



# STRATEGIC PLAN

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MARCH 2021

# TABLE OF CONTENTS

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2	INTRODUCTION
3	VISION MISSION ORGANIZATIONAL GOALS
4	ORGANIZATION
6	IMPACT PLAN
9	LANDSCAPE ANALYSIS
10	GOVERNANCE
12	RETURN ON INVESTMENT
14	STAFF

# INTRODUCTION

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This document represents the strategic plan of the Special Operations Association of America (SOAA), a pending 501(c)19 in Washington, DC. It lays out the vision, the mission, the goals, and the operational plan for the organization, and a three-year development plan. This document is a strategic-level plan to guide the concrete steps that will be taken by the organization's leadership—to include both the staff and the board—to grow the organization over its first three years. While it enumerates benchmarks to be aimed for, nothing in this document should be taken as precluding actions by the leadership in response to circumstances that may arise throughout the time period covered. Strategic plans aim to chart a course, but they are not intended to answer every question of strategy, governance, or prudence.

As a start-up organization, SOAA will need to develop the markers of a successful organization: effective leadership, governance procedures, a donor base, and organizational structure. This document aims to outline that development between 2021 and 2024.



## VISION

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We aim to serve as the voice of the Special Operations community on issues of national security, civic engagement, accountability, and veterans affairs.

## MISSION

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We provide sustained advocacy, research, education initiatives, and community building to ensure the success of the SOF community and their families.

## ORGANIZATIONAL GOALS

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- Strengthen the lines of communication between SOF members, the veteran community, and policymakers.
- Produce high-quality, non-partisan research aimed at improving the lives of SOF members on and off the battlefield.
- Increase the public's awareness of the SOF community to help bridge the civilian-and-military divide.
- Develop a dedicated and motivated membership willing to engage on SOF-related issues informed by SOAA priorities.





## ORGANIZATION

### Programs

The core of any organization is the programming—that is, what the organization *does*. SOAA's mission statement identifies four activities through which SOAA carries out its mission: Advocacy, Research, Education, and Community Building. These activities underpin SOAA's efforts to bring about its Vision. Activities undertaken by SOAA—such as suicide prevention programs; TBI research and advocacy to treat Operator's Syndrome; improving cybersecurity in the National Defense Strategy; legislation to secure programs critical to national security in the National Defense Authorization Act; or, a Benevolence Fund—will fall under one of these four programs and will be guided by reference to the organization's mission and the vision.

#### Advocacy

Through its advocacy program, SOAA seeks to elevate the voice of Operators to influence lawmakers, administration officials, policymakers, and other stakeholders' actions concerning issues affecting the Special Operations community. This is primarily accomplished through the development and promotion of specific policy goals, grassroots advocacy, congressional testimony, regulatory comment, coalition building, and earned media. By engaging

in effective advocacy, SOAA will increase its influence and its visibility, enabling the advancement of its priorities, such as legislation that authorizes novel treatment of Post-Traumatic Stress and Operators' Syndrome; amendments within the National Defense Authorization Act to secure necessary spending for SOCOM specific billets; or, the co-elevation of SOAA and our partners' brands via earned media placements, such as op-eds, interviews, testimony, letters, blogs and social media.

#### Research

An integral part of advocacy is understanding what policy goals are both *desirable* for Operators and *achievable*. Research is the primary means for gaining this understanding. By engaging in and commissioning high-quality research on topics of interest to its members, SOAA will increase its credibility and further its ability to promote its priorities, such as narrowing the civilian-military divide, or securing pilot programs for innovative alternative treatments for Operator's syndrome, showing its positions to be underpinned by cutting-edge findings.



## Education

Educating the general public about Special Operations is a crucial part of SOAA's mission. Over the past several decades the separation between the military and the civilian populace has increased. This divide is particularly exacerbated with regard to the Special Operations community, given the complex and often concealed nature of Special Operations missions. Developing educational resources for the general public aimed at furthering understanding of Special Operations and their role in national defense will help SOAA better advocate for members of the Special Operations community, as well as improve the lives of those who are serving or have served in Special Operations components of the military by improving community reintegration. Further educational resources that elevate national security issues to the public and policymakers will cement SOAA's Advocacy and Community Building efforts.

## Community Building

To be the voice of the Special Operations community, SOAA will establish and grow an engaged membership base of Veterans, Active Duty, and supporters of Special Operations, providing its members with the platform to directly give the ground truth to Congress and the Administration. Aspects of community building include in-person events, digital street teams, webinars, conferences, and a Benevolence Fund dedicated to assisting members in times of need. This robust community not only will provide SOAA with the ground truth of their experience on and off the battlefield, but SOAA will engage its community with its Education, Research, and Advocacy activities to promote SOAA priorities and partners.





## IMPACT PLAN

### Advocacy

The primary purpose of SOAA's existence—and comparative advantage—is to be a voice for the Special Operations community, particularly within the sphere of public policy. SOAA aims to select 10 issues per year to prioritize in its advocacy efforts while engaging other “targets of opportunity” as they arise.

#### Objective 1:

*Engage with Congress and other policymakers to measurably impact legislation and regulatory policy by successfully influencing policymakers to champion legislation and change specific policies to align with SOAA priorities.*

#### Measurements of Success:

- Hold 100 meetings with Congressional members or staff per year.
- Submit quarterly written testimony for any hearings on issues of importance to SOAA.
- Empower SOF Operators to testify before Congress at least once per year.
- Submit quarterly comments on all congressional policy negotiations of importance to SOAA's priorities.
- Launch Legislative Action Center to update SOAA members on relevant pending legislation

- Secure authorizing language for SOF-specific spending in order to meet the goals of the National Defense Strategy in the annual National Defense Authorization Act and Fiscal Year Defense Budgets

#### Objective 2:

*Build a coalition of relevant organizations to promote SOAA's priorities.*

#### Measurements of Success:

- Successfully engage 15 to 20 VSOs and other organizations—such as SOF adjacent nonprofit organizations, research organizations dedicated to SOF related issues like PTSD and TBI, or national security adjacent nonprofits—to partner on advocacy actions projects including co-signing letters of support, issuing joint statements, co-sponsoring events, and holding joint meetings with policymakers.
- Host bi-annual events with peer organizations to discuss issues and identify potential points of collaboration.
- Participate in VSO roundtable discussions, conferences, and conventions to highlight SOF needs.
- Regularly appear in media via op-eds, interviews, or articles to highlight SOAA priorities



**End State:**

Operators are able to give the Ground Truth to members of Congress and policymakers, directly affecting change in order to improve their lives on and off the battlefield.

**Research**

To better understand and advocate for the needs of the Special Operations community, SOAA will produce high-quality research projects, either through conducting or commissioning. Research projects will be identified by SOAA leadership based on relevance to SOAA's objectives and a deficit of reliable research in the area. Research will then be packaged and communicated in a manner that is accessible to policymakers and the general public.

**Objective 1:**

*Conduct or commission high-quality research to further understand issues of importance to SOAA and bolster advocacy efforts.*

**Measurements of Success:**

- Conduct or commission one (1) major research project per year on an issue of relevance to SOAA's priorities and identified as under-studied by SOAA's leadership.
- Produce at least 10 white papers per year on issues pertinent to SOAA's priorities.

**Objective 2:**

*Develop effective communications around research projects in order to make the findings accessible to policymakers and the general public.*

**Measurement of Success:**

- The Communications team will work with researchers to develop *accurate* and *accessible* communications campaigns to raise awareness of the findings of the research.

**End State:**

SOAA's publication and promotion of compelling Research will influence policy and oversight of SOF, authorize new pilot programs to aid SOF, appropriate additional funding for identified gaps in programmatic care, or aid in informing the public in efforts to bridge the civilian-military divide.

**Education**

To promote an increased understanding and help bridge the civilian-military divide, SOAA will engage in projects aimed at educating the general public about the role of SOF in the modern military, and highlighting SOF members in the community that are exemplary in their civil service.

**Objective 1:**

Produce engaging content that brings to light issues aimed at bridging the civilian-military divide, particularly as experienced by SOF members, and tells the stories of members of the SOF community in order to humanize SOF members.

**Measurements of Success:**

- Publish at least one (1) opinion piece per month.
- Produce four (4) Special Operations Forces "Spot Light" videos per year.
- Produce four (4) issue-based informational videos per year.
- Promote at least one (1) earned-media opportunity per quarter.
- Develop MOUs with media companies to cross-promote content.

**Objective 2:**

Provide in-person or virtual opportunities to discuss the role of Special Operations Forces, the civilian-military divide, or other issues of interest, and to encourage interaction between the SOF community and the general public.

**Measurement of Success:**

- Host at least two (2) events per year that explore various issues pertaining to SOF through panel discussions and keynote speakers, and which offer opportunities for interaction between members of the SOF community and the general public.

**Community**

Building a robust community of current and former SOF members is integral to SOAA's vision to be the voice of the SOF community, to bridge the civilian-military divide, and promote Operators themselves before members of Congress.

**Objective 1:**

Build out a membership program to create a sense of identity for members and provide members with opportunities and perks.



**Measurements of Success:**

- Attract 30,000 members in the first three years.
- Create partnerships with three (3) industry leaders to provide opportunities and advantages to members.
- Build a robust digital street team that will promote SOAA content and engage relevant online communities.
- Host 1 fundraising events a year
- Host 1 conference a year
- Host 1 webinar a quarter

**Objective 2:**

*Provide opportunities for members to participate in the SOAA community and advocacy.*

**Measurements of Success:**

- Host at least two networking events for members per year.
- Develop a network of members who contribute to the SOAA blog.
- In coordination with Legislative staff, organize one Legislative Workshop in which current, past, or recently separated Operators will engage members of Congress on SOAA priorities.
- Launch SOAA Awards that honor various members for outstanding achievements and character.

**Objective 3:**

*Build and operate a Benevolence Fund by the end of the third year.*

**Measurements of Success:**

- Register nonprofit foundation operated by SOAA as a Benevolence Fund
- Secure Restricted Funds dedicated as seed money for SOAA Foundation.
- Establish criteria of eligibility for foundation assistance.
- Raise awareness of the SOAA Foundation amongst SOAA members and the SOF community.
- Assist members based on set criteria.

**End State:**

A vibrant and engaged community engaging with various Education, Research, and Advocacy resources, becoming self-directed in their involvement to improve the lives of SOF at home and abroad.





## LANDSCAPE ANALYSIS

The current organizational landscape provides an opportunity for SOAA: SOAA is the only Veteran Service Organization (VSO) primarily focused on and actively advocating for all Special Operations Forces. There is a distinct gap in the landscape where SOAA intends to work.

There are over 45,000 VSOs in America – but none of these VSOs offer public policy and advocacy specifically for the Special Operations community. None of these VSOs address the unique needs and concerns that affect SOF, both on and off the battlefield, or once they transition out of the military; none commit themselves to forming a community for SOF members, nor dedicate themselves to elevating the voice of SOF members to policymakers.

Special Operations Association of America will be the organization that changes this for Operators and their families, and finally closes this glaring oversight in the sea of goodwill America has towards its veterans and servicemembers.

The Veterans advocacy space, particularly at the national level, is dominated by the so-called “Big Six” legacy organizations: The American Legion, Veterans of Foreign Wars (VFW), American Veterans (AMVETS) Disabled American Veterans (DAV), Paralyzed Veterans of America (PVA), and Vietnam Veterans of America (VVA). While these organizations together provide a powerful voice for the interests of veterans, none focus specifically on SOF in any meaningful way. Of note, these “Big Six” have signaled support to SOAA as a welcome and needed addition to the VSO space.

Likewise, newer organizations, such as Wounded Warrior Project and Iraq and Afghanistan Veterans of America (IAVA), focus broadly on specific segments of the veteran populations—service disabled in the former case, and Post-9/11 in the latter—but have no programming geared toward understanding and advocating for SOF members.

Though numerous organizations focus on serving the needs of SOF members and veterans, none engage full-time in any policy advocacy. Instead they, by and large, serve the SOF community by engaging in charitable activities and providing comradery and fraternity. In an analysis of nearly 200 such organizations conducted by SOAA, only *two* engaged in any advocacy activity, and *only one* of these—the Marine Raider Association—do more than simply encourage members to contact their representatives.

The Special Operations Association of America is well-positioned to fill this gap in the VSO landscape. The Co-Founder is an actively-serving Special Forces soldier in the Army National Guard, with more than a decade of military and veteran policy advocacy experience at the national level. He previously successfully launched a nonprofit focused on advocating for veterans in higher education called Veterans Education Project (VEP). The founding team for SOAA will be comprised of experienced legislative and communications staff that form a solid core around which additional staffing can be built out.





## GOVERNANCE

### Board of Directors

The board of directors is the primary governing body of the organization. All staff ultimately answer to the board, and it is the board as a *body* that governs, not individual members of the board. Actions by the board are binding on the organization. Hence, board members should be selected carefully, ensuring that those selected understand and agree with the vision and mission of the organization, and are committed to its care and advancement. Board members should be selected from diverse backgrounds, ideally related to the mission of the organization, in order to bring different strengths and perspectives. While fundraising should not be the primary consideration for board members selection, boards of directors should be able to assist in raising funding for the organization, either by donating it themselves or by influencing others to give. Board members can also help raise the profile of the organization.

Boards should be large enough that they can meaningfully deliberate on issues, but not so large that they risk developing either factions or a de-facto board comprised of a few active members and a large number of passive members. Ideally, a board will have no less than seven and no more than 20 members. The number will be established in the bylaws and may be amended by the board.

SOAA will begin board development by recruiting between ten and 12 qualified members to the board within the first year.

A targeted board composition for SOAA will include:

- Individuals drawn from the corporate sector (1)
- Department of Defense, e.g. high-ranking military officers or secretaries (2-3)
- Defense contractor executives (1)
- Academic or think tank scholars in defense policy or international relations (2-3)
- Finance industry (1)
- State Department or diplomatic community (1)
- Veterans/VSO leaders (1)
- Members/Former Members of Congress (1-2).

The board should convene and approve bylaws and the strategic plan (discussed below) as soon as practicable after being formed.

## Board of Advisors

A board of advisors is an informal group of individuals who are asked to affiliate themselves with an organization to provide their expertise or their prestige. Unlike a board of directors, a board of advisors does not exercise governance authority. As such, the board of advisors should consist of individuals and/or career professionals who are able to provide substantial insight into issues of relevance to SOAA's mission and priorities. These could include current or former high-level DoD/SOCOM personnel, academic or think tank researchers with a focus on these issues, current or former VSO leaders, high-profile veterans of SOF, or other military service.

## Bylaws

Bylaws provide the structure for the board and for the organization, and so should be drafted and adopted as soon as possible. They are the legal document that enables the board to exercise its governance function, and they define the rules by which the board will operate. This can include the purpose of the organization, the size and function of the board, terms and procedures for the election of the board, structure of the board (officers, committees, and so forth), and guidelines for how to conduct meetings including how often meetings should be held, quorum requirements, and rules of order.

Bylaws can contain boilerplate material to serve as a model, but they should be carefully analyzed and tailored to ensure that all language is consistent with the needs of SOAA.

## Strategic Plan

This strategic plan is designed to guide the leadership of SOAA over the three years that it covers, guiding its organizational development and providing benchmarks to meet. As such, the board should approve and adopt this plan—making any changes it deems appropriate—as soon as possible upon convening. The board should monitor organizational progress against the benchmarks laid out in the plan and offer guidance on how the benchmarks can be supported and achieved.

Once the period covered by this strategic plan has elapsed, leadership should engage in another session of strategic planning to chart future growth, for subsequent approval by the board.

### Key Goals

- Recruit at least ten qualified, diverse board members in accordance with the distribution outlined above.
- Draft and have the board approve organizational bylaws.
- Have the board approve the strategic plan.





## RETURN ON INVESTMENT

SOAA is committed to open and ethical financial disclosures. We believe handling financial contributions with integrity and transparency is one of the most important responsibilities we have to our members and donors. We recognize that our donors are entrusting us with the important mission of representing and fighting for the SOF community and that the donations we receive is an extension of that trust. We pledge to make financial statements publicly available and easily accessible on our website.

While we pledge complete transparency with each dollar spent, we understand some donors want to remain anonymous. We are committed to the confidentiality of our donors, and keep our donor list private unless otherwise expressly requested in writing.

**SOAA is a pending 501c19 Organization.**

**SOAA follows and maintains best financial practices to receive a perfect score from Charity Navigator**

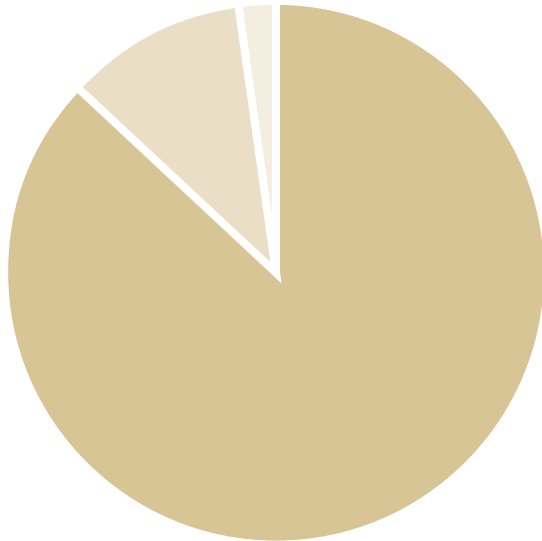
**SOAA has a pending application as an Accredited Non-Profit with the BBB**

SOAA will follow the best practices as determined by the BBB and Charity Navigator. This includes:

- An independent Voting Board
- Providing audited financials prepared by an independent accountant
- Documents Board Meeting Minutes
- Providing a copy of Form 990 to the Board in advance of filing
- Conflict of Interest Policy
- Whistleblower Policy
- Executive Director listed with salary.
- Process for determining CEO compensation.
- Board Listed / Board Members will be volunteers and not compensated

A Clear and Strict Donor Privacy Policy

Publicly and easily accessible Form 990



#### ● **Programming expenses:**

- Advocacy
- Research
- Staffing
- Membership/Community Building
- Benevolence Fund
- Education
- Media Engagement

#### ● **Administrative Expenses:**

- Accounting
- Membership Communication and Engagement
- Executive Salaries
- Legal Counsel
- Insurance
- Office Management

#### ● **Fundraising Expenses:**

- Donor Database management
- Events
- Outreach

Our goal is to put 85 cents of every dollar towards programming, that is, **what we do**





# STAFF

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Building out a staff capable of managing SOAA's programs and the overall growth of the organization is crucial for the success of the programming. It is therefore essential to securing and maintaining the confidence of members, donors, and partner organizations. The following is an outline of the organizational structure that should be aimed for by the end of three to five years.

## Senior Leadership

Executive Director

Chief Operating Officer

## Advocacy

Legislative Director

Assistant Director

Legislative Associate

Intern

## Research

Director of Research

Intern

## Communications/Marketing/Education

Communications Director

Digital Media Director

Copy Writer

Intern

## Outreach

VSO Liaison

Director of Development

## Operations

Administrative Assistant

## Key Goals

### First Year:

- Develop specific initiatives under each of the program areas.
- Recruit a qualified core of staff to supplement existing staff and ensure the basic functioning of the organization and support programmatic offerings. Existing staff includes an Executive Director, a Legislative Director, a Communications Director, and a Digital Media Director.
- First-year recruitment goals should focus on the and Director of Research role.
- Begin considering potential members of a board of advisors.

### Second Year:

- Evaluate programmatic offerings to determine what should be maintained, expanded, or eliminated.
- Continue to recruit staff, aiming for a Chief Operating Officer, Assistant Legislative Director and Administrative Assistant.
- Recruit at least three members of a board of advisors.

### Third Year:

- Re-evaluate programmatic offerings to determine what should be maintained, expanded, or eliminated.
- Recruit VSO Liaison to build relationships with other veterans organizations and assist in collaboration. Fill out organization with lower-level staff to assist directors, and a Development Director.
- Develop intern program.
- Recruit additional members of the board of advisors, up to 10.

