



White Oak Retreats:

**Fostering Cross-Sector
Collaboration for
Military Families**



“Change happens at the speed of trust.”

- Kathy Roth-Douquet,
Blue Star Families



Introduction

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If not for White Oak, it would've taken us much longer to get organizations on the same page for collaboration – and for understanding what other organizations can contribute. You learn whom to go to because you understand the mission and the people in a human sense.

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- Ellyn Dunford,
Military Family Advocate

The story of White Oak is the story of how trust has been key to accelerate positive impact.

Since 2010, the White Oak Collaborative of senior leaders has come together to brainstorm solutions for the issues affecting America's military families, service members, and veterans. Representatives at the retreat work together to create an environment to share new perspectives, catalyze trusted friendships, develop intellectual or operating partnerships, and identify new “big, scalable ideas.” White Oak participants come as thinkers, not as institutional representatives, and brainstorm in a series of workshops and off-the-record, unattributed conversations. White Oak is an incubator of legislative action and innovative programming. The candid, organic, and collaborative nature of discussions at these convenings gives rise to a powerful germination of big ideas with strong consensus. There is an understanding that no single sector can provide all of the solutions. The move towards shared goals and aligned messaging strengthens the overall impact of our voice.

The Collaborative Design



“Expanding the group gradually over time is important insofar as it enables us to gather different perspectives, while also demonstrating the power of collaboration. I thought that White Oak VII was the best example of this approach.” – **Dave Lapan, Bipartisan Policy Center**

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White Oak is a powerful collection of important people, and it's helped me personally and professionally to understand some of the great organizations that are out there that are helping military families and military members. There are very few conferences and summits that I go to where I feel completely overwhelmed by the level of talent—White Oak is definitely one of them. I am just blown away by how well-organized it is, the people that attend, and the lessons that they bring.

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- Ivan Bolden,
U.S. Army Installation
Command

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White Oak's collective impact model has been very effective over the years. I don't think anyone can deny that.

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- Koby Langley,
American Red Cross

Background

1. People

Steering and advisory committees collectively select about 25 participants per sector.

2. Agenda

The steering and advisory committees consider prior meetings, current challenges, and collectively set three areas of focus.

3. Ground rules

Chatham House rules apply. The discussions are off-the-record and without attribution unless permission is granted. This allows frank and unfiltered discussion. It is held on a weekend, allowing the group to work, share, and socialize together over a period of time.

4. Flexibility

The agenda is not prescriptive. Rather, it focuses on conversation starters for discovery purposes. Sessions are facilitated and learnings are captured.

5. Commitments

The retreat closes with the group creating a specific list of next steps. In addition, many individuals create their own personal or sector's next steps. Within 45 days of the retreat, a summary document is sent to all participants, capturing what was learned as well as next steps. Working groups are created around each of the next steps.

6. Lead from behind

White Oak is collectively owned by all who participate. Blue Star Families acts as the convening authority.

Who Participates

- Veteran Service Organizations
- Community
- Government
- Foundations
- Military
- Military Service Organizations

The White Oak Impact

Professional and Personal Relationships Established or Deepened

“White Oak is a thought-provoking forum. It allows participants to hear directly from many of the nation’s top thought leaders about issues impacting the military community. For USAA, the gathering is invaluable and has helped inform how we engage and invest philanthropically to better serve military families.” – **Harriet Dominique, USAA**

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Walmart is fairly new to the table, and we are always looking for learning opportunities, to show us how to work better with others or better connect with those in the field. I learned more from participating in White Oak and having access to such a wide-array of perspectives than from six months of listening tours.

– **Kathy Cox,**
Walmart Foundation

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“White Oak is unique; there are no other connection points between public, private, and non-profit actors. There are no venues outside of galas that actually bring people together to discuss the hard issues. White Oak fills a void.” – **Tracy Malone, United Health Foundation**

“Sometimes when we speak to each other, we tend to talk very inside baseball. Having Harriet Dominique [from USAA] and other attendees from the grant-making side was very helpful; their presence really opened things up and gave me an opportunity to look at our work and our own collaborations with fresh insight. Very healthy.” – **Bonnie Carroll, TAPS**

“White Oak brings a greater awareness of the benefits that non-profit organizations can bring to the table. They are helping to fill some of the gaps that we can’t provide due to resource constraints.” – **Ivan Bolden, U.S. Army Installation Command**

“The one event that I can think of that really brings together true cross-sector participation from leaders and subject-matter experts.” – **Senior Department of Defense Official**

“White Oak has helped us to become a more familiar face in the veteran policy world. Philanthropic organizations weren’t at that table; we weren’t considered a stakeholder, and we are now, as a result of the connections and introductions made through White Oak. We could not have done that on our own. Plus, we had no idea how vast the veteran-and-military-family space was. Understanding that was a pretty big ‘aha’ moment. Without it, we would have continued to be stove-piped; philanthropy would have done its own thing.” – **Stephanie Powers, Council on Foundations**

“We formulated new relationships at White Oak VII, new kinds of relationships, with partners who we had known for a while, but with whom we hadn’t collaborated in our Measuring Communities effort—such as America’s Warrior Partnership, the Tragedy Assistance Program for Survivors, the American Red Cross, the Elizabeth Dole Foundation, Wounded Warrior Project, etc. ... Part of our work at Measuring Communities involves asking our partners to contribute their data to our ‘data potluck.’ Thankfully, we were able to grow our data potluck as a result of conversations at White Oak VII.” – **Dr. Shelley MacDermid Wadsworth, Purdue University’s Military Family Research Institute**

“White Oak VII enabled me to develop relationships with people whom I would not have otherwise had the opportunity to meet. There, I had conversations with OSD leadership which sparked a data-sharing agreement for our nationwide suicide study. We’ve now partnered with almost everyone at White Oak, and have developed a network that has connected 376 community-based programs with national service providers—many of them attendees at White Oak.” – **Jim Lorraine, America’s Warrior Partnership**

New Organization Created

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I realized at White Oak that if we were to go beyond just talking to each other about the civilian-military divide, we had to be able to come up with an answer that helped bridge the gap, and this is what motivated the Vets' Community Connections initiative I now lead with Kari McDonough.

- Doug Wilson,
Vets' Community Connections

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“We launched a coalition of organizations concerned with the lack of research and support for military children who serve as secondary caregivers for wounded warriors—which is a big area of concern for us as an organization. We recruited a dozen plus partners at White Oak who formed the nucleus of a larger coalition [the Military Children Forum], which currently numbers around 40 organizations right now – to come together to discuss the implications of not having sufficient data or research on the effects of caregiving on the children of these military families. We produced a white paper and are now raising money to pursue a first-time study.” – **Steve Schwab, Elizabeth Dole Foundation**

Research Conducted and Enhanced

“Without White Oak VII, I would not have met the lead for the DoD program that provided the data for Operation Deep Dive—a four-year research study that will examine the factors and potential causes involved in suicides and early mortality due to self-harm among military veterans”
– **Jim Lorraine, America's Warrior Partnership**

“White Oak VII helped to inform my understanding of what members of the military family community were thinking – which I was then able to contribute to our discussions at the National Academies for the report on ‘Strengthening the Military Family Readiness System for a Changing American Society.’” – **Dr. Shelley MacDermid Wadsworth, Purdue University's Military Family Research Institute**

“The most valuable element for me is the time out on the patio and rocking chairs. I enjoyed the opportunity as a policy researcher to interact with service providers and advocates. It helped me to think about how our research can be more helpful for those on the ground trying to positively impact the lives of people they're trying to help.” – **Terri Tanelian, RAND**

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“I spoke pretty passionately at White Oak VII around our continued challenge re: the lack of good data on where caregivers are and what their health conditions are. A couple of years prior, at White Oak, we linked up with the Military Family Research Institute at Purdue University through Dr. Shelley MacDermid Wadsworth and her team, and our relationship with them has evolved over time from a small partnership to a robust collaboration wherein they are one of our major grantees. We now have a publicly available data platform and a state-by-state rating system for the health of communities and caregivers. Developing this partnership and data platform was definitely aided by our convenings at White Oak.”

- Steve Schwab,
Elizabeth Dole Foundation

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Narrative Changed

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As a result of White Oak, I have been able to help people in the Army better understand the importance of partnering with NGOs (like the Fisher Foundation, the Armed Services YMCA, etc.). Even though these organizations are non-governmental, they are important to the Army's livelihood. We can't do what we do to support military families without the help of these NGOs... Nowadays, I don't have to talk to a lawyer every time I want to work with an NGO.

- Ivan Bolden,
U.S. Army Installation Command

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“It's invaluable to have the time to step back and see the military family policy space as a whole.” – **Kari McDonough, Vets' Community Connections**

“I gained a deeper understanding of the current and future state of military installations, and what that means to communities surrounding military bases, in terms of community engagement, resources, challenges, and opportunities... White Oak allows for informed thinking. It keeps the challenges in front of us, even when they're not in the headlines. From policy implications, Tricare, military spouse initiatives... there's a litany of positive outcomes that can be attributed to White Oak.” – **Kathy Cox, Walmart Foundation**

Identifying Emerging Issues

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White Oak VII helped us to step back a bit and to take stock of where we are in the military and veterans policy space, as federal and military policy undergoes changes in its priorities... We are looking at what the future is for growing veterans philanthropy, as community reintegration needs are better known.

- Stephanie Powers,
Council on Foundations

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“White Oak has always been very helpful for me in terms of understanding the issues that are emerging in the military family policy space... In the academic world that I live in, I'm not naturally in the flow of information around these issues. Ideas around installation of the future, for example, would not have been on my radar without White Oak VII... I value the opportunity to participate in White Oak, since it gives me the chance to learn from people who I might otherwise have difficulty getting in the same room with.” – **Dr. Shelley MacDermid Wadsworth, Purdue University's Military Family Research Institute**



Detailed Results



New Professional Relationships, Partnerships, and Collaborations

- **Philanthropy Impact Pledge**
- OSD Public Affairs and the Secretary of Defense began convening regular meetings with key military VSO and MSOs (NGO Consortium Roundtable)
- Interagency Task Force led by government department heads from more than 12 agencies worked with WO Collaborative to identify gaps in service and allocate federal, state, and local resources where they were most needed
- Blue Star Families' Caregivers Program, developed with advice and guidance from TAPS, to focus on more peer-to-peer programs for military spouses
- Linking of National Guard Directors of Psychological Health and the VA Vet Centers nationwide
- Partnership with National Association of Counties (adopted at 2016 national convention in New Orleans)
- Technology & Corporate Roundtable
- In collaboration with Student Veterans of America, the Pentagon invited – for the first time ever – 30 senior university administrators, provosts, and other leaders to the prestigious Joint Civilian Orientation Course (JCOC), traditionally reserved for business leaders
- United Health Foundation contributed \$150,000 to Armed Services YMCA to support child-care services at the Camp Pendleton Fisher House
- Expanded partnership between the American Red Cross and DoD's Military Community and Family Policy
- Bipartisan Policy Center convened a group of White-Oak participants to out-brief White Oak VI to the Hill
- Association of Defense Communities and Blue Star Families partnered on an annual defense-community leadership conference for emerging leaders
- Enhanced relationships between organizations
- New partners contributed to the Measuring Communities data-potluck, including America's Warrior Partnership, the Tragedy Assistance Program for Survivors, the American Red Cross, the Elizabeth Dole Foundation, and the Wounded Warrior Project

The Philanthropy Impact Pledge

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Being part of the Impact Pledge is not only a financial commitment in support of our servicemen and women, it is also a commitment by funders to collaborate and share expertise, information, and resources with each other to address the multitude of challenges facing our veterans.

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- Vikki Spruill,
President and CEO of the
Council on Foundations

In 2014, several member organizations of the Council on Foundations initiated the Impact Pledge, in response to the national call to join forces in supporting veterans and military families – especially those who had been deployed to combat in Iraq and Afghanistan. The Council on Foundations took leadership for the pledge and developed the Veterans Philanthropy Exchange to share resources and data and encourage smart, collaborative funding in the military family and veteran landscape.

Founding members: Blue Shield of California Foundation, the Bristol-Myers Squibb Foundation, the Lincoln Community Foundation, the Robert R. McCormick Foundation, the Council on Foundations Veterans' Advisory Group, and participants from the annual White Oak Conference hosted by Blue Star Families.

April 2016 Update

At least 35 philanthropic organizations and corporations have pledged since 2014. Through grants and other forms of support, nearly \$283 million has been committed in the Impact Pledge to date.

New Organizations, Programs, and Research

- Community Blueprint
- U.S. Chamber of Commerce Corporate Fellowship Program: Hiring Our Heroes
- Blue Star Families Careers: Spouseforce
- Military OneSource Training Hub
- Purdue University research expansion
- Military Spouse Employment Program
- Childcare services for veterans seeking medical treatment from the VA
- Got Your 6
- Measuring Communities Research and Online Portal

- “A Battle Plan to Support Military and Veteran Families,” a collection of chapters published by MFRI in the spring of 2017; the book examines lessons learned about supporting military and veteran families since the September 11 terrorist attacks
- The U.S. Chamber of Commerce Foundation’s Military Spouse Empowerment Zones: Hiring Our Heroes
- Tragedy Assistance Program for Survivors (TAPS) and Vets’ Community Connections partner together on TAPS-Togethers (community-based care groups)
- America’s Warrior Partnership entered into a data-sharing agreement with the Department of Defense for its nationwide suicide study
- The Elizabeth Dole Foundation launched the Military Children Forum—a coalition of organizations concerned with the lack of research and support for military children who serve as secondary caregivers for wounded warriors

Community Blueprint

At the 2010 White Oak Retreat, participants discussed the persistent gaps in services, duplication of efforts, and lack of community collaboration to leverage assets to meet unmet needs. It was here that the idea to create the Community Blueprint was formed.

The Community Blueprint consists of community networks and the blueprint toolbox. Community Blueprint networks are local organizations that collaborate to implement solutions in their geographic regions. The Community Blueprint toolbox houses the solutions that help address the impact areas for the military and veteran community. The Community Blueprint is the only national, scalable approach developed by a coalition of over 55 veteran and military-serving organizations, nonprofits, and government agencies to address the needs of our military community.

2015 Outcomes:

- Military initiatives activated in 24 states, engaging more than 300 organizations
- 52 Community Blueprint Networks implemented 475 volunteer projects
- Nearly 19,000 military and civilian volunteers engaged in 90,000 hours of service to address community problems
- Over 60,000 community members and veteran families were impacted during MilVet National Days of Service

Policies and Systems Changed

- **Presidential Study Directive (PSD-9):** Strengthening Our Military Families: Meeting America's Commitment
- Every Student Succeeds Act (ESSA): inclusion of a military student identifier that allows for tracking metrics of the military student population
- Increased spouse licensing/certification transferability between states: The Department of Defense, along with state legislators and regulators, have developed three ways to help military spouses transfer licenses—licensure through endorsement, temporary licensure, and expedited processes for issuing licenses
- Corporate philanthropy: strategic shifts to support military families as well as veteran support organizations
- U.S. Chamber of Commerce Foundation Transition Summits: mandated employment events for transitioning service members on installations across the globe
- Transition Assistance Program: formative changes expanded participation and services to include transitioning military spouses
- Incorporation of Department of Veteran Affairs and United Services Organization assets into National Guard behavioral health and relationship programs

Presidential Study Directive 9

President Obama directed the National Security Staff (NSS) to develop a coordinated federal government-wide approach to support military families. By harnessing resources and expertise across the federal government, the vision was to improve the quality of military family life, help communities more effectively support military families, and thereby improve the long-term effectiveness of U.S. military forces.



The administration's vision was to ensure that:

- The U.S. military recruits and retains the highest-caliber volunteers to contribute to the nation's defense and security
- Service members can have strong family lives while maintaining the highest state of readiness; strengthening our military families
- Civilian family members can live fulfilling lives while supporting their service member(s)
- The United States better understands and appreciates the experience, strength, and commitment to service of our military families
- Foster White House involvement in the creation of an office to engage military family support

Referencing research conducted by key White Oak I participants, this groundbreaking policy directive established a coordinated and comprehensive federal approach to supporting military families. White Oak convening government agencies and organizations worked collectively to respond to this call for enhancing military family well-being.

Expanded Narrative

- **Veterans Employment Pledge**
- Disproved the national narrative that government solutions are slow and costly
- Recognized the shift in communicating the value that military families and service members bring to their communities and to the nation
- Military families are an integral factor in the recruitment, readiness, retention, and reintegration of a strong All-Volunteer force structure
- Corporate employee engagement in the military community convening
- Corporate playbook for supporting military families
- Military family support organization testimony given to the Senate Armed Services Committee
- National messaging cannot exclude National Guard and veteran-connected families

Veterans Employment Pledge

The Veterans Employment Pledge is a consensus document developed with input and insight from experts and practitioners in nonprofit, philanthropic, military, and public sectors. The intent of the Veteran Employment Pledge is to provide a comprehensive and cross-sector plan to inform and support a common agenda based on White Oak principles (e.g. standardizing measures of programs, focusing on impact, and identifying broad areas of consensus).

Results:

- More than 50 companies collectively pledged more than 110,000 hiring and approximately 60,000 training and certification commitments for veterans and military spouses — primarily in the fields of aerospace, telecommunications, and tech
- Since 2011, more than 1.2 million veterans and military spouses have been trained or hired





WHITE OAK VII: Spotlight on Installations of the Future



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One of my takeaways from White Oak VII was learning more about the installation of today and the installation of the future. Military families are increasingly not living on installation, which creates challenges for them because they are outside of the military community support system that has easier access to resources. It illustrated for me that there is a tremendous opportunity for diverse stakeholders to better understand how they can provide meaningful support to these military families.”

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- Harriet Dominique, USAA

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Last year's White Oak focused on installations of the future. Millennials will be running these organizations in the next ten, fifteen, and twenty years. I talked about the necessity of bringing young people on-board at an early age, so that they can have a better understanding of what we are doing in the space.

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- Ivan Bolden,
U.S. Army Installation
Command

In 2019, White Oak participants discussed installations of the future. Consensus found that improving community-installation engagement was critical for expanding recruitment among non-military-connected families, overcoming the civil-military divide, and increasing military families' sense of belonging to their local civilian communities.

Several solutions were offered to increase community-installation engagement:

- Create an installation position responsible for community engagement as a means of recruitment.
- Improve installation engagement with local high schools to ensure military service is a celebrated choice for graduates.
- Open installation recreational resources to local community members for fun events that bring non-military members onto base/post.
- “Wave the flag” via active-duty and retiree participation in local military affinity groups, clubs, and organizations.
- Promote military service as a pathway to the “American Dream” through education.

A lack of installation services and geographical distance from military cultural competency complicates National Guard and Reserve capacity to receive support. In addition to persistent unemployment difficulties, health care “roller coaster” dynamics created by the continuous back-and-forth, to-and-from military medical coverage plague this population. A key recommendation from White Oak VII was to consider an insurance program that offers payment to employers when employees are activated, relieving legitimate employer concerns.

Attendees agreed that many aspects of installation life are no longer required insofar as they duplicate services available in civilian communities with competitive pricing. Participants agreed that joint use government facilities as well as “joint zones” where military and local community members can take advantage of social programs and services together, are powerful ideas for installations of the future.

The White Oak Retreat is an incubator of legislative action and innovative programming. Success is possible thanks to the support and participation of the following agencies and organizations.

American Armed Forces Mutual Aid Association
American Red Cross
American Veterans (AMVETS)
America's Promise Alliance
America's Warrior Partnership
Armed Forces Services Corporation
Armed Services YMCA
Army Emergency Relief
Association of Defense Communities
Association of the United States Army (AUSA)
Be the Change, Inc.
Bipartisan Policy Center
Blue Shield of California Foundation
Blue Star Families (BSF)
BNY Mellon & BNY Mellon Foundation
Bob Woodruff Foundation
Bristol-Myers Squibb Foundation
Business Executives for National Security

Call of Duty Endowment
Center for a New America Security (CNAS)
Clinton Foundation
Cohen Veterans Network
Congressional Military Family Caucus
Corporation for National and Community Service/
AmeriCorps
Council on Foundations
Craig Newmark Philanthropic Fund
Disabled American Veterans
Easter Seals
Elizabeth Dole Foundation
Endeavor Group
Fisher House Foundation
George W. Bush Institute
Give an Hour
Grab the Torch
Got Your 6

Hope for the Warriors
Iraq and Afghanistan Veterans of America (IAVA)
Institute for Veterans and Military Families (IVMF)
Jefferson Institute
Joining Forces
Joint Chiefs of Staff Senior Spouse
JPMorgan Chase & Co.
Lockheed Martin Foundation
Military Child Education Coalition (MCEC)
Military Family Research Institute (MFRI)
Military Officers Association of America (MOAA)
Military Spouse Behavioral Health Clinicians
Military Spouse JD Network
National Association of Veteran Serving Organizations
National Center for Childhood Traumatic Stress (NCCTS)
National Council of Churches
National Defense Industry Association (NDIA)
National League of Cities
National Military Family Association (NMFA)
National Security Council
National Veteran Intermediary
Office of the Chairman of the Joint Chiefs of Staff
Operation Homefront
Our Vets Success
Outserve
Philanthropy Northwest
Philanthropy Roundtable
Points of Light
RAND Corporation
Robert R. McCormick Foundation
Rosalynn Carter Institute for Caregiving
San Diego 2-1-1
San Diego Grantmakers
Schultz Family Foundation
Senate Armed Services Committee
ServiceNation
Student Veterans of America
Team Red, White, & Blue

Team Rubicon
The American Legion
The American Legion Auxiliary
The Howard Gilman Foundation
The Mission Continues
The National Child Traumatic Stress Network
The PenFed Foundation
The Royal British Legion
The USAA Foundation, Inc.
Tragedy Assistance Program for Survivors (TAPS)
Travis Manion Foundation
Truman National Security Project &
Center for National Policy
U.S. Air Force Office of Reintegration
U.S. Army Installation Management Command
U.S. Army Soldier for Life Program
U.S. Chamber of Commerce Foundation
U.S. Department of Defense
U.S. Department of Labor
U.S. Department of Veterans Affairs
U.S. Marine Corps, Marine and Family Division
U.S. National Guard
U.S. National Guard Bureau
U.S. Special Operations Command
Warrior Care Program
Uber
Unite US
United Health Foundation
United States House of Representatives
United Service Organizations (USO)
Veterans Innovation Center
Vets' Community Connections
Volunteers of America
Walmart Foundation
White House
Women's Mentorship Network
Wounded Warrior Project (WWP)
Yellow Ribbon Fund



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