



**Florida Society Sons of the American Revolution**

# **Strategic Plan**

**May 3, 2017**

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**Submitted to: FLSSAR President Raymond F. Wess**

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**Prepared by FLSSAR Ad Hoc Strategic Planning Committee**

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**John M. Stewart, Chairman  
Charles R. Butler, Ralph D. Nelson, Jr., Lee W. Matson, Co-Chairmen**

## **Introduction to FLSSAR Strategic Planning**

The SAR Pledge, recited by every FLSSAR Compatriot since our Society's founding in 1893 defines who we are, and what our responsibilities are:

*We, the descendants of the heroes of the American Revolution who, by their sacrifices, established the United States of America, reaffirm our faith in the principles of liberty and our Constitutional Republic, and solemnly pledge ourselves to defend them against every foe.*

The Florida Society has a long and proud history of tradition and American patriotism. For more than 12 decades, our Compatriots have worked to inspire patriotism in our state by promoting patriotism, honoring veterans, encouraging youth academic achievement and good citizenship, recognizing outstanding community service, and more.

Today, with 34 chapters throughout the state, The Florida Society enjoys a steadily increasing flow of membership applications. The oldest Chapter is Miami, accredited in 1898, and the newest Chapter is The Villages, accredited in 2016. The largest Chapters are Palm Beach (166), Jacksonville (160), Saramana (156), Clearwater (138). The smallest are Lake City (14) and Treasure Coast (14). As of December 31, 2016, our total dues-paid society membership was 2,126. The growing influx of new members provides the Society with a diverse talent pool of patriotic Compatriots who are available to support its Patriotic Initiatives.

Tradition and continuity are hallmarks of the FLSSAR; however, after 124 years, logic suggested that the Florida Society undertake a planning and modernization process to accommodate contemporary societal dynamics, and to meet expectations of new and different stake-holders. There are many alternatives to FLSSAR membership, so it is incumbent upon the organization to understand its economic and demographic environments, as well as its member and candidate member expectations. It also must have the capability of identifying the most appropriate venues for outreach and community service. To effectively accommodate these imperatives, the Society requires organizational flexibility, and strategic agility.

Positive results are the outcome of a well-developed plan, properly implemented. Strategic planning cannot be done with a one-time “to-do list” or cosmetic adjustments.

The issues challenging the Society are strategic, and its responses must be strategic. The recommendations contained in this document address relevant environmental imperatives by refining processes and programs, sharpening the Society’s role and scope, tightening its focus, and modernizing its operations. In the end, positive member experiences will occur, net membership growth will be the outcome, and the Society will flourish.

The future of the FLSSAR depends on the course it defines and sets for itself. The Society’s planning process must be logical, methodical, and ongoing. Toward these ends, this Plan is “strategic” in nature, and focuses on overarching strategies for improving organizational direction, efficiency, and effectiveness. The key to long term success for the FLSSAR is to show results. The Society needs to effectively utilize its array of programs and activities to produce demonstrable, quantifiable outcomes that positively impact life in our state. Its focus must be always outward, and its initiatives clearly defined as being in patriotic service to our communities.

## **Planning Process Initiated**

At the October 15, 2016 BOM, FLSSAR President Raymond F. Wess proposed the formation of a Strategic Planning Committee with John M. Stewart as Chairman. The motion was seconded and passed by the BOM. Mr. Stewart shortly thereafter held a meeting for interested compatriots to help and about thirty members agreed to participate. Mr. Stewart subsequently named three Co-Chairs to help organize the effort and Compatriots Charles Butler, Lee Matson and Ralph Nelson joined the Leadership team. The Planning Committee gathered and assessed considerable amounts of data from a variety of sources over nearly six months.

The Leadership issued several requests for member input during the development of this Document, both as to the current state of the organization and as to recommendations to improve it. Some Compatriots participated, others did not. All information collected by and provided to the Committee Chairs was reviewed, evaluated for relevance and strategic

essence, and given serious consideration during the planning process which lasted nearly six months. All member input was considered, consolidated, combined, extracted, and summarized, and nothing was disregarded.

We did not take the purpose of this Strategic Planning process to be to suggest unsupported or unnecessary changes, to tinker with well-functioning, proven programs, or to disrupt our cherished traditions.

Additionally, we did not address some suggested topics that were nebulous, or too big or too national such as: “to reform the US political class, “rectify our hijacked Constitutional Republic,” or “reform the corruption of the People’s Congress.”

Our assignment, as we took it, was to suggest thought refinements to our existing structure based on data and logic; focus on specific strategic issues which could be impacted positively; recommend the infrastructure to support success; and suggest a vehicle for positive long term organizational momentum. During the overall strategic information and data gathering process, the Committee also identified various operational issues that merit examination. They are noted as such, and are included in the Research Paper for future consideration.

## **Methodology**

The needs of the FLSSAR are unique, and a modified process was adapted to best serve the purposes of the Society. The Strategic Planning Committee set out to employ a *Business Standard Planning Model*, including Organization Description, Environmental Scan, Competition, Strengths and Weaknesses, followed by Conclusions and Recommendations.

The Strategic Planning Leadership conducted interviews, evaluated numerous records, data sources, and documents. It also employed information gleaned from member surveys (Attachments 1,2,5,6 of the Research Paper), solicited and received individual member comments, collected and evaluated large amounts of environmental data, and determined, as best as possible with the data at hand, a definitive assessment of the Society’s current overall position in the marketplace.

Emerging from this analysis were some disturbing conclusions. Apparently the lack of a positive experience on the part of new members was producing an inordinate early dropout rate. Training, involvement at the Chapter level, and encouragement were inadequate. Additionally, the Society and its Chapters were seen as not accomplishing sufficiently the mission of communicating its patriotic and historic messages to the communities they serve.

The Committee then derived Recommendations for the organization with respect to its role, scope, and focus as well as some internal revisions designed to modernize its functionality and enhance its organizational effectiveness. Then a Strategic Plan was created, with Short, Medium and Long Term recommendations.

This plan was previewed with President Wess, who offered guidance based on experience unavailable to the Committee. Consequently, this Strategic Plan was carved out of the original document which was heavy on research details. Nevertheless, that work has been preserved in an accompanying document called the Research Paper.

## **Recommendations**

Based upon the input described in the first four sections of the Research Paper, a grid of recommendations was developed, shown in its Attachment 4. But after further deliberation, the Committee leadership decided to present its final Recommendations by listing them, organizing them by timeframe, and then discussing them in some depth.

1. Expand the RVP Role in Their Chapters.
2. Survey and Inventory the Skills of the Membership.
3. Establish Strategic Planning as an Ongoing Process.
4. Enhance the Technology Advisory Committee's IT Capability
5. Expand the Publicity Committee to a Community Outreach Committee
6. Executive Committee Reconsider State Officers' Expense Reimbursements.
7. Create Plans to Develop Financial Donors both Large and Small.

The following table shows the timeframes assigned to accomplish these Recommendations, though they should be initiated as soon as possible:

Short (1 year)	Medium (3 years)	Long (5 years)
1,2,3	4,5,6	7

## **Discussion of Recommendations**

### 1- Expand the RVP Role in Their Chapters

To facilitate greater performance toward organizational goals, the RVPs need to effectively help Chapter Officers, many of whom are new to their jobs, and with less than optimal guidance from their predecessors due to the natural human way of doing things in a not-for-profit organization. Specifically, the RVPs need to help them obtain the training tools available to learn the requirements of their position, manage and direct the Mentoring Initiative of NSSAR to improve our member experience, especially that of our strong stream of new members. This will strengthen our retention rate which, as detailed in the Research Paper, is less than optimal. Additionally, the RVPs should ensure that their Chapters have an active Americanism Award awareness as this single source is the best way to understand the totality of the SAR experience and mission. Greater awareness of what we do will bring more participants into the areas of endeavor which they enjoy.

### 2- Survey and Inventory the Skills of the Membership

It is suspected that there are many “hidden talents” within our membership. These talents need to be discovered and enlisted into our pursuit of our mission and goals. FLSSAR should coordinate a survey of the membership, done at the Chapter level, devoting particular attention to identifying skills which are useful in pursuit of the goals contained in this Plan.

### 3- Establish Strategic Planning as an Ongoing Process

Either create a permanent FLSSAR Strategic Planning Committee, , or integrate this function into the existing structure as the FLSSAR Executive

Committee and Society President prefer. It should be charged with the responsibility of ensuring the FLSSAR's organizational focus remains on current and emerging critical issues by institutionalizing a formal planning process.

#### 4- Enhance the Technology Advisory Committee's IT Capability

Since our society is moving inexorably towards online communication preferences, we should develop new ways to reach our membership and the communities we serve. Officer training videos, remote access to meetings, a library of educational materials, and enhanced management information are some of the areas which could be addressed.

#### 5- Expand the Publicity Committee to a Community Outreach Committee

This enhanced Committee will be responsible for defining or helping develop focused innovative outreach initiatives. For example, it could coordinate with the Sons of Liberty Florida Brigade to help organize more Chapter color guards, and improve their visibility, as they are excellent ambassadors for greater public awareness of our organization and its goals. A similar coordination with the Newsletters and Periodicals Committee could strengthen our community outreach. Additionally, this Committee could coordinate with NSSAR's Outreach Educational Program and Brand Awareness Committee to improve our Florida Chapters' output of publicity within the state to excite more interest in membership and facilitate accomplishment of our organizational goals. It could coordinate with NSSAR to increase awareness for their educational videos, CD's and curricula already available for schools' use. It could coordinate with outside experts and sources such as Roger Smith, Ph.D. (SAR St. Augustine Chapter), and the South Carolina Society, (video library) and his existing effort to present relevant Florida Revolutionary history as he already is doing in the classrooms in Brevard, Marion and other counties. Another example of what's available is the several South Carolina educational TV videos about the Revolutionary War, which were assisted in development by the SAR in South Carolina. It could coordinate a Speakers Bureau for members, and possibly others, dressed in proper SAR attire or period clothing, to entertain our communities while increasing the awareness and understanding of the SAR. There are many more resources available and this goal will be accomplished by the FLSSAR developing knowledge of

them and working through the Chapters to bring them to the attention of the communities they serve.

#### 6- Executive Committee Reconsider State Officers' Expense Reimbursements

The current reimbursement structure appears inadequate for modern times, and modification to ensure the Society enjoys the broadest possible leadership talent pool should be carefully considered. Serving as FLSSAR Society President or senior officer is a major responsibility. It requires a significant commitment of personal time, incurring unreimbursed cost well above the nominal budgetary amount customarily allotted. State, regional and national travel expectations are major. Additional out of pocket costs include clothing, meals, family accommodations, care for pets while traveling, wear and tear on personal vehicles, and other incidentals. It is unrealistic for the Society to expect its senior officers to incur significant unreimbursed financial cost, as well as sacrificing major amounts of personal family time in service to the Organization. Additionally, this structure eliminates some qualified individuals from agreeing to serve the Society due to financial concerns. Funding for any possible enhancement would come from the growth in membership. In the Research Paper, the Treasurer reports a projected 50% increase in the adjusted gross to FLSSAR in the next 5 years before any of these Recommendations are effected.

#### 7- Create Plans to Develop Financial Donors Both Large and Small

This initiative will explore ways and means of identifying ongoing sources of smaller, perhaps ongoing financial donations from individuals, clubs, non-members, and members. This initiative also will explore ways and means of identifying ongoing sources of *large* financial donations and grants from individuals, clubs, non-members, members, corporations, and other sources. Funds from these sources can be used to significantly enhance our Society's outreach capabilities, and strengthen the organization.



## **Defining Success**

The Committee suggests two objective measurement standards for organizational success applicable to the Florida Society SAR. All other organizational activities, issues and initiatives are subsets of these two factors:

- (1) Net membership growth
- (2) Financial performance

## **Gratitude**

The Strategic Planning Committee wishes to express its gratitude for the support of the FLSSAR management team, and to the participating members of the broad Committee. The Chairman wishes to express his profound and sincere gratitude for the countless hours of hard work, insightful analysis, and collegial participation donated to this effort by his Co-Chairs: Compatriots Charles R. Butler, Lee W. Matson and Ralph D. Nelson, Jr.

John M. Stewart  
Chairman  
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