

STRATEGIC PLANNING WORKSHOP

FORT HOOD—14 SEP 2018

MG Robert M. Joyce School for Family and MWR
IMCOM G 3/5/7 Training Division



**Meet your
School for Family and MWR
Training Team!**

Instructors
Patricia Morález Villarreal
Farrah Santiago
James Moore

WHY FAMILY AND MWR?

- Pair up with someone!
- Why do you work for Family and MWR?

POLICIES AND PROCEDURES

Attendance

- Class time is 0800-1630 daily
- You must attend every session to receive credit for the course (AM & PM)
- Failure to meet this requirement will result in an incomplete

Breaks

- Lunch- 1 hour
- Breaks- 2 per day (AM & PM)
 - Bathrooms in hallway

Classroom Expectations

- Be on time for class and returning from breaks
- Actively participate in group discussions and exercises
- Complete all assignments
- Respect your fellow participants
- Place cell phones on silent or vibrate

SYLLABUS AND INFORMATION

Syllabus

- Agenda

Individual Action Plan

- Actions are clearly stated and based on application of knowledge gained during the course
- Actions are within the control of the individual and include an end date for completion
- Measurements of success are quantitative and measure the success of attaining the action

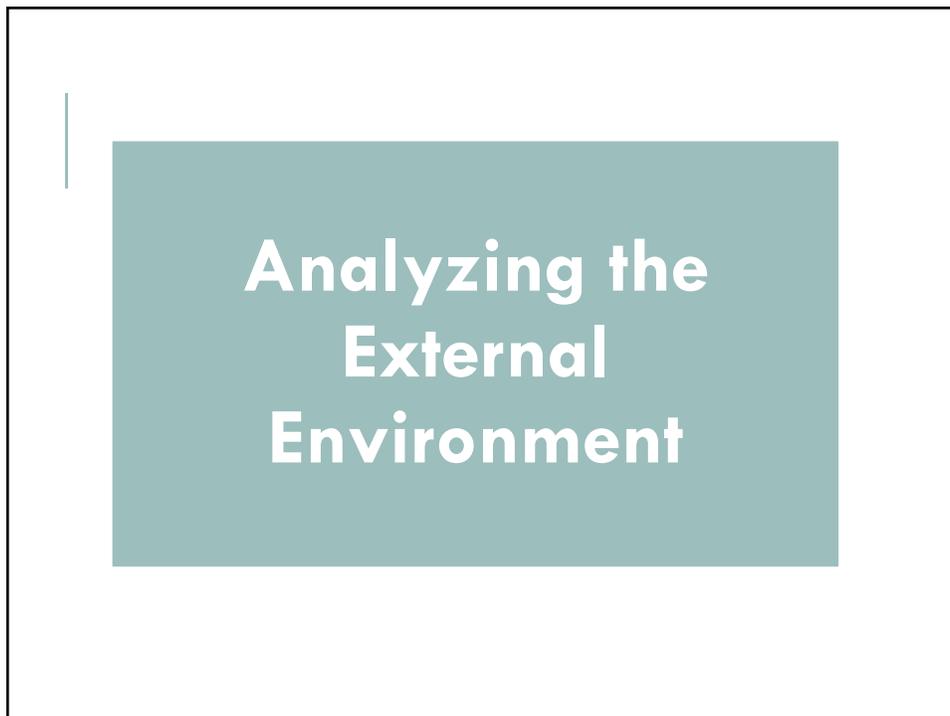
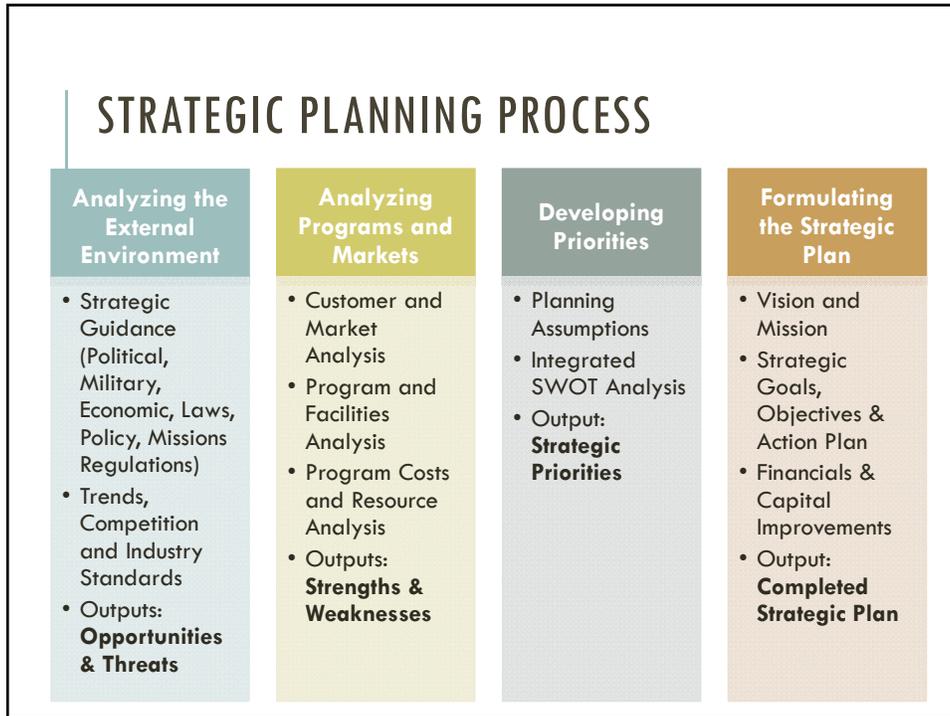
WORKSHOP OBJECTIVE: GIVEN A RECOMMENDED PLANNING PROCESS, LARGE GROUP DISCUSSIONS, AND SMALL GROUP EXERCISES, PRACTICE THE ELEMENTS OF STRATEGIC PLANNING TO SUPPORT FAMILY AND MWR OPERATIONS.

- Synthesize strategic guidance to ensure strategic planning is in alignment with the Army and Installation Management Command's vision, mission and direction.
- Given provided documents and local research, develop a list of trends, both positive and negative, affecting your current program.
- Using the results of the external environmental scan, identify Opportunities and Threats to add to a SWOT analysis.
- Develop a list of internal Strengths and Weaknesses that affect your current program.
- Using a prioritized SWOT, develop goals and objectives that leverage strengths, pursue key opportunities, improve/mitigate weaknesses, and address threats.

EXPECTATIONS

VISIONING EXERCISE—10-YEAR COVER STORY

- On a chart, your table group should create a front page news article that will appear about your program in the Army Times in 10 years!
- In your group, agree on the title/headline
- Write up the 5 or so points the article is making
- Provide charts or pictures that highlight the main points of your article
- Include “facts and data” - - come up with some fun but possible facts about the organization’s size, revenue, clients served, etc.
- Think about the history that led up to this article being written and what we did today to make these changes possible.
- Be prepared to present your article and story to the group.



STRATEGIC GUIDANCE

- Each table group should review their assigned strategic document and answer these questions:

GROUP 1: Army Chief of Staff Message & Army Vision

GROUP 2: Army Directive: Changing Manager Behavior—
Every Dollar Counts

GROUP 3: Army Posture Statement 2018 Transcript

GROUP 4: FY19 IMCOM Annual Command Guidance (pp 1-4)

GROUP 5: FY19 IMCOM Annual Command Guidance (pp 7-10)

GROUP 6: IMCOM Service Culture Policy

1. Summarize the key takeaways for this document.
2. How does this **impact** Family and MWR operations?

TRENDS

- Each table group should research and **find trends documents** for your program area.

1. What are current trends that could (or should!) impact your Family and MWR program?
2. Go BIG! If money weren't an option what trend would you apply to increase business!

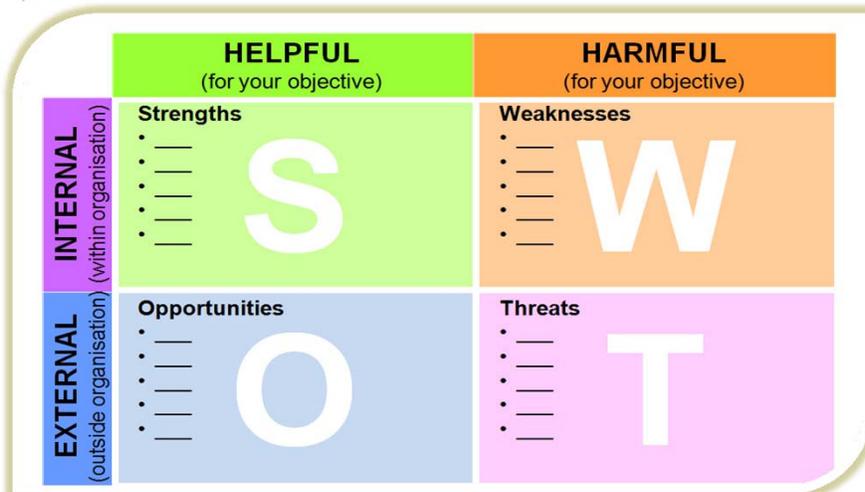
TIP: Here's a starting point:

https://www.imcomacademy.com/ima/?page_id=11688

<https://www.trendhunter.com/trends/2018-trend-report>

<https://trendwatching.com/freepublications/>

SWOT ANALYSIS



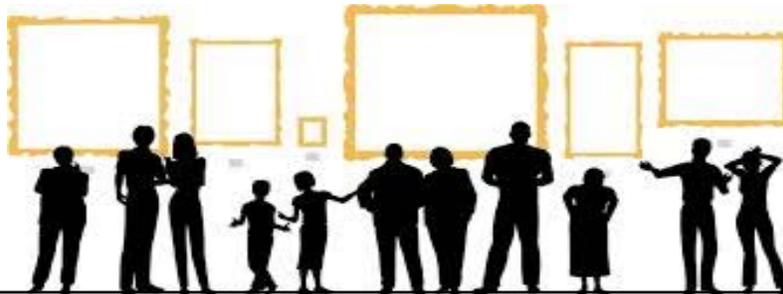
SWOT ANALYSIS: EXTERNAL ANALYSIS

- Using the summary research conducted today (STRATEGIC GUIDANCE + TRENDS):
 1. Use critical thinking to analyze their impact on **your program** within Family and MWR
 2. Identify and chart the **opportunities** and **threats** for your **program area** in Family and MWR



GALLERY WALK

- Grab some post-it notes and go visit each table's charts. Going clockwise, add to each chart any additional ideas of **Opportunities** and **Threats** for their program area.
- Once your team is back at your chart, consider the feedback you received, and add any additional points to your original chart.



Analyzing Programs and Markets

Army Profile



468,541 Active Duty Soldiers

- 52% are married (243,778 Spouses)
- 43% have children (430,206 Children)
- 4,060 Adult Dependents

More than half (59%) of all Soldiers have family matters and responsibilities on their minds

Data from Defense Manpower Data Center (DMDC), January 2016

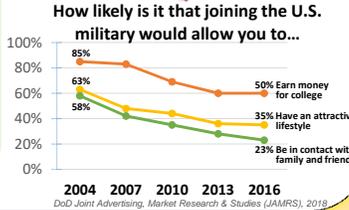
Every Family has unique needs, requiring a flexible and responsive service network

Today's Youth 16-24

Youth lacks favorable associations with the Military that drive consideration

IMPACT
Many youth never even consider the Military as a career – only 13% seriously consider service

How likely is it that joining the U.S. military would allow you to...



Year	Earn money for college	Have an attractive lifestyle	Be in contact with family and friends
2004	85%	63%	58%
2007	80%	55%	50%
2010	75%	50%	45%
2013	65%	45%	40%
2016	50%	35%	23%

DoD Joint Advertising, Market Research & Studies (JAMRS), 2016

Spouse Impact on Retention

Spouse Strongly Favored **Staying**



Service members whose spouses strongly favored staying on active duty stayed at a rate of about 13 for every 1 who left

Spouse Strongly Favored **Leaving**



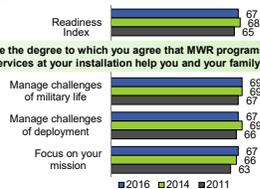
Service members whose spouses strongly favored leaving stayed at a rate of 3 for every 4 who left

Office of People Analytics (OPA), April 2016

79% of Soldiers come from Families that have served in the Military

MWR Customer Satisfaction

Q: "Indicate the degree to which you agree that MWR programs or services at your installation help you and your family"



Category	2011	2014	2016
Readiness Index	67	68	65
Manage challenges of military life	69	67	69
Manage challenges of deployment	67	69	66
Focus on your mission	67	66	63

DoD Morale, Welfare, and Recreation (MWR) Customer Satisfaction Survey, Army Results, 2016

Spouse support of Soldier staying on active duty is a significant predictor of actual retention behavior

Social support is vital for healthy coping and adaptation of Soldiers, spouses, and children



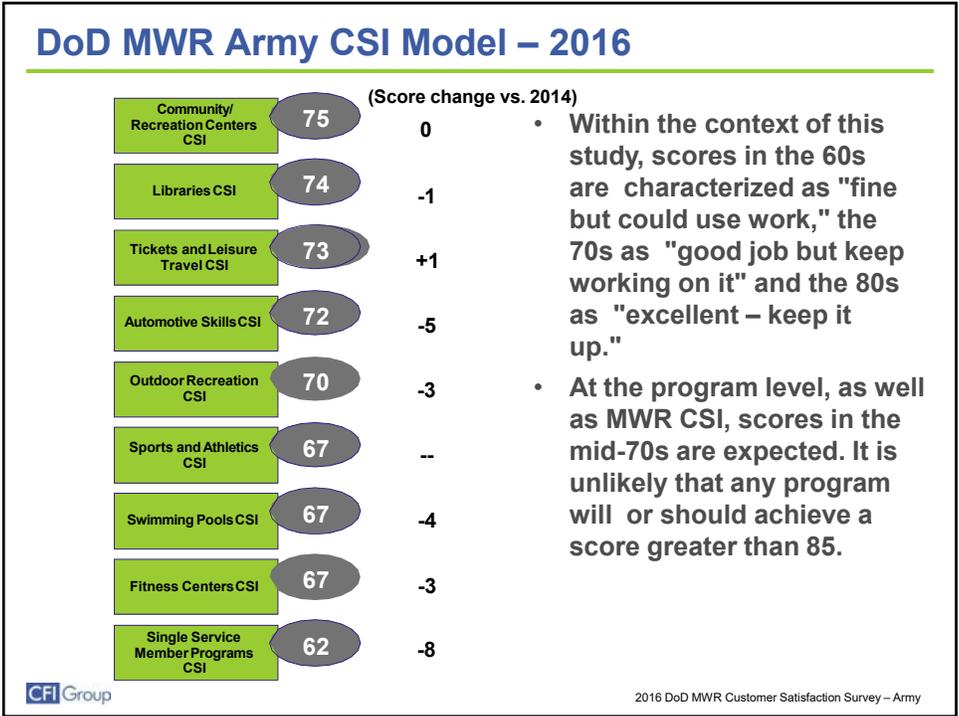

2016 DoD MWR Customer Satisfaction Survey Army

Key Findings

- MWR Satisfaction is down three points in the 2016 study compared to 2014 and is now 66, a statistically significant decline.
- Scores for several individual MWR Programs decreased significantly.
 - > The most notable decreases were Single Service Member Programs and Automotive Skills, which fell eight and five points respectively.
- Single Service Member Programs and Outdoor Recreation have the strongest leverage to drive overall satisfaction with MWR.
- Respondents' ratings for Readiness and Unit Cohesion are consistent with 2014 scores.
- Unit participation in MWR Programs continues to show a very positive effect on Satisfaction, Readiness, Resilience, Retention, and Unit Cohesion.
 - > The 2016 results show a six percentage point decrease in MWR program unit participation.

Respondent Profile – Army

- 74% In the 48 contiguous United States, 9% in Alaska or Hawaii, 17% outside the 50 United States
- 79% Male, 21% Female
- 17% Never married, 66% married to non-military spouse, 9% married to military spouse, 1% separated, 7% divorced, <1% widowed
- 62% Have dependent children
- 25% Less than 5 years Active Duty, 20% 5 to less than 10 years, 36% 10 to less than 20 years, 19% 20 and over
- 5% Currently deployed, 95% not deployed
- 60% Live off-installation – Of this segment, 40% live less than 10 miles away from installation, 47% are 10-24 miles away, 13% are 25 or more miles away



Unit Participation and Satisfaction

“Does your unit participate as a group in MWR activities or programs?”

Service	% Indicate Unit Participates	Unit Participates in MWR	Unit Does Not Participate in MWR
		CSI Score	CSI Score
Total	42%	68	62
Navy	47%	72	65
Marines	46%	63	59
Army	41%	70	63
Air Force	38%	64	57

- As in the 2014 study, the 2016 data indicates that unit participation has a very positive effect on MWR Satisfaction in all four Services.
- On average, Army respondents who participate in MWR activities or programs as a unit score MWR CSI seven points higher than those who do not.
- The proportion of Army respondents saying they participate in MWR programs with their unit is three percentage points lower from the 2014 survey.



2016 DoD MWR Customer Satisfaction Survey – Army

Information Sources – Army

Respondents indicate they most often hear or learn about MWR services/programs through word of mouth. 32% prefer to receive information through email, while increasing numbers report preferring other 'push' sources of information such as SMS, social media or smartphone apps.

MWR Information Sources	Most Often Hear/Learn~		Most Preferred	
	2014	2016	2014	2016
Briefings	26%	17%	3%	2%
Electronic signs	29%	21%	3%	2%
Email	41%	32%	45%	32%
Flyers/handouts	47%	40%	5%	5%
Installation newspaper/newsletter	36%	29%	3%	4%
Website	34%	35%	13%	17%
Paper signs/posters	30%	42%	4%	5%
Social media	19%	27%	9%	14%
Town hall/public forum	4%	5%	0%	0%
Word of mouth	56%	50%	15%	3%
Text messaging/SMS	--	3%	--	4%
Smartphone app	--	3%	--	11%
Other	5%	5%	1%	1%
Number of Respondents	4,111	1,335	4,111	1,335

~Multiple responses allowed

SWOT ANALYSIS: INTERNAL ANALYSIS

1. Identify and chart the **strengths** and **weaknesses** for your **program area** in Family and MWR

INTERNAL
(within organisation)

Strengths

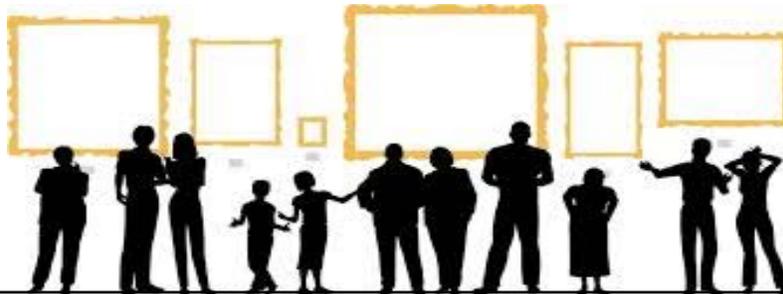
- ___ What do you do well?
- ___ What unique resources can you draw on?
- ___ What do others see as your strengths?
- ___ What do your customer rave about?

Weaknesses

- ___ What could you improve?
- ___ Where do you have less resources than others?
- ___ What are others likely to see as weaknesses?
- ___ Customer complaints?

GALLERY WALK

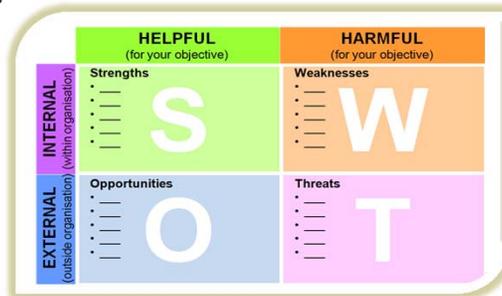
- Grab some post-it notes and go visit each table's charts. Going clockwise, add to each chart any additional ideas of **Strengths** and **Weaknesses** for their program area.
- Once your team is back at your chart, consider the feedback you received, and add any additional points to your original chart.



Developing Priorities

PRIORITIZING YOUR SWOT

- Determine a **method** for prioritizing your lists (e.g., high customer impact, high revenue opportunity, employee focused, etc.)
- Prioritize your SWOT, and circle your **top-three** items for each quadrant.
- Brief back to the class.



Formulating the Strategic Plan

MISSION STATEMENTS



The **Army's mission** is to fight and win our Nation's wars by providing prompt, sustained land dominance across the full range of military operations and spectrum of conflict in support of combatant commanders.



IMCOM integrates and delivers base support to enable readiness for a globally-responsive Army.

We Are the Army's Home

III CORPS MISSION

The screenshot shows the official website of Fort Hood, Texas. The header includes the U.S. Army logo, the website URL 'WWW.HOOD.ARMY.MIL', and the slogan 'THE GREAT PLACE' with a tank icon. A navigation menu lists various categories like Home, Units, Soldiers, etc. The main content area features a photo of Lieutenant General Paul E. Funk II, the Commanding General of the III Corps Command Group. To the right, a text box titled 'III Corps Mission' describes the corps's role in rapid deployment and combat operations.

III Corps Mission
 III Corps and its Subordinate Units are prepared to rapidly deploy and conduct the full range of military operations to seize, retain, and exploit the initiative, in order to defeat any adversary. The Corps is prepared to exercise mission command of Army, Joint, and Multi-National Forces, as a Corps, Joint Task force (JTF), or Combined Joint Forces Land Component Command (CJFLCC).

FAMILY AND MWR MISSION AND VISION

Family and MWR Vision

Committed to Service –
Enhancing Readiness –
Foundation of the Army Culture



Family and MWR Mission

G9 integrates and delivers Family and Morale, Welfare and Recreation programs and services enabling readiness and resilience for a globally-responsive Army.

VISION AND MISSION

- Why does vision and mission matter in strategic planning?

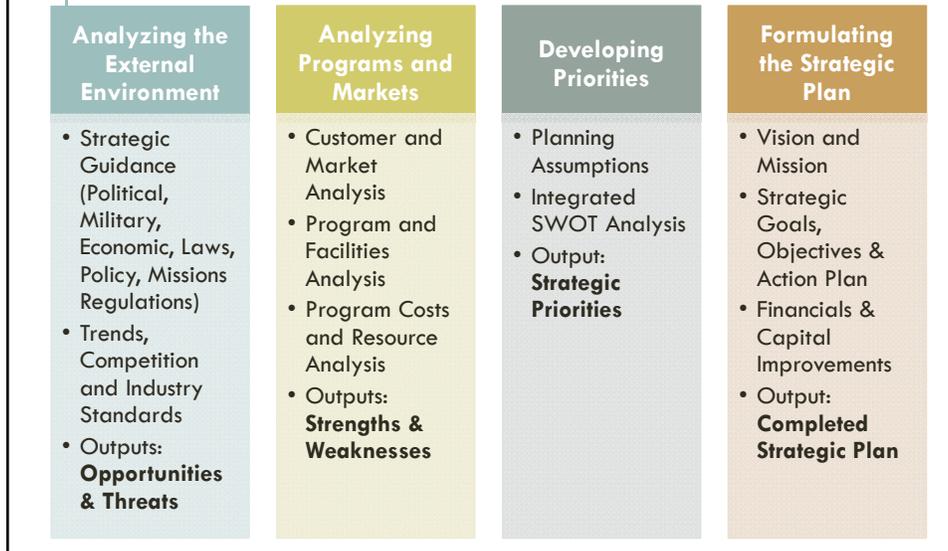
GOALS AND OBJECTIVES

- How do you all set goals for your programs?
- How do you know if you are on target to meet your goals?

WRITING GOALS AND OBJECTIVES

- Analyze your prioritized SWOT! What are some goals you can develop that...
 - Leverage your strengths
 - Pursue key opportunities
 - Improve or mitigate your program weaknesses
 - Address threats
- BE INNOVATIVE! BE STRATEGIC!

STRATEGIC PLANNING PROCESS



INDIVIDUAL ACTION PLAN

- Actions are clearly stated and based on application of knowledge gained during the course
- Actions are within the control of the individual and include an end date for completion
- Measurements of success are quantitative and measure the success of attaining the action

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Individual Action Plan

Write three actions you want to take as a result of what you learned during the course. Describe what success will look like and provide a date by which you will complete or realize each action.

Action I will commit to	How I'll know I've achieved it	Date to Complete
1.		
2.		
3.		

Notes