

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 PLANNING PROCESS

Analyzing the External Environment

- Strategic Guidance (Political, Military, Economic, Laws, Policy, Missions Regulations)
- Trends, Competition and Industry Standards
- Outputs: **Opportunities & Threats**

Analyzing Programs and Markets

- Customer and Market Analysis
- Program and Facilities Analysis
- Program Costs and Resource Analysis
- Outputs: **Strengths & Weaknesses**

Developing Priorities

- Planning Assumptions
- Integrated SWOT Analysis
- Output: **Strategic Priorities**

Formulating the Strategic Plan

- Vision and Mission
- Strategic Goals, Objectives & Action Plan
- Financials & Capital Improvements
- Output: **Completed Strategic Plan**

Analyzing the External Environment

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!

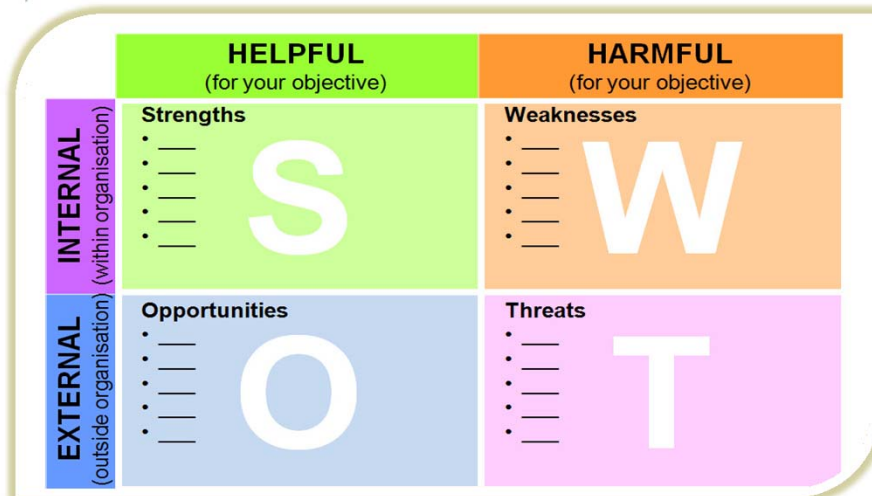
TIP: Here's a starting point:

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

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

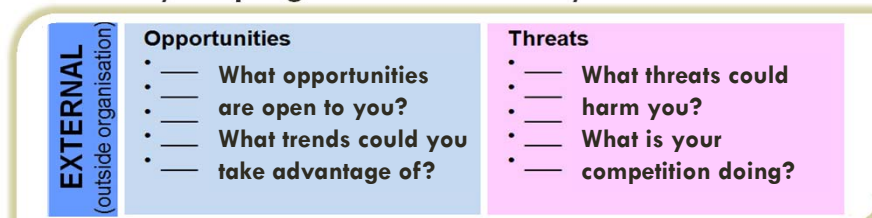
<https://trendwatching.com/freepublications/>

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

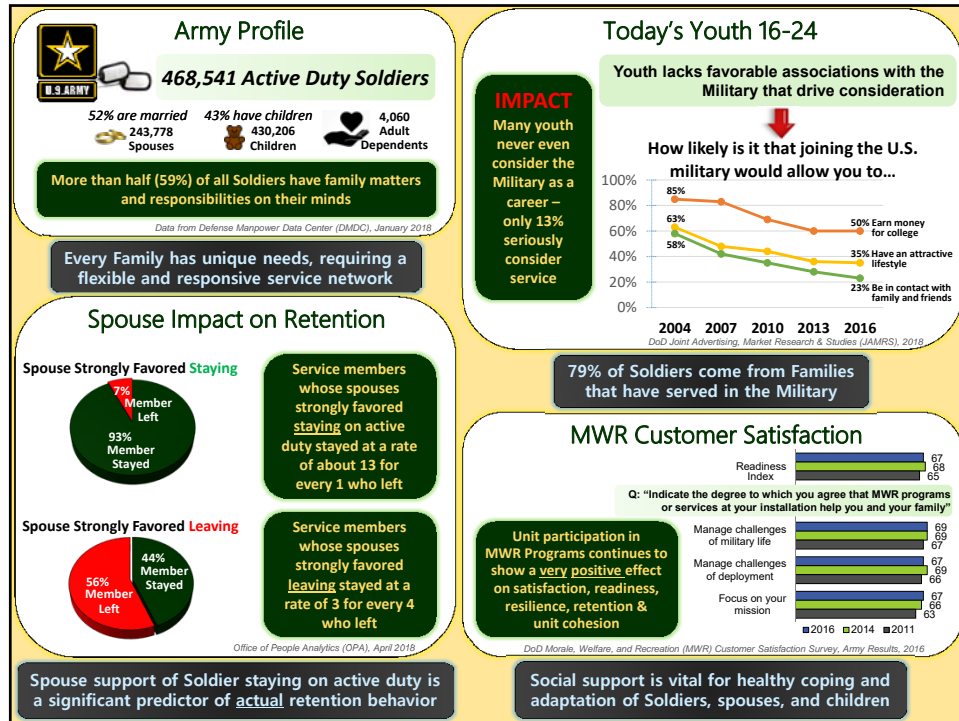


GALLERY WALK

- 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



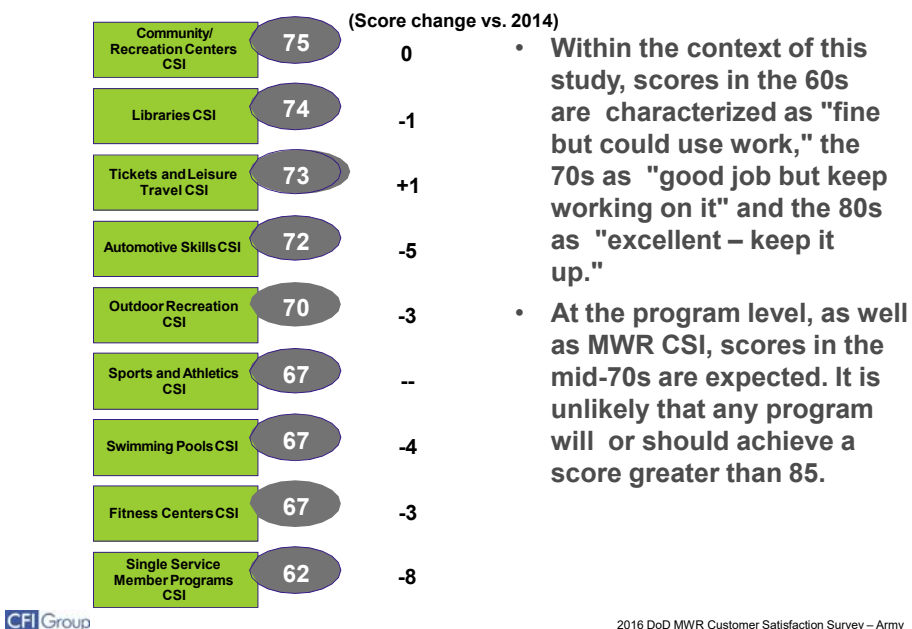
Key Findings

- 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

DoD MWR Army CSI Model – 2016



Unit Participation and Satisfaction

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

| | | Unit Participates in MWR | Unit Does Not Participate in MWR |
|-----------|------------------------------|--------------------------|----------------------------------|
| Service | % Indicate Unit Participates | 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.

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

CFI Group

2016 DoD MWR Customer Satisfaction Survey – Army

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

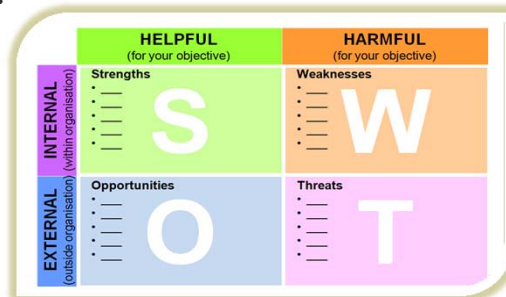
- Grab some post-it notes and go visit each table's charts. Going clockwise, add to each chart any additional ideas of **Strengths** and **Weaknesses** for their program area.
- Once your team is back at your chart, consider the feedback you received, and add any additional points to your original chart.



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

WWW.HOOD.ARMY.MIL
THE OFFICIAL WEBSITE OF FORT HOOD, TEXAS

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).

III CORPS COMMAND GROUP

Commanding General
Lieutenant General Paul E. Funk II

Navigation: Home Units Soldiers DA Civilians Families Retirees Public Affairs Press Center Phone

Left Sidebar: III Corps Command Group, III Corps IG Hotline, III Corps Policy Letters, III Corps Staff, III Corps Chaplain, III Corps EO, III Corps G1, III Corps G2, III Corps G3, III Corps G4, III Corps G8, III Corps G9

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

| Analyzing the External Environment | Analyzing Programs and Markets | Developing Priorities | Formulating the Strategic Plan |
|---|--|---|---|
| <ul style="list-style-type: none"> • Strategic Guidance (Political, Military, Economic, Laws, Policy, Missions Regulations) • Trends, Competition and Industry Standards • Outputs: Opportunities & Threats | <ul style="list-style-type: none"> • Customer and Market Analysis • Program and Facilities Analysis • Program Costs and Resource Analysis • Outputs: Strengths & Weaknesses | <ul style="list-style-type: none"> • Planning Assumptions • Integrated SWOT Analysis • Output: Strategic Priorities | <ul style="list-style-type: none"> • Vision and Mission • Strategic Goals, Objectives & Action Plan • Financials & Capital Improvements • Output: Completed Strategic Plan |

INDIVIDUAL ACTION PLAN

- Actions are clearly stated and based on application of knowledge gained during the course
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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