

**Florida Society
Sons of the American Revolution**

Strategic Planning Initiative

Research Paper

Submitted to: President Raymond F. Wess, FLSSAR

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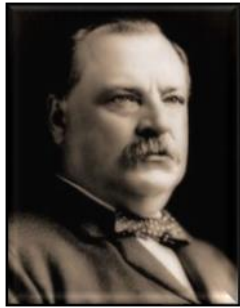
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Research Paper

I. Organization Description

Data Sources: The Florida Society's Articles of Incorporation, Website, and its published documents.

When the FLSSAR enrolled its first Compatriot in 1893, Grover Cleveland was President of the United States; Florida was only sixteen years beyond the departure of its last Reconstruction troops. Coal, horses, and waterwheels powered America, and the telegraph was high technology communication.



GROVER
CLEVELAND

Over its nearly thirteen decades of existence, the Florida Society has made various structural, policy and operational adjustments, but the essence of the organization has remained essentially unchanged: The FLSSAR is a lineage organization established to perpetuate, and commemorate the founding principles of our republic.

The charter purposes of the FLSSAR are and always will be valid. Nevertheless, the processes and procedures of its programs, operations and initiatives must be assessed periodically, and modernized to accommodate changing times.

The objects of the Sons of the American Revolution are declared to be patriotic, historical, and educational. Our goals are to inspire the American community at large with a profound reverence of true patriotism and to maintain and extend the institution of American Freedom. We endeavor to do this in a variety of ways through youth programs such as: elementary school American history contests, Eagle Scout recognitions, awards, and essay contests, JROTC awards, and youth scholarships and service awards. We present community service awards, law enforcement awards, awards for heroism, and we recognize and honor our armed forces.



The FLSSAR and Chapter color guards participate in parades, presentations at public affairs and dedications. Veterans are recognized and other patriotically focused services provided to various community initiatives that incorporate Patriotism.

Organization History

In 1876 there were many celebrations to commemorate the centennial of the signing of the Declaration of Independence on July 4, 1776. As part of this patriotic fervor, a group of men in the San Francisco, California area, who were descendants of patriots involved in the American Revolution, formed an organization called the Sons of Revolutionary Sires.



Their objective was to have a fraternal and civic society to salute those men and women who pledged their lives, fortunes, and sacred honor to the battle for independence from Great Britain. They desired to keep alive their ancestors' story of patriotism and courage in the belief that it is a universal one of man's struggle against tyranny -- a story which would inspire and sustain succeeding generations when they would have to defend and extend our freedoms.

Out of the Sires, grew the National Society of the Sons of the American Revolution, which was organized on April 30, 1889, the 100th anniversary of the inauguration of George Washington as our nation's first President.

We have used the acronym SAR to identify ourselves for more than 125 years. The SAR was conceived as a fraternal and civic society composed of lineal descendants of the men who wintered at Valley Forge, signed the Declaration of Independence, fought in the battles of the American Revolution, served in the Continental Congress, or otherwise supported the cause of American Independence.



The National Society was chartered by an Act of the United States Congress on June 9, 1906. Legislation establishing a federal charter for the National Society was signed by President Theodore Roosevelt, who was a member of the SAR.

The charter authorizes the granting of charters to societies of the various states and territories, and authorizes the state societies to charter chapters within their borders.

Purposes of the FLSSAR

(Source: NSSAR website: Who We are & What We Do)

The Florida Society's Articles of Incorporation wording is that same as that of the National Society's Charter, which states "The purposes of the corporation are patriotic, historical, and educational, and include those intended or designed:

1. to perpetuate the memory of the men who, by their services or sacrifices during the war of the American Revolution, achieved the independence of the American people;
2. to unite and promote fellowship among their descendants
3. to inspire them and the community at large with a more profound reverence for the principles of the government founded by our forefathers
4. to encourage historical research in relation to the American Revolution
5. to acquire and preserve the records of the individual services of the patriots of the war, as well as documents, relics, and landmarks
6. to mark the scenes of the American Revolution by appropriate memorials
7. to celebrate the anniversaries of the prominent events of the war and of the Revolutionary period
8. to foster true patriotism
9. to maintain and extend the institutions of American freedom
10. to carry out the purposes expressed in the preamble to the Constitution of our country and the injunctions of Washington in his farewell address to the American people

Current Mission Statement

(Section Source: NSSAR website: Who We Are & What We Do)

1. We commemorate and provide memorials for the people and events of the American Revolution.
2. We help preserve records relating to the events leading up to and during the American Revolution.
3. The National SAR was a major force behind the construction of the National Archives in Washington DC and the collection of historic documents there.
4. We support research and presentations (books, articles, and talks) related to the history and people of the period 1750-1800.
5. The national SAR Magazine publishes authoritative descriptions of historical events in a quality magazine of archival value.
6. SAR Revolutionary War Graves Committee publishes information about Patriot Gravesites

Patriotic Goals: Educational, Patriotic & Commemorative

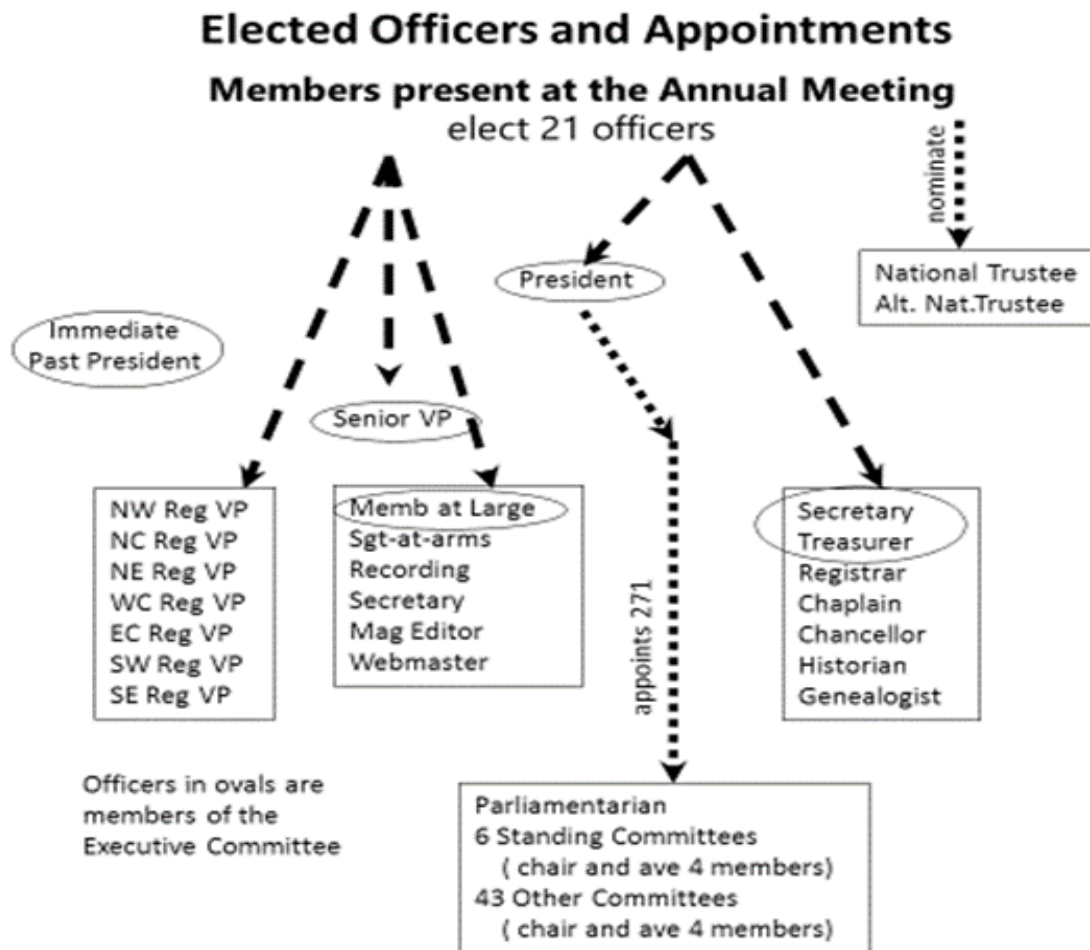
(Source: NSSAR website: Who We are & What We Do)

1. We maintain and extend the institutions of American freedom. In 1994, the NSSAR formed a Task Force to Preserve U. S. History to help focus public attention on profound problems in some proposed national standards for teaching pre-college United States History.
2. We inspire the community with the principles on which our nation was founded.
3. Many chapters and states have color guards that wear Revolutionary War uniforms and participate in civic and patriotic events and observances such as Fourth of July, Veterans Day, Armed Forces Day, Flag Day, Patriots Day (April 19), Bill of Rights Day, Yorktown Day, Constitution Day, and important battles of the Revolutionary War.
4. Each year the SAR National Congress passes resolutions to stimulate personal and national action based on these principles.
5. We help carry out the promises expressed in the Preamble to the Constitution.
6. We provide recognition for public service. The state societies and chapters of the NSSAR present thousands of awards each year to law enforcement officers, public safety officers, and other citizens who exemplify the best civic traditions of our nation. This includes young men and women who are leaders in our communities: high-ranking high school students of history, Eagle Scouts, JROTC and ROTC cadets and midshipmen.
7. We sponsor contests, essay and oration, for high school students, based on historical and patriotic themes.
8. We honor, respect, recognize and support veterans, especially those confined to residential and hospital facilities provided by the Department of Veterans Affairs.

Organizational Structure and Operations

Ralph D. Nelson, Jr.

The **Annual Meeting** of the FLSSAR elects officers, but does not elect the other members of the Board of Managers. Its only other power is to amend the Bylaws and the Articles of Incorporation. At this meeting any member present is a voting delegate. A quorum is twenty members. This gives advantage to chapters located near the annual meeting and chapters with affluent members who can more easily afford the travel costs. The twenty-one officers elected by this body are listed in the chart below:



Executive Committee

The Executive Committee consists of the Immediate Past President and five recently-elected officers: President, Senior Vice-President, Secretary, Treasurer, and an elected Member-at-Large. This group manages the daily affairs of the FLSSAR

Note: This section is a summary for planning purposes only. For full and official details, refer to the FLSSAR Governing Documents accessible on the Society's Website

- a. There shall be an Executive Committee which shall consist of the following members:
- b. The President., who shall serve as Chairman; The Senior Vice President, who shall serve as Vice- Chairman;
- c. The Immediate Past President of the FLSSAR; The Secretary, who shall serve as Secretary of the Committee;
- d. The Treasurer, who shall serve as the fiscal advisor;
- e. A Member-at-Large, who shall be elected by the FLSSAR at its Annual Meeting.
- f. Three members shall constitute a quorum.
- g. The Executive committee shall have the power to conduct its business by mail, email, by electronic means, or telephone in lieu of convening in formal session; provided, however, that each member of the Committee shall confirm by e-mail or hardcopy letter to the Secretary, each vote he has given by telephone.
- h. A report shall be made by the Chairman and/or Secretary at each meeting of the BOM detailing all actions taken by the Executive Committee since its last report to the BOM.
- i. During intervals between meetings of the BOM, the members of the Committee shall have the duty to meet on call of the Chairman and to act for the Board of Management ad interim on any matter that the Chairman deems to be of such urgency and importance that the action must be taken before the next regularly-scheduled meeting of the BOM.
- j. The committee shall also serve as a council to advise the President on planning and operational matters about which he deems the counsel of the Committee to be needed or helpful. The Committee shall also serve as serve as a council to advise the President and the National Trustee on National NSSAR issues that the FLSSAR members have interest in to present to the National Trustee meetings.

Regional Vice President

The Executive Committee, with the advice and consent of the BOM, shall determine the number of Regional Vice-Presidents necessary for the proper and efficient functioning of the FLSSAR and shall determine the boundaries of the various regions within which the Regional Vice-Presidents shall function.

Each Regional Vice-President shall render assistance to the chapters within his region, survey and suggest locations for new chapters, promote membership in the FLSSAR, perform such other duties as requested by the President and/or the BOM, and shall visit each chapter in his region at least once each year.

Board of Managers

Note: This section is a summary for Planning Committee background purposes only. For full and official details, refer to the FLSSAR Governing Documents accessible on the Society's Website.

The membership of the BOM shall include only persons who are members in good standing of the FLSSAR, and who are listed in at least one of the following categories:

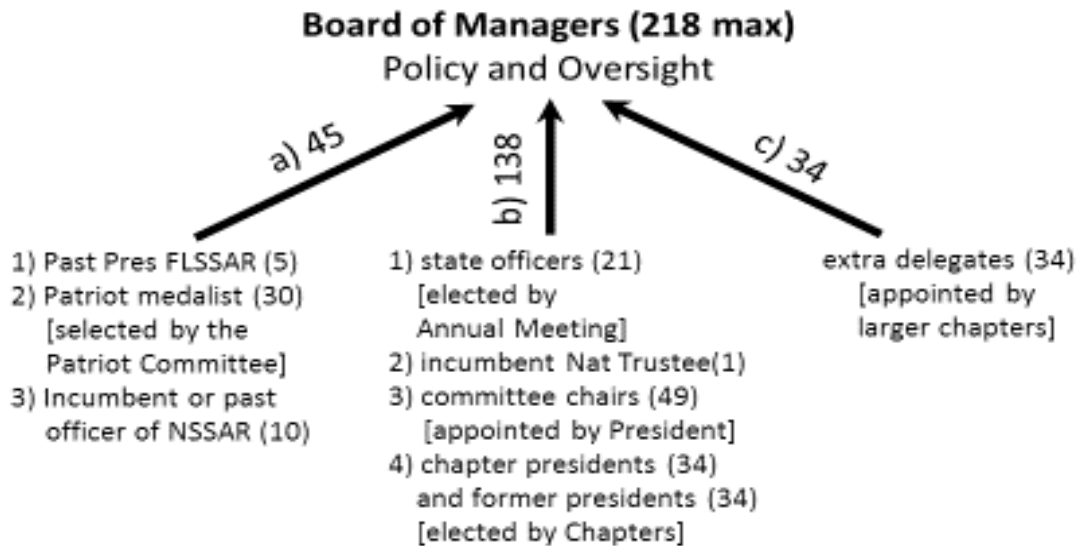
- a. Persons who are lifetime members of the BOM by virtue of being a past President of the FLSSAR, a recipient of the Patriot Medal, or an incumbent or past elected officer of the NSSAR;
- b. Persons who are members of the BOM by virtue of being, and while being, an elected officer of the FLSSAR; appointed incumbent FLSSAR Committee Chairman; an incumbent National Trustee from Florida; an incumbent Chapter President; and the most recent Past President of a chapter, i.e., the person who preceded an incumbent Chapter President in office; if a chapter has no recent Past President it shall name another of its members to serve on the BOM;
- c. Persons who have been appointed by chapters having more than forty members on the basis of one additional member of the BOM for each forty chapter members or fraction thereof more than the first forty, the term of office of such additional members of the BOM to be coterminous with that of the Chapter President incumbent at the time of their appointment to the BOM. A member of the BOM who is unable to attend a meeting may name, in writing, another member of the FLSSAR to attend and act in his stead; provided, however, that no person may have more than one vote.
- d. Members of the FLSSAR who are not members of the BOM may attend and participate in debate but may not vote. Visiting dignitaries, especially those from other State Societies or from the National Society, may attend and may be invited to address the meeting but may not participate in debate or vote.

The BOM Has the Following Powers and Duties

- a. Exercise management and control over the affairs of the FLSSAR;
- b. Create and staff additional offices and committees as needed;
- c. Approve, and authorize adjustments in, the FLSSAR budget;
- d. Admit new chapters;
- e. Fix fees from applicants, dues from members, and raise funds by other means to meet the financial needs of the FLSSAR;
- f. Fill vacancies which may occur in any office, to serve until the next Annual Meeting of the FLSSAR except as otherwise provided in ARTICLE IV, Section 2, of these bylaws; Revision May 2, 2015 Page 14
- g. Sign contracts for the purchase of services and materials, and to establish policies and procedures regarding reimbursement for expenses incurred in carrying on the business of the FLSSAR; and
- h. Adopt and enforce rules and procedures which shall not be inconsistent with the Articles of Incorporation of the FLSSAR, these bylaws, or the Constitution and Bylaws of the NSSAR.
- i. Meetings: The BOM shall hold at least two regular meetings in the one year time period commencing at the end of the Annual Meeting.
- j. One meeting will occur on the day before the date fixed for the opening of the Annual Meeting of the State Society, to be known as the Spring Meeting. The number of, and dates for, additional meetings to be held in the subsequent one year time period will be determined by the BOM at the meeting held closest to November 1.
- k. A meeting may also be held immediately after the adjournment of the Annual Meeting if so announced by the President-elect. Notice of all meetings of the BOM, except that which may follow the Annual Meeting, shall be communicated to all members of the BOM at least 30 days prior the date set for such meeting

Attendance at the BOM meeting is typically 25% or less of the managers, and it has been dominated by elected officers and senior committee chairs.

The chart below illustrates BOM relationships.



The numbers of Managers are maximums because many members are eligible in several categories, but they must choose only one category when registering for a Board meeting.

FLSSAR Committees

Ralph D. Nelson, Jr.

No state officer can work on all the tasks required to operate an SAR state-wide society, so committees have been formed to utilize the resources of many members, and to focus on specific aspects of governance, recruiting, education, service, and outreach.

A **statutory** committee has functions and powers stated in the Bylaws. A **standing** committee is established and empowered by action of the Board of Management to perform functions as specified in their charters. A **special or ad hoc** committee is established and empowered by action of the President or of the Board of Management to perform specific tasks; it ceases to exist when the task has been complete, its report is accepted, and the committee is dissolved.

Below is the list of the 49 committees that do the work of the FLSSAR. While the total of committee members is 271 many board members serve on several committees (some serve on as many as eight). It is inconvenient to have full-committee in-person meetings. There is not enough time in a weekend Board meeting or Annual meeting to schedule 49 committee meetings, so most committees conduct their business entirely by Email and/or by phone.

There are many benefits from committee work:

- administer our finances, policies, and meetings
- increase membership or number of chapters
- coordinate and complement chapter committees and national committees -- typically in the youth contests, public service awards, color guard, and veteran's committees)
- administer internal (to SAR members) awards,
- provide internal and/or external photo-reports and publicity
- coordinate our efforts with parallel organizations (to maintain goodwill and to attract new members).

We do not currently have committees to raise funds, to train officers, to monitor legislative activity, to advocate for desired public policies, or to influence the state curriculum in history or civics.

Most state-active members participate in chapter committees, and some are active on national committees. Coordination between state committees and national committees with similar charters is weak except for the youth contests and Veterans recognition. In contrast the DAR has many program tasks (specified by the national committees) which the same-name state and chapter committees are expected to implement. Involvement with a national project gives chapter members a stake in and pride at the outcome of national programs.

Type	Committee Name	Number of members
Statutory		
	Audit	5
	Ethics	7
	Executive	6
	Finance	5
	Medals and Awards	6
	Nominating	5
	Patriot Medal	6
NSSAR Affairs		
	Advancing America's Heritage	5
	NSSAR Library	5
Internal Affairs		
	Archives	4
	Chapter Challenge & Americanism	4
	Documents	5
	Florida Sons of Liberty Florida Brigade	5
	Genealogy	5
	Long Range Planning	1
	Meeting Arrangements - BOM	6
	Membership Promotion & Retention	7
	New Chapter Development	5
	Newsletters and Periodicals	8
	Strategic Planning (ad hoc)	26
	Technology Advisory	5
Liaisons		
	DAR	5
	FLSSAR CAR & SAR Junior Members Aide	4
	Ladies Auxiliary of FLSSAR	3
Historic Sites		
	Battle of Pensacola	5
	Battle of Thomas Creek	5
	Commemorative Historic Sites	7
	Last Naval Battle	5

Liberty Tree	5
Youth Programs	
Americanism Elementary Brochure	6
Americanism Elementary Poster	7
Eagle Scout Scholarship	7
George S. & Stella Knight Essay	3
Good Citizenship	4
History Fairs	4
Joseph P. Rumbaugh Orations	6
JROTC/ROTC	6
Community Outreach	
American History Teacher Award	6
Habitat For Humanity	4
Operation Ancestor Search	5
Patriotic Activities	5
Public Service and Heroism Awards	5
Publicity	6
Support the Troops	5
Veterans Recognition	6
Veterans Affairs	9
Trust Funds	
Endowment Trust Fund Disbursements	6
Florida SAR Endowment Trust Fund	0
Florida SAR Operating Budget Trust Fund	1
TOTAL	271

FLSSAR And Its Chapters

Charles R. Butler

Any lineage organization is only as strong as its component chapters, so the Society has a vested interest in their success. Reciprocally, the success of each chapter is dependent in great part on the support and resources available through the State Society, so the two organizations should work collaboratively rather than independently.



Chapters should be developmental leadership academies for the State Society, and the State Society should be a graduate school for leadership participation in the National Society. Being a Chapter Officer should be an aspiration, and a pathway to higher achievement at the State Society level, not an anxiety producing, dreaded chore. Since chapters are led by volunteer officers, it is vital that all necessary administrative information, tools, and resources are easily accessible, easy to be used, and helpful.

For most FLSSAR Compatriots, the Chapter constitutes the entire SAR experience. It is our belief they have little understanding of, or interest in, the state society. Chapters expend usually little effort to promote the FLSSAR as a state level senior tier of achievement for Compatriots, and it is unclear if the FLSSAR even is a senior tier. Outreach by the FLSSAR has historically been inconsistent, and limited to officer level interactions, which may or may not be effectively communicated down through the Chapters.

In earlier years, this dynamic appeared to be an adequate arrangement due to distance and a slower societal pace in general; however, today it produces a stilted relationship between the two entities, miscommunications, misunderstandings, and in some instances, active distrust of the State Society, none of which is helpful.

Legally, chapters are subsets of the State Society; however, to many members, the relationship between the FLSSAR and its member chapters is unclear and sometimes paradoxical. Seemingly, the two function as wholly independent entities, resulting in chapters submitting only elemental reporting information to the State, and the State exercising little if any influence over chapter activities. The State Society has a long-standing practice of *laissez faire* toward its member chapters, mandating no chapter level activities other than the minimum required meetings, reports, and state society financial contributions.



It is apparent a need exists for improved organizational alignment, communication, and interaction, which would result in better understanding of which organizations do what, and how the organizations can relate to each other constructively. In turn, this fosters an environment of familiarity, fraternity, achievement, and natural progression which for many Compatriots, does not exist at this time.

The FLSSAR Organizational Culture

Charles R. Butler

Within our state, there are two distinct organizational cultures that sometimes interface well, and at other times clash, creating dysfunctional suspicion and negativity.

Overall, there are three distinct SAR organizational levels: The National Society (NSSAR), the State Society (FLSSAR), and the local Chapters. This report focuses on the Florida Society, and its affiliated chapters.

An absence of emphasis on fraternalism has been identified during our fact-finding process as one of serious concern by more than a few Compatriots, and has been one that reportedly creates unnecessary conflict, impairs organizational effectiveness, and negatively impacts retention. The Society is a voluntary, member-supported organization. Its corporate culture is a major component of member perception of value. As a voluntary, member-supported, fraternal organization, the FLSSAR needs to have a supporting and enabling culture, and ethos. As demonstrated by our drop rate, members can and do walk away from this organization. The FLSSAR can never expect to achieve its maximum potential if Compatriots do not feel valued or respected by others.

As background, the most critical aspect of any voluntary organization's viability is its institutional culture. Its essence defines the internal and external persona of the organization, and creates a common bonding denominator for all members. The FLSSAR reveres our military. That said, in general, the military culture is perceived as hierarchical and authoritarian. These traits do not translate well into a voluntary, dues-supported Society. If new members do not feel welcome or valued, or cannot readily assimilate, then ongoing participation and subsequent retention do not occur, resources diminish and the organization ultimately fails to achieve the critical mass necessary to fulfil its founding purposes.

While the fundamental dynamics of organizational culture are universal, they are particularly salient for the FLSSAR because unlike other large fraternal organizations, its founding ethos is predicated on the inherent fraternalism of American patriotism.

Simply stated, the FLSSAR is a voluntary organization. Its direct member benefit consists of two elements: *fraternalism and patriotism*.

To be a thriving, a successful organization, the Society must deliver consistently both elements to its paying membership. Member reports and comments indicate the FLSSAR has substantial room for improvement in these areas.



The Planning Committee did not conduct a formal survey of former FLSSAR members. Nevertheless, anecdotal reports from active Compatriots, state officers, chapter officers, and some non-renewing members suggest that the SAR's organizational culture is not intrinsically welcoming to new Compatriots. According to a number of individuals, it is often not welcoming to *existing* members. Often the FLSSAR is perceived as hierarchical, cliquish, territorial, condescending, and sometimes hostile to simple inquiries or questions, or requests for assistance. Members also say they perceive the FLSSAR as unnecessarily complex, confusing, legalistic, unfocused, resistant to change, and lacking adequate funding at the chapter level to engage in meaningful community activities.

With respect to the FLSSAR, it is the Committee's conclusion that the Florida Society's antiquated information technology infrastructure and data collection processes are also inhibiting its efficiency and efficacy. This contributes to a general perception (internally and externally) that the FLSSAR is disorganized, unfocused, and anachronistic. Modern, user friendly systems are essential for the Society to operate efficiently in today's environment, and planning for their acquisition and implementation should be a top Action Priority.

Activities and areas of interest served by the Society are numerous, and there is no inherent reason that a Compatriot should not remain a part of the Society for his entire life, regardless of his ability to attend meetings or participate in projects. Unfortunately, the antiquated structure of our organization does not adequately address this factor, and consequently, instead of choosing long term membership in the Florida Society SAR, over the past 15 years, most of our new recruits, and many long-term members

eventually choose to spend their time and money in other pursuits rather than renew their membership. Data presented in this report supports this conclusion.

At the National and State levels, our organization is unique. It has all the inherent attributes necessary to be a thriving lineage organization. In fact, it has all the attributes to be the most successful and most renowned such organization in the country.

Although questions concerning the NSSAR were not asked, many Compatriots volunteered comments which are generally summarized as follows: Compatriots cite various issues of concern with the NSSAR, including what appears to be millions of dollars on various projects that seem to be of localized benefit to Louisville, and a waste of limited member resources. Members do not perceive the National Society does much magazine to help strengthen the Chapters, or even the State Society beyond publishing an excellent magazine.

One recurring member comment theme is the urgent need for a strong National online web presence, state of the art electronic genealogy and research capabilities rather than a costly library, or light show program in a distant city. Chapter Registrars and genealogy volunteers who are trying to recruit and retain members say they do not have the depth of National resource support they need, especially in electronic research venues, and feel the National Society focuses on its own interests rather than helping its chapters grow.

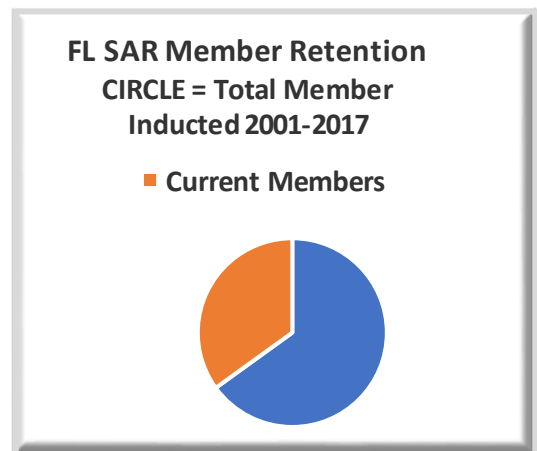
The FLSSAR Membership Trend

Charles R. Butler

The issue of member retention is of vital importance to our Society, and is a frequent topic of discussion among FLSSAR members, and was stated as a concern to the Planning Committee. It is likely the most misunderstood issue as well.

Member Retention cannot be considered as a stand-alone item; it is a *result*, an *outcome* of member satisfaction over time. Mentoring and orientation are excellent tactics, but the *only effective* strategy to enhance FLSSAR retention is to make the *overall member experience* one that encourages retention.

The accompanying graph displays the FLSSAR's 16 Year Member Retention Factor. At a glance, this chart would be relatively unremarkable. However, a deeper analysis suggests that since 2001, 65% of FLSSAR applicants accepted *during that period* are no longer with the organization. To be conclusive, this factor must be adjusted for a variety of demographic elements, but a fair implication would be the FLSSAR needs to provide additional opportunities for member satisfaction.



The chart below shows our 10-year growth trend using reconciled figures for prior years. (The committee was instructed to use National's certified numbers. The 2017 number represents only the number of FLSSAR members who paid dues as of January 1, 2017.)



Referencing the preceding graph, the question arises, “Why, since 2007, has the Florida Society experienced a net increase only of about 570 members, or 57 Compatriots per year over a ten-year period, when we are the SAR’s fastest growing Society in terms of new applications?”

The short answer is “**Retention.**” The most accurate answer, however, is significantly broader, and is rooted in virtually every aspect of the Society.

Concisely stated, *times have changed, and the FLSSAR has not.* As a result, our Society’s market population has essentially evolved away from the type of Member Experience we provide. Improving the newsletter, or having better speakers are simplistic, tactical responses; the correct strategy is to address the core issues, all of which stem from the need to modernize our Society so it can function effectively in a world that could not have been imagined by our predecessors in the era of buggy whips and gas lights. This section of the Report addresses the various component aspects of this issue.

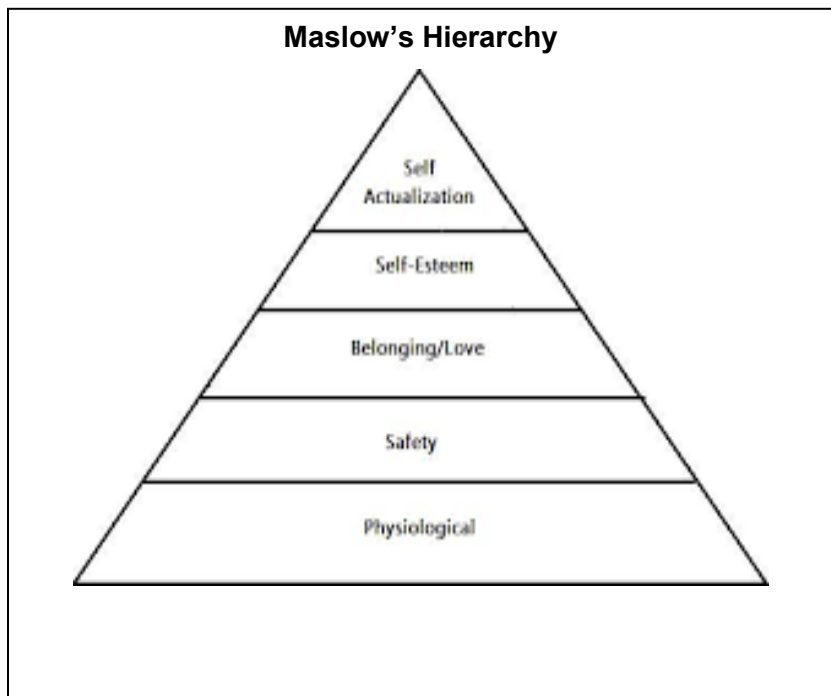
Industrial and Social Psychologist Abraham Maslow likely would assess the FLSSAR as follows:

The FLSSAR is **not structured** such that most Compatriots can consistently achieve the top three levels of *The Hierarchy of Human Needs*:

- Self-actualization (Level 5)
- Esteem (Level 4)
- Belonging / Social (Level 3)

For reference and context, we have included a summary of Maslow’s Hierarchy on the following page.

Maslow's Hierarchy of Needs is a theory in psychology proposed by Abraham Maslow in his 1943 paper "A Theory of Human Motivation" in Psychological Review.



In his Hierarchy, Maslow used the terms below to describe the emotional and psychological evolution through which humans move during their lives:

Highest to Most Basic

- Level 5:** *Self-actualization & self-transcendence*
- Level 4:** *Self-esteem*
- Level 3:** *Belonging & love*
- Level 2:** *Physical safety*
- Level 1:** *Physiological (food and water)*

FLSSAR Compatriots have almost universally achieved

Maslow's levels 1 and 2; through their memberships, they are seeking levels 3-5. Some Compatriots do achieve levels 3-5 in the FLSSAR, and their chapter level experiences, statistics indicate most do not and choose not to renew their membership.

To be an attractive, successful organization, it is incumbent upon the FLSSAR and its member chapters to structure the Society such that all Compatriots are not only welcome, but *feel* welcome (belonging), enjoy their SAR experience, build their sense of accomplishment (self-esteem), and ultimately move to the psychological realization that they have made a lasting and significant contribution to the organization, and to their fellow man (self-actualization and self-transcendence).

FLSSAR Membership Cost / Value Assessment

Ralph D. Nelson, Jr. & Charles R. Butler

The Strategic Planning question addressed is whether financial cost is an impediment to Florida Society SAR member recruitment and retention.

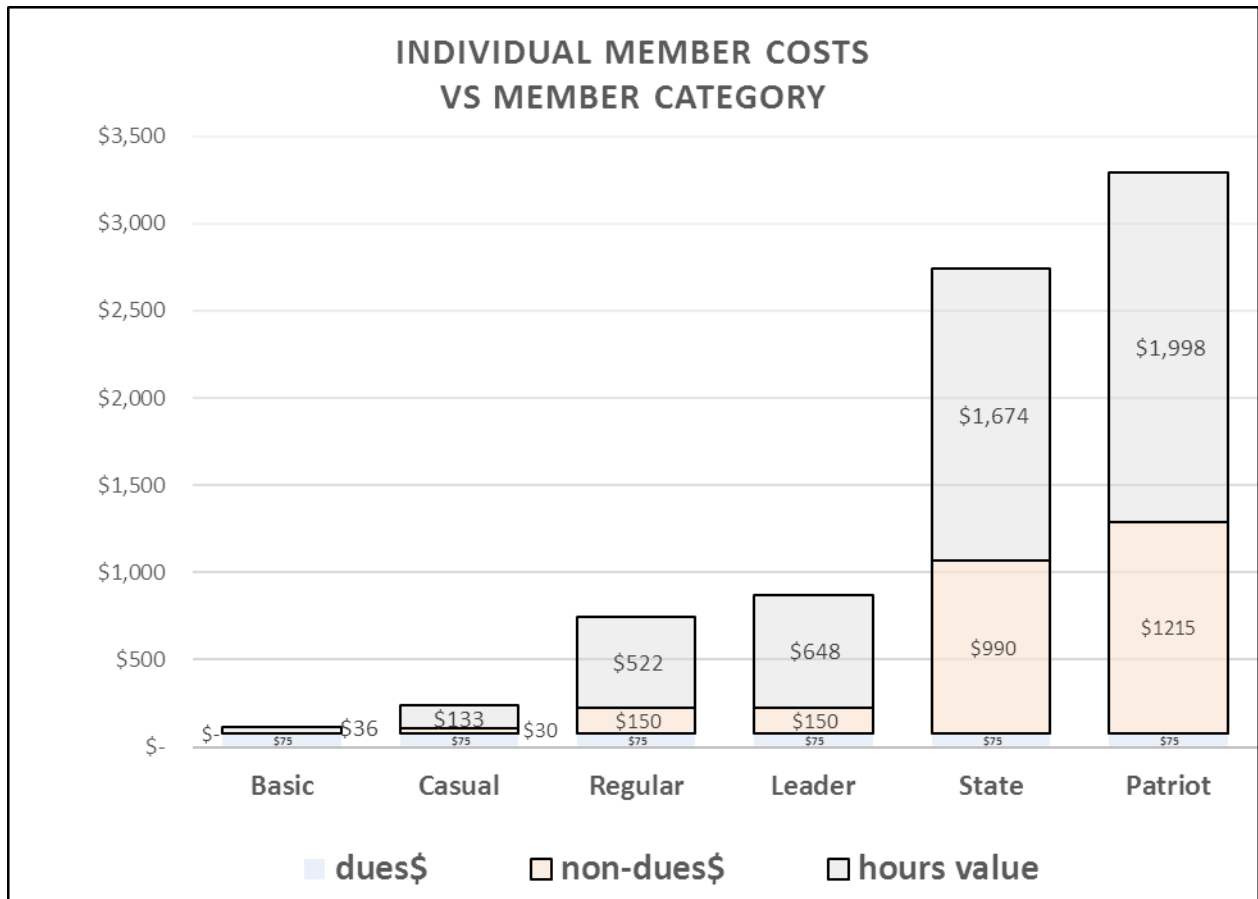
Cost is logically a primary point of analysis for any membership organization. Application related expenses are the initial barrier to entry, and routine chapter costs can be a deterrent to potential membership growth through retention. Cost also serves as a *de facto* filter, deterring certain financially stressed males who may be technically qualified from seeking membership. This is an issue that should be explored by the Strategic Planning Committee at a future time.

It is also important to assess the average cost and *cost equivalent* for key member categories. When viewed as a total investment into the FLSSAR, the criticality of a high-quality Member/Value Experience becomes even more poignant. As shown below, for a Regular FLSSAR member, not in a leadership role, the annual total cost equivalent is \$747, **not** just the \$65 or \$70 for annual dues alone.

Member Investment Value

The following graphic shows the costs that each member in a particular category invests – and is willing to invest – to be a member of that category and thus receive the benefits / satisfaction of being a member in that category with that level of participation.

On the left, the Basic Member invests, on average \$75 in dues, and \$36 in non-dues time value. On the right, a Patriot Member invests \$75 in dues, \$1,215 in Non-dues costs, and \$1,998 in Time Value in service to the Society. Although individual numbers may be difficult to read, the general categories are evident, and demonstrate the need for the Society to ensure Members derive value from their participation in the organization.



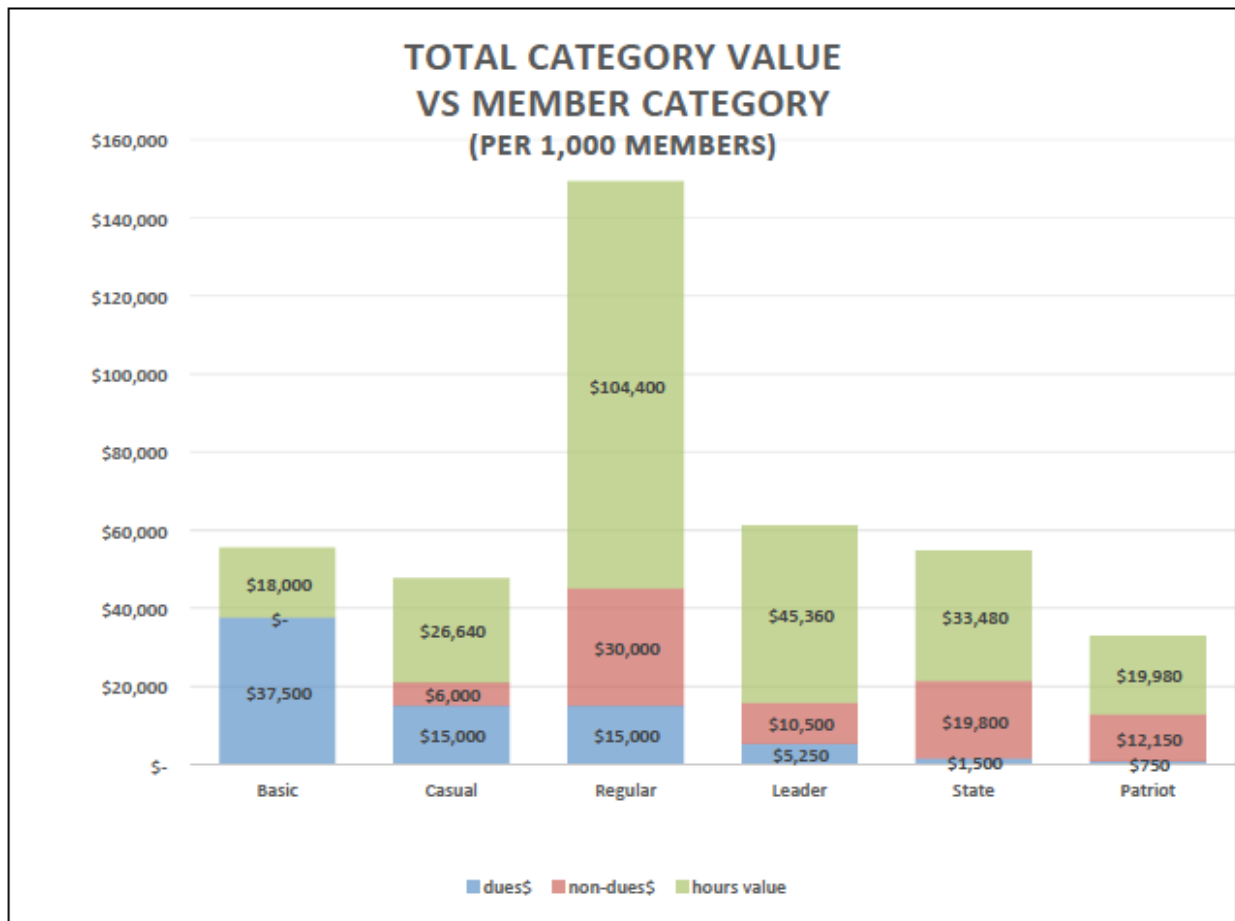
Definitions

- Basic members do not attend meetings but send some time reading SAR publications.
- Casual members (beyond Basic) attend two chapter meetings a year.
- Regular members (beyond Casual) attend all chapter meetings each year.
- Leader members (beyond Regular) attend several non-chapter activities each year.
- State members (beyond Leader) attend three state meetings per year and read the NSSAR website.
- Patriot members (beyond State) attend two non-meeting events.
- None of this includes the between-meeting preparation time for offices and committees.

Member Contribution Value

While a Basic member contributes little to the budget as an individual there are many more Basic members than Leaders. The chart of contributions for each entire category is illustrated in the chart below. This, which is based on society of 1,000 members, 500 of whom are Basic, 200 Casual, 200 Regular, 70 Leader, 20 State, and 10 Patriot.

The Basic member category supports a larger fraction of the FLSSAR budget than does the Leader category, while the Regular member category spends has a larger impact on total member learning about the SAR and RW history (through meetings and reading the SAR Magazine) and attending events than do Leader, State, and Patriot categories combined. Thus, each category should be respected for the value it brings to the organization.



Exploring the Cost to Value Assessment

Assessing the *willingness* of **potential** Florida Society members, and **existing** members to pay the actual cost of membership is a three-part question: "1) Can the prospect afford the application fee? 2) Can the member afford the annual dues? 3) Is renewal of membership worth the anticipated investment of personal time?"

These factors are further assessed below

Category 1: Initial Member Cost is the expense associated with research, preparation of an application, and any other required up-front costs. The Planning question is: Is this category a deterrent to membership growth? Considering the high interest level in the Florida Society and the volume of submitted applications, it would be reasonable to conclude that *Initial Member Cost* is not a significant factor or barrier to entry into the organization.

Category 2: Ongoing Member Cost includes incidental and associated expenses such as meals, event costs, travel, publications, donations, medals, and ribbons, State Society and National Society meetings, and other related expenses.

Based on the volume of applications, and the three-year average member tenure, logic suggests the initial application fee usually serves as an effective dissuader to those who are economically unqualified for membership, so from a narrowly focused perspective, Ongoing Member Cost is like not a major issue affecting retention.

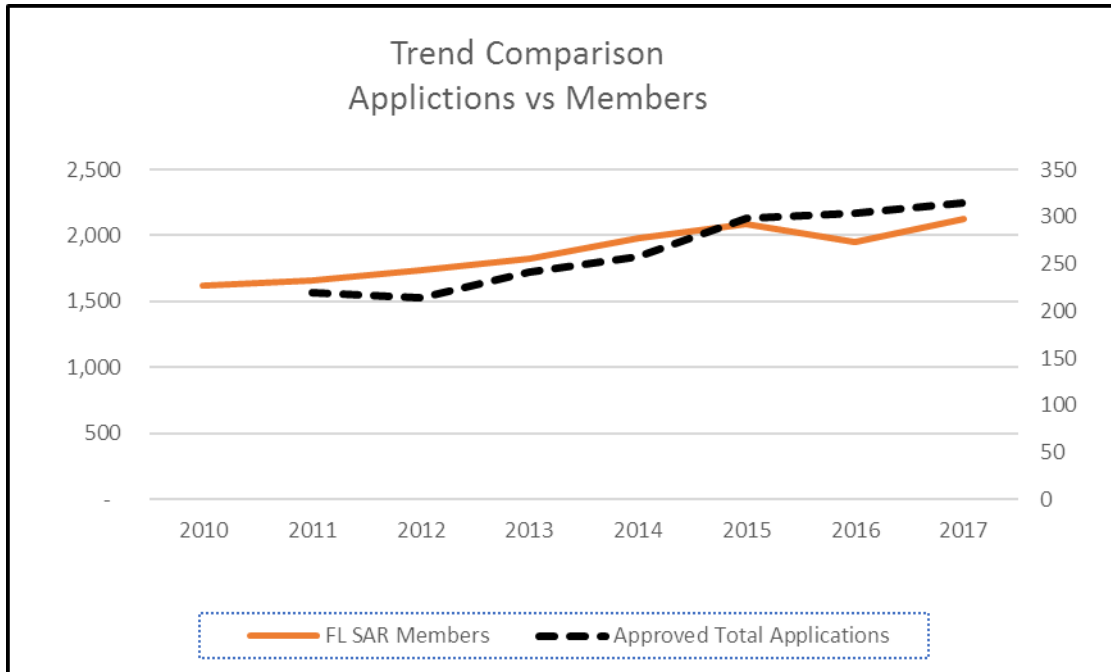
Category 3: Perceived Value for Cost is a *subjective judgement made by the member* assessing Value for Cost: "*Was my entire FLSSAR experience worth my time and money?*"

Consumers attend movies, ball games, parties, concerts, restaurants, and many other activities, and form a judgment as to their relative time and cost value. Membership in the FLSSAR is no different. When purchasers are satisfied with the product or service received, they remain loyal. If not, they choose other options. Interestingly, there appears to be no specific time horizon for determining Value for Cost. A long-time member who fails to find personal value in his membership can resign as easily as a first-year recruit. The assessment process is individual, and highly personal.

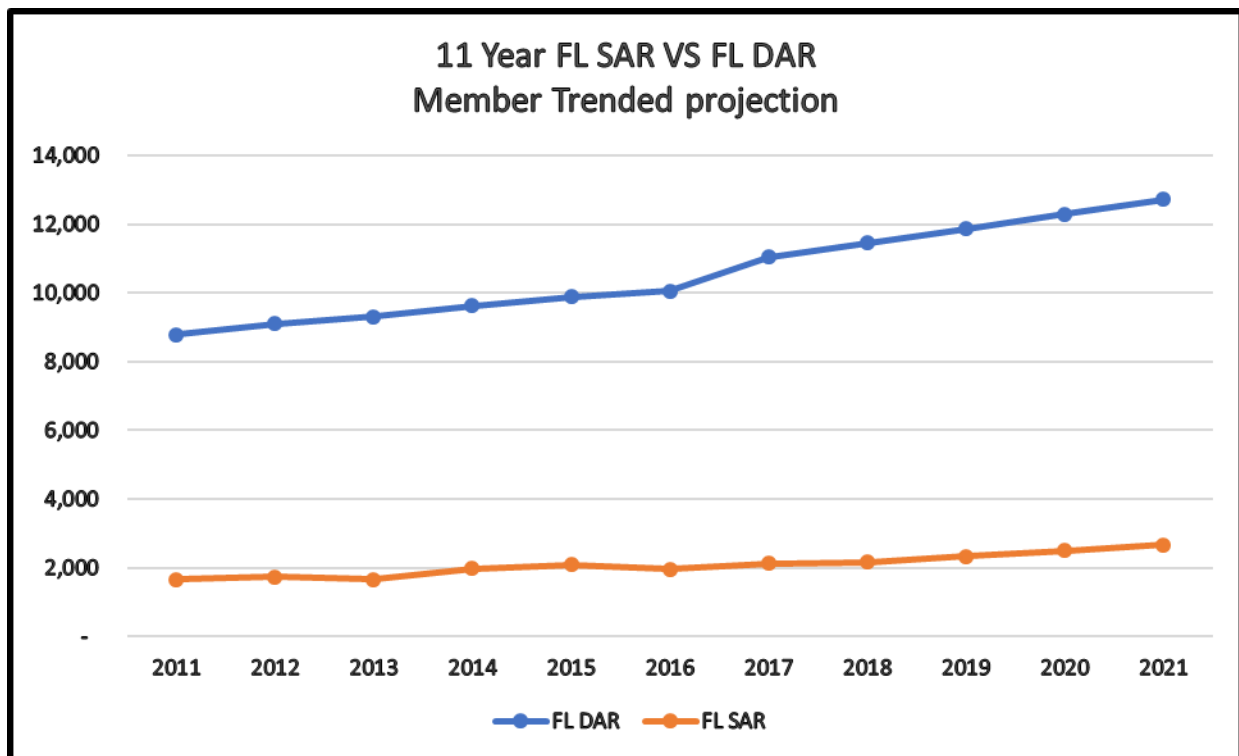
Based on the number of FLSSAR eligible males residing in Florida, as suggested by our models, the Florida Society SAR membership can, under **optimal conditions**, expect to achieve an *eventual sustained enrollment* of at least *two to three times greater* than our current net adjusted number of **2,126**. As indicated by the graph on the following page, the logical conclusion is the issue of "member retention" is negatively affecting net membership.

As shown on the first graph on the following page, although the Florida Application trend is growing, *Net Current FLSSAR membership* does not appear to be increasing at corresponding rates. (Trend lines should be generally parallel over time)

The second graph shows the **historic** net member trend for the FLSSAR and the FLSDAR from 2011-2017, and the **projected** net membership trend from 2017 to 2021. This graphic demonstrates the ability of a relatively similar lineage society in our state to effect positive membership increases through strategic planning, and providing a strong, Direct Member Experience.



Data Source: FLSSAR Secretary Database. Numbers shown for 2017 are reported dues paying members, unadjusted. The National certified count for 2016 was not available at the time of publishing, so the numbers shown for that year are reported FLSSAR dues paying members per the State Secretary database. No significant variance is expected.



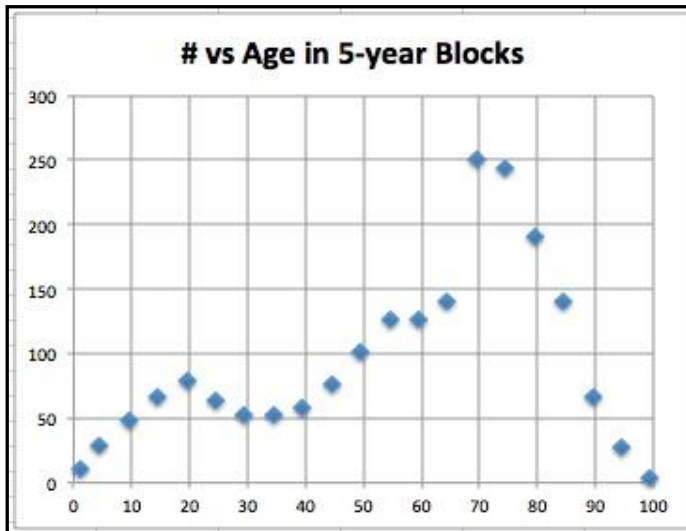
Data Sources: FLSSAR Secretary Database. Numbers shown for 2017 are reported dues paying members, unadjusted. The National certified count for 2016 was not available at the time of publishing, so the numbers shown for that year are reported FLSSAR dues paying members per the State Secretary database. No significant variance is expected. FLSDAR: Member Supplement Reports, additional data provided by DAR at the request of the Committee.

Analysis and Profile of FLSSAR Members

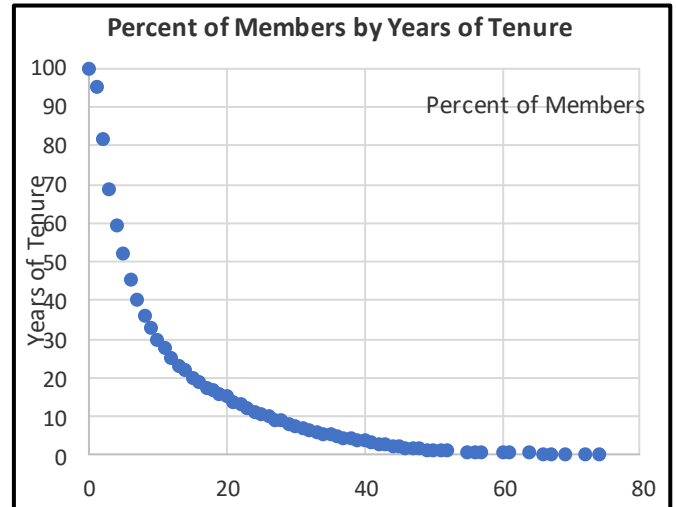
Ralph D. Nelson, Jr.

The following set of analytical graphics illustrate various key perspectives of our Society's membership profile: Age Distribution by Five Year Blocks; Percent of Members by Length of Membership; (on following page): Age Category by Percent of Society Total Membership.

Age Distribution of FLSSAR Membership

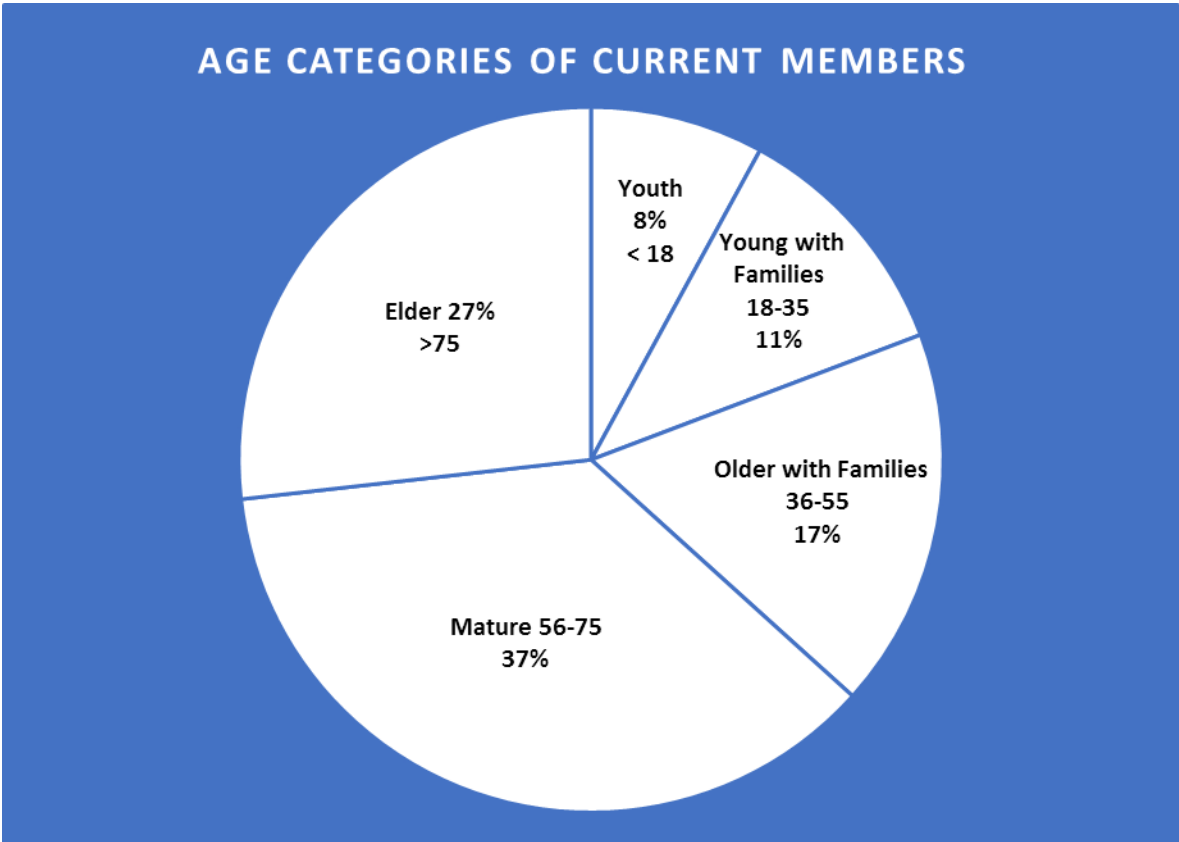


Percent of Members by Years Tenure



Age Distribution Pie Chart

The age distribution graphs on the preceding page, and pie chart below indicate that the Society needs to modernize so as to attract and retain younger members.

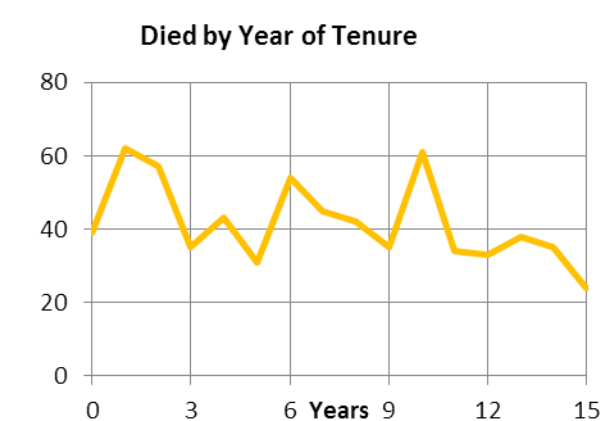
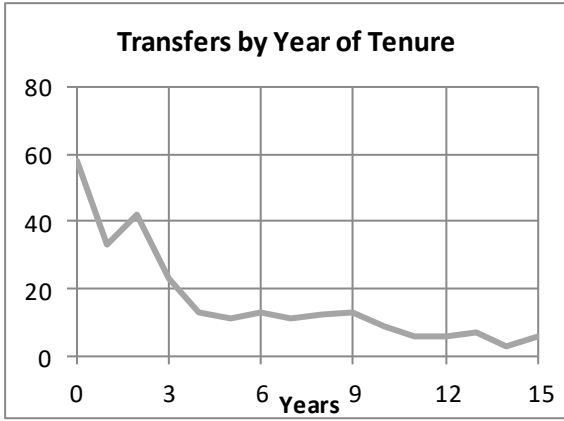
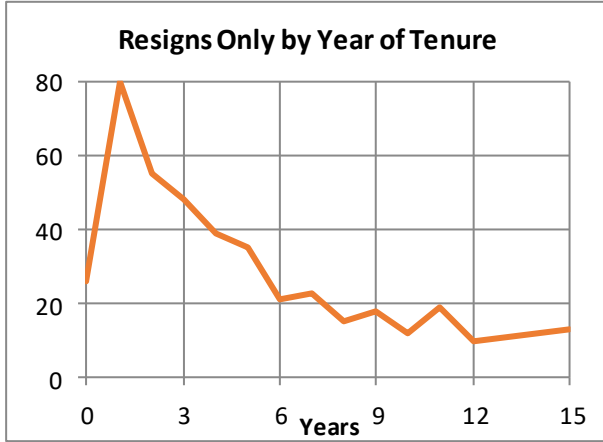
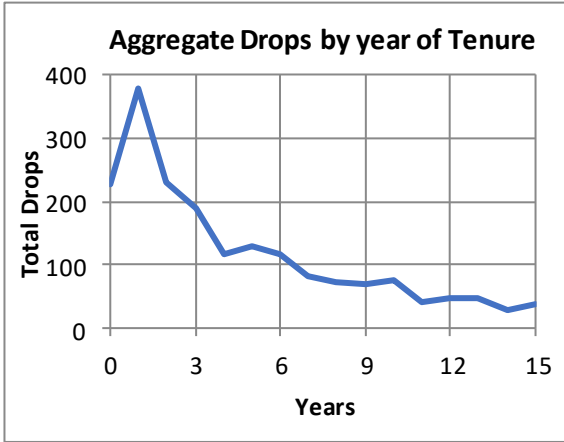


Why do FLSSAR Members Drop?

Ralph D. Nelson, Jr.

The graph set below is important, quite revealing as a diagnostic tool, and demonstrates that retention is the major factor behind the inability of the Society to significantly grow its member base. The graphs are based on all FLSSAR members who have been active in at least one year from 1965 through 2016 (7,484) minus 3,129 members whose records are incomplete (more common for the earlier years), leaving 4,355 records for analysis.

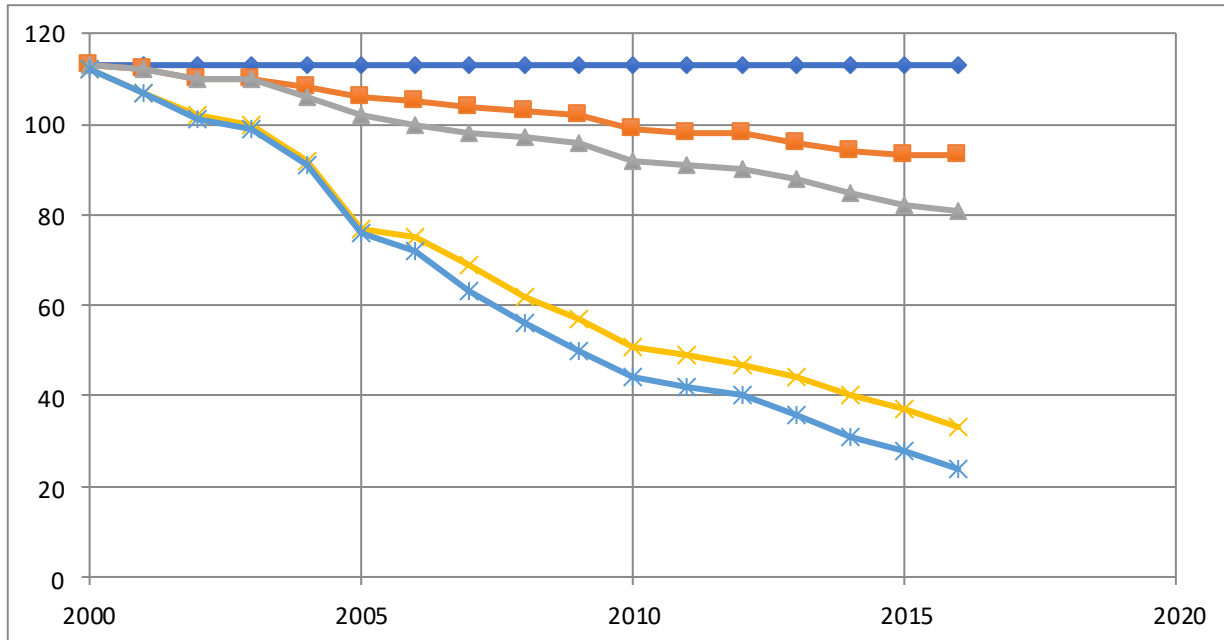
The first graph (left) shows the aggregate total member drop trend by year of tenure. The "Resign by Tenure" graph on the right shows the trend of Compatriots who drop their membership by average year of tenure. In first three years of their tenure 1,024 of these 4,355 members were dropped (23%) and 209 resigned (5%). This is strongly indicative of unsatisfactory Direct Member Experiences within the first three years. Since most members have little experience in State Society affairs, the logical conclusion is their chapter experiences were less than satisfactory.



Transfer by Year of Tenure graph shows the trend for Compatriots who transfer their memberships to other states. The Died by Year of Tenure is self-explanatory. Compared to the “Resigns Only” category, neither Transfer nor Mortality are significant (or controllable) factors in overall FSSAR retention.

Fate of the Membership Class of 2000

For interpretation of this series of graphs, refer to the line definitions beneath the chart.



- The bottom line (**light blue**) is $A\{yr\}$ = Renewing Members of Class of 2000
- The next line up (**yellow**) is $A\{yr\} + B\{yr\}$. = that plus members who transferred out (and thus continued to be SAR members)
- The next line up (**gray**) is $A\{yr\} + B\{yr\} + C\{yr\}$ = that plus members who dropped out (but might be encouraged to rejoin)
- The next line up (**orange**) is $A\{yr\} + B\{yr\} + C\{yr\} + D\{yr\}$ = that plus members who resigned (perhaps less likely to rejoin)
- The next line up (**dark blue**) is $A\{yr\} + B\{yr\} + C\{yr\} + D\{yr\} + E\{yr\}$ = that plus members who died (cannot rejoin)

Abbreviations Defined

$A\{yr\}$ = the number of members who joined the FLSSAR or any state in 2000 and were active members of the FLSSAR in 2001, 2002, ... 2016

$B\{yr\}$ = the sum of the number of members who transferred to another state up to 2001, 2002, ... 2016

$C\{yr\}$ = the sum of the number of members who dropped out (failed to pay dues) up to 2001, 2002, ... 2016

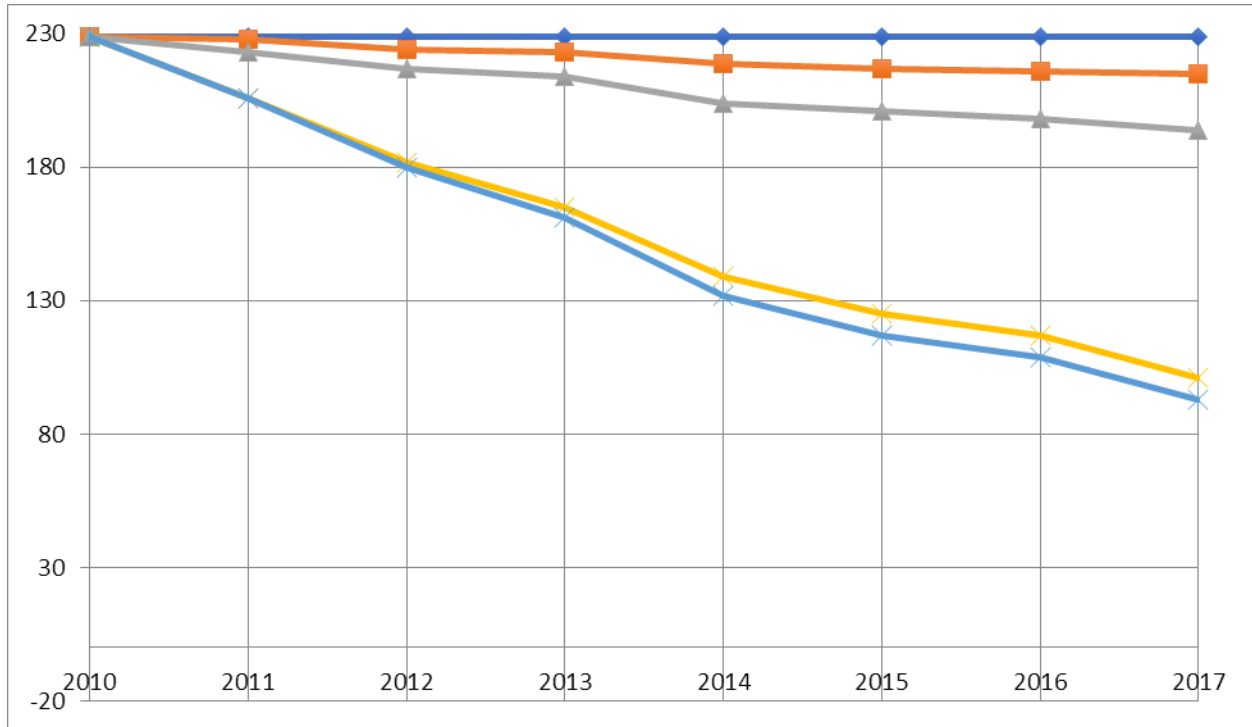
$D\{yr\}$ = the sum of the number of members who resigned up to 2001, 2002, ... 2016.

$E\{yr\}$ = the sum of the number of members who died up to 2001, 2002, ... 2016.

The chart above shows that the number of deaths is almost the same from one year to the next, and that the greatest number of drops was after four years of membership. It took eight years from the number of members of the class of 2000 to drop to half their original number. 10% of that loss was due to transfers out, 64% to drops, 18% to deaths, and 8% due to resignations.

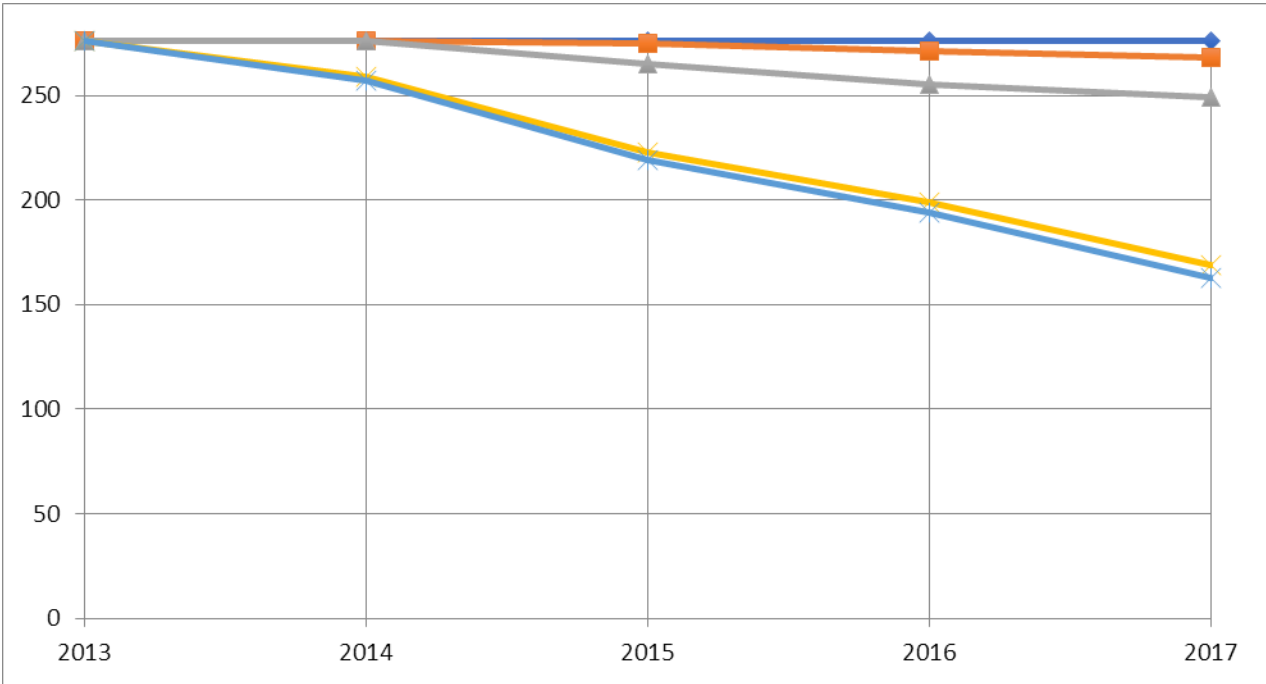
This analysis does not account for the many members who drop out due to bad finances or time pressure and later rejoin, since after they rejoin the state database lists them simply as members, with no notation about the lapsed period. The number of members in each category for any given year is the vertical distance between the lines that add in that category.

Fate of the Membership Class of 2010



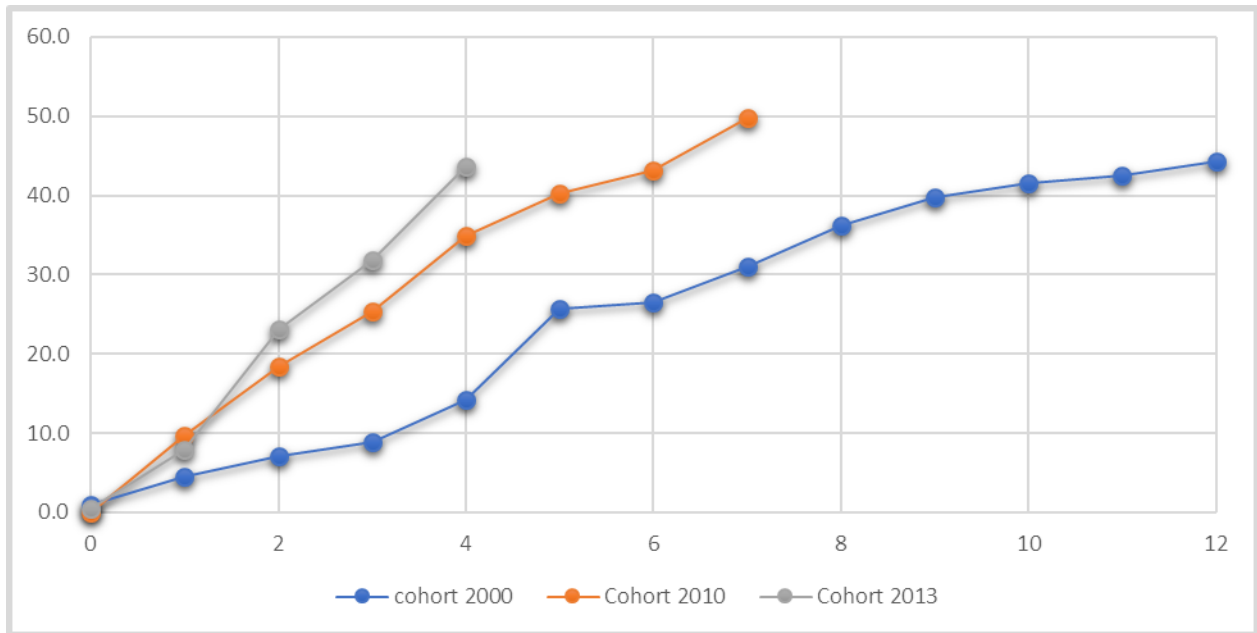
The colors and meanings of the lines here are the same as those for the graph on the preceding page. It took the Class of 2010 only five years to drop to half of its original number of members.

Fate of Class of 2013



The colors and meanings of the lines here are the same as those for the graph on the preceding page. It appears that the Class of 2013 will drop to half of its original number of members.

Drop Rate Trend Comparison Years 2000, 2010, 2013



Cumulative Percent Losses by Drops and Resignations (not Deaths and Transfers)

It may be that in recent years the newly-available Junior memberships for grandchildren, and consequent increased regular memberships for out-of-state sons may explain the higher drop rate in the initial years for 2010 and 2013 data.

Net Member Growth Directly Correlates to Member Retention

FLSSAR Member Retention: 10-year term retention rate is as follows:

2017 Membership: 2,126 (Based on FLSSAR dues paying members January 1)

2012 Membership: 1,742 (National Certified Numbers)

2007 Membership: 1,594 (National Certified Numbers)

2012 - FLSSAR Growth Rate 5 Year

5 Year percent growth: 22.04%

5 Year Av per year new members: 77

Average Yearly growth: **4.41%**

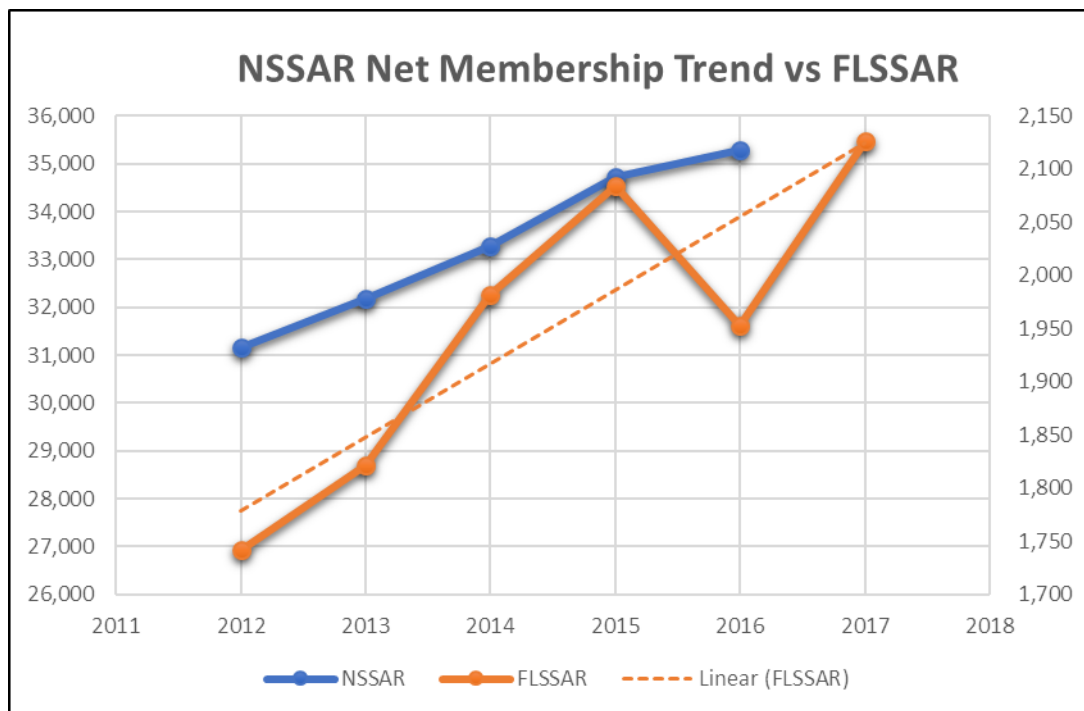
2007 - FLSSAR Growth Rate 10 Year

10 Year percent growth: 36.63%

10 Year Av per year new members: 57

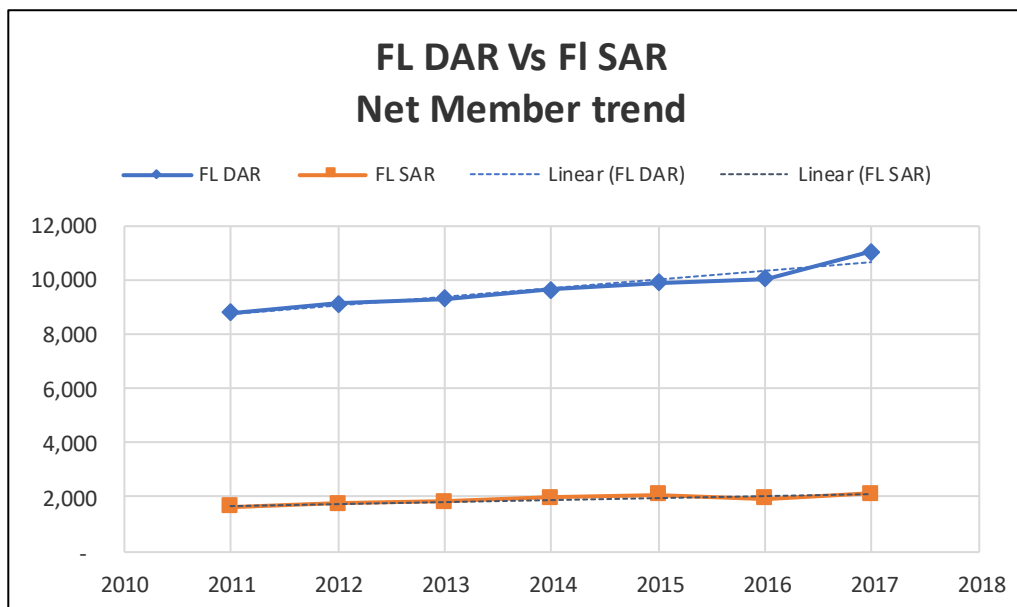
Average Yearly growth: 3.66%

The following graph demonstrates the FLSSAR net member growth trend compared to the **National Society** as a whole. The two trends are notably different. Since Florida is the fastest growing Society in terms of applications, and since the *net growth curve* of the FLSSAR is not as steep as the NSSAR, the apparent inference would be that the National Society as whole is retaining more members for a longer time per approved application the Florida Society. As noted earlier, this is primarily a *direct function of member experience*.



Data and chart notes: The data from NSSAR was provided by the National Registrar, but did not include 2017 since at the time of this report preparation, it was not certified. Since we had access to the number of paid dues FLSSAR members as of January 1, 2017, we used this number to present a more informative trend picture for our Society.

Although the FLSSAR and the FLORIDA DAR have intrinsic differences that limit comparability, one area of shared interest to the FLSSAR is member retention. The Florida DAR has recently initiated a strong internal emphasis on member retention by enhancing member experience. These efforts have been implemented statewide and produced results as indicated by the graph below. The conclusion for the SAR is that our Society’s member retention issue can be positively affected through appropriate planning, and focused, meaningful initiatives. (Source: Focus on Florida FSSDAR)



Sources: FLSDAR & FLSSAR Internal Data Reports

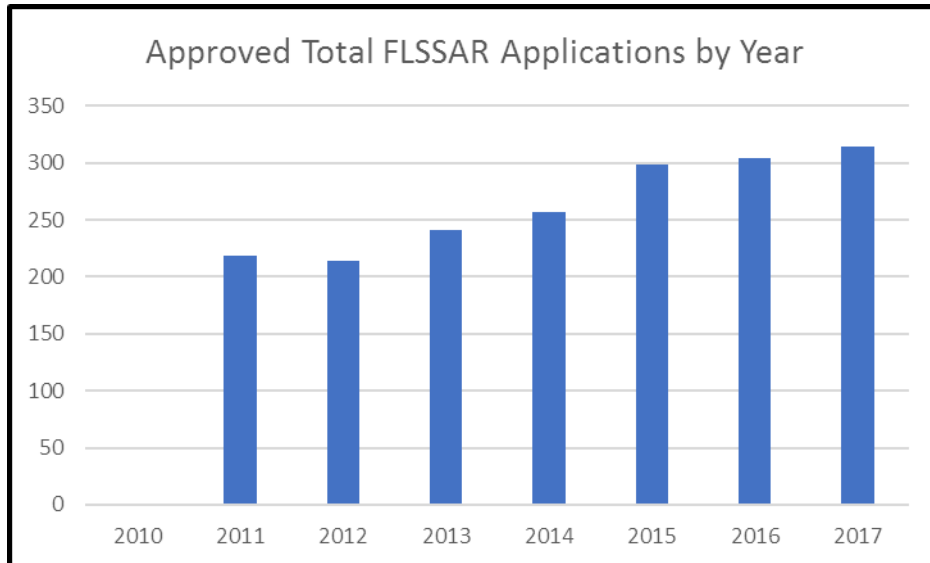
Assessing FLSSAR Future Membership Growth Potential

There are several models for projecting a potential membership range for the FLSSAR. Most would require significant consulting firm expenditure, and for our purposes, the eventual result would not differ significantly from this internal assessment using a simple deductive model.

The barriers to entry, and the inherent patriotic nature of the SAR make it unique compared to most other exclusively male organizations. Consequently, its membership potential cannot be correlated to them, nor can it be accurately correlated relative to the general population growth of the nation due to uncontrolled in-migration, and diminishing SAR qualified population birth rates. (Refer to American Birth Rates by Year, *Page 42* of this report.)

The Florida Society DAR is relatively comparable to our organization in certain basic categories such as service area, strict lineage qualification, patriotic purpose, membership acquisition, member retention, and general organizational functionality; however, other major structural factors mitigate comparability for purposes of assessing overall recruitment potential and net growth velocity.

The FLSSAR is fastest growing society in country in terms of **new member applications** received. Our seven-year application trend is shown on the chart on the following page.



The Committee believes It is important to note that over the prior 15 years, the Florida SAR has inducted 3,427 new members, but we have only increased our actual current, sustained net membership by about 500, equating to about 34 net members per year. To be perfectly accurate, this figure must be age adjusted and normalized to accommodate transfers and deaths, nevertheless, the underlying trend is clear, and addressed by the comments shown below:

Hall Riediger, FLSSAR Secretary

“We as a Society need to find a way to strengthen our retention. We lose about 200 members each year. We add 250 to 300 per year, so we do get a slow growth, but when I look at the membership numbers I see the last new Member’s number was 11,531. My number is 8,104; that means in the last 15 years we have processed 3,427 new members, but we have only increased our actual [net] membership by about 500.”

FLSSAR Member Input Survey

Why men join SAR, and other important perspectives: input from current members

A member survey was conducted to provide FLSSAR leadership with direct empirical input from current members. The steering committee consisted of: **Robert Folk, Charles R. Berger, and Ronald Toops, Chairman.** The committee worked diligently to retrieve, compile, and analyze results. They are summarized in the following section:

General Information: Total Approximate Sample Size: 48

- 1) Input from personal visits to local chapters, on-line and some individuals;
- 2) On-line participation about 40% (approx. 20)

Top Three Reasons for Joining SAR

1. Record Patriot: 77%
2. Chapter Historical Presentations: 79%
3. Socializing: 58%

Other Reported Reasons

- NSSAR Programs: Educational: 43%
- Participation on Committees: 40%
- Participation as Officer/Chairmen: 37%
- Honor & Prestige: 36%

We believe the reported results will be the same as found for the balance of the chapter members, with the Florida Society.

Member awareness of Benefits:

67% State that they are aware of the benefits of being a member of the NSSAR, FLSSAR and their local chapter

Note: If you look at the reasons for joining, i.e. Recording Patriot, Presentations & Socializing. The chapters that have so far responded are apparently doing a good job.

Awareness of FLSSAR & NSSAR Benefits

I would say that most members and officer could not list them. 33% of respondents state that they cannot identify the benefits.

Membership (in NSSAR, FLSSAR and chapters) meets Expectations:

About 70% Agree 30% Disagree

From this data, it is not clear if the members are speaking about the expectations at the chapter level, or NSSAR/FLSSAR, or all the above.

Member involvement with other organizations prior to FLSSAR

Being involved with the Military, Boy Scouts and being a History Buff dominates the results

Many are or have been "Club Officers"

The other categories identify trades, occupations, other "clubs" etc.

These results are probably more significant at the chapter level, and could assist the chapter executive committee and nomination committee in identifying candidates for various officer and program committee positions.

Awareness of listed NSSAR/FLSSAR Programs.

1. About 75% of the membership are not aware of the programs offered. Sixteen different ones were listed in the survey
2. Some chapters are more aware of "all of the programs" than others.
3. Some chapters are more aware of some selected programs than others. for example, Boy Scouts, JROTC, Flag Certificates, Veteran Awards.

4. Chapter Participation in programs depends on interest, knowledge of and availability of members to chair or be a committee member.

Ron Toops, Survey Committee Chairman

“Satisfaction with the ability of a chapter, and more importantly with the FLSSAR to meet expectations should be a priority.”

Final Comments and Conclusions

1. The importance of the NSSAR/FLSSAR programs needs to be communicated to the chapters and maybe objectives, priorities and measurements for success be defined
2. The FLSSAR should know how each chapter participates in all, in general and each of the individual programs. define the baseline performance, then set priorities and objectives for the future, knowing that the ability to participate changes each year for a given chapter.
3. Need to clearly identify the Benefits of being a member of all three entities:
Chapter, Florida Society and National Society.
4. It appears that many of the Chapters are meeting members' expectations.
Some probably are not.
5. It is interesting that there is only one candidate for the Oration Contest for 2017. This appears to be consistent with the low participation rate in most of our programs at the Florida Society level. I have had some members state they would participate if they knew what the program(s) were about.

CURRENT ACTIVITIES OF FLSSAR

FLSSAR Approved Community Outreach Programs

(Source: 2016 Annual Report)

- Habitat for Humanity -- not presently active
- Operation Ancestor Search: SAR members lead programs to help Wounded Warriors and their families strengthen bonds by learning more about their ancestry.
- Color Guard -- Members wearing Continental or other historical uniforms march, present flags, and escort dignitaries and awardees during meetings, parades, patriotic occasions, naturalization ceremonies, wreath laying, and at burials of SAR members.
- Patriotic Activities: Flag Awards
- Commemorations: lead organization at three historic sites.
- Florida Patriot Magazine: Official FLSSAR magazine
- FLSSAR Website: Official Website of the FLSSAR
- Various Collaborative Efforts: with affiliated organizations (DAR, CAR, Sons of Revolution)
- Lecture Presentation: program to be organized
- Support the Troops: not presently active

FLSSAR Award in Support of Education

Tom & Betty Lawrence American History Teacher Award

The National Society of the Sons of the American Revolution, whose mission and objectives are patriotic, historical, and educational, wish to identify, recognize, and commend Outstanding Social Studies Teachers.

These extraordinary educators at private, public, and parochial institutions, who teach our children in a middle or high school setting, are recognized for actively addressing the history of the American Revolutionary era.

The Tom & Betty Lawrence American History Teacher Award winner represents a teacher whose instruction on the Revolutionary War era from 1750 - 1800 demonstrates educational efforts in the classroom that exceed and excel above current, accepted, curriculum requirements.

Youth Focused Programs

(Source: BOM Fall Proceedings: 2016)

The SAR is a historical, educational, and patriotic organization that focuses on the American Revolution. As a part of our educational outreach, the SAR conducts several programs across the country. Some of our most active programs are focused on our future leaders, our children and those who are educators. Below you will find a list of the programs that the SAR operates:

Youth Contests: All are part of National Society contests except as noted

- | | |
|--|--|
| 1. Elementary school: Americanism Poster Contest | 5. High School: Knight Essay Contest |
| 2. Elementary school: Adams Brochure Contest | 6. Good Citizenship, middle school (not part of national listing any longer) |
| 3. High School: King Eagle Scout Contest | 7. High School: Rumbaugh Oration Contest |
| 4. High School: Florida History Fair (FLSSAR only) | 8. High School: JROTC Contest |
| | 9. C.A.R Activity |
| | 10. Youth Exchange |

1 & 2: Sgt. Moses Adams Elementary School: Americanism Poster and Brochure Contest

The National Society of the Sons of the American Revolution (SAR) invites all 3rd, 4th, and 5th grade students interested in the American Revolution to participate in the Americanism Elementary School Poster Contest. The contest is open to public school, parochial, home schooled, Scouting, or Children of the American Revolution member students in that same grade range.

Young artists with an enthusiasm toward art, a love of American history, or a passion in creative expression can submit their posters to their local SAR chapter for competition. While the Americanism Poster Contest begins at the local level, students' masterpieces may eventually be judged and monetarily awarded at the national level in June at the annual SAR Congress.

3. Arthur M. & Berdena King Eagle Scout Scholarship

Open to all Eagle Scouts who are currently registered in an active unit and have not reached their 19th birthday during the year of application. The year that Eagle was awarded is not restricted. Three cash scholarship awards are given: As the National First Place winner - \$8,000.00; Runner-up - \$4,000.00; 2nd runner-up - \$2,000.00. Prizes and recognitions may also be awarded at the SAR Chapter and State levels.

4. High School: Florida History Fair (FLSSAR only)

This is an approved program, but only a few chapters award students prizes in this element of the National History Day event.

5. The George S. & Stella M. Knight Essay Contest

The contest is designed to give high school students an opportunity to explore events that shaped American History. Contestants are in the freshman, sophomore, junior or senior grade of study during the contest year.

The George S. and Stella M. Knight Essay Contest was originally established and named in honor of President Calvin Coolidge, who won a local SAR essay contest while a student at Amherst. The contest was reestablished in 1988 by Compatriot McCarthy De Mere. In 1995, the contest was renamed the George S. and Stella M. Knight Essay Contest in honor of their generous gift to the SAR to support this contest.

Conducted at the Chapter, State Society and National Society levels, the students must submit an original essay with topics based on original research and deal with an event, person, philosophy or ideal associated with the American Revolution, Declaration of Independence, or the framing of the United States Constitution.

6. Good Citizenship Recognition

This program is approved at the State level, is relatively inactive, but is occasionally implemented at the chapter level around the state. This program recognizes the outstanding community contributions of non-members.

For example, The St. Petersburg Chapter has presented this award to an outstanding news broadcaster for work in the area of civic affairs, and to elementary school students who were designated as such by their civics teachers.

The award process is to contact the State Awards Committee for approval, order the award certificate and medal from the National Society, and present it at an appropriate ceremony so that public recognition is achieved for the recipient, and for the SAR. This is a general award category that can be used for a multitude of community award and recognition purposes.

7. The Joseph S. Rumbaugh Historical Oration Contest

The contest is designed to explore the influence of the Revolutionary war on present day America. Contest is open to all students attending home schools, public, parochial, or private high schools who are in their freshman, sophomore, junior or senior (grades 9 through 12) year of study.

There were two candidates who competed for the Oration Contest this year (and one other who was not able to schedule a trip to compete). There were three competing last year. The reason for the small number is that very few schools offer a public speaking course any more due to the pressure to have students pass exams in the basic subjects.

8. High School ROTC/JROTC Recognition Program

The SAR awards the ROTC Medal to foster the principle of the "citizen-soldier", exemplified by the Minutemen of Revolutionary War days. This award is presented by a Chapter, a State Society, or the National Society to ROTC or JROTC cadets who are selected for having a high degree of merit with respect to leadership qualities, military bearing, and general excellence.

9. C.A.R. Activity Award

The Florida Society supports C.A.R. Societies, and provides reimbursement support to those chapters that financially contribute to supporting a local C.A.R. Society. The St. Petersburg Chapter is one of the few Chapters to actively support two C.A.R. Societies, The James McMullen Society, and the Clear Water Harbor Society, financially, and through leadership service. Both Societies are successful having earned streamers, and the Clearwater Society has earned special distinction.



The National Society urges every SAR chapter and state-level society to have a C.A.R. Chairman or Liaison Officer who focuses support and encouragement on this very worthwhile youth organization. It is encouraged to award the SAR, DAR, and C.A.R. members who give their time and effort toward supporting the C.A.R. This recognition

can be given through the SAR or C.A.R. Medals of Appreciation or other appropriate medals for support and service to the C.A.R.

10. Youth Exchange Program

The SAR Youth Exchange Program involving the children and grandchildren of SAR members in France and the United States was first implemented in 2008 and 2009 and has been a resounding success. The exchange includes young ladies and gentlemen between the ages of twelve and twenty years old. The Planning Committee is unaware of any current implementation of this program.

Patriotic and Public Service Awards for Non-Members

Source: NSSAR Handbook, Volume 5

The FLSSAR, at the state and chapter level, recognizes judges, fire department personnel, law enforcement personnel, U.S. and Florida Senators and Representatives, corporations, community councils, churches, and individuals from all levels of society.

Certificate of Appreciation

American History Teacher of the Year Award

Flag Certificate

Outstanding Citizenship Certificate

Wounded Warrior Certificate & Coin

Bronze Good Citizenship Medal

Silver Good Citizenship Medal

Gold Good Citizenship Medal

Medal for Heroism

Law Enforcement Commendation Medal

Fire Safety Commendation Medal

Emergency Medical Services Commendation Medal

Color Guard

Commemorations: lead organization at three historic sites.

Florida Patriot Magazine

FLSSAR Website

Habitat for Humanity - *not presently active*

Joint efforts with affiliated organizations (DAR, CAR, Sons of Revolution)

Lecture Presentation – proposed program to be organized in 2017

Support the Troops - *not presently active*

Operation Ancestor Search: SAR members lead programs to help Wounded Warriors and their families strengthen bonds by learning more about their ancestry.

Liaisons to External Organization

Developing and maintaining cooperative relationships

Daughters of the American Revolution

Children of the American Revolution

Junior Member Aide Committee

Ladies Auxiliary FLSSAR

Historic sites Commemoration Committee

Identification of Commemorative Historic Sites

Battle of Pensacola

Battle of Thomas Creek

Last Naval Battle

Liberty Tree

FLSSAR Current Finances

Richard Young, John M. Stewart & Ralph D. Nelson, Jr.

Balance Sheet:

Society Checking Account (current daily usage)

As of December 31, we had \$81,800 in our checking account. Of that, \$20,000 was prepaid 2017 dues. We had \$67,300 in our Money Market Account.”

Richard Young, Treasurer

In addition to the primary checking account used for daily transactions, The Society's assets are contained in other two separate funds: the (1) **Operating Budget Trust Fund [OBT]** and the (2) **Endowment Trust Fund [ETF]**. These investments are managed by three internal trustees: Richard Young [Treasurer of FLSSAR], Mike Garey [continuing trustee] and John M. Stewart [incoming trustee replacing retiring David Kelsey].

The Operating Budget Trust Fund

The OBT was created in 1991 to hold funds dedicated to augment the annual operating budget of the FLSSAR. It is invested in a diversified portfolio of quality stocks and bonds. The express trust agreement provides for the trustees to pay to the Treasurer an amount between 3 and 5% of the principal annually as determined by the trustees. In 2016, distributions totaled \$3,047.65. The assets in the trust according to the 2016 year end accounting were:

Operating Budget Trust Fund (income to supplement operations)

2016 End Year Statements

Cash in checking account	\$14,297.87
Investments in stock and bond funds and ETFs	<u>\$98,497.19</u>
Total	\$112,795.06

The Endowment Trust Fund

The ETF was created in 1972 to hold funds dedicated to reimburse partially the annual payments for patriotic, educational, and historical expenses of the Chapters of the FLSSAR. Essentially it covers expenses for medals and certificates for such purposes as determined appropriate by a Distribution Committee elected annually at the BOM Annual Meeting.

It is invested in a diversified portfolio of quality stocks and bonds. The express trust agreement provides for the trustees to pay to the Chapters up to an amount between 3 and 5% of the principal annually as determined by the trustees. In 2016, distributions totaled \$11,053.07.

Endowment Trust Fund (Income to fund awards)	
The assets in the trust per the 2016-year end accounting were:	
Cash in checking account	\$ 4,806.51
Cash in savings account	\$ 58,325.73
<u>Investments in stock and bond funds and ETFs</u>	<u>\$403,318.28</u>
Total	\$466,450.52

Income Statement:

The Income Statements for 2014, 2015, 2016 and proposed 2017 are shown in Attachment 4: “**FLSSAR Budget Worksheet from Treasurer**” provided by the FLSSAR Treasurer, Richard Young.

A reformulation of 2017 is shown on the next page. The statement is a revision of our Treasurer’s formal statement designed to highlight the flow of moneys around our activities. This view shows the Operating Income and Expense of the FLSSAR and its activities, exclusive of pass throughs, to be approximately \$47,100. It basically shows that our cash flow is healthy for the current level of activity we generate.

Income Projection

The Treasurer has projected income as shown on the second following page to provide some idea of how reasonable dynamics lay out available revenue for future program development. This projection is a base case and does not include any income and expense incurred as a result of implementing any of the initiatives contained in this report. It shows that our “Total Net to FLSSAR” increases about 50% in the next five years from \$42 to \$63 thousand dollars.

The Income Projection appears after the Budget Page.

Florida Society Budget for 2017 (somewhat consolidated)

Ralph D. Nelson, Jr.

Cash Receipts MINUS non-FLSSAR expenses

Dues	95,000
MINUS NSSAR Dues & Reinstatements	(62,550)
Operating Trust Fund distribution	3,000
Registrar Fees (600 apps * \$25) MINUS Stipend	10,200
Secretary Receipts	2,500
BOM Receipts	
Registration	18,500
MINUS Hotel (Meals)	(19,000)
MINUS A/V & Hospitality Room	(1,200)
Donations, 50/50	250
Carryover from last year	400
	<hr/>
Total available for FLSSAR use	\$47,100

Cash Disbursements for Budgeted Items

Stipend for Secretary (incl storage)	4,800
Stipend for Exec Admin	4,800
Presidents Expenses	3,600
Other Officers Expenses / Postage	1,900
D&O/Liability Insurance	500
Bank Charges/Fees	100
New Chapter Dev Comm	500
History (Fair Comm, Hist Teacher)	1,000
Commems (LNBat. Pensa., Thomas Cr.)	1,650
Patriotic Education, Good Citizen	600
Support Our Troops Cost	1,000
Youth Contests	9,600
Awards (internal and External)	3,400
Endowment Trust Fund Donation	2,250
Patriot Mag Cost	6,000
Internet/Computer/Tech Comm	450
Donations to NSSAR, FSCAR	4,200
Other Committee Cost	250
Miscellaneous Costs	500
	<hr/>
Total	\$47,100
Net Cash Surplus	\$ 0

	Actual 2016	ESTIMATED INCOME PROJECTION REPORT					
		2017	2018	2019	2020	2021	2022
Registrar							
New Applications		375	413	454	499	549	604
Application Fee		\$ 45	\$ 45	\$ 45	\$ 45	\$ 45	\$ 45
		\$ 16,875	\$ 18,585	\$ 20,430	\$ 22,455	\$ 24,705	\$ 27,180
Supplementals		75	83	91	100	110	121
Application Fee		\$ 15	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15
		\$ 1,125	\$ 1,245	\$ 1,365	\$ 1,500	\$ 1,650	\$ 1,815
Total Collections	\$ 15,535	\$ 18,000	\$ 19,830	\$ 21,795	\$ 23,955	\$ 26,355	\$ 28,995
Registrar Stipend	\$ 3,000	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800
Registrar Expenses	\$ 696	\$ 1,000	1,050	1,103	1,158	1,216	1,277
Total Disbursements	\$ 3,696	\$ 5,800	\$ 5,850	\$ 5,903	\$ 5,958	\$ 6,016	\$ 6,077
Net to FLSSAR	\$ 11,839	\$ 12,200	\$ 13,980	\$ 15,892	\$ 17,997	\$ 20,339	\$ 22,918
Membership Dues							
Members		1,800	1,890	1,985	2,084	2,188	2,297
Dues		\$ 20	\$ 20	\$ 20	\$ 20	\$ 20	\$ 20
Total Collections	\$ 33,800	\$ 36,000	\$ 37,800	\$ 39,700	\$ 41,680	\$ 43,760	\$ 45,940
Record Storage							
Allowance	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800
Secretary Expenses	\$ 894	\$ 1,000	1,050	1,103	1,158	1,216	1,277
Total Disbursements	\$ 5,694	\$ 5,800	\$ 5,850	\$ 5,903	\$ 5,958	\$ 6,016	\$ 6,077
Net To FLSSAR	\$ 28,106	\$ 30,200	\$ 31,950	\$ 33,797	\$ 35,722	\$ 37,744	\$ 39,863
Total Net To FLSSAR	\$ 39,945	\$ 42,400	\$ 45,930	\$ 49,689	\$ 53,719	\$ 58,083	\$ 62,781
Assumptions							
10% annual increase in new member applications and supplementals submitted to NSSAR							
NO change in FLSSAR dues or fees							
5% annual increase in membership							
5% annual increase in expenses;							
NO increase in Allowances/ Stipends							

Tax Exemption Status and Its Impact on the FLSSAR Today, and Tomorrow

The Society is an IRS approved, not for profit, charitable foundation. Our organization's discretion as to how it fulfills its founding purpose is significantly restricted by IRS rules for not for profit organizations, the Florida Society's by-laws, and limitations imposed by the National Society based on opinions provided by the Chancellor General; the main concern is ensuring the Not-for-Profit status of the organization is not jeopardized in any way. As a result, a conservative interpretation of the Society's National and State charters prevails which limits its scope of approved initiatives to non-controversial, "safe" activities highlighting, emphasizing, and encouraging generic Patriotic themes in the community. While this circumstance may be frustrating to many Compatriots, and is a likely contributor to the organization's retention factor, it is nevertheless the current reality within which the Society must operate, and it is unlikely to change in the foreseeable future.

Even though significant restrictions apply, the FLSSAR has a moral responsibility to our predecessors, our Founders, and our ancestors to continue to be effective, and to maximize its potential to be a significant, positive force in society.

The challenge presented to future FLSSAR strategic planning efforts is to identify new and different avenues of patriotic initiatives which are under the Chancellor General's compliance umbrella, and which attract and retain new Compatriots so the Society can flourish in a rapidly changing environment.

The patriotic activities and initiatives of the past are important elements of the Society's heritage and functionality, and must always remain part of its repertoire; however, if the organization is to attract younger generation men, it should recognize that Maslow's Hierarchy elements (Pg. 16) are essential exigencies to membership retention, and that interests and proclivities of older men are not necessarily congruent with the interests of younger men.

To attract younger generation men, the organization must broaden its appeal, rather than insisting younger men adapt to the organization. In a voluntary Society, if members do not feel welcome, appreciated, and valued, and if, as young single men, they have little in common with what is in essence a "grandfather's club," they can and do drop membership ("Pg. 23, "Resigns Only" graph).

Tax exempt charitable status also provides financial advantages, since the Society is able to accept donations that are tax deductible by the donor, and the Society is not required to pay taxes reducing cash outlay. Additionally, tax exempt status, and our Congressional Charter, convey a certain uniqueness in affirmative value in our activities and projects. Our Congressional Charter and Tax Exempt status are attributes the Society should explore for further development as strategic advantages.

General Assessment of FLSSAR Activities

FLSSAR Leadership

Senior Officer leadership of the FLSSAR, past and present, were asked to provide candid assessments of the Society. There were three responses. Their comments are aggregated into one grid analysis report prepared by Chairman John M. Stewart, and included as an Attachment 6.

In addition, the 30-member Planning Committee was asked to do the same thing. The eight responses also were combined into one grid and they are included as an Attachment 7.

Finally, the above assessments were combined as shown below to get an overall view of the membership, then color coded showing green where more favorable assessment of current activity was seen, and red where the opposite was true.

	COMBINED COMPOSITE	Sons of the American Revolution					
		Florida society					
		Strategic Plan Initiative					
		Committee Assessment Worksheet					
<u>Activity</u>	<u>Committee</u>	<u>How Well Do We Do This?</u>			<u>Should We Change</u>		<u>Notes</u>
		<u>Well</u>	<u>OK</u>	<u>Not Well</u>	<u>Yes</u>	<u>No</u>	
FLSSAR Affairs							
	Archives						
	Chpt Challenge & Americanism						
	Documents						
	Genealogy						
	BOM Meeting Arrangements						
	Membership						
	New Chapter Development						
	Newsletters & Periodicals						
	Technology Advisory Comm.						
	Florida Sons of Liberty Brigade						a perceived strength
Liaisons							
	Junior Members: SAR & CAR Aide						
	DAR						
	Ladies Auxiliary						
Historic Sites							
	Commemorative Historic Sites						

	Battle of Pensacola						
	Battle of Thomas Creek						
	Last Naval Battle						
	Liberty Tree						
Youth Programs							
	Amer. Elementary Poster Contest						
	Eagle Scout Scholarship Comm.						
	Knight Essay Contest						
	Good Citizenship						
	History Fairs						Poor participation @ Chapter level
	Rumbaugh Oration Contest						
	ROTC						
Community Outreach							
	Amer. History Teacher Award						
	Habitat for Humanity						Poor participation @ Chapter level
	Patriotic Activities						
	Public Service and Heroism						
	Publicity						Chapters need help
	Support the Troops						
	Veterans Affairs						
	Veteran's Recognition						
Trust Funds							
	Endowment Trust Fund Disbursements						
	Endowment & Operating Budget						
	Trust funds						

II. Environmental Scan

Charles R. Butler

The purpose of this section is to identify and assess the impact of any major economic trends with respect to Florida Society SAR membership.

Economic Environment of Our Member Market Place

(Source: Ft. Lauderdale Sun Sentinel 27 Jan 2017)

“Florida’s economy is expected to accelerate at a faster pace than the nation as a whole for the next four years, becoming a \$1 trillion economy by 2018,” said University of Central Florida economist Sean Snaith in his latest forecast.

The economy is projected to expand at an average annual rate of 2.9 percent through 2019, according to the second-quarter forecast. A booming economy would bring new businesses, jobs, housing, more consumer spending and other economic benefits.”

Anticipated Impact of National Economic Trends on FLSSAR

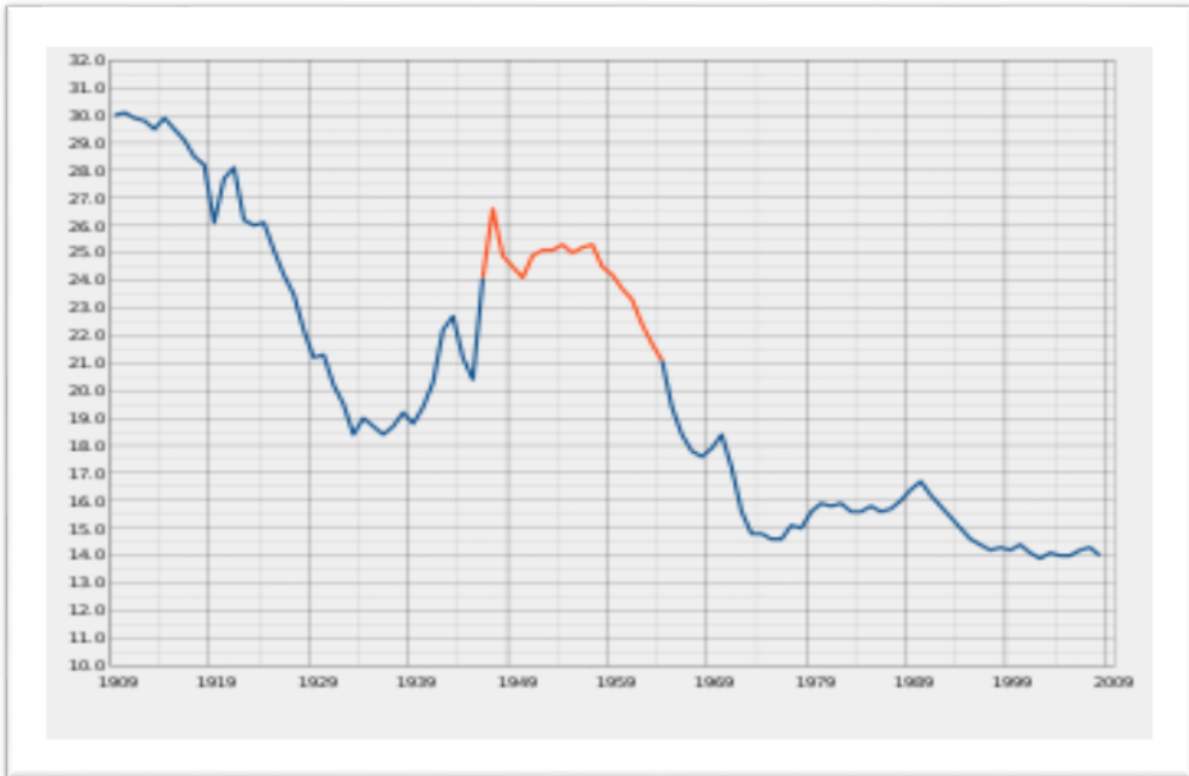
Charles R. Butler

Economic trends for Florida are notably positive as cited above, with significant in-migration from other states for new jobs, increased tourism, and retirees from colder, more heavily taxed states. Additionally, following the election in November 2016, Federal Government changes are expected to yield increasing economic growth in Florida, and nationally.

The national economy continues to improve, unemployment is falling significantly, and the trend is expected to continue for the foreseeable future. As the Baby Boomers and Baby Boomer Echo generation retire, net retiree population growth in Florida is increasing. Many of these individuals are from the northeast and have disposable pension and investment income. Increasingly, they are relatively young and healthy and are seeking to be involved in various community activities. These trends are not expected to impact Florida Society SAR membership.

Patriotic lineage organizations have an emotional and psychological appeal to many of these individuals, as evidenced by our Society’s high application volume. These attributes apply to both males and females, and inferentially create a positive recruitment environment for both the FLSSAR and the FL DAR which actively supports our recruitment efforts. The challenge for the Florida Society SAR is to convert applicant into long term members.

Of longer term interest, however, is the decline in the birth rate of our SAR qualified population which is discussed in the narrative below the chart on the following page.



American Birth Rate Trend by Year

In addition to the generally declining birth rate of the usual lineage society population, recent research shows more whites died in a third of states *than were born*; deaths are mostly attributed to suicides, drug and alcohol poisoning. The University of New Hampshire found Latino, black and Asian populations continue to grow, but white families are having fewer children; meanwhile, soaring death rates among white middle-aged Americans mean that certain states are seeing falling Caucasian populations. The Caucasian death rate now outstrips the birth rate in a third of states.

Although these trends do not present an imminent threat to the Florida SAR, they do imply a potential future decline of potential FLSSAR members at some time in the next two decades.

Lineage Society Membership Types

Charles R. Butler

Over the years, lineage organizations (and others) have developed various business and operating models, some more effective than others. Some have researched the topic of membership in depth, and report some useful conclusions applicable to this Planning effort. In general, lineage society membership interests fall into the following categories:

Patriotic & Heritage Members: A core tier of FLSSAR members join for personal, patriotic, heritage, and service related reasons, and usually they are long term committed members, willing to make significant contributions over an extended time period, often for life. Results in acquiring and maintaining members in this category are a direct result of effective Society outreach, and a high-quality member experience.

Fraternal Members: In general, it appears most individuals join lineage organizations for fraternal and social purposes, making new friends and enjoying activities and the camaraderie of sharing a common lineage.

The recent *FLSSAR Member Survey* conducted by Bob Folk, Ron Toops and Chuck Berger supports this conclusion. These members often stay for longer periods, sometimes a decade or more, but over time, as their social group disperses, the personal bond with the organization fades and memberships drop. Since organizational involvement is over a longer term, many of these individuals are candidates for extended membership, even if they are unable to attend meetings.

Certificate Members: Some individuals become lineage society members primarily for ego and personal prestige purposes. These are called "Certificate Members," and once they receive a "Certificate of Membership," which they can display at home or office, they drop out because they perceive no additional derived value in their membership. A small percentage of these members can be persuaded to retain continuing membership under the right circumstances, but since their original motivation was to receive an ornate certificate, their goal has been attained. FLSSAR Certificate members consume limited and costly Registrar and Society resources for what is essentially no long-term gain.

A few nominal lineage organizations cater to this category of individual, but are little more than Certificate Societies, with virtually no function beyond a website, collecting application fees, and printing expensive calligraphic certificates.

Duress Members: Some individuals become members under family duress, and have no inherent interest in the organization. In general, these persons have very low, if any, retention potential.

Committee Observation: *The Florida Society SAR has limited resources, and consequently has an obligation to its members to allocate them effectively and efficiently. Expending significant effort and cost to research and process applications that do not yield long term members who contribute to the good of the Society is a waste of effort, and detrimental to the organization. Since not all applicants are serious candidates for Society membership, it has been suggested that applicants should qualify for membership beyond simply having acceptable lineage. This is an issue that should be assessed as part of future Planning initiatives. A need clearly exists to develop a process for early identification of **Certificate** and **Duress Members**, and to minimize the resources they consume.*

Advantages of 501 (c) (3) Status Charitable Foundation Business Model

In the Charitable Foundation Business Model, applicable to 501 (c) (3) IRS approved charities (e.g. Red Cross, Salvation Army, Hospital Foundations), the **Membership Value Exchange** is essentially predicated upon what economists term “psychic satisfaction.”

In simple terms, Psychic Satisfaction is the non-commercial, highly personal, emotional satisfaction humans derive from voluntarily supporting a noble, worthy cause or purpose. This category of commitment is unique because it is not correlated to a commercial exchange, as in the purchase of a watch or automobile which are tangible, nor is associated with a service provided such as a haircut or legal advice; but rather it is tied to an intangible feeling of personal, psychological reward for engaging in an activity that benefits a higher purpose.

Some individuals achieve psychic satisfaction by financially supporting religious, educational, or humanitarian relief efforts while others volunteer time in service of their fellow man.

In both of these instances, the Value Exchange (discussed below) appears to have a deeper, more enduring purpose which transcends the vicissitudes of life, and is a deeply rooted motivation that can last an entire lifetime rather than being inherently transactional and episodic.

We believe The Florida Society SAR has significant potential in this area, since charitable giving can, in and of itself, be a **member bonding strategy** as long as the donor perceives value and benefit in return for dollars donated.

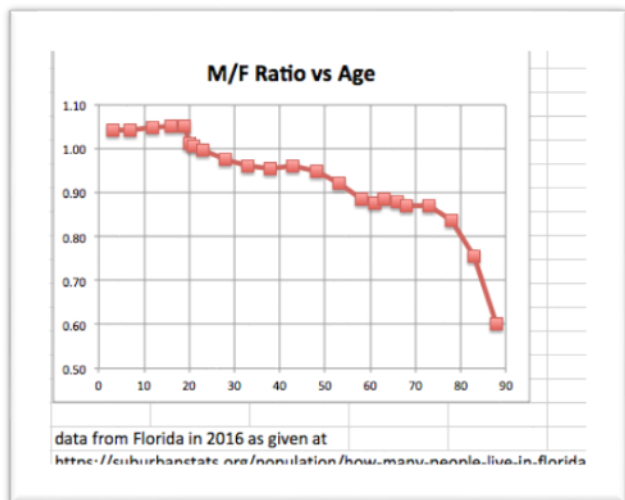
FLSSAR Membership Growth Models and Discussion

The purpose of this section is to review various methods of determining what the Florida Society SAR can reasonably expect to achieve in total membership **in the current environment**.

The chart shows the **Male/Female** ratio for age groups 0-90. Interestingly, the percentage of males in the general Florida population drops after age 20, and for the general range of FLSSAR eligible members, it appears to range from .95 to .90 males for every one female.

This, however, is not adjusted for ethnicity and immigration from lineage-ineligible population groups.

For simplicity, the Membership Models used for growth potential assume 1:1 ratio of males to females.



FLSSAR Membership Growth Model Input Variables and Assumptions

- **Florida** population of 22 million by 2019-2022
- **11,031 Total Florida Eligible SAR males 2019-2022**
- **2,126 Florida SAR** Net adjusted members Jan 1, 2017 FLSSAR Membership Report

- 1) **Population Model:** Shown below, a statistically based extrapolation model infers a feasible Universe of potential Florida Society SAR members from existing population statistics, and makes deductive assumptions based on knowledge and experience. Some genealogists have postulated that 8-10% of America's current population are technically eligible for membership, being directly descended from qualified ancestors. For our conservative purposes, the assumption variable is 2%:

22 million projected Florida Population 2018-19 (Florida Trend Magazine)
 X 50% assumed to be males (1:1 m/f ratio)
 11 million males

X 2% Conservatively assumed percentage ancestrally qualified for FLSSAR membership
 220,000 Potential males qualified for FLSSAR membership

X 90% Disqualified for various reasons
 22,000 Potential FLSSAR members

X 50% Assumed percentage of positive interest in FLSSAR

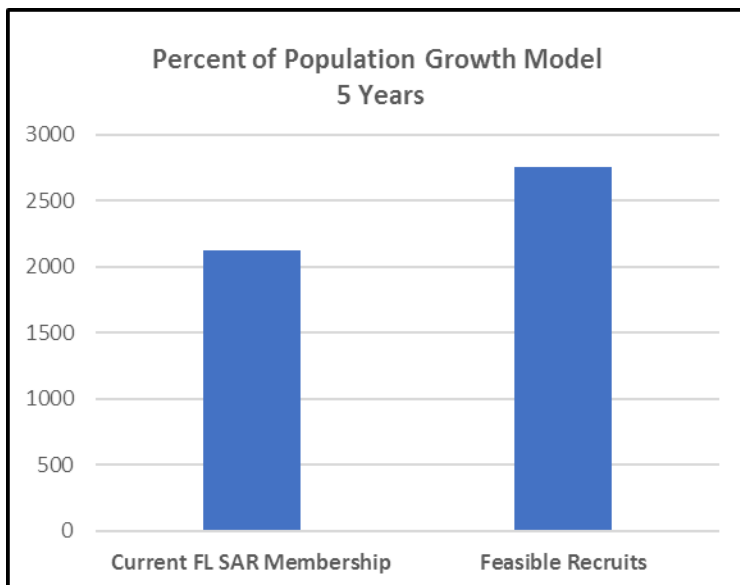
=**11,000** Calculated universe of eligible, interested males for FLSSAR 2017-2022

X 25% Feasible Recruits assumed

2,750 Feasible Recruits

-2,126 Current FLSSAR membership

- **624 = FLSSAR membership growth potential / 5 years** ("Feasible Recruits")
 5.87% annual growth @ 125 per year 624 Net Member gain



- 2) **Alternate Calculation:** Shown below, an alternative FLSSAR membership calculation would be for the Society to reach a net membership of 26% of the 2017 Population Analysis Model shown in the Population Model #1; growth period: 5 years. This model adds an additional 100 applications over five years which may be somewhat optimistic.

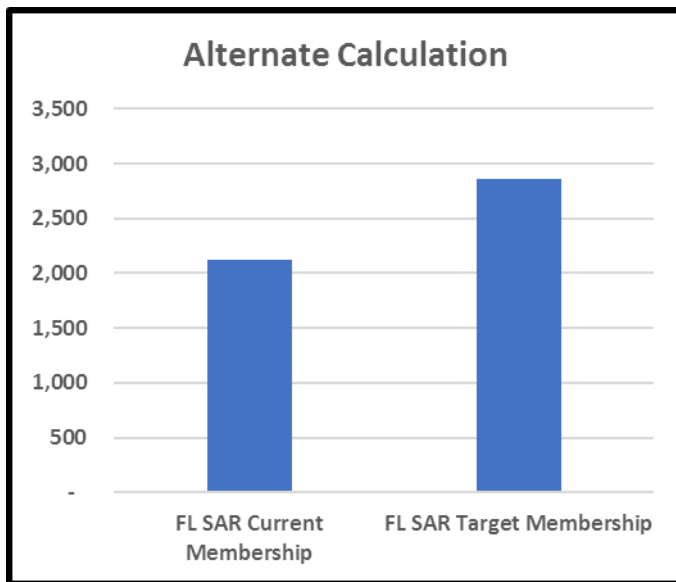
11,000 Projected SAR Eligible Males March 2017 (From Population Model #1)

X 26% FLSSAR membership percent

=2,860 FLSSAR membership potential

-2,126 Current FLSSAR membership

- 734 = FLSSAR Membership Growth Potential / 5 years
- 6.90% annual growth @147 per year 734 Net Member gain



FLSSAR Membership Growth Potential 5 Years

	<u>#1 Population Model</u>	<u>#2 Alternate Calculation</u>
Current Society Membership	2,126	2,126
<i>Additional Members Needed</i>	<i>+624</i>	<i>+734</i>
FLSSAR Membership Goal	2,750	2,860

✓ **Planning Committee Recommendation**

The Committee suggests the most feasible membership goal for the FLSSAR to consider would be: **Percent of POPULATION, Model #1**

III. COMPETITION

Lee W. Matson

COMPETITOR ANALYSIS

The following organizations were selected primarily because of either their linear heritage requirements or potential youth activities. Without a doubt, there are other organizations that would fall into these categories. Many of these are smaller in membership with few if any activities that would compete for our members. There are two service organizations that could potentially compete for members and they are the Kiwanis and Rotary International but they have not been included.

Our competitors could be generally considered the following:

The Society of the Cincinnati
The Order of the Founders and Patriots of America
Order of the Founders of North America
Sons of Union Veterans
American Legion
Veterans of Foreign Wars

Sons of the Revolution
The Mayflower Society
Military Order of the Stars and Bars
Sons of the Confederate Veterans

Criteria for comparison

Are they present in Florida?
How many chapters?
How many members in Florida?
What are their activities, such as youth programs?
What are they best known for achieving?

How many of their members are FLSSAR members?
As an organization, what do they do well?
What can we learn about what they do well?
Are there areas or programs we could share to enhance their and FLSSAR presence?

The Society of Cincinnati

The Society's website is excellent and should be visited: www.societyofthecincinnati.org

The Society of the Cincinnati is the nation's oldest patriotic organization, founded in 1783 by officers of the Continental Army and their French counterparts who served together in the American Revolution. Its mission is to promote knowledge and appreciation of the achievement of American independence and to foster fellowship among its members. Now a nonprofit educational organization devoted to the principles and ideals of its founders, the modern Society maintains its headquarters, library, and museum at Anderson House in Washington, D.C. There are FLSSAR members who are members.

The Society of the Cincinnati encourages understanding and appreciation of the American Revolution through lectures, fellowships, internships, publications, and curriculum materials that support effective teaching and learning about the revolutionary period. The Society also encourages research and study on the history of the Society of the Cincinnati and on the Andersons and Anderson House, the Washington landmark that has been the Society's headquarters since 1938.

The Society supports research in its own collections leading to publication with library fellowships. The Society also supports the development of museum professionals interested in the American Revolution

and related themes with museum internships. The Society also publishes works and supports publications of works of relevance to its broad educational mission.

Order of the Founders of North America

The **OFNA** is a lineage society whose purpose is to memorialize the individuals who founded North America through Colonization; including the Caribbean and offshore North Atlantic Islands during the period of 1492 to 1692. Two current member officers are: Edward F. Butler, Lindsey Brock both are past NSSAR Presidents General.

The Order of the Founders and Patriots of America

Founded in 1896, the Order is made up of "Associates" who trace their ancestry back to those first colonists and who have forefathers in the same male ancestral line who served in the American Revolution. Today, as in the past, it is comprised of a wide range of individuals, all linked by a common heritage and dedicated to American ideals.

Sons of the Revolution (SR)

This is a male Revolutionary War Lineage Society composed of direct descendants of proven soldiers. Unlike the NSSAR, it does not recognize Patriotic Service as a qualifying category. The General Society has established various citizen awards, given to individuals and state societies for their work to continue the SR mission and honor the memory of the participants of the Revolution. The awards include the Modern Patriot Award, the Patrick Henry Award, the Jay Harris Award, the Richard Farmer Hess Leadership Award, the Trent Trophy, the Membership Achievement Award and the Presidential Commendation of Merit.

The Mayflower Society

Founded 1897

Anyone who arrived in Plymouth as a passenger on the Mayflower is considered a Pilgrim, with no distinction being made on the basis of their original purposes for making the voyage. Proven lineage from a passenger, approved by a Historian General, qualifies one to be a member of the General Society of Mayflower Descendants.

Military Order of the Stars and Bars

The **MOSB** is a fraternal organization for documented descendants of men who served as commissioned officers in the armed forces of the Confederate States of America or who are descended from members of the Confederate Congress, or any elected or appointed member of the Executive Branch of the Confederate Government. The group is related to the Sons of Confederate Veterans (SCV), an American lineage society for all male descendants of Confederate veterans.

Sons of the Confederate Veterans

The objects and purpose of the organization are "to encourage the preservation of history, perpetuate the hallowed memories of brave men, to assist in the observance of Memorial Day, to aid and support all members, widows and orphans, and to perpetuate the record of the services of every Southern soldier.

Sons of the Union Veterans of the Civil War

SUVCW is an American fraternal organization, the legal successor to the Grand Army of the Republic (GAR). Founded in late 1881, it was originally one of several competing organizations of descendants of Union veterans. By 1886, others had joined the SUVCW.

American Legion

At the state level, The American Legion is organized into "departments", which run annual civic training events for high school juniors called Boys State. Membership peaked for The American Legion right after World War II, when enrollments doubled from 1.7 million to 3.3 million. However, membership has slowly been decreasing since then. In 2013, the Legion reported 2.3 million members.

Veterans of Foreign Wars

The **Veterans of Foreign Wars of the United States, Inc.**, also known as the **Veterans of Foreign Wars**, is a national association of veterans established on September 29, 1899, who as soldiers, sailors, marines, and airmen served the U.S. in wars, campaigns, and expeditions on foreign soil or hostile waters

Veterans Affairs Volunteer Service Program

The Military Order of the Purple Heart's Veterans Affairs Volunteer Service (VAVS) Program operates the largest volunteer system in the U.S. Federal Government. VAVS works with the VA to supplement resources for the care, treatment and welfare of veteran patients.

Other Various Organizations

In summation, the above organizations were selected primarily because of either their linear heritage requirements or potential youth activities. Without a doubt, there are other organizations that would fall into these categories. Many of these are smaller in membership with few if any activities that would compete for our members. There are other member organizations that could potentially compete for members and they are listed in the box to the right. Shown on the following page is a grid showing perceived relative competition levels of various organizations to FLSSAR.

Other Organizations

- Masons
- Odd Fellows
- Kiwanis International
- Jaycees
- Moose
- Knights of Columbus
- Rotary International
- Elks

Program Analysis Grid

Seq	Item	Soc Cinn	Mayflower	Sons Confed	Am Legion	Vet FW	MO Purple
1	members dual with other states		YES	YES			
1	members: national		5000	36000	2.3 mil	1,234,985	45,300
1	members: youth FL (under 18)		Yes	YES	No	No	No
1	members: Florida		1500	2500			18 Chapters
2	goal: educational						
2	goal: genealogical						
2	goal: historical						
2	goal: patriotic						
3	recog Good Citizen youth						
3	recog JROTC						
3	recog ROTC						
3	recog Scouts						
3	recog: civic service						
3	recog: flag flying						
3	recog: member service						
3	recog: military service						
4	contest: brochure						
4	contest: Eagle						
4	contest: essay						
4	contest: JROTC						
4	contest: oration						
4	contest: poster						
5	activity: hist commem						
5	activity: parades						
5	activity: state meetings/year		3	1			
5	activity: state publication						
5	activity: state website						
5	activity: talks at other socs/year						
6	project: educational						
6	project: historical / commem						
6	project: patriotic / veterans						
9	Competitive Level						
11	High						
12	Moderate						
13	Low						
14	None						

Planning Committee Commentary

Although many if not all the forgoing organizations are theoretical competitors for a potential member's time, financial support and emotional commitment, the practical reality is that for the Sons of the American Revolution, *there is no substitute*.

That being said, it has become apparent to the Committee that the main competitor of our organization is, however, perhaps even more troubling.

It appears that most of our highly coveted new recruits, and even long term members, are apparently finding their FLSSAR Membership less rewarding than participating in church volunteer activities, hobbies, team booster clubs, alumni associations, or other such efforts that might even be more expensive and time-consuming, but personally more gratifying - and therefore at or near Maslow's Hierarchy Level 5. Statistics show for the FLSSAR, this occurs not at four or five years as is the case with the NSSAR, but in about two to three years. This is a direct result of Membership Experience. Modernization of our Society is the only logical conclusion.

IV. Strengths and Weaknesses

This section identifies the Strengths and Weaknesses of the Society as observed by the membership, chapter officers, and State Society officers. To ensure candid and honest responses, the collection process was anonymous. For continuity reasons, some categories and observations were consolidated, and included member discussion for background and clarity.

Member Reported Strengths

- Private, male only organization
- Congressional Charter
- Organizational longevity
- Patriotic purpose
- Brand charisma
- Honor associated with membership
- Association with former Presidents and distinguished leaders
- Patriotic activities in the community
- Social and fraternal opportunities
- Tradition and heritage of organization
- Active support of NSDAR
- High number of applications
- Large talent pool (corporate, financial, political & other varied professional expertise) within FLSSAR membership
- 501 (c) 3 status
- Financial management expertise
- Educational activities for Florida's youth
- Association of talented dedicated volunteers who run the FLSSAR

Member Reported Weaknesses

- No permanent strategic planning committee (DAR has this function)
- Not publicly defined as serving public good or improving society
- Reliance on tactics and activities to address structural issues rather than strategies
- Vision, Mission, Objectives and Goals need modernization and focus; we are unfocused.
- Innovation and creatively discouraged. When does it appear.
- Lack of organizational acknowledgement that Web Portal is our "True Front Door"
- Poor national website frustrates members looking for guidance and help
- Confusing genealogy policies from National
- General lack of general brand awareness of FLSSAR & NSSAR
- No statewide media presence
- No active political-legislative outreach process to support awareness and educational goals
- Confusing and legalistic bylaws, a natural byproduct of an ancient organization

Member Reported Weaknesses

Continued

- Organizational culture often seen as not particularly welcoming
- Attitude of “Malaise” & internal bickering impedes the smooth operation of the FLSSAR
- FLSSAR – Chapter support role is unclear
- Antiquated processes and technologies
- Reluctance to embrace and implement new technologies
- Burdensome reporting processes
- No streaming video of special events
- No apparent structured, organized member recruitment process
- Chapters lack financial resources
- Chapters do not appreciate the large portion of dues going to National since they see little if any local benefit
- No “On Demand” orientation or education for new members and chapter officers
- Antiquated membership system
- Emphasis is on attending meetings, not being a committed long term member
- Low member retention rate
- No orientation or education for new members and chapter officers.
- No real-time way for FLSSAR President (or NSSAR President General) to quickly communicate with members
- Perceived lack of adequate communication by state officers to membership.
- There is no structured officer or leadership training program.
- The state officers are limited to one year terms.
- The organization appears to be one for older men
- Apparent lack of interests to attract and involve younger members
- Unclear relationship among Chapter, State and National Societies
- General adherence to old comfortable processes and rules rather than modernization
- Tepid welcome packet (AARP does a better job)
- Little consideration for members on a “tight” budget
- Confusion as to 501 (c) (3) status concerning or supporting or opposing causes

Discussion of Selected Weaknesses

Lee W. Matson

Retention

It has been shown above that the positive “new member” figure unfortunately do not develop into good long term growth in membership due to a low retention rate of about 5% over the last 6 years. This robs the FLSSAR of valuable talent and financial resources which in turn impedes the performance of the organization.

Awareness and Commitment

A “come and go” problem is in the membership, due at least partially, to a lack of pre-mentoring and informing of prospective members who then join without a good idea of what is really expected of them.

FLSSAR Guidance to Chapters

More direct guidance is needed to augment chapter performance. Reinforcing the implementation of NSSAR’s initiative for mentoring new recruits would ameliorate greatly the retention problem. The specific education annually for the Americanism award activities would help with educating members on the approved, recommended activities members should be considering as they are encouraged to participate in their chapters.

Publicity

The underexposure weaknesses are attributable to a tepid effort within the chapters and at the state level. Educational and other goals could be better accomplished with a modern publicity capability focused on improving our public perception.

Community Outreach

An underutilized Speakers Program is sending too few talented speakers into community organizations and schools, leading to misconceptions about our patriotic foundation and practices. A training and credentialing program for speakers is recommended to ensure accuracy and consistency in presentations. A structured contact and scheduling request process should be developed.

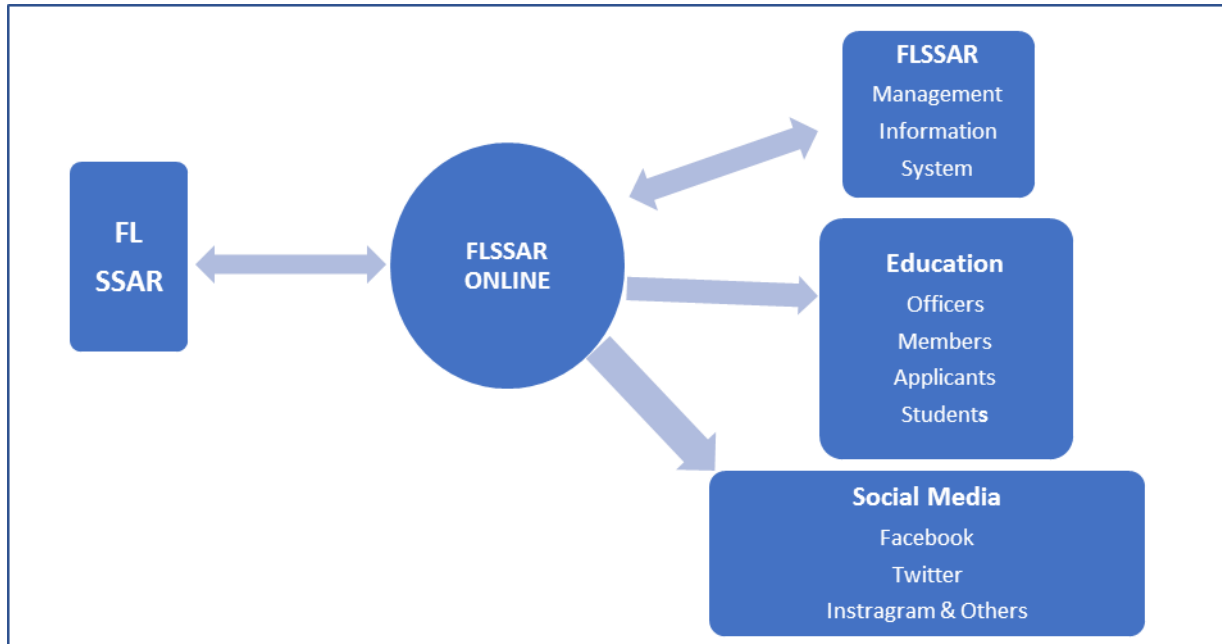
Attitude of Malaise

Several of the performance weaknesses reflect a poor, or at least blasé’ attitude on the part of more than a few members. Despair in ever improving has the organization at a crossroads, and the dynamics of membership unimproved could throw the whole effort into the grave of “dead white men.”

Technology

Not having peppy internet approaches to getting out our message and offering training and guidance to our members impedes our ability to communicate with the up and coming generations, as that is their preferred method of communication and major source of knowledge.

The Society should develop and utilize online venues, to develop, maintain and implement a series of ongoing educational *outreach programs* for the purpose of raising awareness of Americanism, increasing understanding of them, and achieving support for ensuring Americanism is part of Florida’s approved curriculum. **See Graphic Below:**



Rationale

In the early years of the FLSSAR, when patriotism was the national standard, the Society’s general plan for a variety of patriotic activities was all that was necessary to implement our organization’s Founding Principles. Today, it is not.

Today, American society is divided, and more hostile toward itself than it has been in decades. Special interests are actively working through our media and educational systems to undermine traditional Americanism by discrediting and delegitimizing our Founding Fathers, our Founding Documents, and our form of constitutional government. The apparent civic ignorance of our youth has become subject matter for comedians, and left unaddressed, poses a growing danger to our society.

The new direction highlighted in this Plan is not a project, or a task. It is an evolution of philosophy, actualized by specifically focused, measurable FLSSAR initiatives implemented over time. They require the leadership of the State Society, and the willingness of its members and chapter leaders to cooperate and collaborate to create and mobilize a force for true good in an environment of adversity. Although this effort is difficult, it is this endeavor is eminently feasible.

Means, Methods and Resources

The FLSSAR, through a coordination of a proposed Community Relations Committee, which would provide standardization, coordination, and resource support to Chapters, the Publicity Committee and the Information Technology Committee, or alternatively through a qualified committee appointed by the President, shall make available and actively promote to the general public, and civic groups, and other appropriate audiences a variety of academic resources including NSSAR Lesson Plans, and other materials. FLSSAR shall also make available, through its Chapters, outreach programs such as (qualified) Period Dress speakers, Color Guard Presentations, (qualified) lecturers on specific topics (Jefferson, Washington, Madison, Hamilton, Franklin, etc.) Committee input developed an initial set of recommendations shown in Attachment 3. Subsequently, they were modified as explained in the Strategic Plan to the final Recommendations presented therein.

V. Finances

John M. Stewart

No business plan would be complete without a financial section. One could expect a projection of the effects of the complete plan. However, in dealing with a not-for-profit and a prospective adoption and perhaps modification of the plan, or at least an implementation schedule diverse from that planned, creating such a precise projection would be roughly equivalent to trying to bring a cloud to earth by repeatedly piercing it with a rapier. So instead, we have opted for a discussion of the financial considerations of the recommendations.

1. This requires no expenditure and can be implemented immediately by informing and training the RVPs to their new duties.

2. This could involve some cost, either printing and postage for the written survey, or computer design time if done electronically, but neither of these should be a substantial outlay. Since our current budget variance is positive, this expense should not be prohibitive.

3. This can be accomplished immediately without expense. Future costs, if any, would come in future years and deal with meeting expense.

4. This will involve some costs for equipment, software, and labor, either training members or outside expert assistance. But the costs are variable and up to the Committee. They should be able to present a budget which can be fitted to our ability to meet expense.

5. This will begin after the committee is reconstituted and functioning. It will have costs associated with purchase of supplies and perhaps T&E as well as advertisement expense to get the word out. But the costs are variable and up to the Committee. They should be able to present a budget which can be fitted to our ability to meet expense.

6. This subject will be sticky, and probably deferred for a couple of years as we have senior officers now willing to work under the current circumstances. But the Society is losing the contributions of an untold number of men who foresee T&E expense above their liking as they consider taking a state level senior position. Anecdotal evidence indicates that the President alone puts out tens of thousands of dollars of his own money annually to fulfill the duties he has accepted. But, as is the case of the above recommendations, the cost here to the society is variable in any case, and not outside the projections for the net increase in the budget for the next five years received from the Treasurer and contained in the Research Paper.

7. The Executive Committee should deliberate on these plans and structure their preferred approaches. Again, this budget is what they want it to be at that time.

VI. Attachments

Attachment 1 Assessment WORKSHEET (Survey Instrument)

	Committee Assessment Worksheet	Sons of the American Revolution Florida society					
		Strategic Plan Initiative					
Activity	Committee	How Well Do We Do This?			Should We Change?		Notes
		<u>Well</u>	<u>OK</u>	<u>Not Well</u>	<u>Yes</u>	<u>No</u>	
FLSSAR Affairs							
	Archives						
	Chpt Challenge & Americanism						
	Documents						
	Genealogy						
	BOM Meeting Arrangements						
	Membership						
	New Chapter Development						
	Newsletters & Periodicals						
	Technology Advisory Comm.						
	Florida Sons of Liberty Brigade						
Liaisons							
	Junior Members: SAR & CAR						
	Aide						
	DAR						
	Ladies Auxiliary						
Historic Sites							
	Commemorative Historic Sites						
	Battle of Pensacola						
	Battle of Thomas Creek						
	Last Naval Battle						
	Liberty Tree						

Youth Programs							
	Amer. Elementary Poster Contest						
	Eagle Scout Scholarship Comm.						
	Knight Essay Contest						
	Good Citizenship						
	History Fairs						
	Rumbaugh Oration Contest						
	ROTC						
Community Outreach							
	Amer. History Teacher Award						
	Habitat for Humanity						
	Patriotic Activities						
	Public Service and Heroism						
	Publicity						
	Support the Troops						
	Veterans Affairs						
	Veteran's Recognition						
Trust Funds							
	Endowment Trust Fund Disbursements						
	Endowment & Operating Budget						
	Trust funds						

Attachment 2 Member Survey for Recommendations (Survey Instrument)

Place your recommendations in this column	Place the rationale for your recommendation in this column	Years to do 1,3, or 5 only

ATTACHMENT 3 Strategic Planning Recommendations

	<u>1 Year</u>	<u>3 Years</u>	<u>5 Years</u>
A	Expand RVP role in their Chapters Closely manage the Chapter mentoring process and implementation Develop chapter participation in FLSSAR programs and leadership, using Americanism Award as a guide	Develop Color Guards in Chapters Organize, develop, train, schedule Use as public awareness generators	Constitute a Community Relations Committee to coordinate, standardize and enhance Community Outreach programs
B	Develop relationships with educators in schools (public and private) and county administrators to improve participation in our Youth programs	Develop FLSSAR guidance capability for assisting Chapters in educating public and members, including visuals, PowerPoint presentations, etc. and panel of members to respond to information requests and opportunities in trained, pre-formatted ways	Expand Technical Advisory Comm. capability for virtual BOM and other meetings, and online and easy to use Management Information Systems and website
C	Establish Strategic Planning as an ongoing process for FLSSAR	Strengthen the Publicity Committee to help Chapters get publicity and news dissemination to public	Strengthen liaisons with prospect rich organizations

Attachment 4 FLSSAR Budget Worksheet from Treasurer

Florida Society Budget Comparison					
For the Years 2014 to 2017					
		2014	2015	2016	2017
		Actual	Actual	Actual	Proposed
					Budget
Cash Receipts					
	Dues	76,765	82,228	93,561	95,000
	Prepaid Dues -2017			19,590	
	OTF distribution	2,850	2,850	3,048	3,000
	Registrar Receipts	9,490	9,950	15,325	15,000
	Secretary Receipts	3,303	3,620	2,830	2,500
	Other Income	250	115	24	-
	PEPCO Dividends	432	432	108	-
	PEPCO Redemption	-	-	10,900	-
	BOM Receipts			-	
	Registration	14,135	17,460	18,642	18,500
	50/50	260	329	149	250
	Hospitality Room	174	-	-	-
	Donations			-	
	Support Our Troops	200	350	-	-
	Battle of Thomas Creek	1,605	-	-	-
	F4F2	2		-	-
	JROTC	92		-	-
	ETF	-	103	-	-
	Special	-		582	-
	Youth Program Challenge	-	-	720	-
	BOM Expenses	-	-	486	-
	Undesignated	-	20	-	-
	LNB Medal Sales	208	100	325	-
	Patriot Mag Ad Income	120	120	120	-

	Purchase of SAR Pins	-	-	450	-
	Carry Over from Prior Year	-	6,659	428	400
	Void/Replacement Checks	-	-	1,715	-
	Total	109,886	124,335	169,002	134,650

	Cash Disbursements				
	NSSAR Dues	47,105	48,710	59,755	61,750
	Dues Refunds	(90)	90	-	-
	Reinstatement Dues	330	1,275	908	800
	Registrar Stipend	-	-	3,000	4,800
	Exec Admin Stipend	-	-	2,600	4,800
	Presidents Expenses	2,244	2,116	-	3,600
	Sr VP Expenses	-	-	-	100
	Regional VP Expenses	-	-	-	100
	Secretary Expenses	1,951	692	894	750
	Treasurer Expenses	168	-	302	250
	Registrar Expenses	523	503	696	600
	Other Offices Expenses	-	-	-	
	Record Storage	3,600	4,800	4,800	4,800
	BOM Expenses			-	
	Hotel (Meals)	15,152	20,068	19,900	19,000
	BOM Refunds	38	38	46	-
	Hospitality Room	170	234	144	200
	A/V & Other	197	651	1,080	1,000
	Hotel Deposits	-	1,500	-	-
	Internet/Computer Expense	328	-	321	350
	Technology Comm	507	-	-	100
	In-House Printing	240	-	-	-
	Knight Essay Comm	1,050	1,590	1,553	1,800
	American His Teacher Comm				

		500	500	500		500
Eagle Scout Comm		1,750	1,750	2,000		1,800
JROTC Comm		1,592	1,000	1,000		1,800
Good Citizenship Comm		-	-	217		100
Patriotic Education		-	-	-		500
Rumbaugh Oration Comm		3,650	3,375	4,639		3,500
Americanism Poster Contest		612	654	632		350
Americanism Brochure Contest		-	-	-		350
FSCAR Donation		1,000	1,000	1,000		1,000
History Fair Comm		475	475	475		500
CAAH Donation		750	1,000	1,000		1,000
NSSSAR Library		200	200	200		200
Battle of Pensacola		-	-	-		250
Last Naval Battle		517	590	904		1,000
Battle of Thomas Creek						
Purchase Marker		-	2,230	-		-
Ceremony		-	458	270		400
Support Our Troops Cost		1,118	1,010	662		1,000
Medals & Awards Comm		2,483	2,597	2,911		2,000
Patriot Medal Comm		-	-	-		100
Chapter Challenge		-	-	-		100
Newsletters & Period Comm		610	600	450		600
Publicity Comm		650	400	550		600
Executive Comm		-	-	-		-
New Chapter Dev Comm		-	504	528		500
Other Committee Cost		-	15	-		250
Patriot Index Maintenance		-	540	-		-
Purchase of SAR Pins		-	-	450		-
Bank Charges/Fees		78	-	-		100
Miscellaneous Costs		1,475	822	533		500
D&O/Liability Insurance		-	-	-		500

	Patriot Mag Cost		7,216	4,518	5,878		6,000
	Other Postage/Delivery		137	38	-		100
	NSSAR Donation - Youth Programs		-	-	2,000		-
	ETF Donation		1,900	2,169	2,059		2,250
	Refund NSSAR Fees to G Bassett		-	-	580		-
	Hermione/Hamilton Ship Donation		-	500	-		-
	LAFSSAR Donation (pass thru)		1,000	-	-		-
	Naples Chap Donation (pass thru)		-	50	-		-
	F4F Donation		2,000	2,000	2,000		2,000
	Void/Replacement Checks		-	-	1,715		-
	Total		103,226	111,261	129,152		134,650
	Net Cash Surplus		6,660	13,074	39,850		

Attachment 5 Senior Officer Leadership Tabulation
FLSSAR Leadership Only Responses

	COMPOSITE LEADERSHIP	Sons of the American Revolution					
		Florida society					
		Strategic Plan Initiative					
		Committee Assessment Worksheet					
		How Well Do We Do This?			Should We Change?		Notes
Activity	Committee	Well	OK	Not Well	Yes	No	
FLSSAR Affairs							
	Archives		xx	x			
	Chpt Challenge & Americanism	x		xx			
	Documents		xx	x			
	Genealogy		x	x			
	BOM Meeting Arrangements	xx	x				
	Membership	x	xx				
	New Chapter Development			xxx			
	Newsletters & Periodicals	xxx					
	Technology Advisory Comm.		xx	x			
	Florida Sons of Liberty Brigade	x	xx				
Liaisons							
	Junior Members: SAR & CAR Aide	x		xx			
	DAR		xx	x			
	Ladies Auxiliary	xx	x				
Historic Sites							
	Commemorative Historic Sites	x		xx			
	Battle of Pensacola		xx	x			
	Battle of Thomas Creek	xx		x			
	Last Naval Battle	xx	x				
	Liberty Tree		x	xx			

Youth Programs	Amer. Elementary Poster Contest		xx	x			
	Eagle Scout Scholarship Comm.	xxx					
	Knight Essay Contest	xx	x				
	Good Citizenship		x	xx			
	History Fairs		xx	x			
	Rumbaugh Oration Contest		xxx		x		Needs more participants, Chapters
	ROTC	xxx					
Community Outreach							
	Amer. History Teacher Award		xx	x			
	Habitat for Humanity	x		xx			
	Patriotic Activities		xx	x			
	Public Service and Heroism	xx	x				
	Publicity			xxx			
	Support the Troops		xx	x			
	Veterans Affairs	x	x	x			
	Veteran's Recognition	xx	x				
Trust Funds							
	Endowment Trust Fund Disbursements	xx	x				
	Endowment & Operating Budget	xxx					
	Trust funds	xxx					

Attachment 6 Committee Tabulation

Aggregate of Full Planning Committee Responses

COMPOSITE WORKSHEET		Sons of the American Revolution					
		Florida society					
		Strategic Plan Initiative					
		Committee Assessment Worksheet					
Activity	Committee	How Well Do We Do This?			Should We Change?		Notes
		Well	OK	Not Well	Yes	No	
FLSSAR Affairs							
	Archives	X	XXXX	XX			Unknown
	Chpt Challenge & Americanism		XXXXX	XXXX			Needs modernizing
	Documents	X	XXXXX	X			
	Geneology	XX	XXXXX	XX	XX		Need better reporting; entire system needs redesign
	BOM Meeting Arrangements	XXXXXXXX	X				
	Membership	X	XXXX	XXXX			Organisation is focused on itself, not new members
	New Chapter Development		XXX	XXXXXX			Low retention = no need for new chapters
	Newsletters & Periodicals	XXXX	XXXXX				
	Technology Advisory Comm.		XXXXX	XXX			Unknown
	Florida Sons of Liberty Brigade	XXXX	XXXX				Unknown
Liasons							
	Junior Members: SAR & CAR	XX	XXX	XXX	X		Need better reporting; needs sincere commitment
	Aide [to CAR & SAR Jr membrs]		X	XXXXXX	X		Need better reporting
	DAR	X	XXXXXX	XX			Need better collaboration, they want to help SAR
	Ladies Auxiliary	XXXX	XXXX				
Historic Sites							
	Commemorative Historic Sites	XXXX	XX	X	X		Need better reporting
	Battle of Pensacola	XXX	XXX	X			
	Battle of Thomas Creek	XXXXX	XX				
	Last Naval Battle	XXXXX	XX				
	Liberty Tree	XX	XXXX	X	X		Need better reporting
Youth Programs							
	Amer. Elementary Poster Contest	XX	XXXX	XXX			School support is erratic
	Eagle Scout Scholarship Comm.	XXXXX	XXX				
	Knight Essay Contest	XX	XXX	XXXX			POOR PARTICIPATION, schools uninterested
	Good Citizenship	XX	XXXX	XXX	X		Need better reporting
	History Fairs	X	XXX	XXXX	X		Need better reporting
	Rumbaugh Oration Contest	XXX	XXXX	XX			POOR PARTICIPATION, schools uninterested
	ROTC	XXXXXXXX	XX				
Community Outreach							
	Amer. History Teacher Award	XX	XX	XXXX			Schools uninterested
	Habitat for Humanity	X	X	XXXXXX			Unknown; should be considered for dormancy
	Patriotic Activities	XX	XXX	XXXX			Some chapters better than others, overall good
	Public Service and Heroism	XXXX	XXXX	X			Some chapters better than others, overall good
	Publicity	X	XXX	XXXX			probably with Chapters efforts; needs modernization
	Support the Troops	X	XXXXX	XXX			Some chapters better than others, overall good
	Veterans Affairs	XX	XXXXX	XX			Some chapters better than others, overall good
	Veteran's Recognition	XXXX	XXXX	X			Some chapters better than others, overall good
Trust Funds							
	Endowment Trust Fund Disbursements	XXXX	XXX	XX			Simplification & electronic submission needed
	Endowment & Operating Budget	XXXX	XXXX				Needs modernization
	Trust funds	XXXXX	XX	X			Well done
	Conclusions:						Participants:
	Well done usually has a vigorous leader						Ralph Nelson
	Not well is the opposite, or its function is unknown to the membership						John Stewart
	Examine them for continued desirability:						Pat Niemann
	New Chapter Development						Dick Cardell
	Aide [to CAR & SAR Jr membrs]						Bernard Wolff
	History Fairs						John Goolsby
	Habitat for Humanity						Charles Butler
	Patriotic Activities						
	Publicity		probably with Chapters efforts.				