

To: Executive Board Members and Staff

Winter Guard International

From: George Lindstrom

Re: Strategic Plan

Attached is the "revised" strategic plan. The pages of the newly revised plan are interspaced between the pages of the original plan so you can compare and contrast the issues of 1990 with those of 1992-93.

In addition, I have crossed out action plans which were developed in 1990 and have been completed, have been discarded, or otherwise are no longer pertinent. Some of these crossed out action plans should be continued, I think, but it will give you a sense of progress in certain areas.

Also, the new action plans have no year of completion attached to them. Maybe a brief discussion at the business meeting could provide completion dates and responsibility for each new action plan.

WINTER GUARD INTERNATIONAL, INC.
STRATEGIC PLAN 1990 - 1995

Created
September 21 - 23, 1990

revised

WINTER GUARD INTERNATIONAL, INC.
STRATEGIC PLAN 1992 - 1997

Revised
July 1992

In September of 1990 the staff and management of Winter Guard International, Inc. met in Chicago, Illinois to initiate a STRATEGIC planning function for the organization. The process consisted of first identifying WGI's history and current situation. Second, the group analyzed several other factors including WGI's stake holders, the organizations internal and external positions and looked to the future by identifying a five year time frame as its planning horizon.

The analysis produced two major decisions. One was the development of a mission statement for the organization, the other was development of goals, issues and action plans.

The participants further grouped the goals, issues, and action plans into seven specific areas of concern. They are:

Adjudication
Education
Finance
Management
Organization
Product
Promotions/PR

It should be understood that this is only a start and that further planning should be a regular function within the organization.

Those participating in this session were:

Delores Zappala, President - WGI
J.C. Connor, Vice President - WGI
Fred Feeney, President - WGI Foundation
Lynn Lindstrom, Executive Director
Fred Miller, Finance Manager - WGI
Mickey Kelly , Task Force Coordinator - WGI
Shirlee Whitcomb, Education Manager - WGI
Wayne Wengert, Staff Assistant - WGI
George Lindstrom, Facilitator

In July of 1992 the Executive Board and Staff of Winter Guard International, Inc. met in Colorado for the annual Business Committee Meeting. One of the tasks was to review and revise WGI's strategic plan which was initially conceived in 1990.

The results of the review follow. The categories of concern and the five year time frame remained the same. The mission statement was revised and several new action plans were added.

Those participating in the session were:

Delores Zappala - President

JC Connor - 1st Vice President

Noreen Roberts - 2nd Vice President

Todd Marcocci - Secretary

Ron Nankervis - Treasurer

Paul Lampkin - Task Force Coordinator

Shirlee Whitcomb - Education Director

Wayne Wengert - Operations Consultant

Lynn Lindstrom - Executive Director

George Lindstrom - Research and Development

Pat Carey - Guest

STAKEHOLDER ANALYSIS

Parents

- Baby sit
- Positive Experience for kids
- Social Development
- Learning Experience

Teachers

- Perpetuate the activity*
- Money
- Create
- Showcase their talent*
- Compete*

Kids

- Social
- Challenge
- Learn
- Perform*
- Have fun*
- Recognition*
- Self-esteem
- Achieve success
- Participate

WGI Staff

- Personal satisfaction*
- Challenge*
- Sense of belonging*
- Love for the activity*
- Responsibility*
- Sense of accomplishment*

Other Organizations (DCI, MBA, etc.)

- Benefit from WGI(instructors, judges, etc.)*
- Our creative force*
- Our market*
- Support our success*
- Are threatened by our success*

Circuits

- Consistent rules*
- Standards*
- Education
- Administrative work*
- Someone to bitch at*
- Stability*
- Provide direction*

Suppliers

- Money
- Exposure*
- Market*
- Stability

Schools

- Enhances arts curriculum
- Recognition
- Education
- National Exposure*
- Satisfy parents

Unit Managers

- Money
- Stability*
- Help*
- Control
- Participate

Judges

- Participate
- Give something back to the activity
- Recognition
- Education/training*
- Influence on the activity*
- Money
- Travel*
- Prestige*

Volunteers

- Recognition*
- Participate*
- Have an impact*
- Sense of belonging*

Fans

- Be entertained*
- Social/friendships*
- Family
- Competitive
- Excitement*
- Standards*
- Quality product*
- Fairness*

* - WGI is a major contributor to achieving/providing service.

revised

STAKEHOLDER ANALYSIS

No substantial changes were made in this analysis.

INTERNAL ANALYSIS

Weakness

- Board Structure & Business Sense
- Deficit Spending
- Self Serving Focus
- Lack of Visibility
- Loss of Guards
- Stagnated Growth/Explosive Growth
- Poor guard Management
- Lack of Instructors
- Lack of Communication
- No marketing Programs
- Different Agendas
- New Younger Blood on Staff/Crews
- Poor Profits
- Ineffective Committees (lack of Follow up)
- Decentralization

Strengths

- Decentralized
- Competition
- Grass Roots connection
- Longevity of Staff (Experience)
- Volunteers
- Diversity of Staff
- Education
- Flexibility to Meeting Changing Needs
- Staff Positive Attitude
- Unification of Color Guards (Nationwide)
- Decisions for KIDS
- Best Judges/Training
- Scholarships
- Foundation
- Consistent Revenue Growth
- Integrity & Loyalty
- Peer Recognition
- Regional competitions
- Feeling of Belonging
- Entertaining Product
- Automation
- Team Effort

INTERNAL ANALYSIS

Added Weakness

Drugs

Disease

School budget decreases

Internal trust or distrust

Lack of new instructors and judges

Weak sponsors

Weak or negative circuits

Apathy/complacency

Our image

Staff time and workload

Added Strengths

Internal trust

Tradition

Integrity

Diversity

Openness and acceptance

Our image

EXTERNAL ANALYSIS

Opportunities:

- Other Pageantry Activities (Dance, twirlers, bands, etc.)
- Local Circuits (more classes and activities)
- Endorsements
- Marketing/Sales of supplies and services
- Special Events
- TV/Public Awareness
- Access to Facilities
- Publications
- Office Services
- Education
- All Star Color Guard
- Alumni Association

Threats

- School Administrations
- Loss of Scholastic market to other organization
- DCI/MBA
- Tax Laws - (501(c)3
- National Economy (\$'s)
- Changing population (Birth Control)
- Lack of Teachers
- Access to Facilities

EXTERNAL ANALYSIS

Added Opportunities:

International/Global expansion

Integration

Other pageantry programs

Added Threats

Judge union

Nit-picking and gossip

Escalation of travel costs

Family breakdown

High school organization as alternative to WGI

Disasters at regionals and World Championships

MISSION STATEMENT

The mission of Winter Guard International is to provide a competitive arena for, and perpetuate the growth of, color guard and develop a symbiotic alliance with related activities.

MISSION STATEMENT

**To provide artistic and educational leadership
in an international, equal opportunity,
pageantry arts arena emphasizing principles
of integrity, creativity, and excellence.**

ADJUDICATION

GOAL - To insure quality and standards of professionalism on an ongoing basis.

ISSUE - Enlarge base of potential WGI judges.

Action Plans

- ~~1991~~ 1. ~~Insure the Academy is continued~~
- 1992 2. Open up forum to non-local judges
- 1992 3. Motivate and identify instructors who may be interested instructors
- ~~1992~~ 4. ~~Provide scholarships to aged out members to attend Academy~~
- ~~1992~~ 5. ~~Establish a logical rotation plan so all judges have a chance to be used.~~

Implementation - Board of Directors and Task Force
Approximate Cost - 0

ISSUE - Identify potential adjudication needs of other pageantry activities

Action Plans

- 1991 1. Develop a plan to organize, train and incorporate existing knowledge of systems to other areas of pageantry using our own resources
- 1992 2. Identify what other pageantries want rewarded
- 1992 3. Incorporate "other" personnel of the development of policies, procedures, and systems
- ~~1992~~ 4. ~~Insure that judging comes under the WGI judging umbrella~~
- 1993 5. Develop regional chief judges for pageantry

Implementation - Task Force, Education Director, & selected recognized adjudicators
Approximate Cost - 0

revised

ADJUDICATION

Train judges to cover all areas

Enhance and work with local judging associations

EDUCATION

GOAL - To expand those services which will broaden the skills of instructors, judges and performers in pageantry groups

ISSUE - Produce printed materials

Action Plans

- ~~1 or 2~~ 1. ~~Update existing sources and materials~~
- ~~per year~~ 2. ~~Produce new materials as needed~~
- ~~to 1995~~ 3. ~~Produce work books and text books~~
- 1995 4. Produce materials for allied pageantry activities

Implementation - Education Director, Task Force and education review committee
Approximate cost - \$1,000

ISSUE - Produce training videos

Action Plans

- ~~1991~~ 1. ~~Update existing library~~
- ~~1990~~ 2. ~~Produce training video in equipment/body~~
- 1992 3. Produce kid to kid motivational film
- ~~1991~~ 4. ~~Produce caption film on GE~~
- ~~1991~~ 5. ~~Produce training video on "How to" films~~
- 1993 6. Produce 2 films for allied pageantry activities

Implementation - Education Director, Task Force
Approximate Cost - \$7,700

ISSUE - Establish WGI camps and aid existing camps with materials, etc.

Action Plans

- 1992 1. Explore camp possibilities
- 1993 2. Establish camps in undeveloped areas to introduce the activity
- 1991 3. Aid existing camps by offering instruction, materials videos, etc.

Implementation - Education Director, Executive Director
Approximate Coast - \$2,000

ISSUE - Embellish and enlarge meetings, seminars and conventions

Action plans

- ~~1990~~ 1. ~~Continue convention for color guard personnel~~
- 1995 2. Establish multi-faceted pageantry convention which may include supplies, school units, adjudicators, and allied pageantry personnel
- 1992 3. Expand fall clinics to include more instructor development courses and offer items of interest to other pageantry personnel
- ~~1990~~ 4. ~~Maintain the Academy of Pageantry Arts for Adjudicators at the World Championships~~
- ~~1991~~ 5. ~~Promote and establish regional judge training at regional contests~~

Implementation - Education Director, Task Force, Executive Director
Approximate Cost - 0

revised

EDUCATION

Bilingual educational materials

Expand education department to full time/year round/all pageantry programs

Target low income/disabled/problem children for programs

non-traditional areas

NEA/State accreditation

Class credits in all states

Establish reference library

Value for the beginner

College credits

FINANCE

GOAL - To improve, stabilize, and foster the financial position of WGI

ISSUE - Improve cash flow

Action plans

- 1991 1. Contact and enlist corporate sponsorship
- 1992 2. Receive support through the growth of the WGI Foundation
- 1990 3. Control the financial risk of WGI
- ~~1990~~ 4. ~~Develop a permanent line of credit/savings for WGI~~
- 1991 5. Develop a cash flow analysis and spending time line
- 1992 6. Enforce payment time line for WGI regionals
- 1990 7. Sponsors pay for airline tickets when ordered

Implementation - Finance Committee, Controller, Executive Director & Foundation
Approximate Cost - 0

ISSUE - Stabilize the financial position of WGI

Action Plans

- 1990 1. Consider budget cuts through 1991
- 1991 2. Develop a cash flow analysis and spending time line
- ~~1992~~ 3. ~~Expand the responsibilities of the finance committee through priority budgeting, department head input and budget submission in advance of budget meeting~~

Implementation - Finance Committee, Executive Director, Controller, & President
Approximate Cost - 0

ISSUE - Develop a salary schedule for personnel

Action Plan

- 1992 1. Review the salary process and establish schedule based on longevity, experience, credentials, and performance

Implementation - Finance Committee
Approximate Cost - 0

ISSUE - Enhance the growth of WGI's Financial position

Action Plans

- 1991 1. Target and solicit from specific corporate sponsors
- ~~1992~~ 2. ~~Add new pageantry categories~~
- 1991 3. Establish a committee to investigate WGI endorsements
- 1991 4. Solicit championship and convention site bids

Implementation - Board of Directors, Executive Director, Finance Committee, PR Director, President
Approximate Cost - \$2,000

revised

FINANCE

Expand scholarship program

Financial contributions to units

Full-time grant writing/fundraiser effort

Secure our own building

Establish profit making business as subsidiary

Establish consulting services

Make regionals profitable

Explore tax laws

Money from sponsors/donors/vendors

MANAGEMENT

GOAL - To continue to improve and expand services from the WGI office

ISSUE - Increase communication between circuits, units and WGI

Action Plans

- 1990 1. Provide updated roster of circuits and encourage newsletter exchange
- ~~1990 2. Office respond to circuit newsletter topics~~
- ~~1990 3. Offer forum at convention for discussion, sharing, etc. and publish results of meeting~~

Implementation - Executive Director
Approximate Cost - 0

ISSUE - Develop units and circuits in new areas

Action Plans

- ~~1992 1. Target mailing list with Focus to interested area~~
- ~~1991 2. Identify resources to area that may be available~~
- 1994 3. Send in a team to help organize
- 1994 4. Develop "How To" book for circuits
- 1994 5. Send in a unit to perform/clinic

Implementation - Executive Director
Approximate Cost - \$1,000

ISSUE - Provide greater support to units

Action Plan

- ~~1992 1. Investigate group insurance rates and policies~~
- 1991 2. Make explorer post insurance information available
- 1992 3. Provide fund raising ideas in a packet through by collecting ideas from units, and compiling a resource list

Implementation - Executive Director
Approximate Cost - \$500

ISSUE - Establish a WGI Alumni Association

Action Plans

- ~~1991 1. Select a person to initiate Alumni Association Program~~
- ~~1991 2. Contact circuits and units for rosters~~
- ~~1992 3. Advertise in Focus~~
- ~~1992 4. Sell WGI Alumni Shirts~~
- ~~1992 5. Establish special alumni party at championships~~
- ~~1992 6. Help facilitate regional alumni events~~

Implementation - Executive Director, President & Education
Director
Approximate Cost - \$500

ISSUE - Increase T-shirt and Booster item sales

Action Plans

- ~~1991~~ 1. Offer generic T-shirt, etc. at regionals and through the office
1991 2. Investigate establishing an art services, booster production company with appropriate person

Implementation - Executive Director
Approximate Cost - 0

ISSUE - Establish dialogue and participation with Europe & Orient

Action Plans

- ~~1991~~ 1. Communicate with those individuals in the Orient and Europe to begin to establish a relationship
~~1991~~ 2. Establish sanctioned or regional contests in those areas

Implementation - Executive Director
Approximate Cost - \$4,000

ISSUE - Institute a program to locate and develop instructors

Action Plans

- 1992 1. Establish a list of potential instructors
1992 2. Solicit membership rosters from units and circuits
1992 3. Utilize Focus for location of potential instructors
1992 4. Once candidates are identified, do a credibility check and produce a registry for units and circuits

Implementation - Education Director and Executive Director
Approximate Cost - \$500

ISSUE - Recruit Volunteers

Action Plan

- ~~1991~~ 1. Keep your eyes open and respond to inquiries and suggestions

Implementation - Executive Director
Approximate Cost - 0

revised

MANAGEMENT

Full-time staff

Need succession planning program

Establish master calendar of all pageantry activities

Full benefits program and maybe offer to units, etc.

Insure against liability for Board of Directors and Staff

Educate Board of Directors

Establish regional offices in other countries

Unit insurance program

Recruiting system for HS participants to move to Independent World Class

Connect all staff

Expand main office

Involve VFW/Legion in program

Circuit involvement increase

New championship sites

Expand into other pageantry areas

Travel agency

Olympic event

Aux. events at championships

child care/spouse/etc.

ORGANIZATION

GOAL - To structure a Board of Directors that functions in a professional, knowledgeable and efficient manner to conduct the business of WGI

ISSUE - Investigate the restructuring of the Board of Directors to potentially reduce its size, utilize member talents, separate artistic and business disciplines, promote longevity, enhance the financial position while providing organization and leadership

Action Plan

1991

1. Establish a committee to recommend changes

Implementation - President & Executive Director

revised

ORGANIZATION

Redefine structure to include subsidiaries/other pageantry activities

Long range plan for continued expansion and growth

Add unit reps to Board of Directors

Take leadership role in all of pageantry

Pageantry arts newspaper

PRODUCT

GOAL - To motivate units to provide a creative, entertaining, aesthetic and powerful programs

ISSUE - Enhance the seemingly lack of entertainment value (effect)

Action Plans

- ~~1991~~ 1. ~~Teach instructors how staging and design create effect~~
- 1991 2. Encourage judges to be reactive to programs that are truly rewardable.
- ~~1991~~ 3. ~~Utilize convention to motivate instructors toward better programming concepts~~
- 1991 4. Create a "pool" of top designers to teach novice instructors the value of
entertainment by WGI acting as a consulting middle man
- ~~1991~~ 5. ~~Top designers available at the convention~~

Implementation - Task Force Coordinator, Education Director, selected designers
Approximate cost - 0

ISSUE - Add pageantry categories to regionals

Action Plan

- ~~1992~~ 1. ~~Identify the most accessible other pageantry concepts in each area~~
- ~~1992~~ 2. ~~Insure systems/judges are in place to judge such activities~~
- ~~1992~~ 3. ~~Promote locally through regional pageantry associations especially in high schools~~

Implementation - Task Force Coordinator, Educational Director, Regional Directors,
Executive Director, and WGI Adjudicators
Approximate Cost - 0

revised

PRODUCT

Get boring out

PROMOTION/PR

GOAL - To increase the exposure of the activity to the general public and through that process increase participation at all levels

ISSUE - Create a committee to assist PR Director in the development necessary to implement the goal

Action Plan

1991 1. Select a committee

Implementation - Executive Director
Approximate Cost - 0

ISSUE - Enhance national promotion effort

Action Plans

1991 1. Investigate professional services who can help with demographic surveys, marketing strategies and increase profit
1992 2. Develop a unified PR concept to include brochures, slogans, posters, etc.
1992 3. Produce press packets for regional sponsors

Implementation - PR Director & Executive Director
Approximate Cost - \$2,000

ISSUE - Enhance WGI's PR Service to local areas

Action Plans

1991 ~~1. Update or write publications such as "How to Start a Color Guard", "How to Deal with School", "How to Sponsor a Contest", etc.~~
1992 2. Develop "How To" information for local units and sponsors to include items regarding press releases, radio spots, TV spots, public access, etc.

Implementation - Education Director, Executive Director &
PR Director
Approximate Cost - \$500

ISSUE - Investigate national exposure possibilities

Action Plans

1991 1. Promote championships through national print and electronic media
1993 2. Investigate promotion of the activity through "60 Minutes, Connie Chung, Sunday Supplements, etc."
1992 3. Increase Focus to targets national entities
1993 4. Investigate appearance opportunities for color guard in parades, bowl games, basketball, etc.
1992 5. produce articles regarding color guard in band magazines, school administration publications, etc.
1994 6. Produce a promotional film on color guard and pageantry for sponsors, schools, etc.

Implementation - PR Director, Education Director, Executive Director and HELP!!
Approximate Cost - Potentially a BUNCH

revised

PROMOTION/PR

Hire marketing/PR person - full-time

Full media/TV coverage

Advertising slogan/campaign

Establish public awareness

National sponsor

Improve our image

Need recognition