

# Ugly Angel Memorial Foundation Special Edition Newsletter

Volume 10, No.1, March, 2005



To all squadron personnel:

Included in this communication are documents that represent a year's worth of effort, by the board of directors, at defining what our mission is and how we intend to accomplish the objectives contained therein. I would encourage each of you to thoroughly review this document in an effort to see if there is a connection between what we are going to accomplish and skills, capabilities and / or other resources that you may possess that could assist us in reaching these goals.

We have developed an organizational structure, operating management if you will, to deal with executing the tasks assigned to each of these functional areas. These areas and the individual responsible are as follows:

Air show / Museums - Gunny Sachs ([ClipClop6@aol.com](mailto:ClipClop6@aol.com))  
Aircraft restoration - Lew Barnes / Ben Casico ([hmm362@aol.com](mailto:hmm362@aol.com), [BenCascio@aol.com](mailto:BenCascio@aol.com))  
Budgeting - Sherard Dukes / Pete King ([confidentialcorporal@msn.com](mailto:confidentialcorporal@msn.com),  
[peetking@earthlink.net](mailto:peetking@earthlink.net))  
Education - Lew Barnes ([hmm362@aol.com](mailto:hmm362@aol.com))  
Fund raising - Mark Stanton ([mstanton@optonline.net](mailto:mstanton@optonline.net))  
Historian / Web site / Editor - Bob Skinder ([rskinder@att.net](mailto:rskinder@att.net))  
Membership - Ben Casico ([BenCascio@aol.com](mailto:BenCascio@aol.com))  
Planning - Dave Luhrsen ([luhrsen@northwood.edu](mailto:luhrsen@northwood.edu))

What will ultimately secure the foundation that we are putting in place is participation from as many of you as possible. With this in mind please feel free to contact any of the above referenced individuals with your thoughts.

I look forward to hearing from you!

Semper Fi

Lew

## **Ugly Angel Memorial Foundation Updated Draft Strategic Plan of Dec 15, 2004**

### **Background**

The Ugly Angel Memorial Foundation (UAMF) is a not-for-profit corporation founded by former members of Marine Medium Helicopter Squadron 362. It has been designated a charitable organization under Section 501 (c)3 of the U.S. Internal Revenue Code. Its stated purpose has been “to support and create educational programs and events focusing on the United States military involvement in Vietnam during the second half of the twentieth century. This support will take place through the supervision, publication, and distribution of written materials, preparation of public exhibits and displays, and creation of an oral history of the period.” The UAMF is governed by an elected board of directors, which held a meeting at the Embassy Suites Hotel in Tulsa, Oklahoma, from 6:00 PM to 8:00 PM on Friday, October 11, 2003, under the leadership of President Lew Barnes. In attendance were board members Ben Cascio, Sherrard Dukes, Tom Hewes, Dave Luhrsen, Bob Skinder, and Mark Stanton. To begin the discussion of the future of the UAMF, President Barnes presented a draft proposal to the board.

After considerable discussion on the topic, a consensus was reached concerning that establishment of a new vision for the UAMF, along with a slight modification of the stated organizational mission. The consensus was to modify the purpose statement quoted above, by replacing the words “military involvement in Vietnam during” with the words “Marine helicopter and other rotary wing operations during and after.” This broadening of the purpose and mission, in turn, is expected to affect other aspects, such as the UAMF’s field of membership, fundraising potential, operational tempo, annual budgets, organizational structure, potential strategic partnerships. There was considerable discussion among board members regarding possible strategies and plans for the UAMF in each of these aspects. At the conclusion of the meeting, the president and the board asked Dave Luhrsen to prepare a written draft of a potential strategic planning document for review and comments by the board as soon as possible. Luhrsen agreed to do so, and to circulate the draft to board members by electronic mail.

Following is the first draft of that document, which is completed through the “Mission” section, and is outlined in the following sections, where additional detailed work is needed, based on approval and/or modification of the first three sections and the outline of the remainder by the board.

### **Vision**

The strategic planning process traditionally begins with the establishment of the Vision, which is a succinct statement of what the organization intends to be and to have accomplished in a period of at least five to ten years in the future, with an emphasis on how the world or some part of it will be changed in that time by the organization. In this case, however, the vision is to be derived “retroactively” from the newly-modified organizational purpose (mission) statement. The proposed Vision is:

“During the 21<sup>st</sup> century, the UAMF will assure that all of the American public, from young children to senior citizens, both male and female, have been educated about the origin, development, heritage, and role of U.S. Marine rotary-wing aviation in the defense of the United States and the freedoms, values, and lifestyle of the American people, in the past, present, and future. As a consequence, the American public will gain both a better understanding and a better appreciation of the contribution and importance of Marine Aviation in securing the blessings of liberty for the American public and their posterity.”

To the extent that UAMF is successful in carrying out this vision, it may happen that the term ‘Ugly AngeP, which now means a member or a helicopter from HMM-362 or *HMH-362*, will become understood by the public as a generic term that pertains to any Marine rotary wing aircraft or associated personnel,

### **Mission**

The mission of the UAMF is “to support and create educational programs and events focusing on the United States Marine helicopter and other rotary wing operations during and after the second half of the twentieth century. This support will take place through the supervision, publication, and distribution of written materials, preparation of public exhibits, demonstrations, and displays, and creation of an oral history of the period.”

## Goals

1. **Field of membership:** To be expanded in phases over at least three years to those who provide financial and/or in-kind support to the UAMF:
  - a. Primary: Former members of HMM-362, HMR(L)-362. & present members of HMM-362
  - b. Secondary: Former members of HMM-362 & other HMM's besides '362
  - c. Tertiary: Corporations that manufactured the H-34 (Sikorsky/United Technologies) and its components (e.g., Pratt & Whitney), and are located in the cities where H-34's are under rehabilitation or fly from time to time (e.g., Tulsa, OK or Portland, OR)
  - d. Extended: Former and present Marines not associated with HMM's, and governmental entities and officials
  - e. Supporting/sustaining: Individuals, foundations, and corporations that provide ongoing financial support to sustain the operation of the UAMF and its programs
  - f. Open: The general public, especially those who have seen an H-34 exhibition
2. **Operations and activities:** To be expanded in phases over at least three years to serve the broadening constituency:
  - a. Primary: Provide a governance structure which plans, organizes, and operates an infrastructure that serves the expanding membership, beginning with a vision, mission, strategic plan, and ultimately annual action plans that include specific services to be provided, outcomes and objectives, organizational structure, and budgets.
  - b. Secondary: Collect, process, and distribute information about HMM-362, HMR(L)-362, and HMM-362 to the expanding membership via newsletters, history channel, websites, mailings, and membership mail, e-mail, and telephone lists.
  - c. Tertiary: Over time, develop a few regional subgroups for social, operational, and educational purposes, such as parties, air shows, funerals, hospital visits, and reunion activities.
  - d. Extended: Provide a process for facilitating organized activities involving UAMF members under appropriate circumstances such as illness, funerals, reunions, providing scholarships, etc.
3. **Organizational structure:** To be developed over the years as the UAMF's membership, activities, and budget expand:
  - a. Initial: All-volunteer Board of Directors, including specialists who have been elected to hold certain offices, as well as individuals who have and offer the organization certain needed specific skills such as leadership, journalism, communication, website design and maintenance, financial planning, marketing, fundraising, data base management, event coordination, promotion, commercial rotary aircraft flying, helicopter maintenance and restoration, etc.
  - b. As required by events and as supported by financial resources: A part-time administrator who will serve as a point of contact by which UAMF can interact with its members, the general public, and others who have interest in its mission and activities.
4. **Strategic partnerships:** To be developed over the years as the organization develops and expands its membership, infrastructure, financial resources, activities, and programs.
  - a. Initially, entities which own and can make available physical and financial resources that are necessary for the expansion of UAMF's activities and services:
    - i. The YL-37 Group, Gerald Hail
    - ii. Lew Barnes, owner of an H-34 to be rehabilitated
    - iii. The owner of a location where an H-34 can be rehabilitated
    - iv. Sikorsky Aircraft Company
    - v. Pratt & Whitney Aircraft
    - vi. Public and private foundations that provide funds in response to grant requests
    - vii. Governmental entities that provide grants for purposes including the mission of the UAMF
  - b. Over time, identify develop strategic partnerships with other organizations with which the UAMF shares common interests, and that can benefit from UAMF success in accomplishing its mission over time:
    - i. Providers of aviation fuel, fluids, aircraft parts, and maintenance
    - ii. Professional associations that produce Public Service Announcements for non-profit organizations such as UAMF
    - iii. Marine Corps League
    - iv. Magazines and other publications serving the Marine/Aviation Marine market
    - v. Providers of services to the Marine market (e.g., USAA, NCFU)
    - vi. Museums (Marine Corps Museum, Naval Air Museum, etc.)
    - vii. Air shows (Oshkosh, Sun 'n Fun Lakeland, military bases' shows)

viii. Organizations wishing to secure public recognition by sponsoring UAMF

5. **Annual budgets:** to be increased year-to-year, as resources become available to support increasing scope of services and activities that require funding to cover increased expenses.
  - a. **For 2004:** 200 members @ average of \$25 each = \$5000, plus contributions of \$2000 = **total of \$7,000.**
  - b. **For 2005:** 300 members @ average of \$35 each = \$10,500, plus contributions of \$3500 = **total of \$14,000.**
  - c. **For 2006:** 400 members @ average of \$35 each = \$14,000, plus 36 sustaining members @ \$1000 = \$36,000, plus 1 grant of \$25,000 = \$25,000, **total of \$75,000.**
  - d. **For 2007:** 440 members @ average of \$35 each = \$15,400, plus 30 sustaining members @ \$1000 = \$30,000, plus 2 grants of \$25,000 each = \$50,000, plus 1 gift/grant of \$5,000 = \$5,000, = **total of \$100,400.**
  - e. **For 2008:** 500 members @ average of \$30 each = \$15,000, plus 25 sustaining members @ \$1000 = \$25,000, plus 2 grants of \$25,000 each = \$50,000, plus 2 gifts/grants of \$10,000 each = \$20,000, plus 1 gift/grant of \$5,000 = \$5,000, = total of \$115,000
6. **Fundraising:** To transition over time from a volunteer infrastructure operating ad hoc, to a committee operating with nationwide coverage under the same strategy, supported by a database that receives and holds information about priorities, follow-ups, primary contacts, and fundraising goals, so as to achieve the income levels defined in paragraph 5, above.
  - a. Initially, focus on obtaining cash from existing field of membership that does not pay dues
  - b. Over the years. add a category of membership involving sustained financial support at a level far above ordinary dues revenue
  - c. Over time, identify, approach, and close commitments from corporations, then foundations, then individuals of substantial means with an interest in the success of the UAMF' s mission.

## Strategies

1. **Field of membership:**
  - a. Convert existing non-paying affiliate group to dues-paying constituency.
  - b. Gradually upgrade up to 10% of dues-paying members to the "sustaining" category, paying 25 to 35 times the annual dues rate.
  - c. In later years as membership among those who actually served with HMM-362 in Viet Nam declines, replace those members with a larger number of new members from the wider circles of outreach, including the general public, especially helicopter pilots and crew from the "baby echo" generation and their children.
  - d. Over the years, form strategic partnerships and attract members that are not real persons, but are corporations, organizations, and governmental entities.
2. **Operations and activities:**
  - a. Primary: Provide a governance structure which plans, organizes, and operates an infrastructure that serves the expanding membership, beginning with a vision, mission, strategic plan, and ultimately annual action plans that include specific services to be provided, outcomes and objectives, organizational structure, and budgets.
  - b. Secondary: Collect, process, and distribute information about HMM-362, HMR(L)-362, and HMM-362 to the expanding membership via newsletters, history channel, websites, mailings, and membership mail, e-mail, and telephone lists.
  - c. Tertiary: Over time, develop a few regional subgroups for social, operational, and educational purposes, such as parties, air shows, funerals, hospital visits, and reunion activities.
  - d. Extended: Provide a process for facilitating organized activities involving UAMF members under appropriate circumstances such as illness, funerals, reunions, providing scholarships, etc.
3. **Organizational structure:**
  - a. Transition gradually from a very part-time and mostly ad hoc volunteer structure with irregular accountability and little strategic commitment to a coordinated volunteer organization that is committed to a strategic plan and is organized into committees and task forces that are focused on strategic outcomes.
  - b. Over time, add part-time staff that is paid to coordinate and facilitate activities and functions of the organization in a professional manner.
  - c. In the event flight activities are included in the organization's operations, insure that personnel who are performing aviation flight and maintenance functions are properly qualified, licensed, and insured.

**4. Strategic partnerships:** Identify organizations and individuals whose missions and commitments match closely the mission of UAMF, and approach and close their commitments for cooperation and financial support in a systematic and professional manner.

**5. Annual budgets:** Establish realistic goals, and project revenues conservatively and expenses somewhat liberally, so as to increase the probability that net revenues will be positive, even if budget goals are not fully met.

**6. Fundraising:** Plan and organize so as to use combinations of resources, including~ progressively:

- a. Dues revenues from members drawn from the inner circle
- b. Premium dues from particularly loyal and well-healed members that provide substantial revenue over and above ordinary dues
- c. Grants from foundations or corporations with a vested interest in the success of the UAMF mission, especially public flight demonstrations
- d. Grants and gifts from individuals and organizations that identify closely with the UAMF mission, especially public flight demonstrations

#### **Objectives for 2004**

Objectives are to be Specific, Measurable, Achievable, Realistic, and Time-bound (SMART), and usually are established annually for the next year.

#### **1. Field of membership:**

- a. Primary: Former members of HMM-362, HMR(L)-362, as well as present members of I-IMH-362.
- a. Secondary: Former members of HMM-362 & other HMM's besides '362
- b. Tertiary: Corporations that manufactured the H-34 (Sikorsky/United Technologies) and its components (e.g., Pratt & Whitney), and are located in the cities where H-34's are under rehabilitation or fly from time to time (e.g., Tulsa, OK or Portland, OR)

#### **2. Operations and activities:**

- a. Primary: Provide a governance structure which plans, organizes~ and operates an infrastructure that serves the expanding membership, beginning with a vision, mission, strategic plan, and ultimately annual action plans that include specific services to be provided, outcomes and objectives, organizational structure, and budgets.
- b. Secondary: Collect, process, and distribute information about HMM-362, HMR(L)-362, and HMM-362 to the expanding membership via newsletters, history channel, websites, mailings, and membership mail, e-mail, and telephone lists.
- c. Tertiary: Over time, develop a few regional subgroups for social, operational, and educational purposes, such as parties, air shows, funerals, hospital visits, and reunion activities

#### **3. Organizational structure:**

- a. All-volunteer Board of Directors, including specialists who have been elected to hold certain offices, as well as individuals who have and offer the **organization** certain needed specific skills. Such skills to be recruited among volunteer board members include leadership, journalism, communication, website design and maintenance, financial planning, marketing, fundraising, data base management, event coordination, promotion, commercial rotary **aircraft flying, helicopter maintenance and restoration, etc.**
- b. Over the year, define functional areas of endeavor and activities of the organization for which each board will take on responsibility and become accountable, including recruitment of a committee of other members to assist with that area of endeavor.
- c. Define clearly the line of succession to leadership, including from general membership to the board, from the board to office(s), and back out of office.
- d. If desired, establish financial obligations (giving resources) and expectations of resource generation (getting resources) for board members

**4. Strategic partnerships:** Make contact and move toward closure of strategic partnerships with each of these entities during 2004.

- a. The YL-37 Group, Gerald Hail
- b. Lew Barnes, owner of an H-34 to be rehabilitated
- c. The owner of a location where an H-34 can be rehabilitated
- d. Sikorsky Aircraft Company
- e. Pratt & Whitney Aircraft
- f. Public and private foundations that provide funds in response to grant requests

**5. Annual budget:**

- a. Income: 200 members @ average of \$25 each = \$5000, plus contributions of \$2000 total of \$7,000.
- b. Expenses:
  - i. Printing and Postage: 2 mailings @ \$1 each to 500 addresses = \$1000
  - ii. Symbols of membership (decals, patches, stickers, etc.): 250 @ \$4 = \$1000
  - iii. Donor recognition (e.g., plaques to recognize donors/grantors): 8 @ \$50 = \$400
  - iv. Fees to grant-writing consultant: 40 hours @ \$50 = \$2000
  - v. Contributions to strategic partners: 2 @ \$1000 = \$2000
  - vi. Contingency/surplus: \$600

**6. Fundraising:**

- a. Board develops, approves, and commits to implement strategic plan
- b. Board shares plan with existing constituency, invites comments, and publicizes the approved plan with both long-term and 2004 parameters, promoting benefits of membership such as symbols of membership, donor recognition, public relations value, esprit de Corps, future potential for strategic partnerships, exciting shows and activities, etc.
- c. Publicize need for seed money and funding to get the UAMF going and growing.
- d. Establish membership categories, inform existing constituency with appeals for immediate payment of dues at \$35 for 2004
- e. Appeal for contributions of \$1 000/year as benefactor members to support future growth, especially possibility of participating in air shows at a future time.

**Plan of Action**

The Plan of Action describes how the Objectives are to be achieved (strategies to be implemented), including (1) the human resources plan that covers both organization and staffing (both full-time and part-time, both volunteers and paid personnel, both employees and independent contractors), (2) the financial plan that includes both the operating and capital budgets, and (3) monitoring processes for measuring progress toward objectives and identifying opportunities to adjust the plan of action as appropriate during the year.

- 1. Field of membership:
- 2. Operations and activities:
- 3. Organizational structure:
- 4. Strategic partnerships:
- 5. Annual budget:
- 6. Fundraising:

**Monitoring Processes**

- 1. Field of membership:
- 2. Operations and activities:
- 3. Organizational structure:
- 4. Strategic partnerships:
- 5. Annual budget:
- 6. Fundraising: