



**Special Forces Association
Organizational Development Action Plan**

Creating Special Forces / Green Beret National
March 16, 2010

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Introduction

Purpose

This is an organizational development action plan to stabilize and strengthen the Special Forces Association (SFA). It proposes an organizational structure to continue the fraternity of the retired Special Forces (SF) brotherhood, and to build programs and services that are responsive to the needs of active duty SF. The plan outlines critical action steps to honor the history of the SFA and to build for the future.

Process

Nonprofit Impact, a Denver-based consulting firm specializing in nonprofit organizational development, conducted an objective and systematic analysis which is the context for this plan. The Company interviewed 58 people affiliated with SFA, including Board members, Chapter presidents, members and supporters. Interviews included two sessions at Ft. Bragg on March 2, 2010 with 21 active duty soldiers.

A working group¹, chaired by Terry English, guided the planning process and convened in Raleigh on March 3, 2010 to address critical issues. This plan reflects the group's deliberations.

Preface

The SFA is at risk of organizational decay. There is a disturbing incongruence between the grass-roots, informality of the SFA and the heroic legacy and rigorous standards of the SF. Technology, communication, and management information systems lack sophistication; Chapters operate independently with no collective potency; and there is little standardization of programs or services.

Animosity between Chapters and National is a serious distraction from more significant issues. The organization's brand of "old guys that drink beer and tell stories" is part of the SF legacy, but is less relevant to the active duty SF. While almost everyone in the organization recognizes the need to "get the young guys" involved, the Association is out of touch with the today's active duty SF.

¹ Terry English, Kenny Cannon, Philip Kensinger, John Cleckner, Gary Borrowdale, Jim Ringland, Tom Bolton, Butch Young, Bruce Parkman, Jimmie Spencer.

Individuals within the organization, particularly the current Board of Officers, have worked diligently to bring about organizational change. They are to be recognized for their substantial and tireless efforts. However, organizational reinvention cannot succeed with only an individual or small group, regardless of how competent, dedicated and hardworking. The issues are *systemic*. There is a serious strategy-structure disconnect – the structure does not support strategic success and sustainability.

Given the importance of SF in today's war on terror, and the unprecedented service and dedication of the SF soldier, SFA has a moral responsibility to meet the needs of both retired and active SF, and to live up to the high standards of the SF. This plan provides a blueprint from which to reinvent and reinvigorate the organization. It delineates specific and realistic action steps that respect the traditional structure, while building more deliberate and relevant programs and services.

Research and Analysis Summary

This is a summary of the analysis presented to the working group on March 3, 2010. The full presentation is provided in Appendix 1.

Situation

SFA is primarily a fraternal organization which prides itself on fostering camaraderie and honoring the legacy of the SF. It is a volunteer organization which has run successfully for decades due to the dedication and service of retired SF soldiers. The operation is highly decentralized. 85+ Chapters operate independently with geographically defined and personality-driven programs and services. The organization does not benefit from the power and strength of a collective whole and singular strategic direction.

Except for an overall commitment to SF; a fledgling scholarship program, and an annual convention, the SFA lacks distinctive or robust services. Support systems such as management information systems, communication systems, policies and procedures have not kept up with needs. Lack of full-time staff and professional support has hampered the growth and development of SFA. The organization does not support the accomplishment of major goals and initiatives.

The SFA seeks to actively engage the younger, active duty SF soldier. However, SFA is dramatically out of touch with the needs and interests of the today's SF. Social meetings, *The DROP* and scholarships are less relevant. The question is not, "how do we get active duty to be members?" The question is, "what must we do to be of value?"

SFA's strategic focus, direction, and vision need definition. Programs must be developed to meet the needs of today's SF. Organizational capacity and infrastructure must be strengthened to ensure efficacy. A more cohesive and collective vision – with strong and relevant programs and services – will optimize SFA's assets. A structure with adequate resources, staffing, and governance is necessary to build a more potent and sustainable organization that more clearly and respectfully serves and represents the SF.

Competitive Environment

SFA currently occupies a distinct niche as the only organization solely dedicated to SF. However, there are tens of other organizations dedicated to serving the special operations units throughout the military, and hundreds of organizations and programs, nonprofits, military and government that serve Veterans. Further, with the attention on post 9-11 Veterans, new organizations are emerging every day. In Denver, for example, Veterans for Green Jobs is a new organization that has attracted more than a million dollars in funding from Wal-Mart and has economic stimulus dollars.

The Green Beret Foundation, a 501(c)(3) organization, is newly created to serve wounded SF. The organization has a clear mission and a focused strategy, with specific services to a target audience. While its founder is working collaboratively with SFA, it was developed to fill a niche not being filled by SFA. It will compete for funds and it will dilute SFA's distinction of being the only organization for SF soldiers.

To the extent that the SFA chapters do not work as a solid, integrated whole, they compete with each other on message and programs, if not dollars and attention. Lack of standardization or consistency among Chapters prohibits the development of a potent organizational identity.

The SF of Today

Today's active duty soldier is likely to be younger, and to be married with young children. SF soldiers at Ft. Bragg describe themselves as highly motivated, high achievers, independent and competitive. They are fiercely proud of their SF affiliation and respect the high standards achieved by those who went before them.

Today's SF soldier is deployed throughout 50 countries and will see deployment three or four times more than in the past. The operation tempo is significantly accelerated given the wars in Iraq, Afghanistan, and the highly-decentralized war on terror. The stress of combat, the effects of multiple and frequent deployments, and the seriousness of injury and impact incidences take its toll. The young SF soldier's concerns for self, for unit, and for family are intense. Today's missions are complex and under intense, and sometimes inaccurate, scrutiny by the media and the public. SF soldiers deserve an organization that stand in their defense.

The young SF soldier is likely to stay in the military for 20 years and serve in SF for the entire time. One third, however, leave after 10 years. The early SF retiree is only just starting his civilian career and is concerned about post-military career placement and development. With a distinct set of skills and a driven personality, the SF soldier has potential for significant positions in the corporate world. Career networking and guidance is a primary interest.

In addition, the young SF soldier does value a trusted friend to know their needs, take care of their spouses and families in their absence, provide assistance in the event of injury or death, or to stand by them in situations requiring legal defense. However, the generation gap between the Vietnam era and the post 9-11 soldier is glaring. Today's SF soldier does not know what SFA is, and are not available for Chapter meetings, reading *The DROP*, or "drinking beer and telling stories." Not one soldier mentioned scholarships as a need. Many commented on the lack of current information on the Web site.

Organizational Structure

(Note: from this point forward, the plan describes the proposed organization.)

A Strengthened and Expanded Organization

In order to address the issues discussed above, the organizational design both honors SFA's culture as a fraternal organization and strengthens the Chapter structure, while creating distinctive programs and services that are relevant to the active duty SF soldier.

The organization has three distinct, but interrelated divisions.

- 1) The SFA (c)(19) fraternal organization
- 2) The Green Beret (GB) programs
- 3) SF / GB National to serve as the "holding company," the 501(c)(3) umbrella. This name is a "placeholder" to represent the combination of old and new.

Each division has distinct roles and responsibilities. Working together they create a unique and more potent operation that stands for both fraternity and service.

SFA Fraternity

The SFA (c)(19) is the membership fraternity of SF soldiers. The fraternity is predominantly retired SFA members in 85 Chapters worldwide. The SFA honors the legacy of the SF. Chapters provide *local* social, recreational, and support services for all SF personnel and their families. Chapters are responsible for recruiting and serving members and for contributing to *The DROP*.

Chapters are led and organized exclusively by volunteers. Local Chapters are affiliated through SFA with SF / GB National, and as affiliate Chapters they benefit from the services and resources of SF / GB National. In return, they agree to abide by the SFA Constitution and to specific standards. Chapters that do not abide by SFA policies and protocols forfeit the right to use the SFA name or logo.

Chapters are supported by membership dues and local fundraisers. Their income supports projects that serve the local membership and their families or communities, at the discretion of the Chapter.

Per the current Constitution, a small SFA Board of Officers, elected by the membership, is the governing body of the SFA. Representatives of the SFA Board of Officers sit on the SF / GB National Board of Directors. The SFA Board of Officers report to the “holding company” and work cooperatively with the Board of Directors for the greater good.

Green Beret Programs

The GB programs are regional offices working directly and in liaison with active duty groups. They create, coordinate, and implement services to benefit active duty soldiers and their families. The programs meet the needs of the active duty soldier, and range from wounded warrior services, to post-military career placement programs.

In addition, the GB programs also provide vital two-way communication between the active duty units and their command, SF / GB National and SFA. They provide accurate and current data and information on issues of interest to the active duty SF. In short, they are the “ears to the ground” providing input to SF / GB National.

Each regional office houses a full-time “staff²” employed by SF / GB National and dedicated to delivering programs and services. Job descriptions are defined with specific duties for which they are accountable (see Appendix 3). Regional staff coordinate to create a nationally-significant program and to build a network that is greater than the whole. Regional staff are expected to have expertise and to specialize in a specific program or service.

The services that the Green Beret Foundation³ is providing for wounded SF soldiers, is an example of the types of programs that would be offered under the SF / GB National umbrella. While that program might be operated out of one particular region, it would provide those services Nationwide, in a consistent and standardized program.

GB programs work closely with the SFA Chapters who provide the volunteer labor force. They also work closely with Chapters to host and organize the National convention in

² Until a stable funding base, staff may be provided a monthly stipend or honorarium. Staff, as compared to volunteer, implies a specific and accountable job with clear and defined duties.

³ The founder of the Foundation has expressed interest in being part of this larger National organization. As negotiations proceed, it may be appropriate to broaden the mission of the Foundation’s (c)(3) to incorporate a broader range of services and programs under the National umbrella.

each of the regions. GB programs are supported by charitable contributions, grants, corporate partnerships, and sponsorships.

SF / GB National

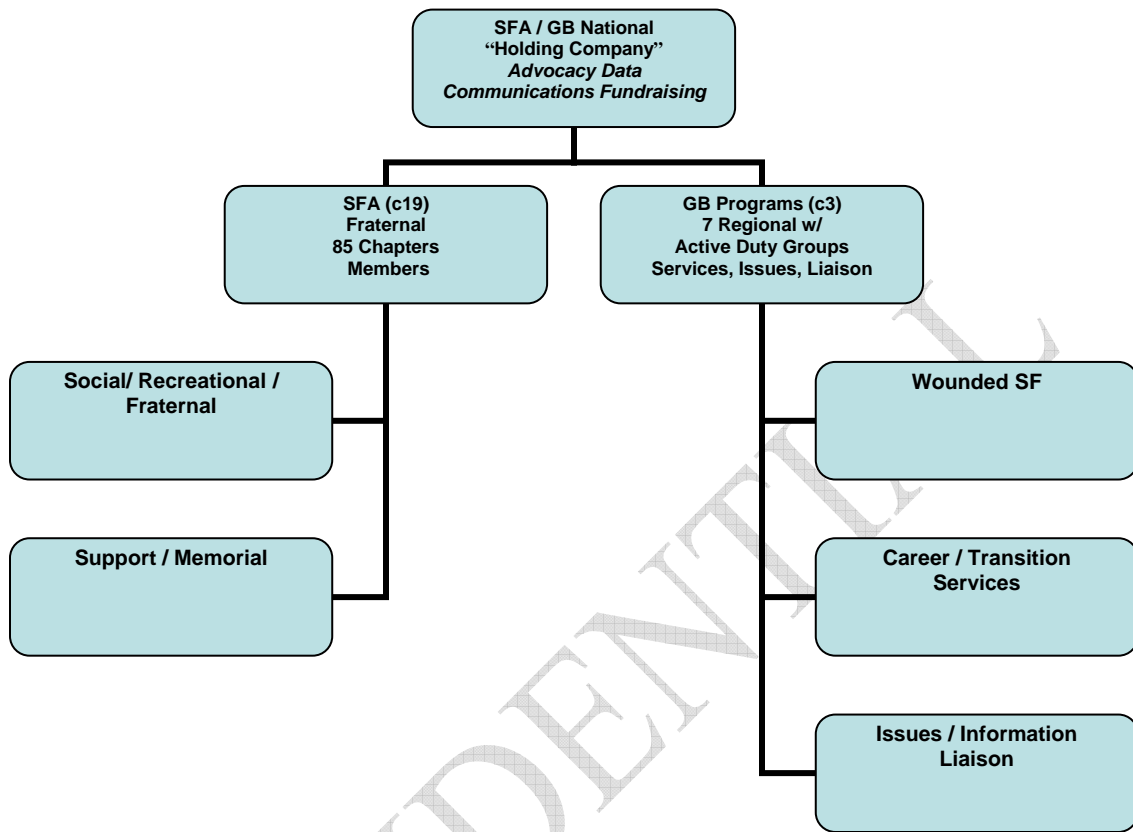
SF / GB National is the “holding company⁴” of both the fraternal membership organization and the charitable program organization. It has a global perspective on the needs and issues of both retired and active SF. As such, SF / GB National represents the collective whole. It is the voice (advocate) with Command, Congress, and the public and it is the voice to all SF soldiers, retirees, and their families.

SF / GB National carries out those functions that serve both Chapters and regions, including communications, database management, and advocacy and public relations. SF / GB National also handles those centralized functions that require high control, compliance, or standardization such as financial management, human resource management, and a centralized but networked Web site. SF / GB National is responsible for fundraising to support Chapters and to develop programs.

The work of SF / GB National benefits all the members as well as creates an environment in which fundraising can take place for programmatic initiatives. SF / GB National also ensures economies of scale, coordination, and reduction in duplicated tasks. Most significantly, it ensures consistency and quality control for brand integrity.

⁴ Holding Company is a business term used “loosely” to represent a concept. A Holding Company is a parent company with enough shares or Directors to control or influence the subsidiaries. In nonprofit organizations, a Holding Company structure is often found when an organization has both a c3 and a c4 entity; or a c3 with a “partner” for-profit subsidiary.

Organization Chart



Description and Focus

Strategic Focus

SF / GB National is a fraternal and service organization solely dedicated to the history, brotherhood, and support of retired and active duty SF and their families. With 85+ Chapters around the globe and regional offices co-located with SF Active Duty / National Guard units, SF / GB National is *the* voice of the SF.

The organization's strategic focus is:

- *History*: Preserving and honoring the history of the SF
- *Camaraderie*: Facilitating life-long camaraderie of SF soldiers
- *Service*: Serving active duty SF soldiers and families through information, advocacy, assistance and direct service programs
- *Advocacy*: Advocating on those issues crucial to the respect, safety and well-being of the SF.

The organization will want to create a strategic plan with the Board of Directors as the first order of business. The strategic plan should be based on the needs of both the Chapters and the active duty SF soldiers. The plan will want to identify 4-5 specific outcomes (goals) to be achieved in the next few years.

Examples of specific goals might include:

By 2013,

- Raise x\$ annually to achieve strategic goals; create a diverse, sustainable and stable financial base.
- Serve x% of wounded SF
- Activate a career networking and placement service for SF retirees
- Ensure all military related legislation considers SF in particular
- Have a coordinated system of 85 chapters and 5 active duty regional offices
- Have efficient, accurate and transparent recordkeeping, financial and database systems

Need and Relevancy

The SFA, and its highly-decentralized Chapter configuration, meets the needs of the SF retiree who is interested in camaraderie and in preserving the SF legacy and history. The Chapters provide much needed and valued services to the local fellowship of SF and the communities in which they live.

Active duty SF, in general, are not likely to be active members of the SFA. They are interested in current information on issues that pertain to them; in a network of SF soldiers for trusted and loyal support; and in programs that recognize and value their unique service and dedication. However, services that active duty SF receive from SF/GB National will ensure their allegiance to the organization over the long term, as they retire, become members and serve the next SF generation.

Description: Services and Programs

Fraternity

The SFA is a fraternal organization that honors and serves the SF retiree and active duty and their families. SFA has 85 Chapters and 22,000 members (~10,000 active) from around the world. SFA Chapters provide opportunities for camaraderie, socializing, and recreation, as well as connection to a brotherhood that is there in time of need. SFA is the membership organization.

Active Duty Programs

The GB program is the charitable, service operation that provides direct services to the active duty soldier and their families. Programs range from wounded warrior services, to technical assistance in navigating bureaucratic systems, to post military career guidance and placement. The GB programs operate alongside each of the Active Duty / National Guard SF groups. They are important liaisons to the active duty units and provide current and accurate information on relevant SF issues. GB programs is the service delivery organization.

SF / GB National

The SFA and the GB program operate under the SF / GB National office (501(c)(3) umbrella). The office provides data management and financial services to the SFA and undertakes a strategic fundraising effort to support GB program development and implementation. The office coordinates all communications and information of interest for Chapters and active duty soldiers to ensure consistency and accuracy. With a 22,000

membership base and seven Active Duty Group Offices, SF / GB National is the leading advocate and spokesperson for the SF worldwide. *SF / GB National has the power, influence and potency of the collective whole and is the voice of the SF.*

Investment

The SF / GB National is the *only* group serving the SF soldier. The organization is dedicated to honoring and respecting the legacy of the SF, and to serving and supporting today's SF soldier. The organization is a unique blend of fraternity and of service. By blending tradition and relevancy, SF / GB National is well positioned to make a difference in the life of every SF soldier. An investment in SF / GB National honors and supports the diplomatic warriors who were the unsung heroes of the past and are central to the war on terror.

Organizational Development

Staffing

The single most important factor in the success of this organization is the quality and leadership of a full-time professional, paid CEO.

The purpose of creating SF / GB National (and not reinventing SFA) is to create a professionally staffed operation in which the CEO has full authority to carry out the mission of the organization and to achieve strategic goals. As in any 501(c)(3) organization, the Board of Directors provides oversight and governance. The CEO reports to, and is evaluated by the Board of Directors, but is not managed by the Board.

The CEO is responsible for the development of the organization and for defining and delivering high-quality, relevant services in accordance with the direction set by the board in strategic planning and in policy decisions.

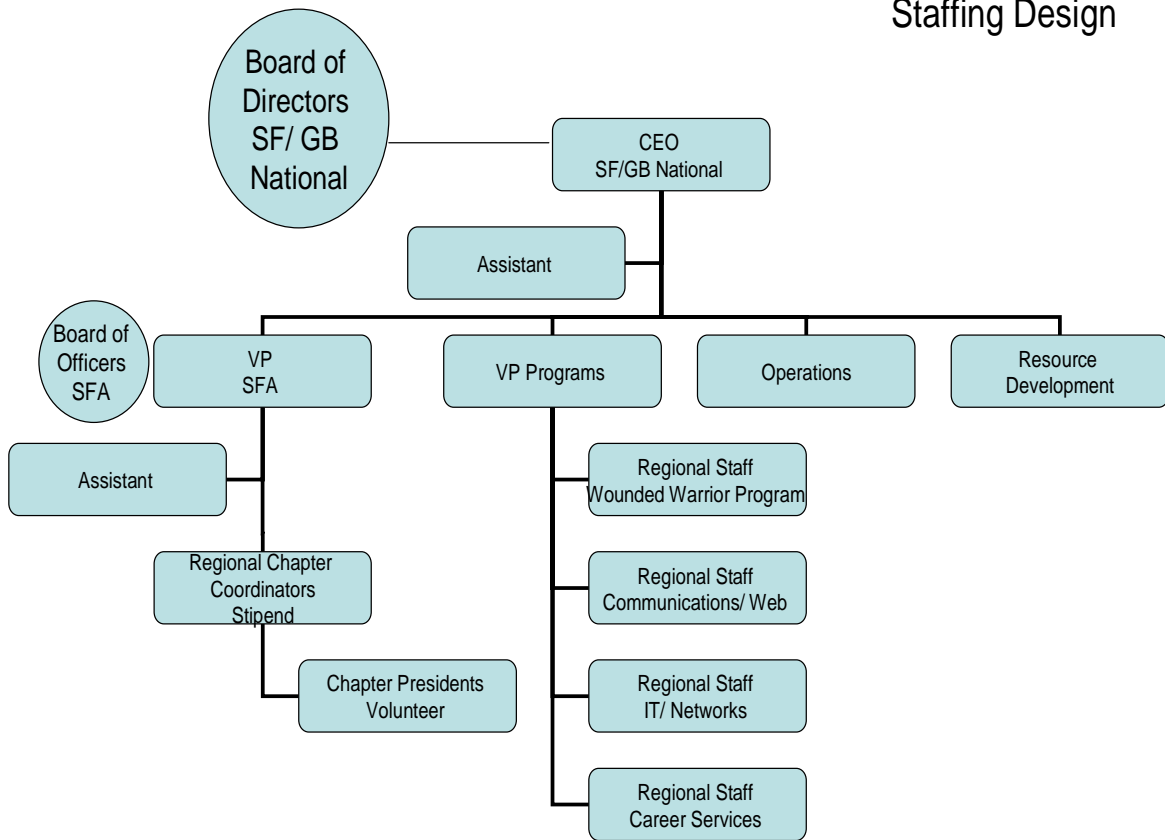
The staffing of the organization is wholly dependent on the ability of a task group to raise start up funds. The budget (Appendix 5) builds out a staffed organization over three years.

Critical staff in year one include a CEO responsible for overall organizational development and management, public relations, external affairs and fundraising. It is unrealistic to expect one individual to excel at both the strategic, visionary, and external relations and partnerships while also attending to details of operating systems. An operations director is necessary to manage human resources and volunteer management, IT, finance, and later, grants management.

Regional staff, with specific functional expertise (in programs, communications, or advocacy) will be added as resources allow. Three are proposed in the first year, to handle communication / Web; IT and networks and the wounded warrior program.

Over time, as the organization grows, a Vice President for SFA and a Vice President for GB programs complete the staff. Administrative support, for both the CEO and the SFA is critical to ensuring efficiency and for employing best management practices.

Staffing Design



Governance

The second most important factor in creating a successful organization is the quality, influence, and coordinated effort a high-level, high-functioning Board of Directors.

The SF / GB National Board of Directors will operate as a governing board with primary responsibilities for strategic direction, policy, fundraising and public relations. (See Appendix 4). The Board must include prominent and influential SF personnel, businessmen who have shared interests, and other interested parties who recognize the value of the highly trained diplomatic warrior.

The Board furthers the mission and to assist in achieving strategic goals. Given that the Board will be geographically dispersed, meeting requirements should be no more than four times per year. An Executive Committee, comprised of President, Vice President, Secretary, Treasurer, Resource Development Committee Chair, and Program Chair, may meet (by phone) monthly.

Board members will be expected to make a financial donation to the organization and to assist in fundraising solicitations on behalf of the organization.

Revenue Model and Budget

Without the right leadership, both at the staff level and at the Board level, resources won't matter. Funding is not the first or second priority – leadership is. With the right CEO and the right Board, resource development should not be difficult, and resources will be managed and allocated to achieve specific results.

The revenue model for SF / GB National is a fairly traditional philanthropic model. SFA, the (c)(19) operation, will continue to benefit from membership fees and from local special events. The GB programs, the (c)(3) operation, will benefit from philanthropic contributions, grants, and corporate partnerships. The annual convention is appropriately supported by sponsorships, booths, and advertising. *The DROP* should be fully supported by advertising.

The start-up budget is approximately \$500,000 (see Appendix 5). Salaries are on the low end of Association salaries, given positions are likely to be held by retired SF, and given the size and scope of the start up operation. Benefits are assumed to be covered by the US military pensions. It is proposed that regional offices be co-located with active duty units or that office space be donated or rented for below market prices.

However, while the budget is modest, this should not be positioned as a “resource poor,” grassroots organization. The organization culture, from its inception, must have a powerful, proactive, and influential persona.

Action Plan

Fundraising

- 1) Transition funds
 - a) Solicit individual donor investors to assist in organizational capacity building based on this plan. Specific outcomes are defined in the items below
- 2) Coordinated strategic fundraising effort
 - a) Create a resource development committee of the SF / GB National Board
 - b) Define the fundraising strategy for organizational support, programs, and services
- 3) Solicit funds and create finance policies for bequests, endowments, operating, and project money
- 4) Year Two: Hire a fundraising professional, reporting to the National CEO and accountable to specific financial goals

SF / GB National

- 1) Create a start up task force committee to oversee the development of SF / GB National and the tasks below. (This could be the committee convened for this project. It should have representation from the SFA Board of Officers, but should be a separate group.)
- 2) Create the 501(c)(3)⁵ “holding company” and the Board of Directors
 - a) Work with a nonprofit attorney to create by-laws, articles of incorporation, and IRS tax exempt status. The group is a simple charitable organization; it is not a membership organization
 - b) Create a 17 member (c)(3) Board of Directors
 - i) National representation
 - (1) no more than two members of the SFA Board of Officers or two members from the Green Beret programs
 - ii) Ability to network at high levels, fundraise at high levels
 - iii) Serves as the governance / advisory / fundraising board, not as unpaid staff
 - iv) Sets overall direction and vision and oversees advocacy, public relations, organization brand

⁵ It may be possible to use / expand the (c)(3) of the Green Beret Foundation, but that will depend on negotiations with the Green Beret Foundation Board of Directors. It does not make sense to have several (c)(3)'s. The SF / GB National should serve as the umbrella (c)(3) for all charitable programs.

- 3) Hire a full-time, association professional as CEO (see Appendix 2 for job description)
 - a) Hired by the Board of Directors with a specific search process to meet specific qualifications.
 - b) The CEO is primarily responsible for creating the new organization and for organizing the finances, internal systems, and Chapter system of the (c)(19)
 - i) Hire full-time administrative support and outsource / contract for IT and accounting support
 - c) The CEO must have strong public relations, education / influence / negotiation (advocacy), communication skills, writing, as he will be the National “face” of the organization
 - d) The CEO will work with the task force to build the larger organization and ensure coordination with the SFA Board of Officers
 - e) The CEO has full authority to build the organization, and reports to the SF / GB National Board of Directors

Critical Tasks

- 1) Web site
 - a) Recreate the Web site as a central hub, managed by and with content provided by SF / GB National with affiliate Chapters having individual “home pages.”
- 2) Define and build the (c)(3) programs
 - a) Advance the wounded warrior services of the Green Beret Foundation
 - i) Formally define the relationship as a subsidiary, merger or joint venture
 - b) Define the career networking and placement program
 - i) May sub-contract for development of this program or create strategic partnerships
 - c) Identify critical SF issues and set advocacy / information agenda
 - d) Create Board of Director committees to assist / oversee program areas
 - i) Enhance committees with non-board volunteers as necessary

SFA

- 1) Amend Constitution
 - a) Approve becoming part of holding company
 - b) Increase Board of Officers to ensure geographic diversity
- 2) Define “affiliated” Chapter requirements
 - a) Set standards for use of SFA name / logo
 - b) Set requirements for minimum level of service and membership
 - c) Require participation in single Web site “portal” to ensure consistency of information and brand
 - d) Redefine service to active duty through coordination with GB programs

Year Two: Regional Offices

- 1) Define regional office staffing needs, responsibilities and qualifications based on fund availability and program focus
- 2) Place Regional Directors at / near SF Active Duty / National Guard Groups (see Appendix 3 for job description)
 - a) Create specific job descriptions and undertake specific selection process
 - i) May be full-time volunteers with honorarium and stipends, with part-time paid administrative coordinators
 - b) Regional Directors are primarily responsible for liaison with active duty commands and bringing the organization to active duty soldiers through value-added programs and services
 - c) Regional Directors also support National with specific skills and expertise in support functions or program areas
 - d) Must work with closely with Chapters for coordination and to recruit volunteers as needed
 - e) Define specific work plans with measurable results
- 3) Continue to ensure coordination between Chapters and programs
- 4) Review and adapt

Appendix 1: Research and Analysis Presentation

“Bottom Line”

- SFA fills a distinct and critical niche
- Opportunity for the whole to be much greater than the sum of the parts
- Doing a lot of activities, but little “collective whole”
 - Need to define “win” – what SFA is and what it should be
 - No “real” organization. A collection of individuals doing good things
- Strategy (focus and direction) wholly unclear / lack of common vision
- Brand is outdated; membership is stagnant
 - Brand is what you do, not what you say
- Structure, systems, and staffing do not support strategy
- The organization needs fundamental reinvention to be relevant for today’s SF
 - Or at risk of decline

Two Fundamental Decisions

- What should / must SFA be?
 - A fraternal organization or more?
- Do we have the collective “will” to create a highly-functioning, 85+ chapter entity?

Perceptions

(Below is the responses from interviews. in approximate frequency order)

Purpose of SFA - What is it?

- Fraternal organization
 - Camaraderie
 - Fellowship
 - “Place for old guys to drink beer and tell stories”
- Voice of the SF
 - Spokesperson
 - Advocate
- Preserve the legacy
 - Tradition and history
- Benevolent, charitable organization
 - Support active duty and their families
 - Support retirees

Services / Programs - What does it do?

- Scholarship program
- Patriot funds
- *The DROP*
- Varies by chapter
 - Picnics
 - Services to families
 - Involved in community
 - ETC...

Impact - What difference do you want to make?

- ???
- Improve fraternity
- Network
- Tell the world / the public about SF
- Help SF and their families

Measure Success

- 85 chapters strong
- ?
- One voice
- People know about SF

If had lots of \$\$\$\$

- More scholarships
- More patriot funds
- Support families
- Help wounded or families of those left behind
- Staff
- National headquarters

Role of Chapters

- (No consistent answer)
- Conduit for national collective vision
- Get young guys involved
- Promote national to subordinates
- Voice of members
- Our programs for our community

What National Should Do

- Provide the framework, data for coordination, share information
- Be the data contact / communication contact
- *The DROP*
- Listen
- Build the center / don't build the center
- Don't be Fayetteville-centric

Other Organizations

- No other that focuses solely on SF
- LOTS of Special Operations organizations
- LOTS of Veterans organizations
- Army and Veterans Affairs programs
- The Green Berets Foundation
 - Stepping in to fill void not being handled by SFA
- All the SFA chapters (operate as separate entities)

Advice

- Get young guys involved
- Adapt to current soldier and listen
- Need to be the voice of SF
 - Tell the story of SF
 - Stand up for SF
- Need a plan
- Stop talking about the past
- Focus and stand up for SF
- Support families when deployed

Young / Active Duty “Profile”

- Younger, married, or family
- Stress from combat and effects of op tempo
- Care / worry about families
- More head injuries from impact incidents
- Concern / interest in jobs, professional development, networking post-military

The Young / Active Duty - re: SFA

- SFA doesn't know what their needs / interests are
- Young / active duty don't have “a clue” about SFA
- Not interested in joining upon graduation / deployment

- Not clear what it does or why important
- Not interested in the DROP
- Not interested in meetings in between tours – family time is precious
- Young guys don't want to drink beer and hear old war stories
 - “More likely to go to gym than the bar”
- National needs to ask “what do you want us to do while you are in Afghanistan / Africa...?”

From Ft. Bragg Interviews

- SF Soldier characteristics
 - Self sufficient
 - Highly motivated
 - Competitive
 - High achievers
 - Unconventional
 - Have high standards
 - Today's SF more unique
 - “After 9-11 knew you would be going to war” and still signed up
- Know nothing or very little about SFA or its programs/ services
- The “brotherhood” is important, people they can trust, loyalty to each other
- Don't want to have to work through a bureaucracy, work in their own network to get things done
- SF needs to be more relevant
- Not just social, tie into Command
- Things that are important
 - Network of SF to call on for information, help- people they trust and know will take care of them
 - Post military transition, career guidance, networking, information
 - How to apply these skills in other than “law enforcement” “mercenary” arenas
 - Issues information and advocacy
 - Work on our behalf
 - Keep us informed
 - Have a strong voice in Congress
 - COMMUNICATE regularly
- Web, on line newsletters (not *The DROP*)
- Work through LNOs
- Be where Groups are
- Care about history and legends, but “have heard” that the young guys are looked down on, not welcome

Other

- Green Beret Foundation
 - The (c)(3) charitable arm
 - Filling the gap left by SFA
 - It will compete for attention if not funds
- Governance, board / chapter structure, staffing, communication and technology issues

Analysis

Identity

- Differing views about what SFA is and should be
- No common strategic direction, vision, or focus
- Key programs (scholarship and patriot fund) are fledgling at best
- 85+ chapters operating mostly independently – no collective whole
 - Programs, impact, highly decentralized with little to no coordination
 - No standardization
- Until strategy is clear, cannot address organizational design and development
- “Grass roots,” resource-poor, small local chapter identity incongruent with the importance, (potential) power, and need for SFA
 - i.e. the Chapter \$100 back and forth
- Current brand is not useful
 - And it is difficult to change a brand

Constituents

- Different understanding of who is the audience
 - Retirees, command, young active duty, families, everyone
- Little understanding / “market intelligence” about the needs / interests / challenges of young active duty
- Generational disconnect – not talking the same language
 - And, the “old guys” don’t listen
- Programs for elementary kids to the public-at-large as potential constituency is not a clearly defined target market
- Strategies do not align with a market
- Membership does not necessarily build constituency
- Role of membership ill-defined

Capacity

- Ron and new board recognized for great progress and bringing about needed change
- Chapter leaders are dedicated and passionate
- Fraternity is strong...but not living up to its fullest potential

- All volunteer structure lacks the support and staffing systems to maintain and grow
 - If volunteer structure is a deliberate business model, then need to build the systems to support
- Duplication of efforts – chapter Web sites and newsletters, programs, fundraising, resources NOT being well deployed to “win”
- Technology, communication systems, data management, and financial systems do not adequately support the operation
- Board role, composition, and structure to be refined – does not serve the organization as is
- Web sites and *The DROP* need “face lift” and relevancy

Summary

- Strategy / structure disconnect
 - Structure and systems do not support a cohesive strategy
- Not harnessing (significant) power of the whole
 - SFA is NOT an organization – it is a collection of individuals around the world doing really great things
 - No leverage of distinct assets / strengths
- No common definition of programs and services – what are we doing and for whom, and are we organized to do it well
- “Get the young guys involved” is not the correct approach
 - Need to have products and services that are of meaning
- “Identity” decision (who we are) drives all other decisions
 - What is the “win”?

For Consideration - Consultant’s Conclusion

- Honor the past, but reinvent for relevancy
- Take advantage of distinct assets, leverage the collective whole
- Adapt to current realities, not the way it’s “supposed to be”
- Filling the niche that needs to be filled will require steadfast leadership and change

Therefore...

- Both fraternal and charitable
 - (c)19 and (c)3
 - Strategic alliance / partnership with Green Beret Foundation set up to serve a very specific audience
- Retired (and near-retired) SFA membership have specific role and responsibility to serve active duty
 - With consistency and “standardization” of services worldwide
 - Services and programs based on needs of active duty... may change over time

- Identity – we serve our fraternity...
- SF soldiers become members after 10 years or at retirement
 - Membership is an honor, but also a duty... (“when we retire, we’ll take care of you and your families, and when you retire...”)
 - ALL SF active duty are “eligible” for SFA services and attention
- Chapters serve very specific functions in relation to providing services to active duty
 - Affiliated chapters are much more than meetings and picnics
 - Affiliation means specific agreements
- Chapters in regional cohorts, with “hubs / center” at each of seven active duty units
 - All chapters in the region work together to “adopt” the active duty units
 - Forge an “intimate” relationship between the chapter cohort and the active duty unit
 - Each regional center ideally has at least one (or more) full-time staff
- Fayetteville is not “national,” but the “lead” (or largest) regional center; core functions / tasks can be centralized wherever it makes the most sense
- Funding model
 - Philanthropy, US army grant / contracts, membership, sponsorships / partnerships, fees for service
 - Job placement / career guidance and “workplace giving” program

Appendix 2: CEO Job Description

SEND COVER LETTER AND RESUME VIA MAIL by (date)

c/o : (no phone calls, no e-mail please)

Organization Background

SF / GB National is a new entity designed to develop, coordinate and manage the 501(c)(19) SFA organization and the programs and services to active duty operating under the SF / GB National's 501(c)(3) umbrella.

SF / GB National is a fraternal and service organization solely dedicated to the history, brotherhood and support of retired and active duty SF and their families. With 85+ Chapters around the globe and regional offices co-located with SF Active Duty / National Guard units, SF / GB National is *the* voice of the SF.

The organization's strategic focus is

- *History*: Preserving and honoring the history of the SF
- *Camaraderie*: Facilitating life-long camaraderie of SF soldiers
- *Service*: Serving active duty SF soldiers and families through information, advocacy, assistance and direct service programs
- *Advocacy*: Advocating on those issues crucial to the respect, safety and well-being of the SF

The Board of Directors is seeking a qualified candidate to provide overall management for SFA and overall direction to GB programs. The CEO is the responsible for the success of the organization. He is the public face of the organization, an expert on SF issues and works closely with the Board on fundraising.

Primary Responsibility

The Chief Executive Officer (CEO) shall be responsible for the operation, leadership, management and development of both the 501(c)(19) and the (c)(3) non-profit corporation. The primary purpose of the position is to create highly efficient systems to support SFA operations, to develop programs to meet the needs of active duty and to advocate on behalf of SF needs and interests.

The CEO will work closely with the Board of Directors to define and achieve strategic goals and to attract and manage the resources to ensure long term success and viability.

The CEO will initially have significant operational responsibilities to oversee and develop financial management, human resource management and organizational development systems to support the SFA. Once those systems are operating efficiently and effectively, the CEO will focus on external relations for public relations, advocacy and fundraising purposes. The CEO will build out staff and programs as resources permit. The CEO will have full responsibility and authority to create an organizational model, structure and staffing pattern for stability, sustainability and success.

Responsibilities

Organizational Leadership and Development (30%)

- Oversee and be accountable for financial resources, management and investment
- Develop and implement project management systems for coordination, scheduling and risk management
- Institutionalize organizational systems and processes for effectiveness and efficiency
- Manage and lead a volunteer and decentralized work place and work force
- Define and develop staff development needs and processes to ensure stable, trained staff capacity
- Create and lead a fully functioning top level team of board volunteers, staff and Chapter volunteers
- Work with task force/ Board members to build a first class Board of Directors
- Develop, nurture and maintain relationships with Board members
- Assist the SFA Board of Officers in their role of overseeing Chapter activities

Public Relations and Advocacy and Communication (30%)

- Define, develop and nurture relationships with key partners, government and military officials
- Define and develop the issues and advocacy agenda of most importance to the SR
- Develop and implement a systematic and comprehensive outreach, marketing, communication and public relations plan
- Position the organization as *the* SF organization
- Represent SF and the organization in highly visible and strategic settings worldwide
- Set and maintain high standards for accurate, current and focused communication throughout the organization
- Promise and deliver effective and transparent operations
- Represent the organization around the world
- Define Web site standards and oversee redevelopment and maintenance as a primary communication tool

Fundraising / Program Development (30%):

- Create the annual operating budget for board approval
- Create and oversee the strategic fundraising plan to build institutional sustainability and a diverse, stable funding base
- Work with Board committee to achieve fundraising goals in all categories
- Hire and work with staff to create and implement programs of particular service to the active duty soldier
- Work with board and staff to create institutional investment and to expand the core base of support
- Oversee and monitor program success and evaluation

Other (10%)

Salary and Benefits Package

Minimum Qualifications

- SF training and experience
- Demonstrated writing, communication and public relations skills
- Experience managing budgets and staff
- Ability to move from concept to reality, ability to work at a strategic level and a detail, tactical level
- Ability to effectively manage and build a strong team of diverse individuals

Preferred Candidate will have

- College degree in business, finance or administration
- Demonstrated success in fundraising, sales or marketing
- Experience in large nonprofit or association management

Appendix 3: Regional Staff Job Description

SEND COVER LETTER AND RESUME VIA MAIL by (date)

c/o : (no phone calls, no e-mail please)

Organization Background

SF / GB National is a new entity designed to develop, coordinate and manage the 501(c)19 SFA organization and the programs and services to active duty operating under the SF / GB National's 501(c)(3) umbrella.

SF/GB National is a fraternal and service organization solely dedicated to the history, brotherhood and support of retired and active duty SF and their families. With 85+ Chapters around the globe and regional offices co-located with SF Active Duty / National Guard units, SF / GB National is *the* voice of the SF.

The organization's strategic focus is

- *History*: Preserving and honoring the history of the SF
- *Camaraderie*: Facilitating life-long camaraderie of SF soldiers
- *Service*: Serving active duty SF soldiers and families through information, advocacy, assistance and direct service programs
- *Advocacy*: Advocating on those issues crucial to the respect, safety and well-being of the SF

The CEO is seeking a qualified candidate(s) to provide establish, lead and manage regional offices and programmatic service delivery to active duty soldiers.

Primary Responsibility

The Regional Staff are co-located with/ or in close vicinity to each of the Active Duty / National Guard SF Units. Regional staff are primarily responsible for serving as a liaison between the active duty SF and the organization and creating and delivering services to meet needs of the active duty. In addition, regional staff represent the issues of interest to the organization for relevant and proactive advocacy.

Regional staff work closely with SFA Chapter presidents to coordinate volunteers and to create opportunities to bring together active duty and retired SF and their families.

Each regional staff person will have a specific program responsibility, such as the wounded warrior program, a job placement program; or organizational responsibility such as Web site management, issues papers or coordinating briefings or special events.

Responsibilities

Active Duty Liaison/ Voice of the SF Active Duty Soldier (30%)

- Be the liaison between the Active duty SF and the organization
- Understand and represent the needs of the active duty to the CEO / Board
- Communicate and educate Active duty on issues that effect them and the organization's role in advocating on their behalf
- Establish and maintain excellent relationships with SF Command
- Serve as ombudsman for SF and their families.

Program Development and Service Delivery (30%)

- Identify and conceptualize programs or services that meet the needs and interests of the active duty SF
- Work with CEO and Board of Directors to develop distinct and valuable programs
- Develop programs and standardize nationwide
- Coordinate staff and / or volunteers for service delivery
- Evaluate, adapt and measure results of programs

Chapter/ Active Duty Coordination (15%)

- Be the liaison between the Active Duty and the Chapters
- Coordinate Chapter members, through Presidents to serve as the volunteers for service delivery
- Work cooperatively with area Chapters
- Ensure accurate, consistent and timely information between and among Chapters, Active duty groups and the organization.

Organizational management and development (15%)

- Work among regional staff and with CEO to create a dynamic, results based organization
- Build the organization brand of service to the SF
- Handle organizational management tasks in area of expertise, such as financial management, data base management, Web site management, communications
- Professionally represent the organization at all times.

Other (10%)

Salary and Benefits Package

Minimum Qualifications

- SF training and experience
- Demonstrated writing, communication and public relations skills

- Project management skills
- Program development and implementation

Preferred Candidate will have

- College degree in business, finance or administration
- Demonstrated success in specific program or administrative functions (to be developed)

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Appendix 4:

SAMPLE Board of Directors Roles, Responsibilities, Qualifications

Note: This Board Job Description is copyrighted to our colleague, Marc Smiley Organizational Development. This is a typical board job description and should be customized to the SF / GB National Operation.

JOB DESCRIPTION: BOARD MEMBER

Responsibilities

The board as a whole has the responsibility for governing the entire organization. The board is responsible for determining agency policy in the following areas: Human Resources, Planning, Finance, Development, Community Relations and Operations.

Board members share responsibilities in these key areas:

Leadership/Human Resources

1. Board membership, which includes recruiting and orienting new board members, training, evaluating and recognizing existing board members and providing board members with opportunities to grow and develop as leaders.
2. Selecting and supporting the Executive Director, including reviewing performance regularly and providing on-going assistance as requested by the Executive Director.
3. Personnel policies, which include setting policy regarding salaries, benefits and grievance procedures.
4. Volunteer involvement, which includes setting policy regarding how the organization treats, recognizes and celebrates its volunteers.

Strategic Planning

1. Set and review the organization's mission and goals on an annual basis.
2. Plan for the organization's future, on a long-term and short-term basis.
3. Decide and plan which projects and programs the organization will provide.
4. Evaluate the organization's programs and operations on a regular basis.

Financial Management

1. Ensure financial accountability of the organization.
2. Oversee an ongoing process of budget development, approval and review.
3. Manage and maintain properties and investments the organization possesses.

Resource Development

1. Ensure adequate resources to achieve the organization's mission and implement the organization's programs and projects.
2. Participate in fundraising activities based on the individual's skills and background.

Public Relations

1. Ensure that the organization's programs and services appropriately address community/constituents needs.
2. Promote the organization to the general public, including serving as an emissary of the organization to the community.
3. Promote cooperative action with other organizations, including activities and occasions when the organization should take part in coalitions, joint fundraising, etc.

Operations

1. Ensure that the organization's administrative systems are adequate and appropriate.
2. Ensure that the board's operations are adequate and appropriate.
3. Ensure that the organizational and legal structures are adequate and appropriate.
4. Ensure that the organization and its board members meet all applicable legal requirements.

Requirements/or Board Service

- A demonstrated interest in the organization's mission and goals.
- Specific experience and/or knowledge in at least one area: Human Resources, Planning, Finance, Development, Community Relations, or Operations.
- Representative of a key aspect or segment of the population of the community.
- A willingness to expand knowledge or board responsibilities through orientation and ongoing training.
- A willingness to represent the organization to the community.
- Six to ten hours per month, distributed approximately as follows:
 - 3-4 hours Board meetings (preparation and attendance)
 - 2-3 hours Committee meetings (preparation and attendance)
 - 1-3 hours Special requests
- A willingness to participate in board fundraising activities and make a financial contribution to the organization to the best of one's ability

Appendix 5: Preliminary Budget

Budget: SAMPLE SF/GB National				
Expense	Description	Year 1	Year 2	Year 3
CEO	external and development	75,000	77,000	80,000
VP SFA			62,000	65,000
VP GB Programs				62,000
Operations	HR, finance, IT, grants management	55,000	58,000	60,000
Admin support	exec assist. To SFA Board	35,000	36,000	37,000
Admin support	exec assist. To CEO	35,000	36,000	37,000
Development	depending on skills of CEO		60,000	65,000
Regional staff	3 in year one, build as resources available			
Communications / Web		40,000	42,000	45,000
IT/ Networks		40,000	42,000	45,000
Wounded Warrior		40,000	42,000	45,000
Career Services			40,000	42,000
New program				40,000
Benefits	health and retirement by SF			
Payroll taxes	7.65%	24,480	37,867	47,659
Office overhead	postage, supplies, etc.	15,000	20,000	25,000
Travel	CEO, Regional Directors mtgs	19,200	24,000	30,000
Web site annual	could range from \$250/ yr/ chapter to \$1200	45,000	45,000	45,000
Marketing		15,000	20,000	30,000
B& O insurance	board and officers	1,000	1,000	1,000
Rent/Utilities	donated or military space?			
Board expenses	meetings 4x year	10,000	10,000	10,000
Misc.		5,000	5,000	5,000
		454,680	657,867	816,659
one time				
Computers	one for each staff at \$1500 ea	7,500	1500	1500
Color printer		2500		
Phone system		3000		
Data base(s)	contacts management, fundraising	12000		
Web redesign		50000		
Collateral materials	business cards, brochures	8000		
		83,000		

