

# INSIGHTS INFORMING THE CONCERNS OF POST- 9/11 VETERANS AND FAMILIES

*Case Study:*  
*USO of Illinois*



SYRACUSE UNIVERSITY'S INSTITUTE FOR VETERANS AND MILITARY FAMILIES (IVMF) HAS BEEN CONTRACTED TO SUPPORT THE GEORGE W. BUSH INSTITUTE'S RESEARCH TO EFFECTIVELY SERVE AND EMPOWER OUR POST-9/11 VETERANS AND MILITARY FAMILIES.



# GEORGE W. BUSH INSTITUTE



## USO OF ILLINOIS CASE STUDY

### 1. Organizational Overview

#### History

Ahead of the US entry into World War II, President Franklin D. Roosevelt asked six private organizations – the YMCA, YWCA, National Catholic Community Service, the National Jewish Welfare Board, the Traveler’s Aid Association and the Salvation Army – to come together to serve the recreational needs of the members of the armed forces. These organizations pooled their resources and formally incorporated the United Service Organizations (USO) in New York State on February 4, 1941. President Roosevelt served as the first Honorary Chairman of the USO beginning a tradition that endures today. During World War II the USO began serving military service members stationed stateside and abroad by providing live entertainment through performances known as Camp Shows and by operating facilities known as USO Centers that intended to serve as places of recreation and relaxation. Although the USO has developed a number of additional programs in the years since, live entertainment and USO Centers continue to be the organization’s best known programs and how the USO reaches the majority of service members and their families.

Specifically, the *USO of Illinois* is the focus of this case study review, which is an example of the stateside affiliate program under which USO World Headquarters (aka USO, Inc.) extends a charter to an independently incorporated 501(c)(3) allowing them to operate within a dedicated geographic service area. This program was described by the USO of Illinois staff as the method by which the USO localizes its mission. On behalf of USO, Inc. Vice President of Operations Glenn Welling said that they “really enjoy this collaborative relationship, and we couldn’t do what we do here, particularly in the continental United States, without the charter centers,” continuing to say that “the innovation that occurs within our organization doesn’t occur in [our corporate headquarters located in] Arlington. It occurs here.” Of the more than 160 USO locations worldwide, the USO of Illinois operates five within Illinois and is tasked with delivering additional community based programs to the more than 60,000 service and family members within the state.

Notable events in the history of the USO, Inc. and its USO of Illinois affiliate are as follows:

- February, 1941 – United Service Organizations (USO) is formally incorporated.
- May, 1941 – Bob Hope leads a group of celebrities to perform for airmen stationed at March Field California, the first such performance.
- October, 1941 – USO Camp Shows Inc. is established and is designated by the War and Navy

Departments as the official entertainer of the men and women of the Armed Forces.

- April/May, 1942 – Chicago opens two USO clubs, the first USO club at the Illinois Central Railroad Terminal at Roosevelt Road and the second in the historic Union Station on May 20, 1942.
- December, 1947 – All USO clubs and facilities are closed, and the organization is given an honorable discharge by President Harry S. Truman.
- January, 1951 – The USO is reactivated for the Korean War under a Memorandum of Understanding between the President and the Department of Defense.
- December, 1979 – President Jimmy Carter signs the USO’s newly granted Congressional Charter which guides the present day operation of the USO.

Present day, the USO operates under the 1979 Congressional Charter signed by President Jimmy Carter and recorded in 36 USC 220101 and 36 USC 220102, which states that the purposes of the corporation are:

- (1) To provide a voluntary civilian agency through which the people of this Nation may, in peace or war, serve the religious, spiritual, social, welfare, educational, and entertainment needs of the men and women in the Armed Forces within or without the territorial limits of the United States;
- (2) To contribute to the maintenance of morale of such men and women;
- (3) To solicit funds for the maintenance of the organization and the accomplishment of its responsibility;
- (4) To accept the cooperation of and to provide an organization and means through which the National Board of Young Men’s Christian Associations, National Board of Young Women’s Christian Associations, National Catholic Community Service, the Salvation Army, the National Jewish Welfare Board, the Travelers Aid-International Social Service of America, and other civilian agencies experienced in specialized types of related work, which may be needed adequately to meet particular needs of the members of the Armed Forces, may carry on their historic work of serving the spiritual, religious, social, welfare, educational, and entertainment needs of such men and women and be afforded an appropriate means of participation and financial assistance;
- (5) To coordinate their programs; and
- (6) Other consonant purposes.

While acting as Honorary Chairman, the President of the United States may appoint up to six members to the Board of Governors, one of which is the Secretary of Defense or their designee. The relationship with the Armed Forces is further formalized and guided by a Memorandum of Understanding (MOU) between the USO and the Department of Defense (DoD). The latest MOU was signed in 2008 and specifies that the DoD will provide the USO access to military facilities and personnel and will provide the USO primarily logistical support to the extent compatible with the DoD’s primary mission, but is specifically restricted from formally endorsing the USO or supporting the USO through a direct expenditure of funds. This level of federal government and military cooperation is highly uncommon among private service providers working with military service members.

### Mission Statement

The mission of the USO of Illinois is as follows, where the portion underlined is adopted from the mission of USO World:

*The USO Lifts the Spirits of America's troops and their families. The mission of the USO is to enhance the quality of life of the U.S. Armed Forces personnel and their families and to create a cooperative relationship between U.S. military communities and involved or supporting civilian communities.*

## Organizational Structure

Headquartered in downtown Chicago, the USO of Illinois operates as an independently incorporated 501(c)(3) affiliate chartered by the USO World Headquarters. The geographic service area granted by USO World Headquarters (aka USO, Inc.) includes the State of Illinois with the exception of Scott Air Force Base (due to its proximity to St. Louis) and also reaches into the Quad Cities area of Iowa to provide service for the area's Rock Island Arsenal (on the border of Iowa and Illinois). The organization is led by its President & CEO Alison Ruble, who serves at the discretion of the 50 person Board of Directors and supervises a staff of approximately twelve. The Board is regularly involved in the operation of the organization and consists of Directors possessing a diverse set of professional skills and affiliations who serve on committees dedicated to operational areas such as finance, development, public relations, marketing and human resources where their oversight and advice is relied upon to operate the organization. In addition to its downtown offices, the organization operates the following five facilities that serve as its physical footprint in the State of Illinois:

- USO Naval Station Great Lakes
- USO Rock Island Arsenal
- USO Chicago O'Hare International Airport, Terminal 2
- USO Chicago O'Hare International Airport, Terminal 3
- USO Chicago Midway International Airport, Concourse C

## Programming

Programming provided by the USO of Illinois is intended to serve what is described by the staff as the "Continuum of Care." The Continuum of Care represents a period of time/need beginning at the point a service member and their family enters the military, during their deployment, upon their return from deployment and in preparation for reintegration with the civilian communities ahead of the service member's discharge from the Armed Forces. The overall goal of the programming was described by Ms. Ruble as intending to contribute to the service member and their family's "resiliency" or overall well-being.

Programming activities fall under the following three broad categories: USO Facilities (airports and on-base), USO Programs and Special Events.

### **USO Facilities**

USO of Illinois facilities provide a place for rest, relaxation and entertainment for active duty military and their families while traveling through airports or serving at or near the Naval Station Great Lakes or Rock Island Arsenal. Airport USO Centers operated by USO of Illinois are found in O'Hare Airport (Terminal 2 and Terminal 3) and Midway Airport and have been in operation since 1969 and 1991 respectively. Facilities typically provide comfortable seating, food and beverages without charge and access to a variety of entertainment amenities such as television, computers with internet access and children's areas for

visiting families. The larger on-base Centers such as those at Naval Station Great Lakes and the Rock Island Arsenal offer a wider selection of entertainment options such as billiards and ping pong tables. The Centers are staffed by a combination of paid employees and volunteers, with volunteers playing a critical role in their ongoing operation.

In addition to serving as the host site for many formal programs offered by the USO of Illinois, the USO Centers informally cooperate with the military and other service organizations to assist in their programs as opportunities arise. One examples of these activities is volunteer ad-hoc support of Honor Flights, Families of the Fallen and domestic death transfers where volunteers meet planes carrying fallen service members, escort the service members' assigned to oversee transport, provide them with a meal and accompany them to their connecting flight.

### **USO Programs**

The USO of Illinois administers a variety of programs described by Ms. Ruble as being developed in response to identified needs of service members and their families throughout their geographic service area. Of note, Jan Emmert, long-time member of the Board of Directors for both USO, Inc. and the USO of Illinois, shared with the research team that the programmatic needs addressed by the USO have shifted over time, and that the organization has included a greater focus on the family of deployed service members in recent years. This point was reinforced by Glen Welling of USO, Inc. who said that "we look at the family need just as much as we're looking at the troop need."

Of the long list of programs offered, the following stand out as major programs occupying the majority of staff time and/or reaching the greatest number of service members and families:

- **Tickets for Troops** – Through this program, tickets are donated to the USO of Illinois and distributed to service members and their families for sporting events, concerts, theatrical performances and other cultural events occurring at venues throughout the state, but primarily in or around Chicago. Program staff estimated that approximately 15,000 tickets with a value of \$500,000 are distributed annually.
- **No-Dough Dinners** – Free meals are served by USO volunteers to military service members and their families bi-weekly at USO Great Lakes. During 2013, 7,500 meals were served at 21 No-Dough Dinners (averaging roughly 350 served at each dinner).
- **USO Camp R&R** – Described by Associate Director of Programs Jill Gayton as one of the most powerful programs, Camp R&R invites military service members returning from deployments and their families for a weeklong stay at a rural summer camp in Wisconsin where the family can rest, relax and reconnect. As of 2013, its 8<sup>th</sup> year in operation, the program had served more than 450 service members and their families.
- **USO U-505 Naval History Program** – Serving what Ms. Ruble describes as an active part in the service member's career development, the USO U-505 Naval History Program is a partnership between USO of Illinois, Chicago's Museum of Science and Industry, the Pritzker Military Museum & Library, and Naval Station Great Lakes. Through this partnership, during Navy Chief Petty Officer (CPO) advancement training at Naval Station Great Lakes, CPO selectees are educated by the Pritzker Museum and serve as museum docents at the U-505 Submarine exhibit at the Museum of Science and Industry. Director of Programs Wiley Norden explains that approximately 50 CPO selectees "do two research days where they learn how to do actual research on the submarine,

and then they learn how to become a docent and deal with people, guest service training...they do that at the museum, and then they become a docent for a week.”

A summary of other programs offered by the USO of Illinois as categorized in the 2013 annual report include the following:

### ***Military Family Programs***

- **USO Life Skills Programs** – This category of programs focus on supporting active duty members of the military to prepare for the transition to civilian life.
  - **USO Employment Mentorship** – This program originated in response to a request to develop a program for the US Army’s Community-Based Warrior Transition Unit (CBWTU) stationed on Rock Island Arsenal which has now been relocated to Fort Knox. Due to the relocation of the unit, the program is no longer offered but when in operation it was providing support defining career goals, strategies for resume writing and successful interviewing skills.
  - **USO Money Matters** – This program is offered in partnership with BMO Harris bank to provide financial literacy skills, including training for and information about financial planning and aptitude, mortgages and credit scores, and strategies and support for deciphering GI Bill benefits.
- **USO Youth Programming**
  - **Discovery Kids** – Serving children under age 10, this program addresses the unique needs of military children by gathering together groups for free recreation, cultural programs and events. The activities are described as being fun, educational and designed to help alleviate stress, to enhance exposure to learning and cultural activities and to create bonds within military family communities.
  - **Teens & Tweens** – Serving children between the ages of 10-18, this program is seen as an extension of the Discovery Kids program above. Teens/Tween programs are described as programs that provide recreational and educational opportunities tailored to blossoming minds and imaginations, lifting the spirits of this vulnerable adolescent population.
- **United Through Reading** – Deployed military service members are provided an opportunity to videotape themselves reading a book for their children to watch at home.
- **USO Home for Holidays** – During Thanksgiving and December the USO provides meal and gift assistance for families in need as well as 24 hour USO Center support at O’Hare and Midway for traveling military and their families.
- **Emergency Relief** – As individual emergencies arise the USO Emergency Relief Fund provides financial assistance to military service members and their families.
- **USO Toast to the Troops** – Program providing newlywed military couples custom engraved keepsake glasses.

### ***Community Outreach Programs***

- **Operation Enduring Thanks** – Provides support for unit deployments and homecomings, including front of the line airport gate/terminal access for military families.
- **USO “Sweet Home Chicago” care packages** – Delivers customized unit-sized and individual care

packages sent overseas to deployed service members.

- **Flowers from the Frontlines** – Allows service members stationed overseas to send flowers to their loved ones for Valentine’s Day free of charge.
- **Spirit of the USO Band** – A unique music program comprised of Chicago-based professional musicians and entertainers.
- **Military Family Days** – Support in the form of financial assistance, entertainment and/or USO programs/briefings is provided for Family Day picnics and gatherings for military units throughout Illinois.
- **Pre-Deployment Operations** – During preparation for deployment the USO of Illinois staff provide informative briefs on USO programs and services available to deployed service members and their families.
- **Yellow Ribbon Briefings** – Yellow Ribbon Briefings are scheduled at military events assisting with reintegration for returning military personnel. USO staff contributes to these events by informing the military of USO of Illinois programs and resources available to service members and their families.
- **Gold Star Family Support** – Gold Star Families are those of fallen service members and are supported by the USO of Illinois at several annual events throughout the year, including Mother’s Day and at the Chicago Memorial Day Parade.

### **Special Events**

Special events serve a dual purpose within the USO of Illinois – to build awareness of the USO and its mission, and to raise funds to support the execution of that mission. The three special events hosted by the USO of Illinois are:

- **Clark After Dark** – Promoted as the last “Hoo-Ah” of the summer, Clark After Dark is an annual block party that features live music, military vehicle displays, a raffle and food and drink specials. Admission is a suggested donation of \$10. More than 14,000 attended in the four years beginning in 2010 and ending in 2014, and the development team expects to raise roughly \$100,000 or more as a result of this event.
- **USO Heartland Classic golf tournament** – An annual golf event promoted as an opportunity to “Tee-Off for the Troops” is in its 4<sup>th</sup> year of operation, offering a full day of golf, recreation, and entertainment, including the chance to sponsor a premier golf experience for active duty military members. In 2013 registration fees were \$375 for a single golfer or \$1,500 for a foursome and sponsorships were solicited at rates from \$2,000 up to \$20,000. The development team expects to raise roughly \$100,000 or more as a result of this event.
- **Annual Gala** – Hosting 732 guests and raising more than \$965,000 in 2013, the USO of Illinois Annual Gala is described as an evening of entertainment and military pageantry in honor and support of service members. Proceeds account for three-quarters of special event related fundraising and more than a tenth of the organization’s total support and revenue. Tickets are \$200 for military service members and \$600 for non-service members and sponsorships range from \$6,000 to \$25,000. Past hosts include celebrities such as Mr. Bill Murray.

### **Veteran Populations Served**

By congressional charter, USO Inc. and therefore the USO of Illinois is directed to serve the needs of men

and women serving in the Armed Forces which is interpreted as Active, Guard, and Reserve personnel (service members) and their families. In practice, this restriction has been amended to include veterans with a disability rating. Occasionally, Airport Centers will serve a broader veteran population as capacity allows and personnel working in the Centers have been trained to “err on the side of compassion” when enforcing the restrictions. It was made clear to the research team that there is a willingness to serve the broader population of former service members should resources allow and that the strategic planning process recently undertaken by USO, Inc. is considering the extent to which that may be possible.

### Funding Sources and Strategies

The 2013 Annual Report for the USO of Illinois indicates that the organization operated with \$7.2M in total donated support and revenue. Of that support, 68% was in-kind contributions such as ticket donations, office space and operations space for center facilities at airports and on military bases. The report further indicates that 84% of donations are used to support Center Programs and another 4% is used to support Military Family and Community Outreach Programs.

Ms. Ruble indicates that the organization receives only “incremental support” from USO, Inc., and that the USO of Illinois is expected to do all of their own fundraising. To that end, the organization employs a Vice President of Development (Jessica Dolan) to seek funding and lists approximately 450 donors in the 2013 Annual Report. The organization does not receive government funding and when asked to describe their base of donations Ms. Ruble and Ms. Dolan describe it as consisting of individuals, corporations and foundations. In terms of direct financial support (as opposed to in-kind contributions), the greatest sources of funding are the three special events hosted by the organization annually. Collectively, these events contribute 18% of total donated support and account for nearly 60% of direct financial support. Ms. Dolan shared that when soliciting donations from individuals the organization tends to focus on major donors and uses personal methods of communication including hand written notes and emails. Due to overlap with the USO, Inc. direct mail campaign and confusion in the minds of potential donors, the USO of Illinois’ broader fundraising campaign consists of only two mailings a year which Ms. Dolan described as a “soft ask” and that an envelope for donations is also included in the annual report.

When considering the geographic distribution of supporters, Ms. Ruble and Ms. Dolan explained that nearly all of the in-state support originates in the Chicago Metro area, but that a recently formed Rock Island Advisory Committee is helping to identify additional sources of support from the area around the Rock Island Arsenal.

One theme that emerged during the interview with Ms. Dolan was the notion that when choosing among causes to support, some donors may default away from choosing charities that are associated with the military due to an inherent moral struggle – a financial manifestation of “I support the troops but not the war.” She articulated this by stating, “People don't have lots of time to spend on [their donation choices], right? It's a lot easier to be like, ‘That puppy is cute,’ and ‘Oh my god, it's abused. I'm going to give \$500 to that,’ rather than try to sort through their moral feelings on war and violence.” Despite the historic nature of the USO, spanning decades and conflicts both popular and unpopular (and therefore, conceptually, it's loose ties to any specific conflict), the USO still faces this challenge which might more intuitively be associated with an organization specific to post-9/11 veterans.

## 2. Measurement and Data Supporting Effectiveness & Impact

### Types of Data Routinely Collected

Of the data collected by USO, Inc. and USO Illinois, the broadest method of collection is the annual Tell USO survey conducted world-wide by USO, Inc. According to the USO, Inc. website more than 16,000 surveys were collected in 2012 and examples of aggregate results that were shared publicly are that 93% of all service members and their families agree that the USO:

- “Boosts my morale”
- “Tells me that my country supports me
- “Eases my separation from friends and family”

The USO of Illinois staff explained that the survey mostly focuses on service members’ experiences in USO Center facilities and with associated programs. The survey is conducted online and service members are asked to complete the survey during visits to the USO Centers. The USO of Illinois receives a report of results associated with the centers they oversee and additional reports specific to each center if a significant number of responses pertaining to the center have been collected.

Ms. Ruble and Mr. Norden shared plans to augment the data collected from the Tell USO survey by launching a survey called “SpeakUp!”, intended to gather information on the community programming provided by USO of Illinois to answer the questions of “How are we doing?” and “What do we want to do better?” For example, one specific data point the team seeks to identify is the distance that service members and their families are willing to drive to participate in USO events, in the hopes that the answer will inform the organization on how best to serve remote National Guard and Reserve units. The organization also conducts program-specific surveys of participants in curriculum based programs such as those associated with financial literacy and career-development.

In addition to the above, the organization records data regarding the number of service members and their family members served, volunteer hours donated and donations collected then shares the data with USO, Inc. through a formal quarterly reporting process which feeds into a Charter Renewal process (a.k.a. Standards of Excellence Review).

### Data Analysis and Reporting

Quarterly data is collected and sent to USO, Inc. in association with the Standards of Excellence Review process, then is assessed in comparison to peer organizations and associated benchmarks by both the USO of Illinois staff and by USO, Inc. Should an irregular performance trend emerge, USO, Inc. offers assistance in developing corrective strategies as necessary. Likewise, USO, Inc. provides analysis and reporting associated with the categories of USO Center Services which the Tell USO Survey addresses such as quality of service, the type of services offered, and some logistical and locational aspects that contribute to how services are delivered. Separately, responses to community program participant surveys are aggregated where possible, though more formal analysis and reporting is expected in association with the “SpeakUp” survey.

In terms of public reporting, each year the USO of Illinois’ creates an annual report for distribution to funders and other interested parties which is available in print and by download directly from the

organization's website. This report states the organization's mission and summarizes the past year's performance in terms of operational impact and financial stewardship. Each USO Center and community program is listed along with a brief description and the report then highlights specific constituents who have benefited from the services they received and donors who have supported the organization. The organization's annual tax return is also available for download from its website.

#### How data are used for getting to impact

Ms. Ruble and her staff regularly expressed the difficulty in gauging the impact of their programs, which affect a difficult-to-define emotional response they describe as "resiliency" or overall wellbeing and that USO, Inc. regularly refers to as "goodness". Additionally, should resiliency be defined clearly enough to be measured, the staff relayed that another obstacle to gauging impact is that a large proportion of the service members and families served are in-transit or are benefitting from programs with narrow windows of interaction such as attendance at an event through the Tickets for Troops program, receiving a free meal at No Dough Dinners, or visiting one of the airport USO Centers. They expect that this level of interaction will limit their ability to meaningfully measure impact or even impact over time. With that in mind, the staff chose to focus on the practical application of the data they collect such as determining what additional services would be appreciated and the service members' ideas for how to best serve the rural units.

#### Formal Evaluation Activities (internal and external)

USO, Inc. conducts a Standards of Excellence Review intended to evaluate how well the local charters execute their mission and follow the prescribed standards of excellence. This process occurs every three to five years with the potential to occur more often if the local charter does not perform well. For their part, the USO of Illinois received the highest available rating of five stars during the last review and is scheduled for their next review in 2015. When asked what is evaluated during the review process, Ms. Ruble described the process as collecting data on and evaluating the quality of service in the USO Centers, upkeep of the facilities, best practices for internal mechanisms such as banking and accounting, board structure and bylaws, and the timeliness of the quarterly reports due to USO, Inc. The quarterly reports include data on numbers served, donations and volunteer hours and are aggregated and analyzed during the review as well.

### 3. Strategic Themes

#### Social Connectedness

The theme of social connectedness is heavily addressed through the visibility of the organization's community programs though it is not the primary objective of any one program. The staff expressed concerns over the public's changing perception of military service and specifically pointed to evidence of a growing divide collected through focus groups recently conducted by USO, Inc. Ms. Ruble relayed that in response to questions about the value of the USO's mission civilian participants shared feedback such as "They're over there to work, why do they need a video game?", "They're over there to do a job", and "Don't they get everything they need from the government?" Ms. Dolan cited other research done by the Pew Research Center when she said "I don't know what the [exact] percentage is, but there's more than 50 percent of the American population that says, 'This is just part of the job. You signed up for this.'" The staff attributes this shift in attitude to proportionately fewer civilians being touched by the military service of family members or friends.

The USO of Illinois' programs that may best address the civilian/military divide are those which allow interaction between the service members and public. The most interactive of those programs is the USO U-505 Naval History Program where Navy Chief Petty Officers in training perform the duties of a docent at the U-505 Submarine exhibit at Chicago's Museum of Science and Industry. Another example is the No-Dough Dinners where Mr. Norden explains that a company "can send folks from their organization to actually serve the meal, greet the sailors as they come in, or interact with them at the USO. The sailors are getting a great meal out of it, but the organization is getting something out of it too because they're giving back to the military community." Events like these are seen by the staff as opportunities to change the public's perceptions and garner greater support for service members and their families.

Next, there are programs that help address the civilian/military divide as a result of their visibility. Of these programs, the Chicago Blackhawks Hero of the Game is likely to be seen by the most members of the general public. Before each game, one active duty service member and one veteran stand out on the ice during the National Anthem and are then invited to attend the game afterwards. Another example is Operation Enduring Thanks where service members returning from deployments are met at the airport with a welcome home reception. A final example that is the most likely to remind the public of military sacrifice is the USO of Illinois' support of the Gold Star Families of fallen soldiers at the Chicago Memorial Day Parade and during Mother's day.

Finally, the USO of Illinois conducts a variety of fundraising activities that also address the theme of social connectedness due to their visibility and interaction with the civilian community. The three formal events of this kind are the annual USO of Illinois Star Spangled Salute gala, the USO Heartland Classic golf tournament and Clark After Dark. These three events account for 60% of the organization's direct financial support but of more relevance to this theme is their significant media coverage and civilian attendance. The best attended event is Clark After Dark which is a block party promoted as the last "Hoo-Ah" of the summer and that features live music, military vehicle displays, a raffle and food and drink specials. During the event's four years in existence more than 14,000 people have paid to attend thereby showing their support for military service members and/or learning more about the military.

The strategic theme of Social Connectedness is the theme most closely related to the work being performed by the USO of Illinois and is the theme most often addressed by the organization. Despite that, this theme is tangential to the organization's primary mission and is not consciously incorporated into the organization's programming at the local level. The focus of their every activity is to either benefit the individual service members and/or families participating or to solicit donations to carry out those activities. Ms. Ruble and her staff expressed a sense of duty to ensure that their programs genuinely meet the mission of lifting service members' spirits and are careful not to entertain ideas that exploit the uniform or inconvenience the service member in an attempt to satisfy a donor. That said, to the extent that a service member and their family appreciate attention there is ample opportunity for them to receive it and for the theme of social connectedness to be addressed as a result of the organization's activities.

### Independent Sector Involvement

Independent sector partnerships with the USO of Illinois exist at the service level and are widespread and informal, however the independent sector also influences the strategy of the organization through an

active and involved Board of Directors, many of whom are executives from local companies. With 69 percent of its annual support and revenue derived from in-kind donations, daily cooperation with the Independent Sector is required for the organization to succeed in its mission. Although each program benefits from in-kind donations, the 2013 annual report indicates that 84 percent of the organization's annual operating expenses are associated with the Center Programs suggesting that Center Programs consume the largest proportion of in-kind donations. Donations supporting the Center Programs are the spaces they occupy, associated furnishings, operational supplies and food served. When asked about the food and supplies in particular, a story shared by two long-time husband and wife volunteers stood out as an example of their close relationship with local businesses. These supporters have two daughters and one son-in-law who are service members and began volunteering in 2006 after hearing of their daughters' appreciation for the USO. During that time they personally approached Fresh Market grocery store and other local business to ask for donations which now account for the majority of food served at the airport centers with an in-kind value of well over \$1,000 in donations per week.

Another of the programs that would not exist without the close cooperation of local businesses is the Tickets for Troops program which occupies the majority of the program staff's time and accounts for approximately 15,000 in donated tickets annually at an approximate value of \$500,000. Through this program, tickets are solicited by the program staff for sporting events, concerts, theatrical performances and other cultural events occurring at venues throughout the state, but primarily in or around Chicago. Their effort is assisted through an engaged Board of Directors including Directors who own or are employed by organizations such as the Ravinia outdoor music festival and the Chicago Blackhawks. The organization further benefits as they rely on the relationships built with businesses through the program to respond to additional areas of need and create new programs. Examples of this are the Bears Cares programs, military appreciation days, and AT&T and the Chicago Bulls sponsoring a pre-game basketball session for veterans with former championship players Bill Wellington and Stacey King.

The organization has also worked to provide opportunities for local corporations and their employees to personally participate in the programs they sponsor. One such example is the No-Dough Dinner which Ms. Dolan described as "not that much money if you think about it for most companies – \$2,000 – and they get to have that great night." Ms. Dolan explains, companies "can send folks from their organization to actually serve the meal or greet the sailors as they come in or interact with them at the USO." The staff explained that programs of this type are developed through a collaborative process and evolve over time as the relationships with their business partners grow closer.

## Media

The strategic theme of media concerns the organization's effort to leverage media to tell the story of its mission. First, Ms. Ruble made clear that although USO, Inc. may have a budget for national advertising and media/marketing programs which benefit the USO of Illinois, local expenses are limited to the promotion of their three special events (Clark After Dark, the USO Heartland Classic golf tournament and the Annual Gala) and that the promotional activity surrounding those events is primarily donated in-kind by local radio and television. The organization does, however, benefit from regular news coverage as a result of programs such as Operation Enduring Thanks (homecoming celebrations for service members and whole units returning from deployments) which have news appeal for their patriotic themes and as a human interest story. Outside of news coverage concerning those programs, the organization receives media attention for the fundraising events it hosts and that are hosted for its benefit. As an example, a

search for USO on the Chicago Tribune website returned four results since July where three were related to fundraising events. During conversations with Ms. Ruble and her staff there was more concern over preserving the dignity of the mission and service members and families than capitalizing on every opportunity to appear in the media. For example, in exchange for tickets to events donors may sometimes “want the uniform” which can make the service member feel uncomfortable and is contrary to the purpose of the program, so such a donation may not be accepted. In addition, when asked her opinion on what media opportunities are best to pursue Ms. Ruble said she asks herself “who is this [opportunity for media coverage] important to?” and explains that her foundation and corporate funders make decisions based on well-crafted proposals rather than media coverage.

### Community Connectedness

The theme of Community Connectedness addresses the organization’s reintegration strategy and its efforts to ensure veterans receive comprehensive care and are connected with the broader community of local support services. Reintegration is an activity on the edge of the USO of Illinois’ adopted mission and therefore this theme is not addressed as a part of their structured activities. However, this area is addressed indirectly as a result of their position as a trusted agent in the minds of veterans and their representatives who regularly contact the organization seeking referrals to local service providers. The staff embraces this role and refers providers with whom they or someone within their office has had first-hand experience or who is funded by a well-known foundation with a thorough vetting process, such as the McCormick Foundation.

### Reintegration with Family

To the extent that reintegration with family occurs prior to the service member’s separation from service, the USO of Illinois supports this strategic theme primarily through the Camp R&R program. After first describing it as their most powerful program, Ms. Gayton and Mr. Norden went on to explain that the program is for service members and their families where the service member is returning from a long deployment or multiple deployments. It takes place the first five weeks of summer at a lodge in northern Wisconsin, the use of which is donated by a Board member. The service member and their family are invited for a weeklong stay and the lodge accommodates between four and five families at a time. All expenses associated with the stay are paid by the USO of Illinois including fuel for the trip and meals during the week. During their stay, the service member and their family have access to outdoor experiences such as horseback riding, fishing, swimming and boating. This program was described as providing a platform for reconnection free from modern distractions such as television and internet. Camp R&R is the organization’s most intense program in terms of individual service member and family engagement, but reaches significantly fewer service members (450 service members and their families in 8 years) overall in comparison to the organization’s broader (though significantly less intense) programs.

### Veteran Programming Differentiation

Within the scope of the service member population served (military service members, their families and veterans with a disability rating) differentiation is dictated by the circumstances of the service members and their families being served rather than through the intent of the program. The circumstances which dictate differentiation are service members who are either 1) In-transit and are served at the USO Airport Centers, 2) Reside within the State of Illinois and benefit from the programs available locally or 3) Reside in Illinois but are presently deployed and benefit from local programs available to family as well as

programs dedicated to the deployed such as “Sweet Home Chicago” Care Packages and the United Through Reading program.

One further distinction the organization has begun to recognize is urban vs. rural (National Guard and Reservist) service members. During interviews it became evident that there is a growing struggle between resource allocation and impact among programming for these two groups. The distance of each rural unit from the USO of Illinois’ headquarters in Chicago, of one rural unit from another rural unit and of rural service members from one another add a level of complexity to programming not present with urban service members and their families. For rural service members and families, the organization coordinates their programming with drill dates and also attempts to find tickets to events throughout the state that the service members may be able to attend, but does not find its efforts nearly as impactful overall as those for urban service members and families.

### Women Veteran Efforts

Programs and facilities provided by the USO of Illinois do not distinguish between service member populations based on gender and are not tailored for or targeted to women in any distinguishable way.

### Transition to Civilian Life

In the continuum of care, the transition to civilian life is the point at which the USO of Illinois’ stated mission has the least impact due to its focus on active duty military and their families. To the extent that the USO Money Matters program teaches financial literacy skills valuable to transitioning service members, this program is the only offered by USO of Illinois which addresses the transitioning theme. In the recent past, the organization has responded to a request to provide additional services such as resume writing and established a USO Employment Mentorship program, but the unit participating in the program was relocated and the program ended. On this topic, the Director of Programs, Mr. Wiley Norden, explained that programs designed to address this theme such as the USO Money Matters program and USO Employment Mentorship program are/were not as well attended as the other programs in their portfolio in part because the USO’s reputation lies in entertainment and morale programs rather than education.

### Employment and Education

The theme of employment and education addresses how the organization ensures its programs, services and support network advance employment and education concerns for the population it serves. This theme is not addressed as a part of the USO’s mission and they are not presently engaged in activities associated with it. However, the organization has demonstrated a willingness to perform service in this area through programs such as the USO Employment Mentorship program when it addresses the needs of the service members and families they serve. Additionally, while USO Illinois does not play a role in this process, USO, Inc. has begun leveraging its broad national credibility over the last several years to identify and partner with select nonprofit organizations which provide such programming (such as Hire Heroes USA, which provides resume writing and job search skills) to jointly host programming which will prepare service members for the transition.

## 4. Key Learnings and Reflections

### Catalysts of Impact

One of the greatest strengths of the USO of Illinois is its relationship with USO, Inc. and its position as a national brand and trusted agent in the eyes of service members. Operating under a congressional charter and with the clear cooperation of military leadership is an advantage in comparison to other Military Service Organizations in terms of perceived legitimacy and in the logistics of carrying out its mission. The organization further builds on this strength by working to create clear paths of communication with local military leaders to ensure they are top of mind for partnership opportunities.

Ms. Ruble felt a second clear advantage for her organization is its physical presence (“brick and mortar” facilities) in the communities it serves and that provide the majority of its financial and in-kind support. Centers located on-base have an inherent advantage in reaching members of the Armed Forces, and the USO Centers located in well-traveled airports serve as a constant reminder to potential donors of the mission being carried out by the USO. On *nearly* any base or in *nearly* any airport, due to the USO, service members have a physical place to seek entertainment and morale. Almost no other organization which serves this population can claim such a high level of visibility or access.

Another strength of the organization is its large Board of Directors who are active in the operation. The majority of the Directors are leaders in local industry and would be targeted as major donors or corporate sponsors by other non-profits. The Directors support nearly every program through donations of tickets, facilities, and advertising and serve on operational committees (finance, development, etc.) as trusted advisors. Ms. Ruble relayed that like her staff, the majority of the Directors have either served in the military or have otherwise been “touched” by military service which has led to a sincere dedication to the organization’s mission.

Finally, the diversity of support provided to the organization through volunteer hours, in-kind donations and direct financial support is paramount to its ability to accomplish its mission. The staff have worked to build relationships in the community that can be counted on to support on-going programs and have also been creative in developing programs like the No-Dough Dinners which not only accomplish their mission but are also easily packaged and “sold” to potential donors. The annual report lists approximately 450 different donors not including volunteers and indicates an enviable position of broad based local support.

### Barriers to Impact

During the site visit the following were points of friction and concerns the staff had or that the research team came to see that could interfere with the organization’s ability to accomplish its mission.

The scope of the USO of Illinois operations must be prepared to grow and contract in proportion to the size of demand which cannot be reliably predicted in the intermediate to long term and this creates a strain on operational planning. This issue is more closely associated with programs that serve deployed service members and their families than the Illinois’ USO Centers, however each must adjust to shifts in both demand and in the resources available to meet that demand. As an example, the “Sweet Home Chicago” care package program would have qualified as a major program during the height of post-9/11 deployments, but is now a relatively minor program. As the country faces other threats (such as the escalating conflict with ISIS/ISIL), “Sweet Home Chicago” may again become a major program but the volunteer network relied upon to support it would need to be reconstructed and operational knowledge and efficiencies regained or at least imparted to new volunteer partners. The staff feels this issue is further exacerbated by the public’s perception of need being out of sync timing-wise with these shifts in actual

need creating temporary shortages of funding or other resources required to support the programs.

A separate but related issue is the staff's concern over the public's change in attitude towards military service and their belief that because fewer people have friends or family who have been service members, they do not recognize the sacrifice required in general or the relevance of the USO's mission. As addressed earlier, Ms. Ruble pointed to research completed by USO, Inc. which seemed to confirm this concern through respondent comments to questions about the USO's mission such as such as "They're over there to work, why do they need a video game?", "They're over there to do a job", and "Don't they get everything they need from the government?" The combination of shifts in need, the public's perception of need being out of sync with these shifts, and a growing apathy towards the USO's mission in general make the coordination of performing service and collecting the resources to perform those services particularly challenging.

The model adopted by USO, Inc. is to reach the local community through independently incorporated 501(c)(3) affiliates while also operating "company owned" centers, and fundraising nationally. This leads to some overlap of activities. The overlap between USO, Inc. and USO of Illinois relates strictly to fundraising because donors to the national campaign may be unwilling to also donate locally or may misunderstand the difference between USO, Inc. and USO of Illinois altogether. The two organizations work closely together and have prescribed remedies available when overlap occurs, but in comparison to organizations that have no such conflict this is a barrier to fundraising for the USO of Illinois.

The USO's longstanding reputation for providing entertainment and recreational facilities to members of the military has garnered a broad awareness of its existence and prominence, but limits the effectiveness of programs addressing needs outside of these areas. The research team was repeatedly told that the public continues to associate the USO with Bob Hope and that although they were glad to embrace that history it represented too narrow a definition of its present day mission. It was also made clear that programs that did not conform to the preconceived notion of "USO = Fun" suffered from a lack of awareness on the part of the public and poor attendance by the service member population served.

Programming provided by the USO of Illinois is directed towards current service members and their families and to veterans with a disability rating, but there is tension between the veteran population and the USO for having been excluded. Ms. Ruble and her staff repeatedly expressed a willingness to serve the retired and discharged veteran population and "err on the side of compassion" in their decisions, but summed up the issue succinctly during Ms. Ruble's explanation that the USO is structured to support an active duty population of approximately 3.5 million in the United States whereas there are 22 million veterans. USO, Inc. expects to consider whether any changes to the population served are warranted during its upcoming strategic planning process, but it's clear that any change would dramatically impact resources.

Staff expressed concern over how to best serve National Guard and Reserve units throughout the largely rural state. When considering the time spent for staff travel to the remote locations, it's important to allocate resources effectively so that the most service members and families can meaningfully benefit from the allocation of those resources. Up to this point, the review has focused primarily on the complication of distance and geographical distribution but another factor for consideration is whether the rural Guard and Reserve units have fundamentally different needs from their active duty counterparts

and how to best address those needs.

Finally, the issue of how to consistently define and then measure the impact of the programs offered by the USO of Illinois is one that has the potential to affect the perceived value of the organization among the public and potential donors. That USO, Inc. discusses impact in terms of “goodness” indicates the challenge in defining the impact to be measured, while measuring impact during such narrow windows of interaction further compounds this challenge. In the face of a potentially apathetic public (an earlier issue in this section), it is critical that the organization is able to quickly relay its impact in a way that resonates.

#### Ongoing Efforts to Enhance Impact

Staff shared with the research team that the organization had recently picked a facilitator for a strategic planning process scheduled to end in 2015. USO, Inc. will also begin a separate strategic planning process in the near future and Ms. Ruble expects that the results of the local planning process will help to inform the national process. The program staff is also expecting to launch a program survey and expect to use the results of the survey to develop new programs or improve existing programs to better meet the expectations of service members thereby improving their impact.