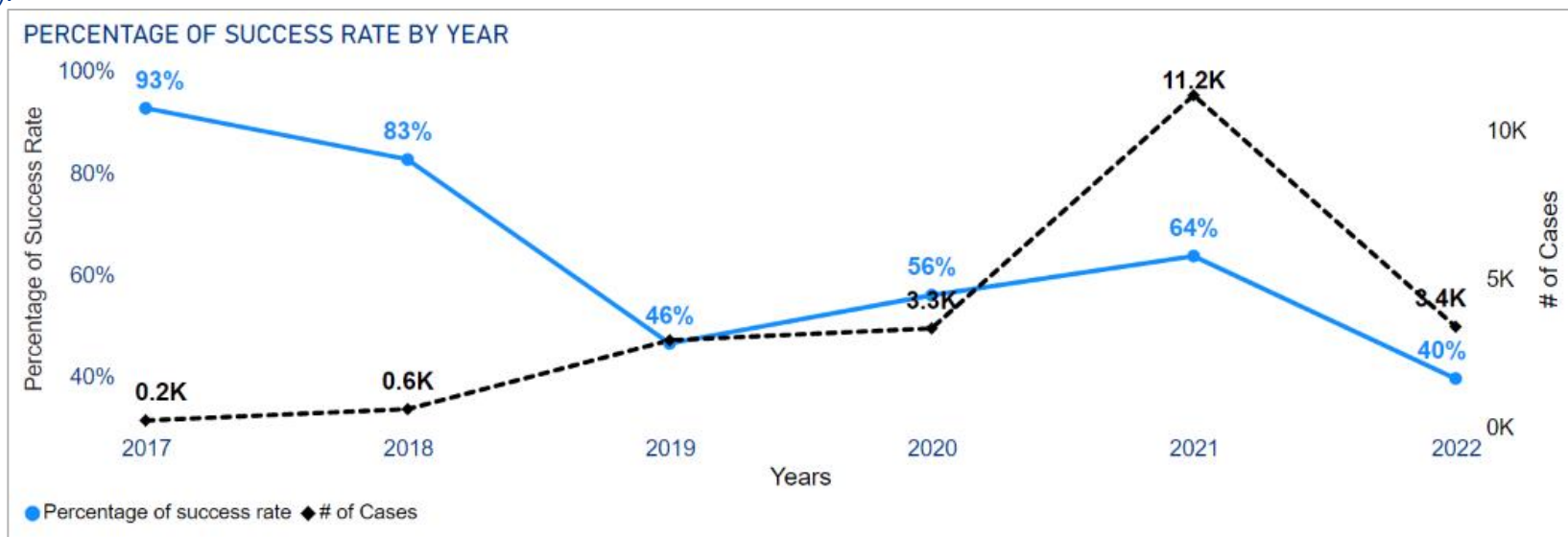
Note: The grand total was calculated based on Closed Connection Status (Column AD), and Year was based on Create Dt (Column X) from the CA-TEXAS_case file. Note that 2022 data is only for first 3 months so a full case total projection would be 13.6K, 21% higher than 2021 rate, ignoring seasonal effects.

Insight Summary: Successful vs. Unsuccessful by Service Requested

Insight(s):

- **Mental Wellness** has a high number of cases (**797 total cases**) and falls within the lowest Success Rate organizations at **28.7%**. The increase in service request for mental health could be the reason behind the decreased Success Rate.

- **Resource Referrals** showed **a higher Success Rate** of **76.6%** across **8,424** total Cases.

- It does not seem to be a trend between number of Cases per Service Category and Success Rate. For example, **Entrepreneurship** has a **relatively high** number of cases (**368 total cases**) and a **high success rate** (**72.3%**) while **Companion Animal** has both **a low number of cases** (**28** total cases) and **a low success rate** (**25%**).

Actionable Suggestion(s):

- **Internal Services**, **Mental Wellness**, and **Food Assistance** all have a **high** number of **Cases** and a **low Success Rate**. These **Service Categories** should be **investigated** further to determine **why successful connections** are **not** being **made.**

- **Communicate** findings regarding **Successful Connections** and **leading Successful Connection Types** across all **Service Categories**, especially those with **lower Success Rates.**

PERCENTAGE OF SUCCESSFUL CASES BY SERVICE CATEGORY
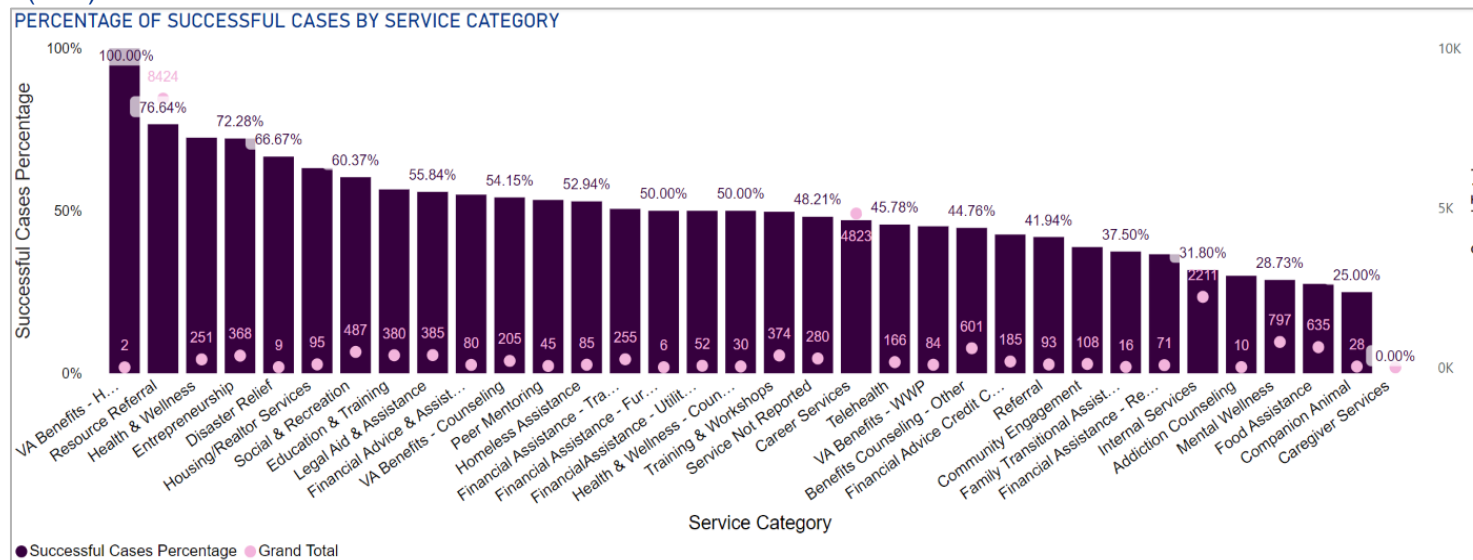
Service Category	% of Successful Cases
VA Benefits - Healthcare	100%
Resource Referral	76.64%
Health & Wellness	72.51%
Entrepreneurship	72.28%
Disaster Relief	66.67%
Housing/Realtor Services	63.16%
Social & Recreation	60.37%
Education & Training	56.58%
Legal Aid & Assistance	55.84%
Financial Advice & Assistance - Other	55%

Note: *Closed Connection Status (Column AD) and Service Category (Column N) from the CA-TEXAS_case file were used for the analysis.*

Insight Summary: Successful vs. Unsuccessful by Partner Organization

Insight(s):

- In order to compare Combined Arms with other resources outside of the organization, the Connection Resource data was **categorized** into **Internal Resources and External Resources.**

- **Internal Resources (68.7%)** have a **higher Success Rate** when compared to that of **External Resources (47.9%)**; however, the **Case Load** for Internal Resources **is less.**

- **Sixteen Partner Organization** had **Success Rate** of **100%**; however, they all had **35 cases or less.**

- Examining **Partner Organizations** with **50+ Cases**, the **Top 2**, when it comes to Success Rate, are **Combined Arms Gym (99.4%)** and **Texas Veterans Commission Entrepreneur Program (95.5% percent).**

- **Combined Arms Resources** has the **largest** number of **Cases (9,414 cases)** with **68.2% Success Rate.**

Actionable Suggestion(s):

- Overall, it is challenging to evaluate Partner Organization effectiveness when they have a trivial number of Cases.

- Perform **deep-dive** into **External Resources** in an effort to **examine root cause** for why External Resources have a **Success Rate that is sub-50%.**

- With **thresholds in mind**, it is possible that these **top Partner Organizations** for Success Rate **could be prioritized for Cases** going forward; if relationship is still active.

- **Collaborate** and **determine best practices** used by these Partner Organizations to **carry forward amongst all external resources.**

- Initial hypotheses point to a few potential problem areas that could be related to any of the following:

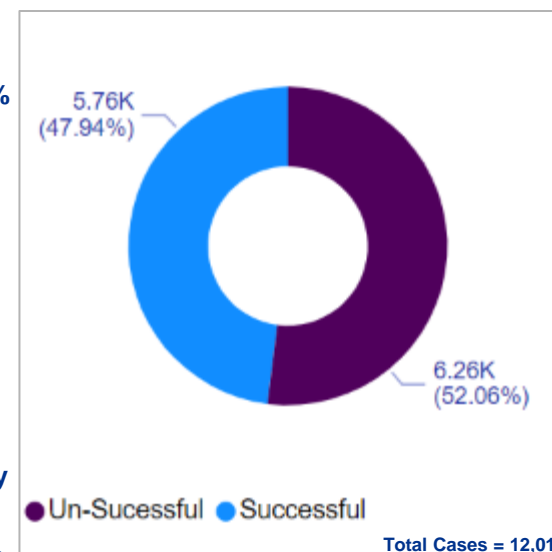 - Outreach channel, capacity, follow up procedure, etc.

External Resources

- Title does not contain "Combined Arms."
- The success rate in external resources is about **47.94** percent which is not that significant.
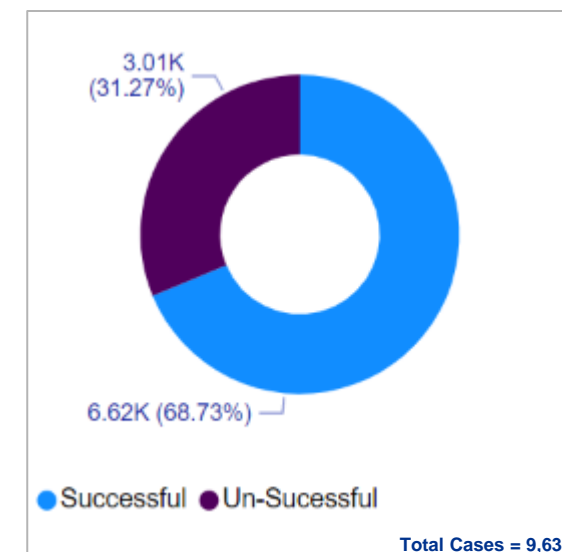
Internal Resources

- Title contains "Combined Arms."
- Internal cases had a success rate of about **68.73 percent**.

External Resources

5.76K (47.94%)

6.26K (52.06%)

● Un-Sucessful ● Successful

Total Cases = 12,018

Internal Resources

3.01K (31.27%)

6.62K (68.73%)

● Successful ● Un-Sucessful

Total Cases = 9,631

Note: *Closed Connection Status (Column AD) and Connection Resource (Column P) from the CA-TEXAS_case file were used for the analysis. "External Resources" and "Internal Resources" were defined above.*

Insight Summary: The average length of time it takes the organization to reach a client who has requested services
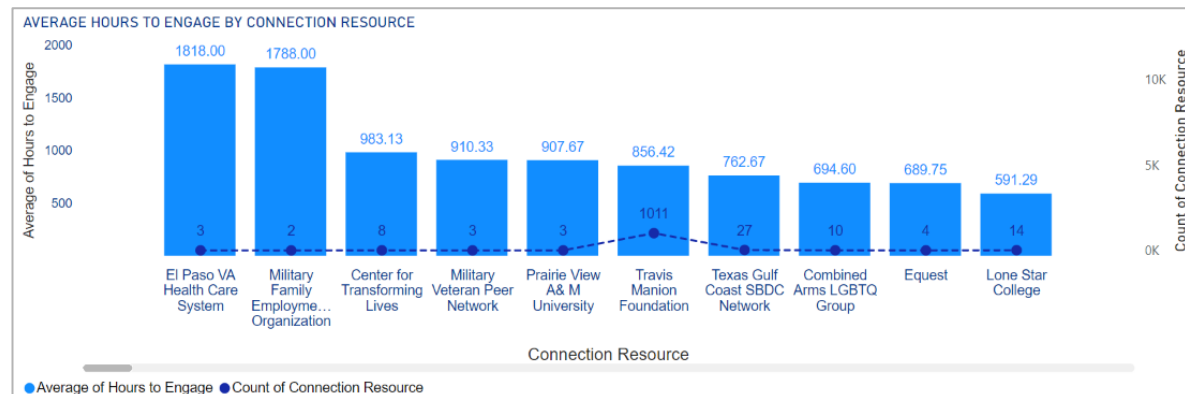
Insight(s):

- The **Average Hours to Engage** for **External Resources** is **3x+** than that of **Internal Resources.**

- **Internal Resources** take **~40 Hours** (i.e. 1 Work Week), while **External Resources** take **130+ Hours** (i.e. 3 Work Weeks).

- The **Top 2 Partner Organizations**, when it comes to Average Hours to Engage, took over **44 work weeks** to engage; however, these organizations had **fewer than 4 cases each.**

- The **Top 10 Partner Organizations**, associated with the largest Average Hours to Engage, had **less than 28 cases**, with the **exception** of **The Travis Manion Foundation**, which had **1,011 cases.**

- No trend between number of cases and number of hours to engage was recognized.
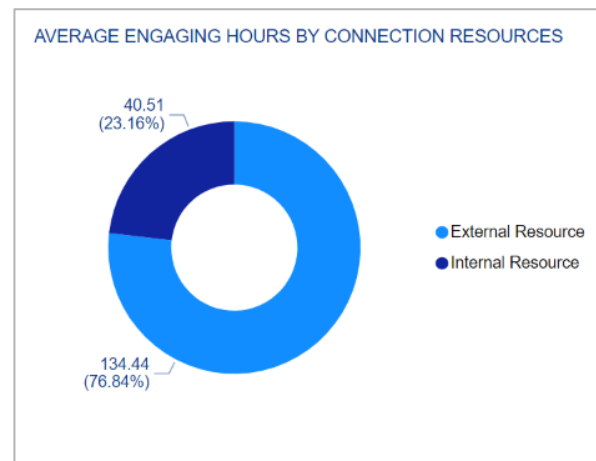
Actionable Suggestion(s):

- **Research and identify potential root causes** related to **Partner Organization outside** of Combined Arms taking 16+ business days on average to engage with Veterans.

- **Generate uniform SLAs** across all **External Partner Organizations** as it relates to establishing a timeline for engagement with Veterans (i.e. First outreach must be **within 5 business days**).

- **Implement a proactive system**, **procedure**, or **alerts** that monitor incoming requests and **ensure** that no connection **request** is **delayed or overlooked.**

AVERAGE ENGAGING HOURS BY CONNECTION RESOURCES

40.51
(23.16%)

134.44
(76.84%)

- External Resource
- Internal Resource

Note: Hours to Engage (Column AS) and Connection Resource (Column P) from the CA-TEXAS_case file were used for the analysis

AVERAGE HOURS TO ENGAGE BY CONNECTION RESOURCE

Connection Resource	Average of Hours to Engage	Count
El Paso VA Health Care System	1818.00	3
Military Family Employee... Organization	1788.00	2
Center for Transforming Lives	983.13	8
Military Veteran Peer Network	910.33	3
Prairie View A&M University	907.67	3
Travis Manion Foundation	856.42	1011
Texas Gulf Coast SBDC Network	762.67	27
Combined Arms LGBTQ Group	694.60	10
Equest	689.75	4
Lone Star College	591.29	14

- Average of Hours to Engage
- Count of Connection Resource

Insight Summary: The average length of time it takes the organization to reach a client who has requested services (Cont.)

Insight(s):

- *Internal Resources*

  - The **Average Hours to Engage spiked**, and reached it's **peak**, in **2019**, when the metric reached **85.8 Hours.**

  - Coincidentally, after reaching it's peak, The Average Hours to Engage **decreased** from ~**85.8** in **2019 to 40.7 2020**.

  - Since 2020, the **Average Hours to Engage** has gradually **declined** despite a large **increase** of over **5,100 cases in 2021**.

- *External Resources*

  - Despite **early decreases** in the Average Hours to Engage (2017-2019), **recent years** have seen gradual **increases** from **93.5 (2019) Hours** to **112.48 Hours (2022)** on average.

 - Both average hours to engage and the number of cases increased in 2021.

Actionable Suggestion(s):

- **Examine** any **processes and procedures** that were **recently implemented**, related to Average Hours to Engage, that could have **contributed to declines internally.**

- **Collaborate with Partner Organizations** to assess potential **bottlenecks** that could exist and **share leading practices** that could **improve** the Average Hours to Engage **externally.**

- **Continue tracking** and accurately capturing data related to Average Hours to Engage**, ensuring prevention** of any **outlier data points** in the future.

External Resources – Case Load & Hours to Engage (Avg) by Year
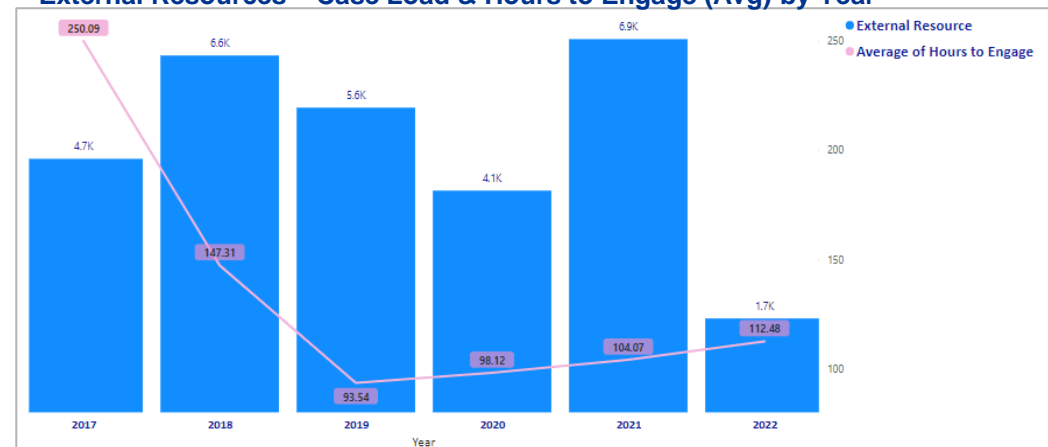
Internal Resources – Case Load & Hours to Engage (Avg) by Year
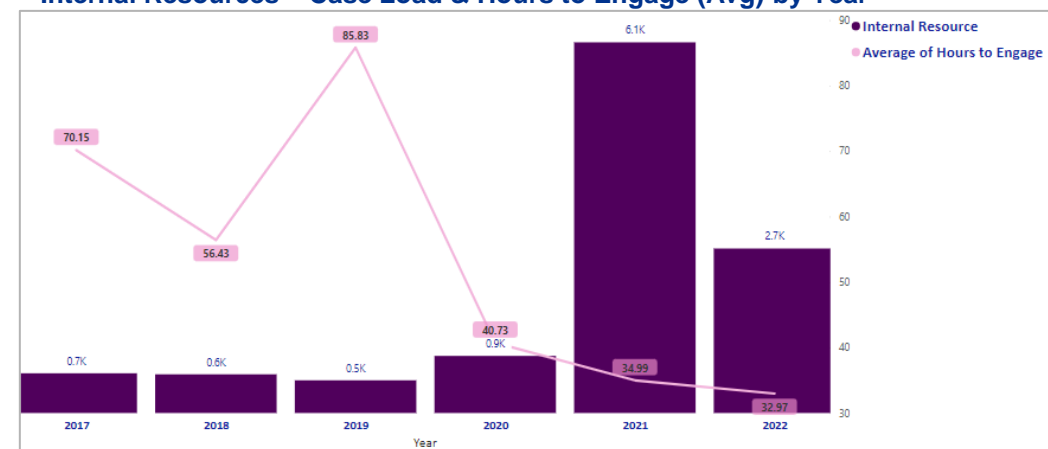
Note: *Hours to Engage (Column AS) and Connection Resource (Column P) from the CA-TEXAS_case file were used for the analysis. "External Resources" and "Internal Resources" were defined on a previous slide. Hours to Engage and Connection Resource both had 0 percent null values.*
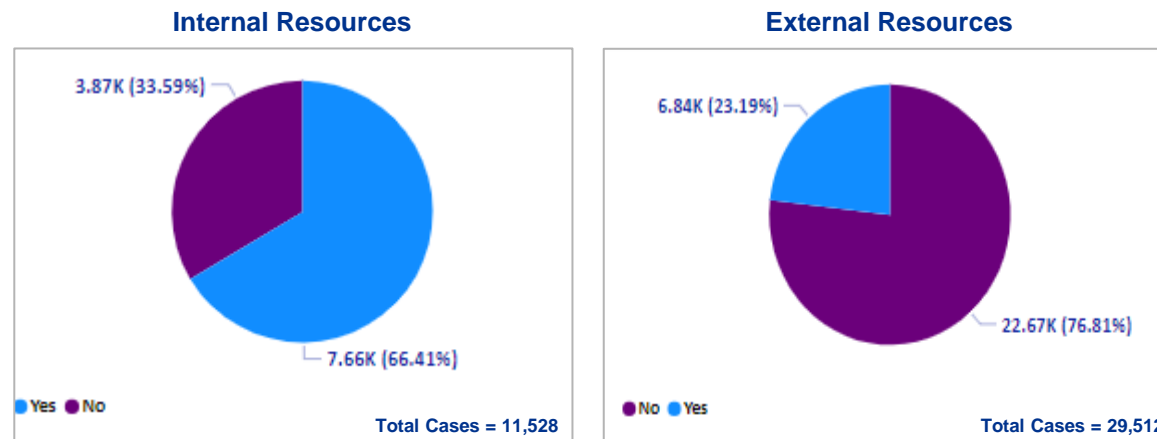
Insight Summary: First Connection Rate
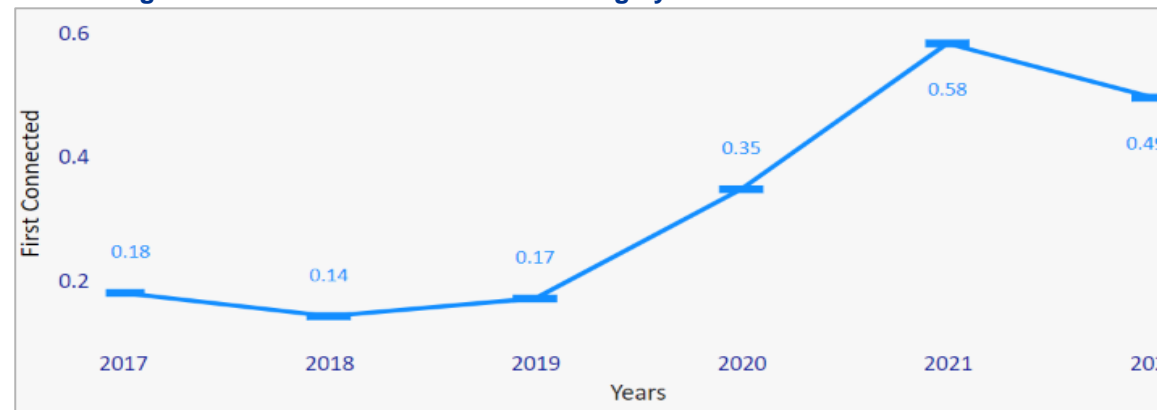
Insight(s):

- **Internal Resources** were able to connect Veterans to a Partner Organization during their **First Connection** <u>**66.4%.**</u>

- **External Resources** were able to connect Veterans to a Partner Organization during **First Connection** <u>**23.2%.**</u>

- Over the years, the percentage of **First Connections** has **improved** from year to year; even **more recently**, where the **First Connection** rate from **2019 to 2021 has increased 41%.**

- The **internal approach** that Combined Arms is taking, to **improve** their service at **First Connection**, appears to have a **positive influence** on Frist Connection Rates

Actionable Suggestion(s):

- The approach that Combined Arms **has recently taken on** has had a **positive impact to the First Connection Rate** – **continuation** of any recent changes or implementations is **highly encouraged** to continue improving, or preserving, Combined Arms' First Connection Rate.

- To **further improve** the overall First Connection Rate, perhaps an implementation, or **connection**, on recent improvements made internally, with **External Resources**, could **improve the external First Connection Rate.**

Internal Resources

3.87K (33.59%)
7.66K (66.41%)
● Yes ● No
Total Cases = 11,528

External Resources

6.84K (23.19%)
22.67K (76.81%)
● No ● Yes
Total Cases = 29,512

Percentage of First Connection Rate – Trending by Year

First Connected

0.6
0.4
0.2

0.18   0.14   0.17   0.35   0.58   0.49

2017   2018   2019   2020   2021   2022

Years

Note*: First_connection (Column G) from the CA_TEXAS_case_timeline file and Create Dt (Column X) and Connection Resource (Column P) from the CA-TEXAS_case file were used for the analysis.*
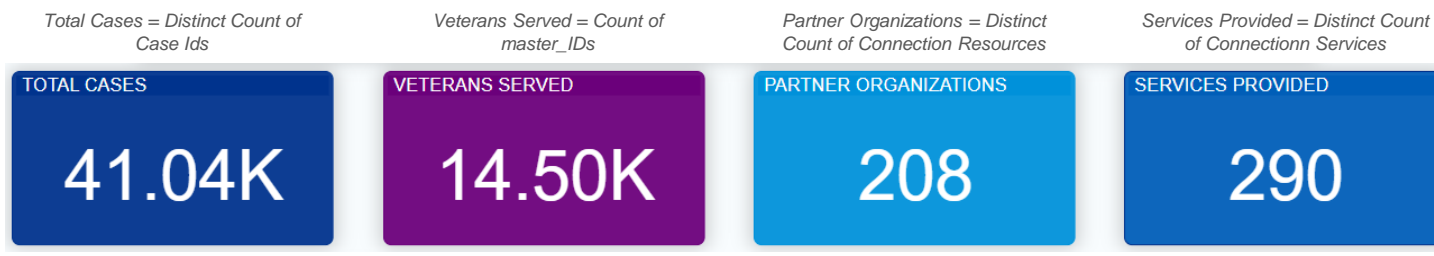
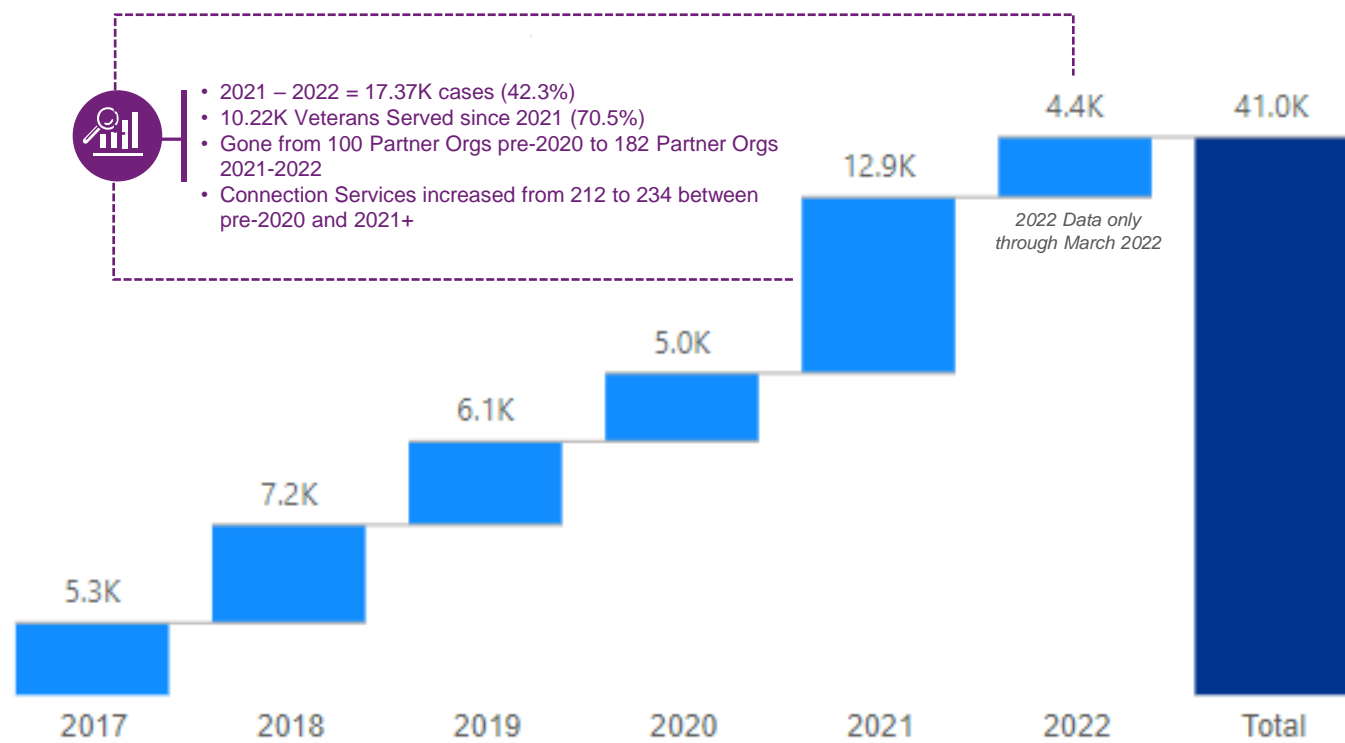Q2: Partner Organizations, Services, and Supply vs. Demand

Insight Summary: CAX KPI Summary & Partner Organization Success

Insight(s):

- Since 2017, through March of 2022, Combined Arms has assisted with a total of **41,040 distinct Cases.**

- Until, 2021, Case Load on an annual basis, was roughly around ~6,000 Cases.

- In **2021**, total Case Load sharply **increased to 12,942 Cases.**

  - **100%+ increase** from annual average.
  - **16% higher** than previous **two years combined** (2019-2020).

- **All external Partner Organizations**, included in the *CA-TEXAS_case.csv* file, had **successful matches to Services that they provide** via the *resources_offered.csv.*

- Only **differences** in Connection Resource/Service and Services they provide exist when **Combined Arms Resources** is the **Connection Resource** – 882 (2.1%) Cases in total.**

  - These were vetted and determined to be exceptions that root from unknown/null Connection Resource data.
  - Current data model logic states that when a Connection Resource is unknown, it is force populated to Combined Arms Resources.

Total Cases = Distinct Count of Case Ids

Veterans Served = Count of master_IDs

Partner Organizations = Distinct Count of Connection Resources

Services Provided = Distinct Count of Connectionn Services

TOTAL CASES	VETERANS SERVED	PARTNER ORGANIZATIONS	SERVICES PROVIDED
41.04K	14.50K	208	290

CASES BY YEAR

- 2021 – 2022 = 17.37K cases (42.3%)
- 10.22K Veterans Served since 2021 (70.5%)
- Gone from 100 Partner Orgs pre-2020 to 182 Partner Orgs 2021-2022
- Connection Services increased from 212 to 234 between pre-2020 and 2021+

2022 Data only through March 2022

Waterfall chart — Cases by Year: 2017: 5.3K, 2018: 7.2K, 2019: 6.1K, 2020: 5.0K, 2021: 12.9K, 2022: 4.4K, Total: 41.0K

Insight Summary: CAX Service Groups & Partner Organizations

Insight(s):

- Examining the Service Groups that CAX connects clients with each Partner Organization, we notice that majority of the Cases are focused within **Internal Services (34.3%)**, **Career Services (30.4%)**, and **Health & Wellness (7.6%).**

- The aforementioned **Top 3 Service Groups** account for **72.3%** of all Cases in Combined Arms' history (2017-2022).

- Examining the trend lines within each Service Group, it is clear that a **majority** experienced **spikes** to their respective case loads **starting in 2021.**

- Examining the **Top 3 Resources** within each of the Top 10 Service Categories we can see **repeat Partner Organizations** such as: **Combined Arms Resources**, **Nextop**, **Wounded Warrior Project**, **Team Red White And Blue**, and **Lone Star Legal Aid.**

Actionable Suggestion(s):

- Understanding the most in-demand Service Groups, when it comes to Total Cases, can prove to be a **starting point** when seeking **new Partner Organization to collaborate with.**

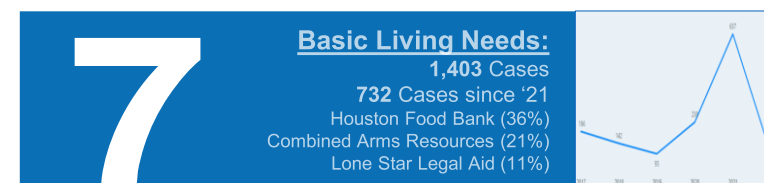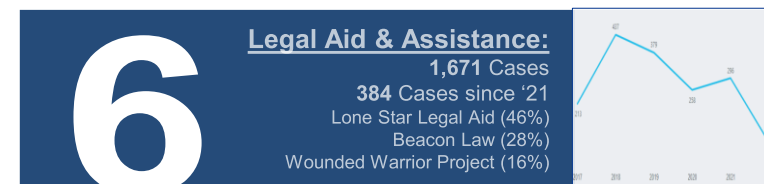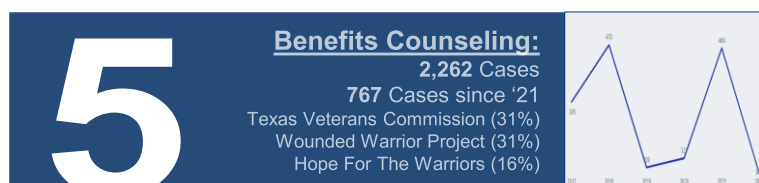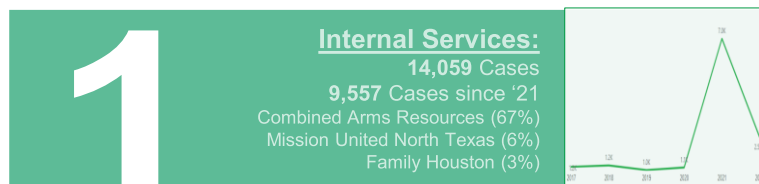- The above is **certainly true**, where top Organizations are **handling a large potion (+30%)** of the Case Load (i.e. Internal Services, Benefits Counseling, Legal Aid & Assistance, Basic Living Needs, and Financial Advice & Assistance).

Top 10 Service Groups, their Case Loads, and Partner Organizations

1 **Internal Services:**
14,059 Cases
9,557 Cases since '21
Combined Arms Resources (67%)
Mission United North Texas (6%)
Family Houston (3%)

2 **Career Services:**
12,492 Cases
2,779 Cases since '21
Vet Jobs (15%)
Nextop (13%)
Career Gear Houston (9%)

3 **Health & Wellness:**
3,114 Cases
1,209 Cases since '21
Veteran Wellness Alliance (19%)
Easter Seals of Greater Houston (11%)
Team Red White And Blue (9%)

4 **Social & Recreation:**
2,832 Cases
509 Cases since '21
Team Red White And Blue (15%)
Lone Star Veterans Association (12%)
Wounded Warrior Project (10%)

5 **Benefits Counseling:**
2,262 Cases
767 Cases since '21
Texas Veterans Commission (31%)
Wounded Warrior Project (31%)
Hope For The Warriors (16%)

6 **Legal Aid & Assistance:**
1,671 Cases
384 Cases since '21
Lone Star Legal Aid (46%)
Beacon Law (28%)
Wounded Warrior Project (16%)

7 **Basic Living Needs:**
1,403 Cases
732 Cases since '21
Houston Food Bank (36%)
Combined Arms Resources (21%)
Lone Star Legal Aid (11%)

8 **Financial Advice & Ast:**
1,069 Cases
549 Cases since '21
Combined Arms Resources (41%)
Alamo Area Council of Govts (13%)
Lone Survivor Foundation (13%)

9 **Education & Training:**
771 Cases
462 Cases since '21
Nextop (21%)
TX Vets Commish Edu Advising (10%)
TX Vets Commish Vet Edu Dep (9%)

0 **Community Engagement:**
698 Cases
93 Cases since '21
Travis Manion Foundation (29%)
Team Rubicon (23%)
The Mission Continues (20%)

Case Load = Distinct Count of Case IDs; Partner Organizations = Connection Resource; all data coming from Case File
All trend lines contain 2022 data, which is not complete. 2022 Data only through March 2022

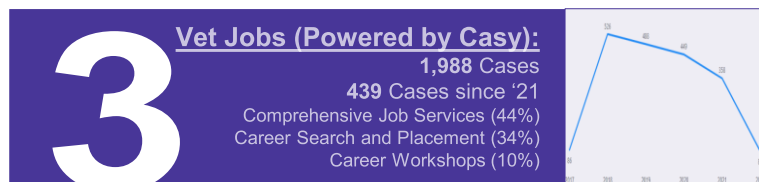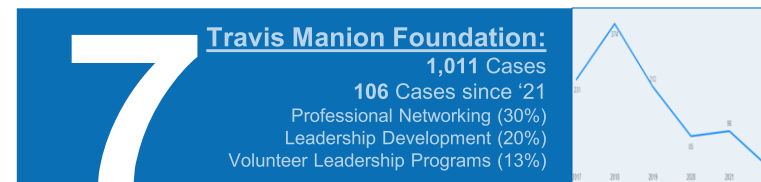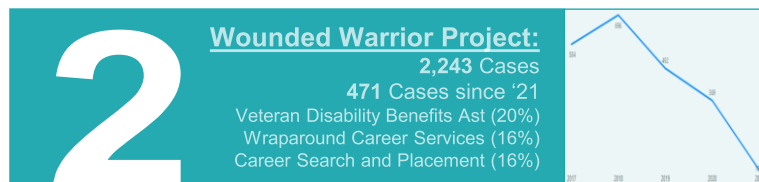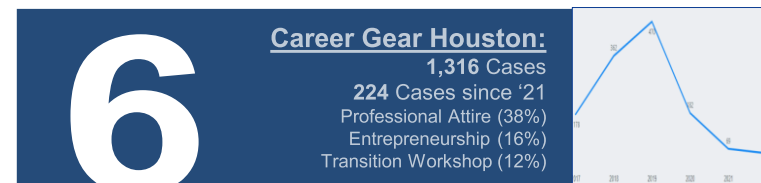# Insight Summary: CAX Partner Organizations & Connection Services

Insight(s):

- Exploring the Top 10 Partner Organizations, it is clear that, by Cases, the **Top 3 Partner Organizations** are **Combined Arms Resources (26.9%)**, **Wounded Warrior Project (5.5%)**, and **Vet Jobs (Powered by Casy) (4.8%)**.

- The **Top 3 Partner Organizations** are responsible for **37.2%** of CAX's Total Case Load (2017-2022), with **Combined Arms Resources** contributing a vast **majority.**

- Mostly, from a Partner Organization standpoint, Cases have been on the **decline since 2021** outside of Combined Arms, Nextop, Texas Veterans Commission, and Mission United North Texas; all of which have saw increases in 2021.

- Additional view of Top 10 Connection Services and Top 3 Connection Resources included in the Appendix.

Actionable Suggestion(s):

- Combined Arms, and the Veterans that they assist, repeatedly associate their needs to **Career Services**, **Health & Wellness**, and **Benefits** categories – this should play a role in **future relationships and expansion** (i.e. new locations or services areas).

Top 10 Partner Organizations, their Case Loads, and Connection Services

1 **Combined Arms Resources:**
11,056 Cases
8,318 Cases since '21
General Inquiry (46%)
Service Rendered (12%)
Internal Rent Referral (7%)

2 **Wounded Warrior Project:**
2,243 Cases
471 Cases since '21
Veteran Disability Benefits Ast (20%)
Wraparound Career Services (16%)
Career Search and Placement (16%)

3 **Vet Jobs (Powered by Casy):**
1,988 Cases
439 Cases since '21
Comprehensive Job Services (44%)
Career Search and Placement (34%)
Career Workshops (10%)

4 **Nextop:**
1,959 Cases
549 Cases since '21
Wraparound Career Services (40%)
Job Placement (29%)
Career Mentoring (5%)

5 **Lone Star Veterans Assoc:**
1,438 Cases
0 Cases since '21
Professional Networking (29%)
Entrepreneurship (14%)
Leadership Development (12%)

6 **Career Gear Houston:**
1,316 Cases
224 Cases since '21
Professional Attire (38%)
Entrepreneurship (16%)
Transition Workshop (12%)

7 **Travis Manion Foundation:**
1,011 Cases
106 Cases since '21
Professional Networking (30%)
Leadership Development (20%)
Volunteer Leadership Programs (13%)

8 **Lone Star Legal Aid:**
999 Cases
163 Cases since '21
Family Law (31%)
Veteran Benefit Appeals (17%)
Housing (15%)

9 **Texas Veterans Commission:**
986 Cases
614 Cases since '21
Veteran Disability Benefits Ast (70%)
Emp Career Search & Placement (26%)
Central Ajc-benefits (1%)

0 **Mission United North Texas:**
956 Cases
909 Cases since '21
Financial Assistance – Internal (45%)
Resource Referral (41%)
Homeless Services – Internal (8%)

Case Load = Distinct Count of Case IDs; Partner Organizations = Connection Resource; all data coming from Case File
All trend lines contain 2022 data, which is not complete. 2022 Data only through March 2022

Insight Summary: Supply vs. Demand

Insight(s):

- While **not widespread**, monthly **threshold exceeding does occur**, especially in prevalent Service Groups.

- On a monthly average, a **threshold is exceeded** anywhere from **~1% (2017-2020)** to **~1.3% (2021-2022)** of the time, which is intermittent. Although sparse, threshold exceeding has been **seen more recently.**

- While thresholds are exceed on sporadic occasions, we do see some happening more than others, especially more recently (2021-2022): Combined Arms Resources - General Inquiry, Texas Veterans Commission – Veteran Disability Benefits Assistance, Combined Arms Resources – Basic Needs.

Actionable Suggestion(s):

- The below information on repeat threshold exceeding can help **prioritize areas of concern** going forward, whether it's particular Service Groups, Connection Resources, Services, etc. Ultimately, **assisting** with areas to **initiate threshold expansion conversations**, provide additional evidence of **internal support claims**, or **prioritize** areas where **new Partner Organization relationships** could be most beneficial to the end clients / Veterans.

Supply vs. Demand: Repeat Threshold Exceeding Connection Resources & Connection Services					
Service Group	**Connection Resource**	**Connection Service**	**# of Months Exceeding Threshold**	**Avg % of Threshold**	**Last Occurrence**
Internal Services	Combined Arms Resources	General Inquiry	13	383%	March-2022
Career Services	Workforce Opportunity Service	Comprehensive Job Services	9	131%	August-2018
Career Services	SER Houston	Job Placement	6	420%	October-2017
Career Services	Career And Recovery Resources Inc.	Comprehensive Job Services	5	154%	October-2018
Benefits Counseling	Texas Veterans Commission	Veteran Disability Benefits Assistance	3	208%	March-2022
Career Services	SER Houston	Wraparound Career Services	2	150%	October-2017
Internal Services	Combined Arms Resources	Internal Rent Referral	2	124%	November-2021
Career Services	Still Serving Veterans	Career Search And Placement	2	140%	March-2022
Internal Services	Combined Arms Resources	Basic Needs	2	198%	October-2021

Next Steps

KPMG

Potential For Further Exploration

01

Threshold vs. Success Rate

Supplement current findings of Thresholds being exceeded for particular Connection Resources and their respective Connection Service with historical Case Success Rates to determine if there is any correlation.

02

Partner Organization Deep-Dive

Align Quantitative analysis performed with future Qualitative review of high-performing and low-performing Partner Organizations. Will enable identification of successful procedures being performed by high-performing Partner Organizations, which can in turn, be implemented into the Partner Organizations with lower quantitative metrics (i.e. Success Rate, First Connection Rate, etc.).

03

## Connection Service Seasonality

Gain insightful understanding as to why there is fluctuation related to the demand of certain Connection Services over time (i.e. Mental Health & Wellness over the more recent years). Are the increases purely seasonal and related to their inherent nature (i.e. more Social & Recreational requests in the summer months)? Culture related? Any other valid explanation?
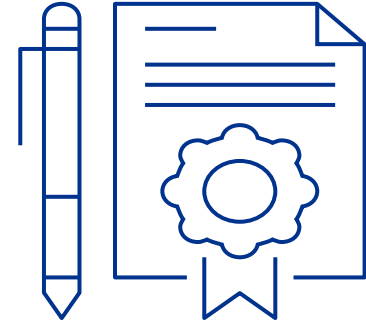
Immediate Next Steps
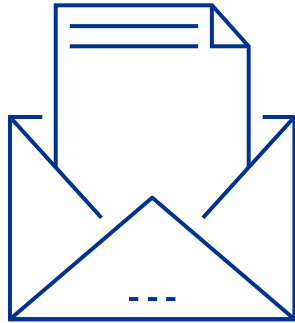
KPMG to send final transmittal letter with Insights Guide for Combined Arms acknowledgement of successful and complete delivery
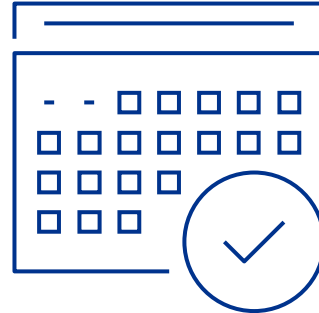
KPMG will schedule follow up with Combined Arms to discuss potential for continued support

KPMG team to send survey to get your feedback

Appendix

For Better with Data

Dataset Inventory

Inventory of data utilized for the analysis:

- **Dataset 1:**
  - Name: CA-TEXAS_case.csv
  - Description: Table containing customer resource requirements, resource servicing the service rendered to the customer
  - Source (client/KPMG): Combined Arms (CAX)
  - De-identification required for any PII, PHI or other sensitive data types: No PII, PHI, or other sensitive data types included
  - Data Attributes Used: Service Group, Service Category, Connection Resource, Service, Service Id, Closed Date, master_id, Case Id, Case Number, Status, Reason, Original Service, Original Resource, Resource Id2, Description, Is Closed, Resource Id, Create Year, crdate, Hours to Engage, Outcomes, Closed Connection Status, Connection Type

- **Dataset 2:**
  - Name: resources_offered.csv
  - Description: Table defining what services are offered by each owner
  - Source (client/KPMG): Combined Arms (CAX)
  - De-identification required for any PII, PHI or other sensitive data types: No PII, PHI, or other sensitive data types included
  - Data Attributes Used: resource_id, resource_name, resource_service, org_id, threshold

- **Dataset 3:**
  - Name: CA-TEXAS_case_timeline.csv
  - Description: Table defining the time lag between when a customer profile was created and when the first case was initiated.
  - Source (client/KPMG): Combined Arms (CAX)
  - De-identification required for any PII, PHI or other sensitive data types: No PII, PHI, or other sensitive data types included
  - Data Attributes Used: First_connection

Success Rate by Service Category By Year

2017

Legend: ● Success Rate ● Total Cases

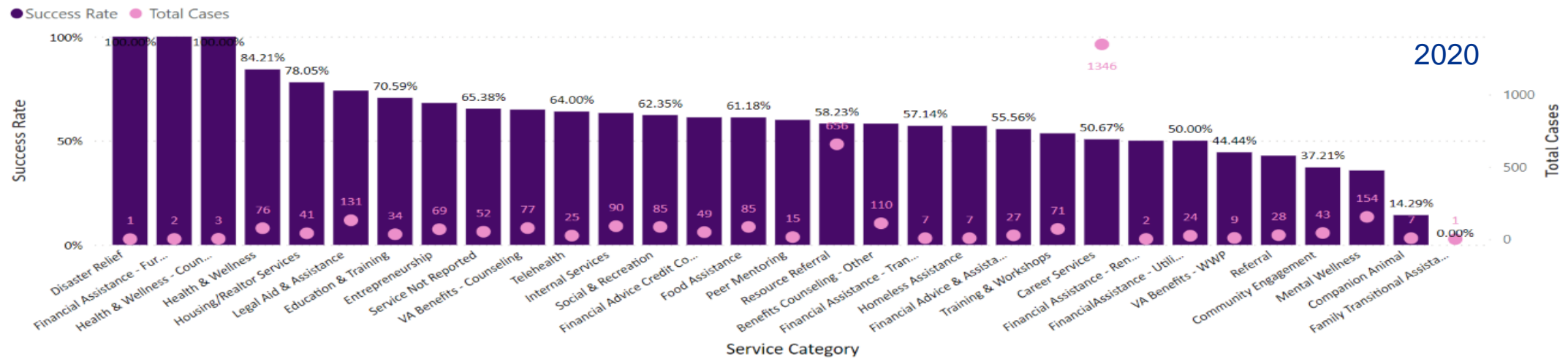| Service Category	Success Rate	Total Cases
Benefits Counseling - Other	100.00%	4
Community Engagement	100.00%	1
Family Transitional Assista...	100.00%	3
Financial Advice Credit Co...	100.00%	1
Food Assistance	100.00%	1
Health & Wellness	100.00%	4
Health & Wellness - Coun...	100.00%	2
Mental Wellness	100.00%	4
Social & Recreation	100.00%	3
Training & Workshops	100.00%	7
Resource Referral	97.22%	36
Entrepreneurship	92.86%	28
Career Services	91.18%	102
Internal Services	86.96%	23
Companion Animal	0.00%	

Success Rate and Total Cases by Service Category

2018

Legend: ● Success Rate ● Total Cases

Service Category	Success Rate	Total Cases
Community Engagement	100.00%	1
Social & Recreation	100.00%	1
Entrepreneurship	93.24%	74
Resource Referral	86.96%	46
Training & Workshops	85.45%	55
Internal Services	85.37%	41
Career Services	84.00%	359
Education & Training	25.00%	12
VA Benefits - WWP	10.00%	10
Health & Wellness	0.00%	1
Mental Wellness	0.00%	1
Service Not Reported	0.00%	4

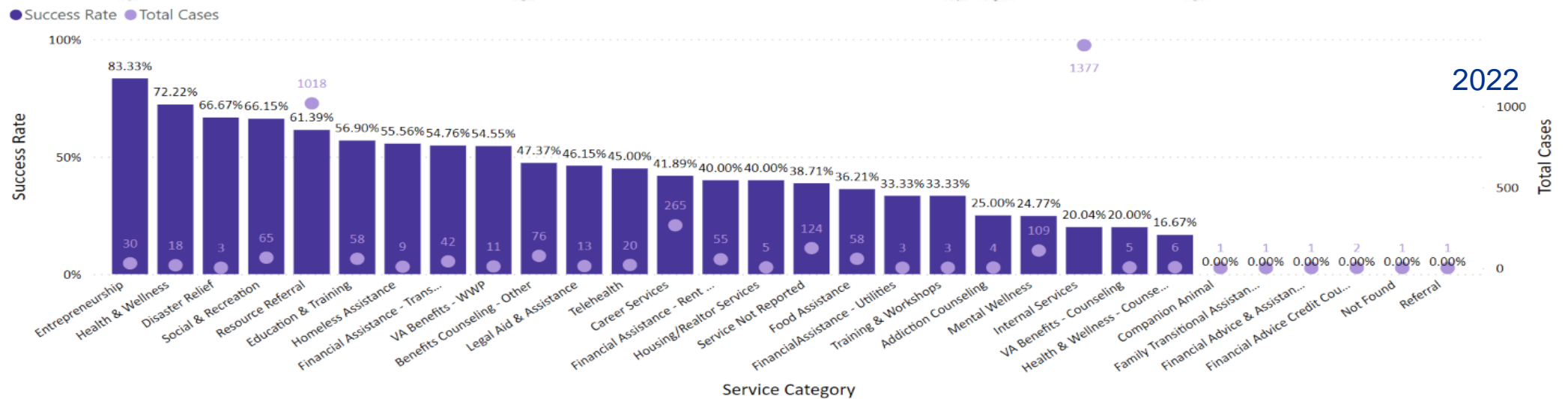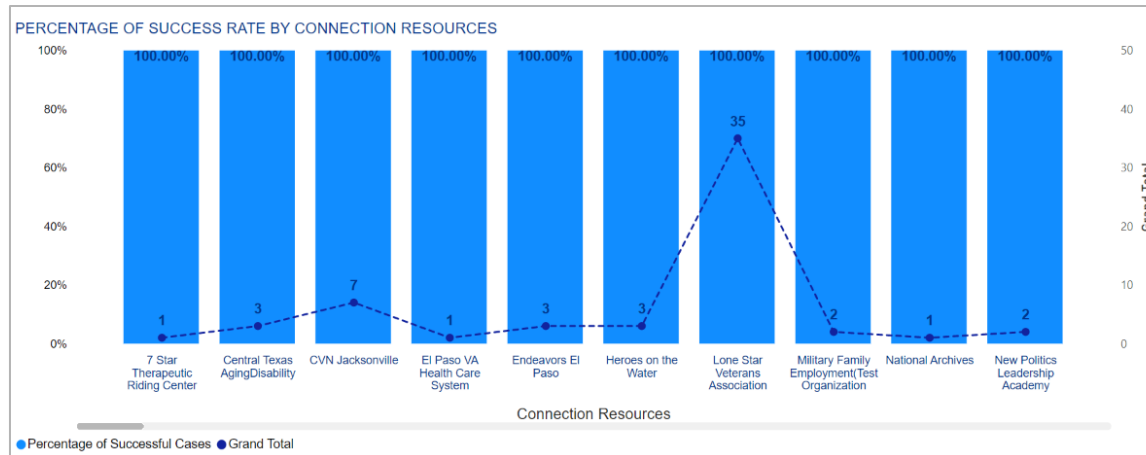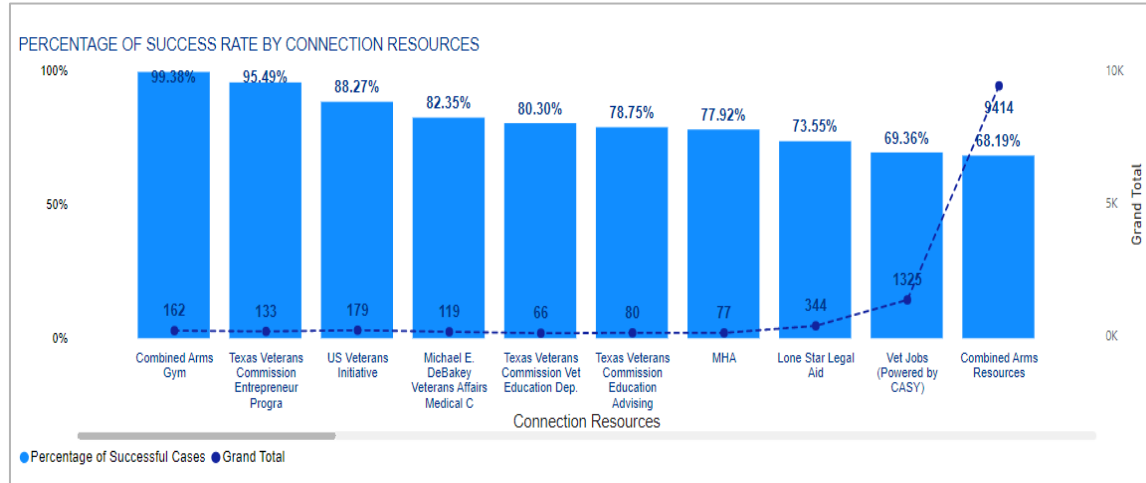# Success Rate by Service Category By Year

Success Rate by Service Category By Year

Success Rate By Partner Organizations

PERCENTAGE OF SUCCESS RATE BY CONNECTION RESOURCES

Top chart (Percentage of Successful Cases / Grand Total):

- Combined Arms Gym — 99.38% — 162
- Texas Veterans Commission Entrepreneur Progra — 95.49% — 133
- US Veterans Initiative — 88.27% — 179
- Michael E. DeBakey Veterans Affairs Medical C — 82.35% — 119
- Texas Veterans Commission Vet Education Dep. — 80.30% — 66
- Texas Veterans Commission Education Advising — 78.75% — 80
- MHA — 77.92% — 77
- Lone Star Legal Aid — 73.55% — 344
- Vet Jobs (Powered by CASY) — 69.36% — 1325
- Combined Arms Resources — 68.19% — 9414

Legend: ● Percentage of Successful Cases ● Grand Total

PERCENTAGE OF SUCCESS RATE BY CONNECTION RESOURCES

Bottom chart (all 100.00%, Grand Total values):

- 7 Star Therapeutic Riding Center — 100.00% — 1
- Central Texas AgingDisability — 100.00% — 3
- CVN Jacksonville — 100.00% — 7
- El Paso VA Health Care System — 100.00% — 1
- Endeavors El Paso — 100.00% — 3
- Heroes on the Water — 100.00% — 3
- Lone Star Veterans Association — 100.00% — 35
- Military Family Employment(Test Organization — 100.00% — 2
- National Archives — 100.00% — 1
- New Politics Leadership Academy — 100.00% — 2

Legend: ● Percentage of Successful Cases ● Grand Total

Note: Closed Connection Status (Column AD) and Connection Resource (Column P) from the CA-TEXAS_case file were used for the analysis.

Top 10 Partner Organizations with highest success rate with more than 50 cases

| Service Category	% of Successful Cases
Combined Arms Gym	99.38%
Texas Veterans Commission Entrepreneur Program	95.49%
US Veterans Initiative	88.27%
Michael E. DeBakey Veterans Affairs Medical C	82.35%
Texas Veterans Commission Vet Education Dep.	80.30%
Texas Veterans Commission Education Advising	78.75%
MHA	77.92%
Lone Star Legal Aid	73.55%
Vet Jobs (Powered by CASY)	69.36%
Combined Arms Resources	68.19%

16 Partner Organizations with 100% success rate and less than 50 cases

Service Category	% of Successful Cases
7 Star Therapeutic Riding Center	100%
Central Texas AgingDisability	100%
CVN Jacksonville	100%
El Paso VA Healthcare System	100%
Endeavors El Paso	100%
Heroes on the Water	100%
Lone Star Veterans Association	100%
Military Family Employment (Test Org)	100%
National Archives	100%
New Politics Leadership Academy	100%
Prairie View A&M University	100%
SD Vet Services	100%
TVC Employment DFW Region3	100%
VA Benefits Office	100%
Valor Ranch	100%
We Support Vets (Test Org)	100%

Average Hours To Engage Internal And External Resources

**AVERAGE of HOURS TO ENGAGE BY CONNECTION RESOURCES**
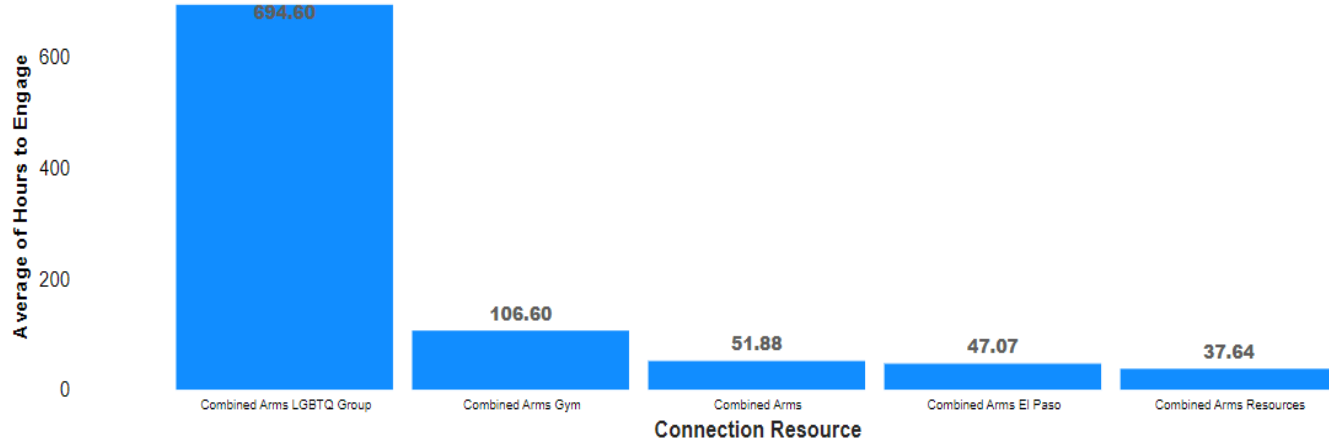
Internal Resources outliers with highest average hours to engage

Organization	# of Records	Minimum # of Hours	Maximum # of Hours	Mean	Median
Combined Arms LGBTQ Group	10	24	1941	694.6	320.5
Combined Arms Gym	368	0	1263	106.6	48.5

AVERAGE of HOURS TO ENGAGE BY CONNECTION RESOURCES

External Resources outliers with highest average hours to engage

Organization	# of Records	Minimum # of Hours	Maximum # of Hours	Mean	Median
El Paso VA Health Care System	3	24	2715	1818	2715
Military Family Employment (Test Organization	2	1754	1822	1788	1788
Center for Transforming Lives	8	24	2285	983.13	449.5
Military Veteran Peer Network	3	20	2379	910.33	332
Prairie View A&M University	3	24	2468	907.67	231
Travis Manion Foundation	1011	0	4617	856.42	167
Texas Gulf Coast SBDC Network	27	20	2979	762.67	241
Equest	4	48	2285	689.75	213
Lone Star College	14	5	2283	591.29	46
We Support Vets (Test Organization	4	24	1348	584.25	482.5
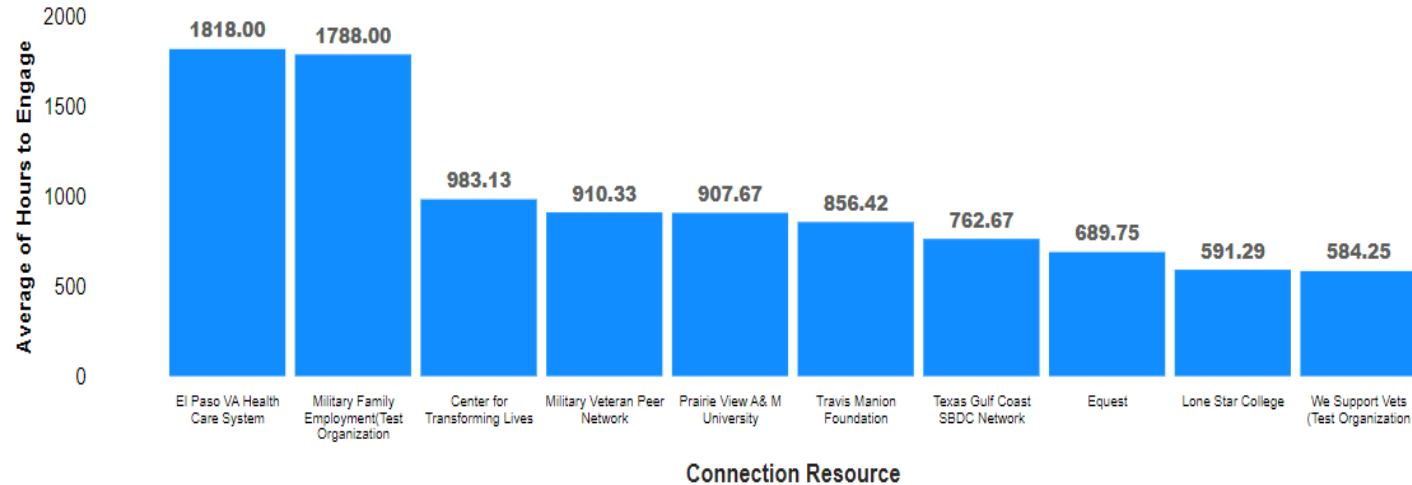
Insight: CAX KPI Summary & Partner Organization Success

Analysis Approach CAX Case Summary:

1. KPI Metric Counts (i.e. Total Cases, Cases by Year, Veterans Served, etc.) all calculated using a count, or a distinct count, where applicable, to generate metrics over a specific time or in total.
2. When attached to a point in time, the counts, or distinct counts, were based off of the date field "Create Dt".
3. Based off of project notes, and guidance, comparisons were done via two groupings: Pre-2021 and 2021+.

Analysis Approach Partner Organization Success:

1. Grouped Connection Resource and Services from CA-TEXAS_case.csv and compared to "master list" of resource names and resource services in the resources_offered.csv.
2. Joined two groups together to see where case file groups did not match resources offered master list.
3. All external resources matched 100% to services that they provide.
4. Combined Arms Resources was the only Resource that had instances of cases attached to a service they were not listed to provide – these instances were confirmed exceptions due to data model logic that is applied when connection resource is unknown.

Key Insights:

- Since 2017, through March of 2022, Combined Arms has assisted with a total of 41,040 distinct Cases.
- Until, 2021, Case Load on an annual basis, was roughly around ~6,000 Cases.
- In 2021, total Case Load sharply increased to 12,942 Cases.
- 100%+ increase from annual average.
- 16% higher than previous two years combined (2019-2020).
- All external Partner Organizations, included in the CA-TEXAS_case.csv file, had successful matches to Services that they provide via the resources_offered.csv.
- Only differences in Connection Resource/Service and Services they provide exist when Combined Arms Resources is the Connection Service – 882 (2.1%) Cases in total
  - These were vetted and determined to be exceptions that root from unknown/null Connection Resource data.
  - Current data model logic states that when a Connection Resource is unknown, it is force populated to Combined Arms Resources.
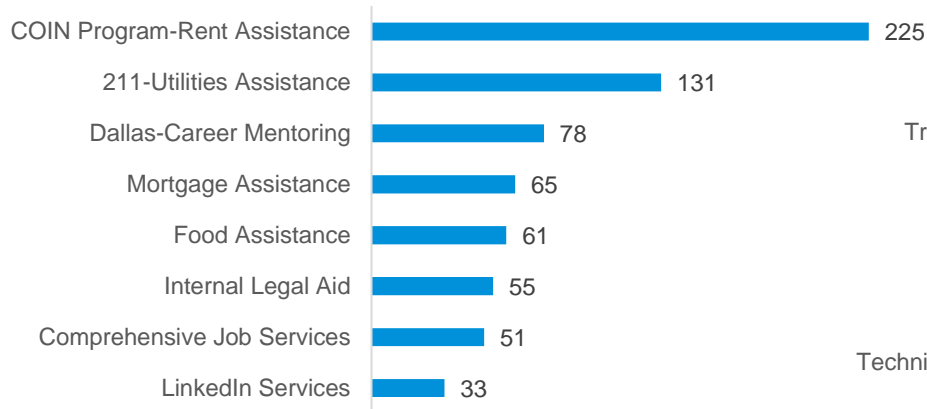
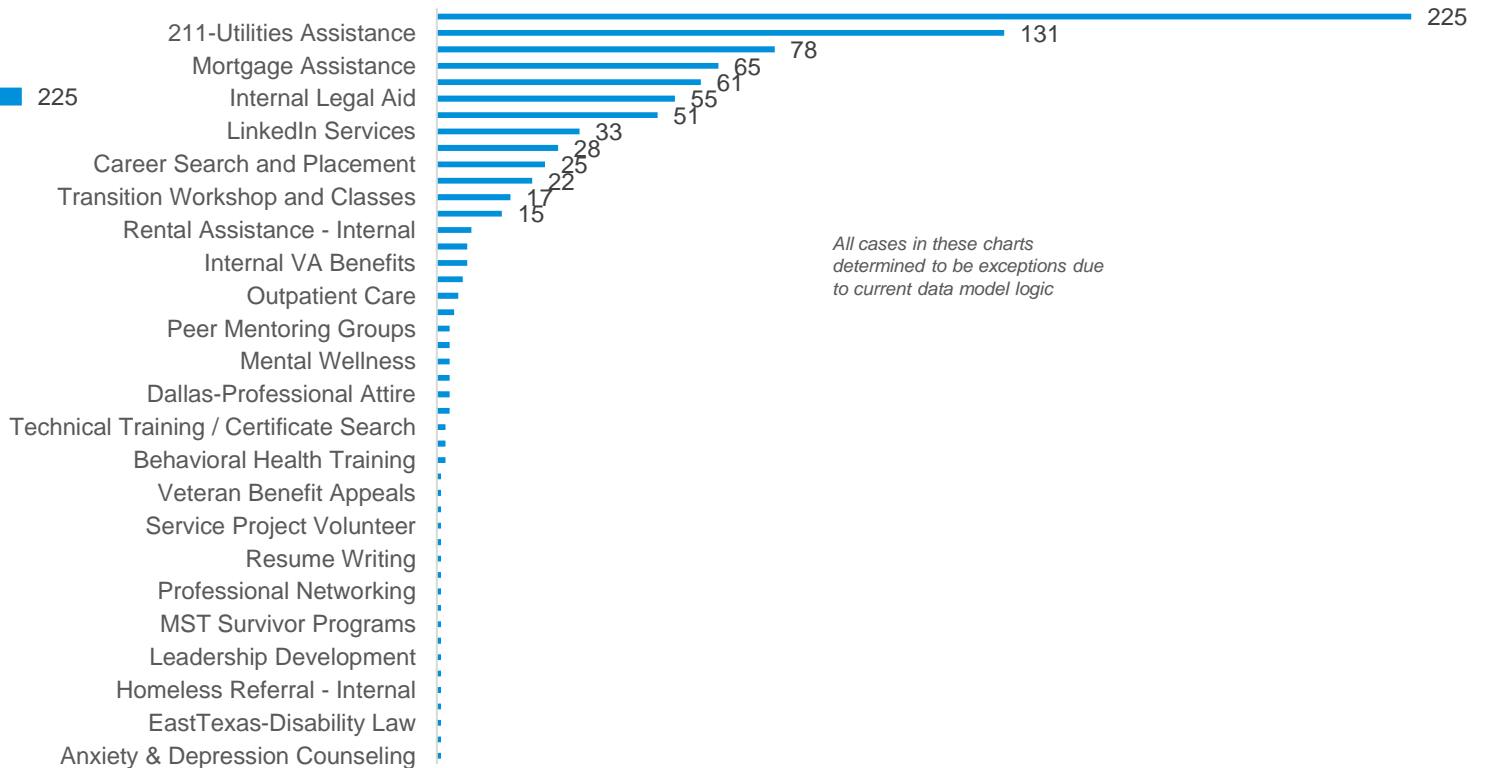# Insight: CAX KPI Summary & Partner Organization Success (Cont.)

Supporting Data:
1. Summarized table of findings
2. Power BI Dashboard – screenshot provided in deck – separate Power BI document provided in unison with slides

Combined Arms Resources - Services Not Match by Case Count (>30 Cases)

Service	Count
COIN Program-Rent Assistance	225
211-Utilities Assistance	131
Dallas-Career Mentoring	78
Mortgage Assistance	65
Food Assistance	61
Internal Legal Aid	55
Comprehensive Job Services	51
LinkedIn Services	33

All cases in these charts determined to be exceptions due to current data model logic

Combined Arms Resources - Services Not Match by Case Count (All)

Service	Count
211-Utilities Assistance	225
Mortgage Assistance	131
Internal Legal Aid	78
LinkedIn Services	65
Career Search and Placement	61
Transition Workshop and Classes	55
Rental Assistance - Internal	51
Internal VA Benefits	33
Outpatient Care	28
Peer Mentoring Groups	25
Mental Wellness	22
Dallas-Professional Attire	17
Technical Training / Certificate Search	15
Behavioral Health Training	
Veteran Benefit Appeals	
Service Project Volunteer	
Resume Writing	
Professional Networking	
MST Survivor Programs	
Leadership Development	
Homeless Referral - Internal	
EastTexas-Disability Law	
Anxiety & Depression Counseling	

All cases in these charts determined to be exceptions due to current data model logic

Insight: CAX Service Groups & Partner Organizations

Analysis Approach:

1. Grouped data by Service Group and Connection Resource.
2. Counted distinct Case IDs by Service Group and Connection Resource grouping.
3. Sorted records in descending order, by count of Case ID and then in alphabetical order for Service Group.
4. With records grouped by Service Group and in a descending order, able to retrieve a sample of each Service Group, which consisted of the Top 3 Connection Resources by Service Group.
5. Assigned Tile Groups to properly represent a Connection Resource's rank within the Service Groups.
6. Calculated percentage of Case Load for each Connection Resource (Connection Resource Cases / Total Cases of Service Group) to formulate a percentage of cases metric.
7. Transposed to represent in more summarized fashion.

Key Insights:

- Examining the Service Groups that CAX connects clients with each Partner Organization, we notice that majority of the Cases are focused within Internal Services (34.3%), Career Services (30.4%), and Health & Wellness (7.6%).
- The aforementioned Top 3 Service Groups account for 72.3% of all Cases in Combined Arms' history (2017-2022).
- Examining the trend lines within each Service Group, it is clear that a majority experienced spikes to their respective case loads starting in 2021.
- Examining the Top 3 Resources within each of the Top 10 Service Categories we can see repeat Partner Organizations such as: Combined Arms Resources, Nextop, Wounded Warrior Project, Team Red White And Blue, and Lone Star Legal Aid.

Actionable Suggestion(s):

- Understanding the most in-demand Service Groups, when it comes to Total Cases, can prove to be a starting point when seeking new Partner Organization to collaborate with.
- The above is certainly true, where top Organizations are handling a large potion (+30%) of the Case Load (i.e. Internal Services, Benefits Counseling, Legal Aid & Assistance, Basic Living Needs, and Financial Advice & Assistance).

KPMG

Insight: CAX Service Groups & Partner Organizations (Cont.)

Supporting Data:
1. Summarized table of findings
2. Power BI Dashboard – screenshot provided in deck – separate Power BI document provided in unison with slides

Top 3 Partner Organizations by Service Group (% of Total)					
Service Group	Total Case Load	Distinct Partner Orgs	#1 Partner Org	#2 Partner Org	#3 Partner Org
Internal Services	14,059	67	Combined Arms Resources (67%)	Mission United North Texas (6%)	Family Houston (3%)
Career Services	12,492	75	Vet Jobs (Powered By Casy) (15%)	Nextop (13%)	Career Gear Houston (9%)
Health & Wellness	3,114	74	Veteran Wellness Alliance (19%)	Easter Seals Of Greater Houston (11%)	Team Red White And Blue (9%)
Social & Recreation	2,832	35	Team Red White And Blue (15%)	Lone Star Veterans Association (12)	Wounded Warrior Project (10)
Benefits Counseling	2,262	23	Texas Veterans Commission (31%)	Wounded Warrior Project (31%)	Hope For The Warriors (7%)
Legal Aid & Assistance	1,671	11	Lone Star Legal Aid (46%)	Beacon Law (28%)	Wounded Warrior Project (16%)
Basic Living Needs	1,403	21	Houston Food Bank (36%)	Combined Arms Resources (21%)	Lone Star Legal Aid (11%)
Financial Advice & Assistance	1,069	24	Combined Arms Resources (41%)	Alamo Area Council Of Governments (13%)	Lone Survivor Foundation (17.6%)
Education & Training	771	33	Nextop (21%)	Texas Veterans Commission Education Advising (10%)	Texas Veterans Commission Vet Education Dep. (9%)
Community Engagement	698	10	Travis Manion Foundation (29%)	Team Rubicon (23%)	The Mission Continues (20%)

Insight: CAX Partner Organizations & Connection Services

Analysis Approach:

1. Grouped data by Connection Resource and Connections Services.
2. Counted distinct Case IDs by Connection Resource and Connection Service grouping.
3. Sorted records by Connection Resource and then also sorted, in descending order, by distinct count of Case IDs.
4. With records grouped by Connection Resource and in a descending order, able to retrieve a sample of each Connection Resource, which consisted of the Top 3 Connection Services by Connection Resource.
5. Assigned Tile Groups to properly represent a Connection Service's rank within the Connection Resource.
6. Calculated percentage of Case Load for each Connection Service (Connection Service Cases / Total Cases of Connection Resource) to formulate a percentage of cases metric.
7. Transposed to represent in more summarized fashion.

Key Insights:

- Exploring the Top 10 Partner Organizations, it is clear that, by Cases, the Top 3 Partner Organizations are Combined Arms Resources (26.9%), Wounded Warrior Project (5.5%), and Vet Jobs (Powered by Casy) (4.8%).
- The Top 3 Partner Organizations are responsible for 37.2% of CAX's Total Case Load (2017-2022), with Combined Arms Resources contributing a vast majority.
- Mostly, from a Partner Organization standpoint, Cases have been on the decline since 2021 outside of Combined Arms, Nextop, Texas Veterans Commission, and Mission United North Texas; all of which have saw increases in 2021.

Actionable Suggestion(s):

- Combined Arms, and the Veterans that they assist, repeatedly associate their needs to Career Services, Benefits, and Health & Wellness categories – this should play a role in future relationships and expansion.

Insight: CAX Partner Organizations & Connection Services (Cont.)
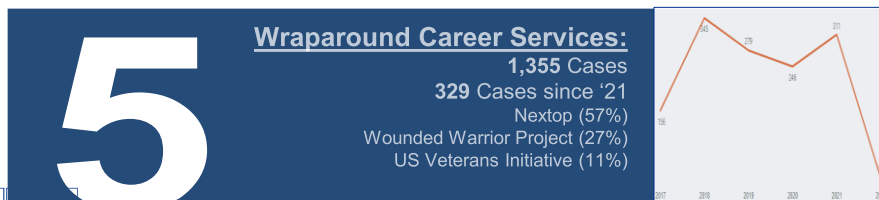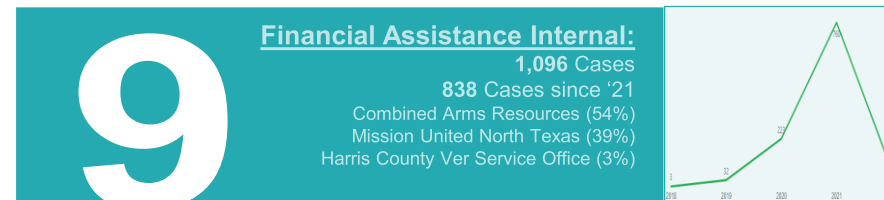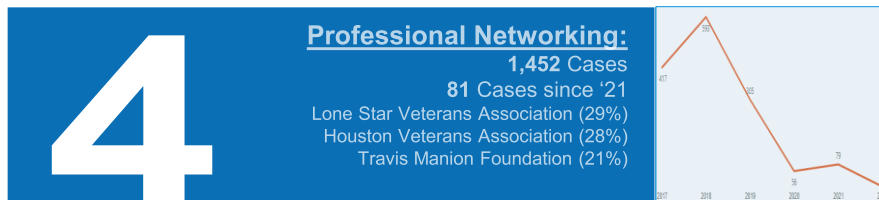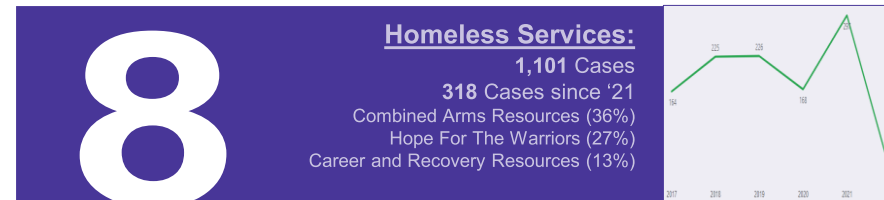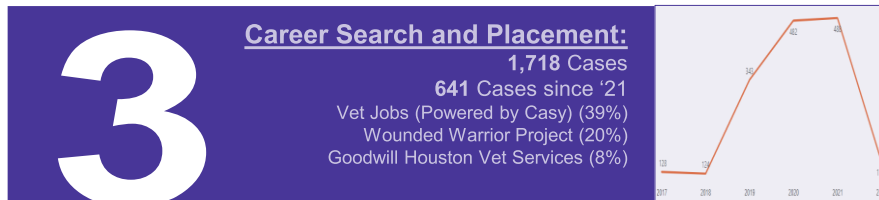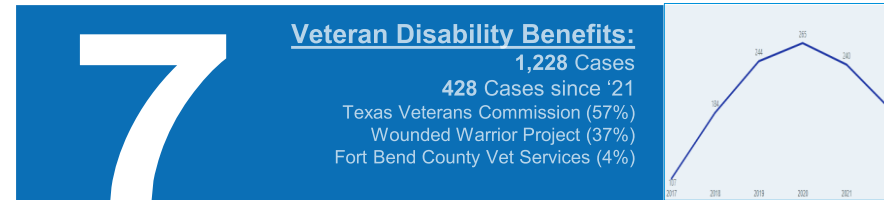
Supporting Data:
1. Summarized table of findings
2. Power BI Dashboard – screenshot provided in deck – separate Power BI document provided in unison with slides

Top 3 Connection Services by Connection Resource (% of Total)					
Connection Resource	**Total Case Load**	**Distinct Partner Orgs**	**#1 Connection Service**	**#2 Connection Service**	**#3 Connection Service**
Combined Arms Resources	11,056	84	General Inquiry (46%)	Service Rendered (12%)	Internal Rent Referral (7%)
Wounded Warrior Project	2,243	21	Veteran Disability Benefits Assistance (20%)	Wraparound Career Services (16%)	Career Search And Placement (16%)
Vet Jobs (Powered By Casy)	1,988	8	Comprehensive Job Services (44%)	Career Search And Placement (34%)	Career Workshops (10%)
Nextop	1,959	15	Wraparound Career Services (40%)	Job Placement (29%)	Career Mentoring (5%)
Lone Star Veterans Association	1,438	14	Professional Networking (29%)	Entrepreneurship (14%)	Leadership Development (12%)
Career Gear Houston	1,316	8	Professional Attire (38%)	Entrepreneurship (16%)	Transition Workshop (12%)
Travis Manion Foundation	1,011	8	Professional Networking (30%)	Leadership Development (20%)	Volunteer Leadership Programs (13%)
Lone Star Legal Aid	999	10	Family Law (31%)	Veteran Benefit Appeals (17%)	Housing (15%)
Texas Veterans Commission	986	8	Veteran Disability Benefits Assistance (70%)	Employment-career Search And Placement (26%)	Central Ajc-benefits (1%)
Mission United North Texas	956	13	Financial Assistance - Internal (45%)	Resource Referral (41%)	Homeless Services - Internal (8%)

Insight: CAX Partner Organizations & Connection Services (Cont.)

Top 10 Connection Services, their Case Loads, and Partner Organizations

1

General Inquiry:
5,077 Cases
5,077 Cases since '21
Combined Arms Resources (100%)

2

Comprehensive Job Services:
2,264 Cases
435 Cases since '21
Vet Jobs (Powered by Casy) (39%)
Hire Heroes USA (20%)
Workforce Opportunity Service (14%)

3

Career Search and Placement:
1,718 Cases
641 Cases since '21
Vet Jobs (Powered by Casy) (39%)
Wounded Warrior Project (20%)
Goodwill Houston Vet Services (8%)

4

Professional Networking:
1,452 Cases
81 Cases since '21
Lone Star Veterans Association (29%)
Houston Veterans Association (28%)
Travis Manion Foundation (21%)

5

Wraparound Career Services:
1,355 Cases
329 Cases since '21
Nextop (57%)
Wounded Warrior Project (27%)
US Veterans Initiative (11%)

6

Services Rendered:
1,325 Cases
1,325 Cases since '21
Combined Arms Resources (100%)

7

Veteran Disability Benefits:
1,228 Cases
428 Cases since '21
Texas Veterans Commission (57%)
Wounded Warrior Project (37%)
Fort Bend County Vet Services (4%)

8

Homeless Services:
1,101 Cases
318 Cases since '21
Combined Arms Resources (36%)
Hope For The Warriors (27%)
Career and Recovery Resources (13%)

9

Financial Assistance Internal:
1,096 Cases
838 Cases since '21
Combined Arms Resources (54%)
Mission United North Texas (39%)
Harris County Ver Service Office (3%)

0

Job Placement:
930 Cases
170 Cases since '21
Nextop (61%)
Ser Houston (15%)
Workforce Opportunity Service (9%**)**

Case Load = Distinct Count of Case IDs; Partner Organizations = Connection Resource; all data coming from Case File
All trend lines contain 2022 data, which is not complete. 2022 Data only through March 2022

Insight: CAX Partner Organizations & Connection Services (Cont.)

Supporting Data:
1. Summarized table of findings
2. Power BI Dashboard – screenshot provided in deck – separate Power BI document provided in unison with slides

Top 3 Connection Resources by Connection Service (% of Total)					
Connection Service	**Total Cases**	**# of Resources**	**#1 Connection Resource**	**#2 Connection Resources**	**#3 Connection Resources**
General Inquiry	5,077	1	Combined Arms Resources (100%)		
Comprehensive Job Services	2,264	19	Vet Jobs (Powered By Casy) (39%)	Hire Heroes Usa (20%)	Workforce Opportunity Service (14%)
Career Search And Placement	1,718	31	Vet Jobs (Powered By Casy) (39%)	Wounded Warrior Project (20%)	Goodwill Houston Veteran Services (8%)
Professional Networking	1,452	11	Lone Star Veterans Association (29%)	Houston Veterans In Business (28%)	Travis Manion Foundation (21%)
Wraparound Career Services	1,355	4	Nextop (57%)	Wounded Warrior Project (27%)	Us Veterans Initiative (11%)
Service Rendered	1,325	1	Combined Arms Resources (100%)		
Veteran Disability Benefits Assistance	1,228	4	Texas Veterans Commission (57%)	Wounded Warrior Project (37%)	Fort Bend County Veteran Services (4%)
Homeless Services	1,101	7	Combined Arms Resources (36%)	Hope For The Warriors (27%)	Career And Recovery Resources Inc. (13%)
Financial Assistance - Internal	1,096	7	Combined Arms Resources (54%)	Mission United North Texas (39%)	Harris County Veteran Services Office (3%)
Job Placement	930	6	Nextop (61%)	Ser Houston (15%)	Workforce Opportunity Service (9%)

Insight: CAX Partner Organizations & Connection Services (Cont.)

Supporting Data:
1. Summarized table of findings
2. Power BI Dashboard – screenshot provided in deck – separate Power BI document provided in unison with slides
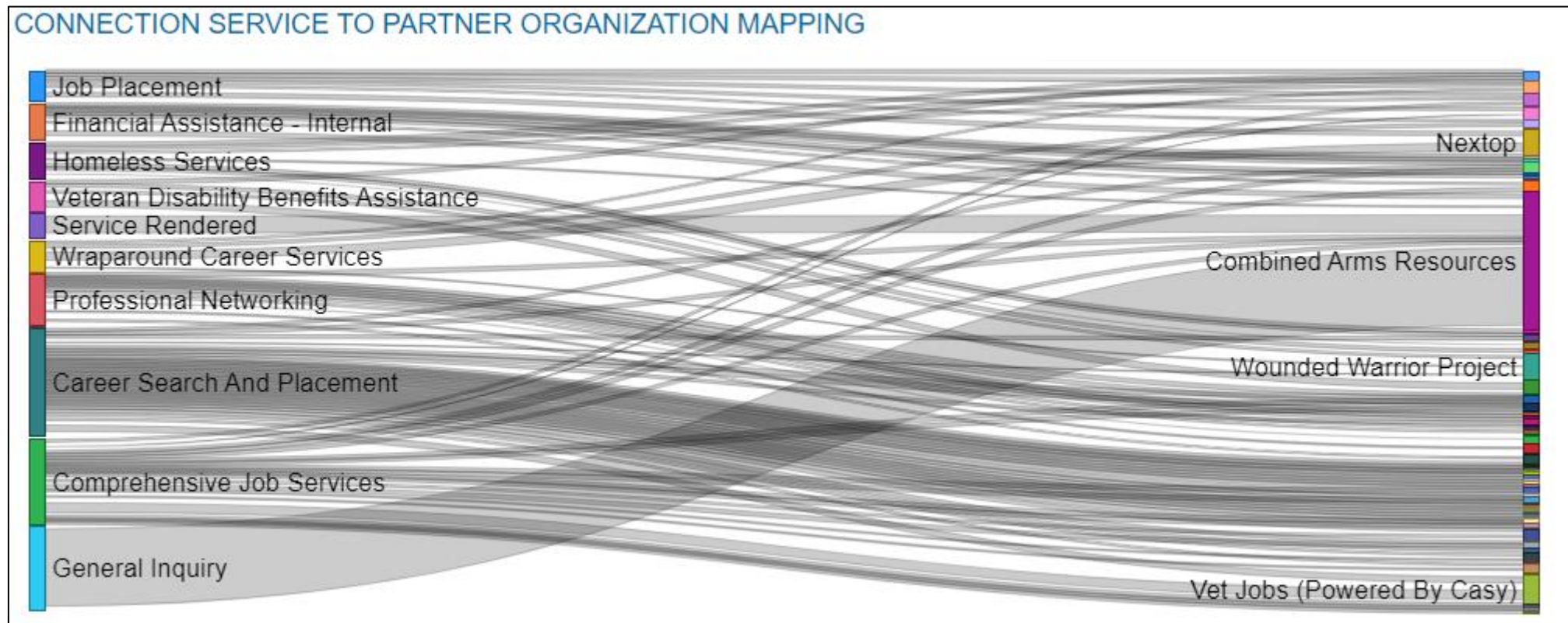
Top 10 Connection Services and ALL of their Connected Resources

Insight: CAX Service Groups & Connection Services

Top 10 Service Groups, their Case Loads, and Connection Services

1

Internal Services:
14,059 Cases
9,557 Cases since '21
General Inquiry (36%)
Services Rendered (9%)
Homeless Services (8%)

2

Career Services:
12,492 Cases
2,779 Cases since '21
Comprehensive Job Services (18%)
Career Search & Placement (14%)
Professional Networking (12%)

3

Health & Wellness:
3,114 Cases
1,209 Cases since '21
VWA Mental Health (19%)
Counseling Services (15%)
Anxiety & Depression Counseling (9%)

4

Social & Recreation:
2,832 Cases
509 Cases since '21
Yoga (18%)
Family Get Togethers (13%)
Mixers / Happy Hours (12%)

5

Benefits Counseling:
2,262 Cases
767 Cases since '21
Veteran Disability Benefits Assistance (54%)
Scholarship Research (14%)
Benefits (13%)

6

Legal Aid & Assistance:
1,671 Cases
384 Cases since '21
Appeal VA Disability Benefits (21%)
Family Law (20%)
Clearing Criminal History (13%)

7

Basic Living Needs:
1,403 Cases
732 Cases since '21
Food Assistance (56%)
Housing (11%)
Food Relief (8%)

8

Financial Advice & Ast:
1,069 Cases
549 Cases since '21
Internal Utility Services (27%)
Veteran Retreats (19%)
Other Financial Assistance (14%)

9

Education & Training:
771 Cases
462 Cases since '21
Education Advisory Services (24%)
Financial Education (12%)
GI Bill Support (11%)

0

Community Engagement:
698 Cases
93 Cases since '21
Service Project Volunteer (43%)
Disaster Response (17%)
Youth Mentoring (16%)

Case Load = Distinct Count of Case IDs; Partner Organizations = Connection Resource; all data coming from Case File
All trend lines contain 2022 data, which is not complete. 2022 Data only through March 2022

Insight: CAX Service Groups & Connection Services (Cont.)

Supporting Data:
1. Summarized table of findings
2. Power BI Dashboard – screenshot provided in deck – separate Power BI document provided in unison with slides

Top 3 Connection Services by Service Group (% of Total)					
Service Group	**Total Cases**	**# Distinct Services**	**#1 Connection Service**	**#2 Connection Service**	**#3 Connection Service**
Internal Services	14,059	47	General Inquiry (36%)	Service Rendered (9%)	Homeless Services (8%)
Career Services	12,492	51	Comprehensive Job Services (18%)	Career Search And Placement (14%)	Professional Networking (12%)
Health & Wellness	3,114	63	Vwa Mental Health (19%)	Counseling Services (15%)	Anxiety & Depression Counseling (9%)
Social & Recreation	2,832	30	Yoga (18%)	Family Get Togethers (13%)	Mixers / Happy Hours (12%)
Benefits Counseling	2,262	13	Veteran Disability Benefits Assistance (54%)	Scholarship Research (14%)	Benefits (13%)
Legal Aid & Assistance	1,671	13	Appeal Va Disability Benefits (21%)	Family Law (20%)	Clearing Criminal History (13%)
Basic Living Needs	1,403	14	Food Assistance (56%)	Housing (11%)	Food Relief (8%)
Financial Advice & Assistance	1,069	20	Internal Utility Services (27%)	Veteran Retreats (19%)	Other Financial Assistance (14%)
Education & Training	771	19	Education Advisory Services (24%)	Financial Education (12%)	Gi Bill Support (11%)
Community Engagement	698	7	Service Project Volunteer (43%)	Disaster Response (17%)	Youth Mentoring (16%)

Insight: Supply vs. Demand

Analysis Approach:

1. Joined the resources_offered.csv file to CA-TEXAS-cases.csv file via Service ID and resource_id.
2. Joining on Service ID and resource_id allowed to properly align the Connection Resource and Connection Services threshold values.
3. Created a "MM-YYYY" date format off of the Case Create Date to allow for proper monthly grouping.
4. Removed all Connection Resources and Connection Services that reported a threshold of "0" or "null" values.
5. Counted unique Case Ids by Year, Month, Connection Resource, and Connection Service (unique grouping).
6. Compared the count of unique Case Ids to that of the Max Threshold for the unique grouping.
7. Generated a Threshold % metric, which equals the % reached against the threshold.
8. Generated an Availability % metric, which details the % of potential onboarding a unique grouping could continue to take on.
9. Generated a Threshold Flag for when Threshold % was >= 100%.
10. Filtering/Sorting by the Threshold Flag, able to discern which services and Partner Organizations were going over the thresholds.
11. Summarized into repeat exceeding of threshold cases to point out the areas that have recurring threshold issues.

Key Insights:

• While not widespread, monthly threshold exceeding does occur, especially in prevalent Service Groups.
• On a monthly average, a threshold is exceeded anywhere from ~1% (2017-2020) to ~1.3% (2021-2022) of the time, which is intermittent. Although sparse, threshold exceeding has been seen more recently.
• While thresholds are exceed on a sporadic occasions, we do see some happening more than others, especially more recently (2021-2022): Combined Arms Resources - General Inquiry, Texas Veterans Commission – Veteran Disability Benefits Assistance, Combined Arms Resources – Basic Needs.

Actionable Suggestion(s):

• The below information on repeat threshold exceeding can help prioritize areas of concern going forward, whether it's particular Service Groups, Connection Resources, Services, etc. Ultimately, assisting with areas to initiate threshold expansion conversations, provide additional evidence of internal support claims, or prioritize areas where new Partner Organization relationships could be most beneficial to the end clients / Veterans.

Insight Summary: Supply vs. Demand (Cont.)

2021-2022 Connection Resources & Connection Services Exceeding Monthly Threshold Detail Table

Year	Month	Service Group	Service Category	Connection Resource	Connection Service	Count of Case IDs	Threshold (Max)	Threshold %	Availability %
2021	March	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	915	100	915	-815
2021	April	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	879	100	879	-779
2021	August	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	689	100	689	-589
2021	November	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	448	100	448	-348
2021	February	Career Services	Career Services	Nextop	Wraparound Career Services	146	40	365	-265
2022	March	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	322	100	322	-222
2021	October	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	318	100	318	-218
2022	February	Benefits Counseling	Benefits Counseling - Other	Texas Veterans Commission	Veteran Disability Benefits Assistance	94	30	313	-213
2021	June	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	279	100	279	-179
2021	September	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	269	100	269	-169
2021	July	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	254	100	254	-154
2021	May	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	239	100	239	-139
2021	September	Internal Services	Internal Services	Combined Arms Resources	Basic Needs	46	20	230	-130
2021	November	Internal Services	Internal Services	Combined Arms Resources	Basic Needs	42	20	210	-110
2021	April	Basic Living Needs	Food Assistance	Houston Food Bank	Food Assistance	185	100	185	-85
2022	March	Benefits Counseling	Benefits Counseling - Other	Texas Veterans Commission	Veteran Disability Benefits Assistance	52	30	173	-73
2021	October	Internal Services	Internal Services	Combined Arms Resources	Basic Needs	33	20	165	-65
2021	October	Career Services	Career Services	Still Serving Veterans	Career Search And Placement	16	10	160	-60
2022	January	Internal Services	Internal Services	Combined Arms Resources	Basic Needs	30	20	150	-50
2021	August	Basic Living Needs	Food Assistance	Combined Arms Resources	Internal Food Resources	43	30	143	-43
2021	September	Health & Wellness	Health & Wellness	Combined Arms Gym	Functional Fitness	17	12	142	-42
2022	January	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	137	100	137	-37
2022	January	Benefits Counseling	Benefits Counseling - Other	Texas Veterans Commission	Veteran Disability Benefits Assistance	41	30	137	-37
2022	March	Internal Services	Resource Referral	Harris County Veteran Services Office	Financial Assistance - Internal	13	10	130	-30
2021	December	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	125	100	125	-25
2022	March	Career Services	Career Services	Still Serving Veterans	Career Search And Placement	12	10	120	-20
2021	April	Career Services	Career Services	Texas Veterans Commission	Employment-career Search And Placement	33	30	110	-10
2022	February	Internal Services	Resource Referral	Combined Arms Resources	General Inquiry	105	100	105	-5
2021	October	Financial Advice & Assistance	Financial Advice & Assistance - Other	Bakerripley	Rental Assistance - Internal	10	10	100	0
2021	September	Benefits Counseling	Benefits Counseling - Other	Harris County Veteran Services Office	Benefits	10	10	100	0
2022	January	Benefits Counseling	Benefits Counseling - Other	Harris County Veteran Services Office	Benefits	10	10	100	0
2022	February	Benefits Counseling	Benefits Counseling - Other	Harris County Veteran Services Office	Benefits	10	10	100	0
2022	February	Career Services	Career Services	Vet Jobs (Powered By Casy)	Career Search And Placement	20	20	100	0
						5,842	1,772	249	-149
						Total	Total	Average	Average

Insight Summary: Supply vs. Demand (Cont.)

					2017-2020 Connection Resources & Connection Services Exceeding Monthly Threshold Detail Table				
Year	Month	Service Group	Service Category	Connection Resource	Connection Service	Count of Case IDs	Threshold (Max)	Threshold %	Availability %
2017	June	Career Services	Career Services	Ser Houston	Job Placement	48	5	960	-860
2017	July	Career Services	Career Services	Ser Houston	Job Placement	24	5	480	-380
2017	August	Career Services	Career Services	Ser Houston	Job Placement	15	5	300	-200
2017	September	Career Services	Career Services	Ser Houston	Job Placement	14	5	280	-180
2017	October	Career Services	Career Services	Ser Houston	Job Placement	13	5	260	-160
2017	June	Career Services	Career Services	Career And Recovery Resources Inc.	Job Placement	24	10	240	-140
2017	May	Career Services	Career Services	Ser Houston	Job Placement	12	5	240	-140
2018	June	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	48	25	192	-92
2018	July	Career Services	Career Services	Career And Recovery Resources Inc.	Comprehensive Job Services	19	10	190	-90
2018	August	Career Services	Career Services	Career And Recovery Resources Inc.	Comprehensive Job Services	19	10	190	-90
2018	April	Career Services	Career Services	Career And Recovery Resources Inc.	Comprehensive Job Services	16	10	160	-60
2018	May	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	39	25	156	-56
2017	September	Career Services	Career Services	Ser Houston	Wraparound Career Services	15	10	150	-50
2017	October	Career Services	Career Services	Ser Houston	Wraparound Career Services	15	10	150	-50
2018	April	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	34	25	136	-36
2018	August	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	33	25	132	-32
2020	July	Career Services	Career Services	Goodwill Houston Veteran Services	Career Search And Placement	13	10	130	-30
2019	June	Benefits Counseling	Benefits Counseling - Other	Harris County Veteran Services Office	Benefits	13	10	130	-30
2018	September	Career Services	Career Services	Career And Recovery Resources Inc.	Comprehensive Job Services	12	10	120	-20
2019	February	Legal Aid & Assistance	Legal Aid & Assistance	Lone Star Legal Aid	Family Law	18	15	120	-20
2018	February	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	30	25	120	-20
2018	July	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	30	25	120	-20
2019	August	Career Services	Career Services	Goodwill Houston Veteran Services	Comprehensive Job Services	17	15	113	-13
2018	June	Internal Services	Resource Referral	Hope For The Warriors	Homeless Services	17	15	113	-13
2018	October	Career Services	Career Services	Career And Recovery Resources Inc.	Comprehensive Job Services	11	10	110	-10
2018	February	Internal Services	Resource Referral	Combined Arms Resources	Internal Rent Referral	33	30	110	-10
2017	September	Internal Services	Resource Referral	Grace After Fire	Internal Disaster Financial Relief	27	25	108	-8
2017	November	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	27	25	108	-8
2017	December	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	27	25	108	-8
2018	January	Career Services	Career Services	Workforce Opportunity Service	Comprehensive Job Services	27	25	108	-8
2018	April	Benefits Counseling	Va Benefits - Wwp	Hope For The Warriors	Scholarship Research	16	15	107	-7
2020	February	Career Services	Career Services	Career Gear Houston	Professional Networking	21	20	105	-5
2018	May	Career Services	Career Services	Career And Recovery Resources Inc.	Comprehensive Job Services	10	10	100	0
2017	October	Internal Services	Resource Referral	Career And Recovery Resources Inc.	Homeless Services	20	20	100	0
2018	April	Health & Wellness	Mental Wellness	Give An Hour	Counseling Services	5	5	100	0
2019	April	Career Services	Career Services	Goodwill Houston Veteran Services	Career Search And Placement	10	10	100	0
2020	February	Benefits Counseling	Benefits Counseling - Other	Harris County Veteran Services Office	Benefits	10	10	100	0
2020	November	Career Services	Entrepreneurship	Texas Veterans Commission Entrepreneur Progra	Entrepreneurship	20	20	100	0
						802	565	175	-75
						Total	*Total*	*Average*	*Average*

Power BI Dashboard – KPI Overview / CAX Summary

TOTAL CASES	VETERANS SERVED	PARTNER ORGANIZATIONS	SERVICES PROVIDED
41.04K	14.50K	208	290

CASES BY YEAR

2017	2018	2019	2020	2021	2022	Total
5.3K	7.2K	6.1K	5.0K	12.9K	4.4K	41.0K

Insights Gathered:
Total Cases in 2021 were **12,942**; the most of any individual year and **16% higher** than **2020 and 2019 combined**.

2021-2022 (2022 first quarter represented) accounts for **42.3% of all Cases** over

TOP 10 CONNECTED SERVICES

General Inquiry	Compre... Job Services	Career Search And Pla...	Professi... Network...	Wraparo... Career Services	Service Rendered	Veteran Disability Benefits...	Homeless Services	Financial Assistan... - Internal	Job Placement
5077	2264	1718	1452	1355	1325	1228	1101	1096	930

TOP 10 CONNECTED PARTNER ORGANIZATIONS

Combined Arms Resources	Wounded Warrior Project	Vet Jobs (Powered By Casy)	Nextop	Lone Star Veterans Associat...	Career Gear Houston	Travis Manion Foundat...	Lone Star Legal Aid	Texas Veterans Commis...	Mission United North Te...
11056	2243	1988	1959	1438	1316	1011	999	986	956

Key Insights:
- Total Cases in 2021 were 12,942; the most of any individual year and 16% higher than 2020 and 2019 combined.
- 2021-2022 (2022 first quarter represented) accounts for 42.3% of all Cases over Combined Arms' history.
- Oddly, General Inquiry is a recent add to the Connected Service catalog, and still has the most Cases in total; added in 2021.
- Veterans Served = Unique Count of Master IDs, which were believed to be tied to a single individual

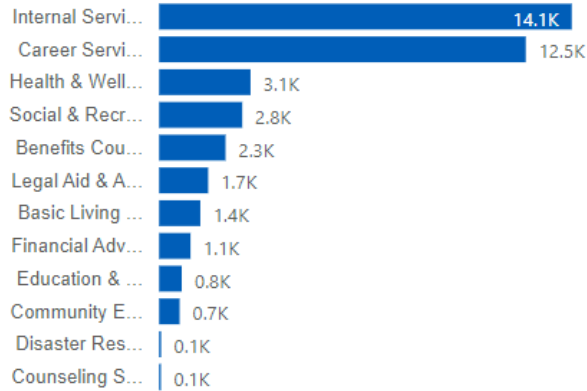# Power BI Dashboard – KPI 2021 Comparison

TOTAL CASES

41.04K

2021+ TOTAL CASES

17.37K

CASE COUNT BY YEAR

10K

7.2K

6.1K

5K

5.3K

5.0K

4.4K

12.9K

2017 2018 2019 2020 2021 2022

TOTAL VETERANS SERVED

14.50K

2021+ VETERANS SERVED

10.22K

TOTAL PARTNER ORGANIZATIONS

208

2017-2020 PARTNER ORGANIZATIONS

100

2021+ PARTNER ORGANIZATIONS

182

Insights Gathered:
2021-2022 (2022 first quarter represented) accounts for **42.3% of all Cases** over Combined Arms' history. This directly showcases the **growth** that Combined Arms has **experienced since 2021**.

Total number of **Veterans Served**, a count of distinct **Master IDs**, has been **14.50K** in Combined Arms' history. With the Total count of Veterans Served since 2021 being **10.22K (70.5%).**

Since 2021, Combined arms has **expanded** their coverage of **Services**

TOTAL SERVICES PROVIDED

290

2017-2020 SERVICES PROVIDED

212

2021+ SERVICES PROVIDED

234

Key Insights:
- 2021-2022 (2022 first quarter represented) accounts for 42.3% of all Cases over Combined Arms' history. This directly showcases the growth that Combined Arms has experienced since 2021.
- Total number of Veterans Served, a count of distinct Master IDs, has been 14.50K in Combined Arms' history. With the Total count of Veterans Served since 2021 being 10.22K (70.5%).
- Since 2021, Combined arms has expanded their coverage of Services by increasing their number of Partner Organizations from 100 distinct Partner Organizations to 182 distinct Partner Organizations. With that, their distinct Services grew from 212, pre-2021, to 234 in 2021 and beyond.
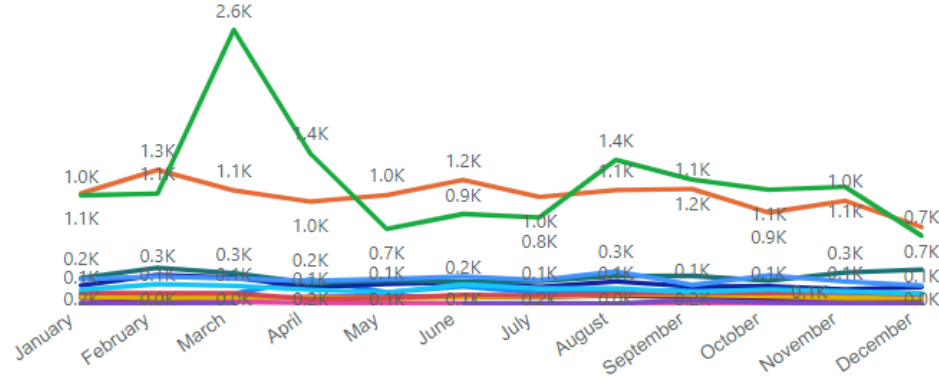
Power BI Dashboard – Partner Organization & Connection Services Breakdown

SERVICE GROUPS BY CASE ID

- Internal Servi... — 14.1K
- Career Servi... — 12.5K
- Health & Well... — 3.1K
- Social & Recr... — 2.8K
- Benefits Cou... — 2.3K
- Legal Aid & A... — 1.7K
- Basic Living ... — 1.4K
- Financial Adv... — 1.1K
- Education & ... — 0.8K
- Community E... — 0.7K
- Disaster Res... — 0.1K
- Counseling S... — 0.1K

SERVICE GROUP SEASONALITY

(Line chart across January – December; green line peaks at 2.6K in March, orange line around 1.0K–1.4K; values shown: 1.0K, 1.3K, 1.1K, 2.6K, 1.4K, 0.7K, 1.0K, 1.2K, 0.9K, 1.0K, 0.8K, 1.4K, 1.1K, 1.2K, 1.1K, 1.0K, 0.9K, 0.7K, 0.7K; lower lines: 0.2K, 0.3K, 0.3K, 0.2K, 0.1K, 0.1K, 0.2K, 0.1K, 0.1K, 0.3K, 0.1K, 0.1K, 0.3K, 0.1K)

Insights Gathered:
Majority of activity around Cases, when focusing on **Services Groups**, is witnessed within **Internal Services**, **Career Services**, **Health & Wellness**, **Social & Recreation**, as well as **Benefits Counseling**.

When focusing on **Service Categories**, the most Cases are seen within **Resource Referrals**, **Career Services**, **Social & Recreation**, **Internal**

SERVICE CATEGORIES BY CASE ID

- Resource Re... — 11.2K
- Career Servi... — 10.9K
- Social & Recr... — 2.8K
- Internal Servi... — 2.7K
- Mental Welln... — 1.8K
- Benefits Cou... — 1.6K
- Legal Aid & A... — 1.1K
- Food Assista... — 1.0K
- Training & W... — 1.0K
- Health & Well... — 0.8K
- Education & ... — 0.8K
- Entrepreneur... — 0.6K
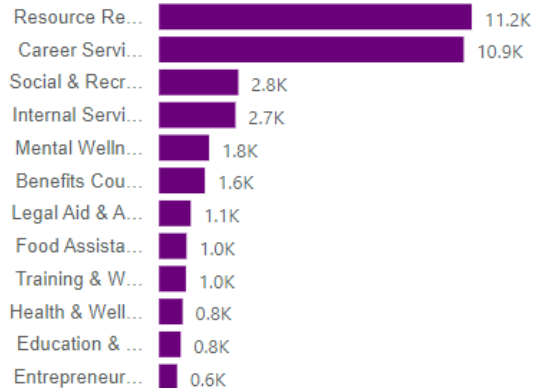
PARTNER ORGANIZATION BREAKDOWN

- Combined Arms Reso... — 11.06K
- Wounded Warrior Pro...
- Vet Jobs (Powered By ...)
- Nextop — 1.96K
- Lon... — 1.44K
- Car... — 1.32K
- Tr... — 1....
- L... — 1....
- Te... — 0....
- Missi..., East..., Fa..., W...
- The ..., The ..., Us ...
- Care..., Wo...
- Team ..., Vete..., Mha
- Hire ..., Beac..., Go...
- Hope ..., Hou..., Co...
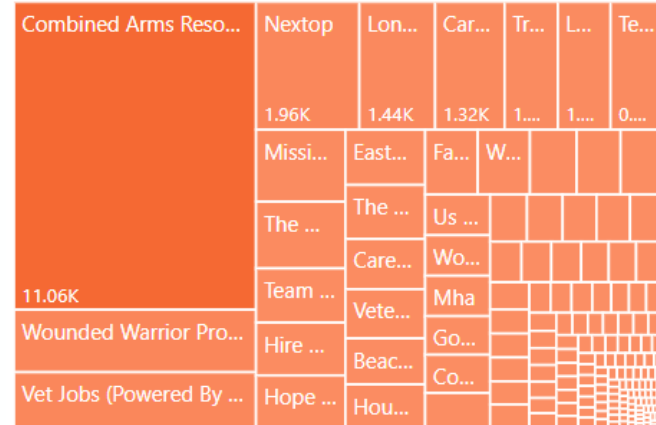
CONNECTION SERVICE BREAKDOWN

- General Inquiry — 5.08K
- Comprehensi... — 2.26K
- Career Search...
- Professional ...
- Wrapar... — 1.36K
- Service ... — 1.33K
- Veteran ... — 1.23K
- Homele...
- Financia...
- Job Plac...
- Int... — 0.8...
- Fo... — 0.7...
- P... — 0...
- Ren..., Car..., S..., Tra..., Yoga, Co..., Res..., Res...

Key Insights:
- Majority of activity around Cases, when focusing on Services Groups, is witnessed within Internal Services, Career Services, Health & Wellness, Social & Recreation, as well as Benefits Counseling.
- When focusing on Service Categories, the most Cases are seen within Resource Referrals, Career Services, Social & Recreation, Internal Services, and Mental Wellness.
- Outside of General Inquiry, Combined Arms Resources provides Services that include Financial Assistance, Homeless Services, Internal Utility Services, Rent Referrals, Basic Needs, and more.
- Across all Partner Organizations, outside of General Inquiry, it appears that the Connection Services with the most Cases are centered around Career Services / Job Placement.
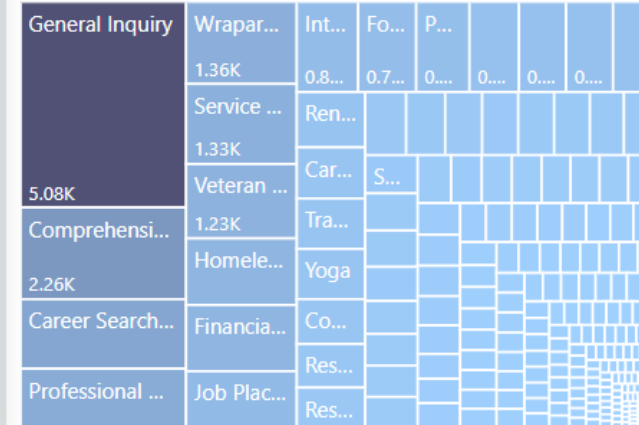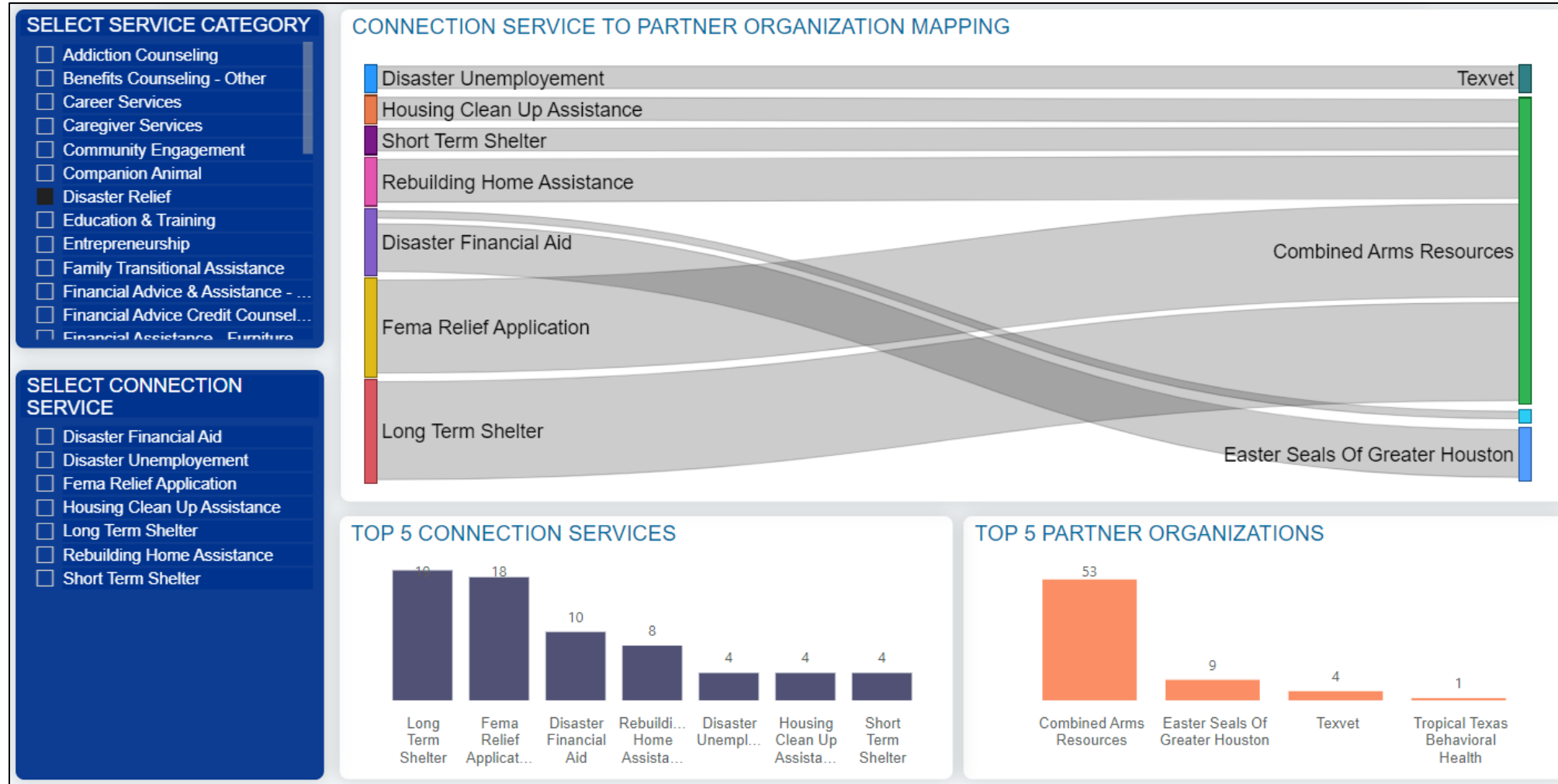
Power BI Dashboard – Partner Organization to Connection Service Exploration

Key Insights:
- No specific key insights on this slide – more exploratory use case within the dashboard itself
- Filtered for Disaster Relief only to show a specific example in the Sankey Diagram

Power BI Dashboard – Supply vs. Demand for Connection Services

SELECT SERVICE GROUP
- ☐ Basic Living Needs
- ☐ Benefits Counseling
- ☐ Career Services
- ☐ Community Engagement
- ☐ Counseling Services
- ☐ Disaster Response
- ☐ Education & Training
- ☐ Financial Advice & Assistance
- ☐ Health & Wellness
- ☐ Internal Services

SELECT SERVICE CATEGORY
- ☐ Addiction Counseling
- ☐ Benefits Counseling - Other
- ☐ Career Services
- ☐ Caregiver Services
- ☐ Community Engagement
- ☐ Companion Animal
- ☐ Disaster Relief
- ☐ Education & Training
- ☐ Entrepreneurship
- ☐ Family Transitional Assistance

SELECT YEAR
- ☐ 2017
- ☐ 2018
- ☐ 2019
- ☐ 2020
- ☐ 2021
- ☐ 2022

Navigation Information:

Utilize the Service Category and Service Group filters to examine all Connection Services within the respective filters.

Details on exact month and and threshold details are all listed in the Detail Table. All exceeding of Thresholds should be showcased in the top rows of the Detail Table, as it is sorted by Availability %.

TOP 25 BY CASE LOAD: SUPPLY VS. DEMAND

SUPPLY VS. DEMAND DETAIL TABLE

Year	Month	Connection Resource	Connection Service	Count of Case Id	Max of Resource Threshold	Threshold % Ava
2017	June	Ser Houston	Job Placement	48	5	960.00
2021	March	Combined Arms Resources	General Inquiry	915	100	915.00
2021	April	Combined Arms Resources	General Inquiry	879	100	879.00
2021	August	Combined Arms Resources	General Inquiry	689	100	689.00
2017	July	Ser Houston	Job Placement	24	5	480.00
2021	November	Combined Arms Resources	General Inquiry	448	100	448.00
2021	February	Nextop	Wraparound Career Services	146	40	365.00
2022	March	Combined Arms Resources	General Inquiry	322	100	322.00
2021	October	Combined Arms Resources	General Inquiry	318	100	318.00
2022	February	Texas Veterans Commission	Veteran Disability Benefits Assistance	94	30	313.33
2017	August	Ser Houston	Job Placement	15	5	300.00
2017	September	Ser Houston	Job Placement	14	5	280.00
2021	June	Combined Arms Resources	General Inquiry	279	100	279.00

Key Insights:
- Utilize the Service Category and Service Group filters to examine all Connection Services within the respective filters.
- Details on exact month and threshold details are all listed in the Detail Table. All exceeding of Thresholds should be showcased in the top rows of the Detail Table, as it is sorted by Availability %.
- When viewing the Supply vs. Demand chart, it is possible that the Services showing an exceeding of Threshold may not be exceeding when the Connection Resource is displayed in the Detail Table.
- Routinely, since 2021, Connection Services that have regularly exceeded their respective Thresholds include the following: General Inquiries, Career Services (i.e. Job Placement, Career Search And Placement, etc.), Basic Needs, Veteran Disability Benefits Assistance/Benefits, Financial Assistance, and Food Assistance.

Legal Disclaimer

The advice, recommendations, work product, and deliverables provided as part of this engagement have been developed for Combined Arms, and are not intended for use by any other party or for any other purpose, and may only be relied upon by Combined Arms and are so marked. We disclaim any intention or obligation to update or revise the observations whether as a result of new information, future events or otherwise. Should additional documentation or other information become available which impacts upon the observations reached in our deliverables, we reserve the right to amend our observations and summary documents, including deliverables, accordingly.

Additional assumptions:

— Insights and recommendations uncovered in the analysis are based on assumptions defined between KPMG and Combined Arms, and therefore directional in nature.

— Any visuals created for the project used static data, and KPMG is not responsible for the operationalization of any visuals created for the project. If management leverages any visuals for decision-making purposes, management is responsible for validating the presentation of information, filters, and suitability determination.

— KPMG prepared these visuals from the information and requirements provided by management and validated through the iterative discussions held with management. KPMG did not independently verify the data Combined Arms provided. However, KPMG may have asked for clarification of some of the information in the course of the work. KPMG's engagement cannot be relied on to uncover errors, omissions, or irregularities, should any exist in the underlying information provided. However, KPMG will inform Combined Arms of any such matters that come to our attention.

Terminology Data

- **Data Types**: Data may come in a variety of forms, the most common being numerical (e.g., 1 or 3.14159) or categorical (e.g., "False" or "Male"). Other data types are date, time, unstructured (e.g., documents or free text).

- **EDA**: Exploratory Data Analysis – identifying key characteristics of a dataset, summarizing the dataset attributes, looking for patterns, examining cross-sections of the data, etc. and typically involves visualization.

- **Data Cleaning**: Data cleaning usually arises after an assessment of quality and consistency in the data. After this assessment, certain actions may need to be taken to address issues or to prepare the data for a specific task. This may be tasks such as filling in missing data, identifying duplicate entries, and identifying outliers. It may also include processes such as transforming, joining, or aggregating data.

- **Data Transformation**: Certain statistical or algorithmic analyses assume certain characteristics of the data (e.g., two attributes are independent). To meet those assumptions, transformations such as log transformation or dimensionality reduction may be necessary.

- **Filtering**: Many business use cases may only be answered by a relevant subset of data. Data filtering techniques generally use logical and conditional statements to obtain a specific subset of a larger dataset that can then be used to appropriately address the problem.

- **Aggregation**: Data may be aggregated to roll attributes up to a higher hierarchical level. For example, if a log is keeping track of when a user accesses a page, we may aggregate (in this case, a sum) the number of times they visited at the daily level. Other aggregations may be means, majority votes, minimum values, etc.

- **Joining**: Data may be spread across many datasets and need to be consolidated. Joining datasets on a unique ID or after aggregation allows the tying together of diverse data sources for further analysis.