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Assets Not Victims: The Heinz Foundation sees vets as a competitive advantage

With more than 4 million Americans having served in the U.S. military since the 9/11 attacks, it is inevitable that a certain percentage will encounter some difficulties during their subsequent transition to civilian life. Like some other philanthropists, leaders at the Heinz Endowments wanted to do something to help those individuals. They asked Rob Stephany, their program director for community and economic development, to come up with a response.

Stephany summarizes their thinking. “We’re a regional foundation. We are both grantmakers and advocates. We set agendas and we drive them. Successful lives for local veterans was defined as a key competitive issue for our region, and that’s why the board wanted to get into it. It was that simple and straightforward.”

The head of the foundation made a crucial decision to approach veterans using an economic-development lens, not a human-services lens. That’s why Stephany was asked to take the lead. His philanthropic specialty was to get people and neighborhoods to a point where they could compete in the marketplace, whether that meant helping individuals take up work, or developing property to stabilize neighborhoods.

Stephany had experience helping regional nonprofits build housing and economic-development programs. Putting together a grant portfolio for veterans, though, was something new and unfamiliar. Complicating matters was that fact that a very unhealthy narrative was dominating the national conversation about veterans. Rob kept hearing “talk about post-traumatic stress like it was a disabling scourge, like a virus. And the work of integrating vets into civilian life was presented like some social-service drain and human burden.”

After Stephany met Megan Andros, a West Point graduate and former Army ordnance officer, he asked her to conduct some research, and to survey veterans recently returned to the western-Pennsylvania home region of the Heinz Endowments, to identify their needs. “The basic questions,” says Andros, “were ‘What does the population look like? What do existing resources look like? And are they effective?’” She ran focus groups with 130 veterans to gather initial information. Soon Stephany offered her a permanent position at Heinz.

“I think everyone was shocked at how large our local population of veterans is,” recalls Andros. Nearly a quarter of a million veterans live in the immediate region, and over 37,000 of them are post-9/11 veterans. But more detailed information about the population was scant. Improving local knowledge on veterans would become an important part of the foundation’s strategy.

Learning from missteps

Even before the endowment took up its methodical commitment to veterans, it had a couple of large grants in the pipeline that were based on the conventional wisdom many funders in the field were following. In 2013, Heinz funded a couple projects aimed at some of the psychological wounds that

media reports suggested were ubiquitous among veterans. These included a jobs program for veterans with disabilities, and a nature retreat run by older veterans who wanted to help younger veterans with PTSD.

Of the charities available to fund, recalls Andros, “the vast majority were geared toward helping veterans in crisis—both in the way they worked, and in the way they fundraised.” Moreover, “they were trying to assist veterans from the Iraq–Afghanistan era in the same way Vietnam-era veterans had been approached.” They were focused on individuals with the worst problems. And they didn’t find many former servicemembers who wanted what they offered.

The programs funded by the Heinz grants were not well attended. And they seemed to engender a counterproductive sense of weakness and dependency. “They tried to do whatever they could to tell this generation of veterans that they were frail victims,” notes Stephany.



The older veterans’ charities were geared toward vets in crisis, and didn’t recognize differences in the Iraq–Afghanistan cohort. What they offered didn’t match many of the talented individuals leaving service.

The endowment had to climb a steep learning curve. “Our assumption was that there must be a lot of veterans trying to connect with those resources, and they just weren’t able,” says Andros. So Heinz, like a large number of other funders across the country following advice that continues to be fashionable, poured money into setting up a website that aimed simply to connect needy vets with existing agencies and organizations claiming they could help.

It quickly became apparent, though, that just creating a central list wouldn’t work. Any sort of “community collaboration”—as these trendy efforts were labeled—was only as good as the individual organizations that make it up. And the reality is, many of the government programs and sentimental charities aimed at vets are ineffective or even counterproductive. A much smarter effort was needed.

Facing these initial failures squarely, the Heinz Endowments immediately adjusted course. Andros’s presence helped. She knew from her own

experience in the Army that the conventional philanthropic approach to who veterans are and what they need didn't match the many talented, high-potential individuals coming out of our volunteer military. She knew the endowment, and the field generally, needed more accurate information on which to base decision-making. And she suspected that different parts of the country would have particular topics they'd need to address. "One-size-fits-all solutions and sweeping generalizations do a lot of damage. Every region has specific issues they have to deal with."

So Heinz commissioned a study of the needs of veterans in southwestern Pennsylvania, conducted by the Center for a New American Security. The result was a trove of useful data profiling local vets. Heinz learned details of demographics, employment and earnings levels, health status, and self-reported challenges.

It turned out that six out of ten new vets were entering civilian life without major problems, finding work and nestling into towns across the region. The situation was just the opposite for about 2 percent of the returning men and women. This small group had serious problems with addiction or homelessness or disability. Government V.A. resources were flowing heavily to that slice of the population.

The other 38 percent were folks who could be helped with small boosts. They had jobs, but not thriving careers, or missed the clear sense of purpose they felt while in the military. Given the right support at the right time, they had an excellent chance of succeeding.

Heinz sensed a big opportunity to do something with this latter group. In particular, it was interested in intervening with preventive programs before significant problems could gather together into a crisis. Stephany remembers realizing, "There's not a 'catch them before they fall' charity operating here. We think that is where philanthropic resources can best help." Andros agreed that helping veterans to thrive so as to get ahead of potential problems was the best way to make a lifelong impact on individuals and on Pennsylvania communities.

"It's not about fixing them"

This new approach required different ways of thinking, and a new set of nonprofit partners. "We went from approaching this as a charitable mission to understanding veterans as assets of generational importance, with our role being to help them migrate into civilian society in the most successful ways." Heinz asked old-line veterans' organizations to help them in this new approach, but didn't find any local groups willing to shift

gears, or able to change fast enough. Then Andros met, at a Philanthropy Roundtable conference, the leaders of several organizations breaking new ground in charitable work for veterans. What united these groups was the fact that they had tested and proved out the thesis that veterans are civic assets, not fodder for pity—and then built all of their programming on that important insight.

“It’s not about fixing them. It’s about having communities in the Pittsburgh area embrace their talent,” says Andros. Building purpose and high expectations and community is the very best way to help most new veterans, savvy philanthropists are now finding.

Heinz approached The Mission Continues (see Chapter 11 in *Serving Those Who Served*), a national organization that provides six-month part-time service fellowships, and service platoons in which veterans are organized for volunteer work and camaraderie with the expectation that they will continue to serve others in civilian life as they did in the military. Andros asked the group what roles vets might play in the economic-development work of the Heinz Endowments. The Mission Continues hadn’t yet expanded to Pittsburgh, but it seemed like a good fit geographically, so the nonprofit prepared a proposal to organize a local service platoon of several dozen veterans under a platoon leader it would recruit. Andros would help that person find the right project in Pittsburgh where both the veterans and the service recipients would benefit from the effort.

The first mission they settled on was helping low-income elderly live independently in their homes. By repairing houses of older people too infirm to do it themselves and too poor to hire a contractor, neighborhoods would be helped at the same time that veterans found purpose and community in meaningful volunteer work with other veterans. It was a perfect fit.

Stephany describes an average project: “They come on a Saturday, 30-strong, and walk door to door with neighborhood partners. They help senior citizens clean out their basement, or fix a leaky pipe, or clear a fire hazard.” When delivered with the consistency and discipline of a service platoon, seemingly small projects like these make a world of difference for both residents and veterans finding their way in a new world. This initial project was so successful that another neighborhood group asked The Mission Continues to organize a second service platoon. Both are now active in the Pittsburgh area.

At this point, local community organizations started to pick up on the ways that Heinz was promoting veterans. Leadership Pittsburgh, a

group devoted to training and connecting local leaders, took an interest and joined Andros in producing a six-month-long course for veterans that teaches them about the region and its challenges, introduces them to civic heads and business executives, and helps place them on service and nonprofit boards around the city. After three cohorts of 20 veterans had gone through the course, veterans were more engaged in the region and bringing new energy to community positions. And more stable graduates of the program were informally mentoring some of the younger and less settled participants who were struggling to find direction and good jobs after service.

The data that Heinz collected early on suggested that some young veterans in their area were employed for fewer hours than they wanted to work, and at wages lower than they should be able to command. And despite good intentions, most of the existing organizations addressing jobs for veterans were part of the problem. As Andros explains, they were “all organized to help the lowest common denominator in crisis get a job, not a career. What happens when you’re fully capable of a career and you enroll in an organization that can only get you a job? Now you’re ‘at risk.’”



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Heinz needed a partner that better understood the capacities of young post-9/11 veterans and how to help them succeed occupationally. Andros likes to say she “stole” the idea of using Corporate America Supports You from fellow funder Dan Goldenberg at the Call of Duty Endowment. Based on the audit of CASY done by Call of Duty, Andros thought the national job-aid organization might be a good match for what she needed. So she called it up and said, “I love what you’re doing nationally, but can you focus it on these three counties in southwestern Pennsylvania, and focus on under-employment rather than just joblessness?” The nonprofit decided that with some adjustments, it could be done.

Stephany likes the fact that CASY works from both ends of the employment contract. “They build relationships with employers. They partner with hiring managers of firms and help mold, change, and

challenge job descriptions to better match corporate opportunities and vets.” And in their interactions with former servicemembers they ask jobseekers to “look into their souls and find out what they really want to do. They match that with what their CV ought to look like, given the experience they have. They don’t want to place somebody and have them leave after six months because they don’t like where they are.”

Both CASY and Heinz want to help veterans enter long-term vocations, not just jobs. And their collaboration seems to be working. As of May 2016, less than a year into its first grant, CASY has placed 200 veterans in jobs in the Pittsburgh area, with a median annual salary of \$50,000.

A network backbone

To help local veterans find these new services it was creating, the Heinz Endowments gave the Syracuse University Institute for Veterans and Military Families a grant to create a new organization known as PA Serves. “Simply put, it’s a concierge service,” says Andros. The group helps direct veterans to programs they are interested in and qualified for, and it helps organizations refer their participants to other Heinz grantees. A small staff coordinates the linkups, and keeps track of interactions between individuals and organizations, including sending customer-service messages to veterans to gather feedback. Every organization joining the network has to commit to sharing information and participants with one another.

PA Serves makes it easy for service groups to refer vets to other organizations for needs outside their area of expertise. With just a few clicks they can send requests to others in the network, then get back to what they do best. In its first year, PA Serves connected 933 vets with over 1,600 services.

One unanticipated side benefit of the information-sharing that PA Serves makes so much easier is that it exposes the small number of clients who are just aimlessly fishing for benefits. “One of the interesting early findings of the network was that many of the first folks to put in service requests had been seen multiple times by other participating nonprofits,” says Stephany. “They were people working the system for whatever resources they could find, without putting much effort of their own in. Now all of that was transparent to several dozen charities.”

Initially, Stephany was skeptical of the bureaucracy that often accompanies large collaborations. “I think 147 different nonprofits in Allegheny County mention veterans in their mission statement. We invited them all

to our initial meeting. We told them openness and accountability were essential to us. About 40 showed up at the next meeting. Among the several dozen groups in our network today, only a small number are specifically focused on veterans. The rest are just great regional nonprofits.”

In addition to offering veterans a wide range of employment, health, family, financial, and other services, the information shared across this network has provided a steady deepening of understanding of the needs of local veterans, helping Heinz and other charitable funders recognize trends on which to make future grants. For example, says Andros, “right now, older veterans age 45 to 64 are requesting housing support and financial assistance. Younger post-9/11 veterans are requesting education planning, social networking, and volunteering opportunities. So now I can say to an organization, ‘wait a second, if you’re supporting post-9/11 vets, you need to be in these areas.’”

Within the first few years of deciding to make support for veterans a permanent part of its charitable work in western Pennsylvania, the Heinz Endowments had become masterful in studying and understanding the real needs of local veterans. Then it invested \$4.3 million over its first three years, learned from mistakes, and made sure it got the results it wanted. In the process it has recast the veterans of its region as civic assets. By carefully testing out ways of providing early support, it is helping even vulnerable vets avoid crises down the road, while helping the large mass of men and women who need only small nudges of assistance to develop into thriving and productive citizens.