



Institute for Senior Professionals

Okaloosa-Walton Community College

**SALVATION ARMY  
STRATEGIC PLANNING STUDY**

**Presented by the**

**Institute for Senior Professionals  
at  
Okaloosa-Walton Community College**

**January 1994**

**TABLE OF CONTENTS**

*Preface* . . . . . *ii*

*Executive Summary* . . . . . *Page 1*

*ISP Task* . . . . . *Page 1*

*Methodology* . . . . . *Page 2*

*Formulate Mission Statements* . . . . . *Page 4*

*Support Florida State Goals* . . . . . *Page 4*

*Evaluate Historical Trends* . . . . . *Page 5*

*Current Programs and Facilities* . . . . . *Page 5*

*Historical Trend Charts* . . . . . *Pages 6 through 13*

*Assessment of Needs* . . . . . *Page 14*

*Plan of Action* . . . . . *Page 16*

*Appendices* . . . . . *Page 19*

## *Preface*

The Okaloosa-Walton Community College's Institute for Senior Professionals (ISP) is an organization committed to providing a means for talented retired individuals to continue to make contributions to the community through participation in economic development of the college district and through volunteer participation in the college's educational programs.

Since its inception over two years ago, the ISP has become involved in such topics as education funding, governmental consolidation, transportation, county fee structure, and the Elderhostel Program, among others. At its request, a major study was completed for the Okaloosa County Commission dealing with facility needs for the future.

This report, Salvation Army Strategic Planning Study, was accomplished by the ISP at the request of the Commander, Fort Walton Beach Salvation Army Corps. It is intended to serve as a guide to the Commander, his staff and to the Salvation Army Advisory Board as they prepare for the future needs of the greater Okaloosa County community.

The OWCC Institute for Senior Professionals is pleased to present this report to the Commander, Fort Walton Beach Salvation Army Corps.

Allyn C. Donaldson, Jr.  
Chairman

## ***EXECUTIVE SUMMARY***

The Fort Walton Beach Salvation Army Corps does not possess the resources to meet current human and spiritual needs, nor those forecast for the next 5-10 years in the greater Okaloosa County area. A campaign to raise capital funds is critical to acquire/construct facilities essential to meeting these needs.

A successful capital campaign for the Fort Walton Beach Salvation Army Corps will however, be dependent on the ability of the Corps and its Advisory Board to articulate to the community both present and outyear critical human needs and identify the resources/facilities to meet those needs.

The Institute for Senior Professionals (ISP) Task Force judged that the following elements were essential to a strategic plan which includes a major fund raising effort:

- Revitalization of Advisory Board
- Assessment of Critical Needs
- Definition of Resources to Meet Needs
- Major Public Affairs Campaign
- Commitment of Community Leaders
- Capital Fund Campaign/Community-wide

## ***THE INSTITUTE FOR SENIOR PROFESSIONALS' TASK***

Each Corps of the Salvation Army normally develops a strategic plan, in concert with its Advisory Board. The Fort Walton Beach Corps was requested by letter from Divisional Headquarters in Tampa, Florida, to develop its plan (Appendix A). In discussions with the Advisory Board and other members of the community, the Fort Walton Beach Corps Commander learned of the Institute for Senior Professionals at Okaloosa-Walton Community College and in turn, requested their assistance in formulating a plan (Appendix B).

Although the ISP thus far has had no experience in strategic planning, it was the consensus that there were members who had been involved in long-range planning in their earlier careers, and thus were willing to help the Salvation Army in this effort.

A task force was formed to gather information about the current activities and capabilities of the local Corps, the future human service needs of the community, and subsequently recommend actions by the Corps to meet those needs. While no specific deadline was established for completing the plan, the ISP Task Force felt it important to provide their recommendations to the new Advisory Board before it is scheduled to take office in September 1993.

## ***METHODOLOGY***

The Institute for Senior Professionals (ISP) at Okaloosa-Walton Community College, in response to a request from the Commanding Officer of the Fort Walton Beach Salvation Army Corps, formed a Task Force to develop a Strategic Plan for the Army in Okaloosa County.

The Task Force conducted a series of meetings with the Commanding Officer and members of the Corps Advisory Board to gather information about the FWB Corps' past and current programs, with particular emphasis on how these programs have and are meeting the needs of the community.

The ISP Task Force visited all of the Corps' facilities and met with a number of its employees and volunteer workers.

Interviews were held with individuals who are responsible for carrying out various programs, to gain their thoughts concerning the Army's ability to meet the community's needs.

In addition, one member of the ISP Task Force visited the Salvation Army Corps in Panama City and Pensacola. Very valuable information and insights into their respective programs was brought back and has been incorporated into this Strategic Planning Study. The trip report of those visits follows in Appendix C.

The ISP Task Force also felt it was important to establish a baseline for the Fort Walton Beach Corps' current activities and resources as a starting point from which it could project the Corps' future roles & missions in Okaloosa County. Thus, historical trends were developed from data dating back to 1985, to determine the areas of human services where the Corps has expended its resources in the past.

In addition to baselining the Corps' programs and resources, which included the above referenced trend analysis, it was necessary to describe the community to be served in the time frame for which the strategic plan would be operative. The ISP had previously completed a study of Okaloosa County facilities to meet future needs (dated May 1992 ) in which population estimates and projections were included. This demographic projection for the year 2000, coupled with other inputs from Health & Rehabilitation Services (HRS), Sheriff's Department, Drug Enforcement Agency (DEA), and other County and State agencies, helped in characterizing the future community and projecting future human services requirements (Appendix D).

Having established the baseline for the Corps' current activities and a definition of the community it will serve, the Task Force was prepared to undertake the strategic planning process. There were a number of strategic planning models to choose from and they all embodied similar fundamental elements or principles. The Salvation Army

Florida Divisional Headquarters in Tampa, recommended in its January 22, 1992 letter to Major Tanner, the following process:

Articulate Mission & Goals

Evaluate Strengths & Weaknesses

Evaluate Opportunities

Determine Optimum Scenario

Determine Financial Plan

Prepare Plan of Action

Implement the Strategic Plan

Evaluate Progress

The Task Force acknowledged this process as a general guide which should be adapted to local conditions (the last two steps should be left to the Corps and Advisory Board).

The Task Force therefore, modified the steps recommended by the Divisional Headquarters as follows:

Formulate Mission Statement(s)

Support Florida State Goals

Evaluate Historical Trends

Review Current Programs & Resources

Conduct Assessment of Needs

Formulate Plan of Action

Additional observations not directly within the scope of this study but considered to be of significance to both local and regional operations of Salvation Army units is contained in Appendix E.

## ***FORMULATE MISSION STATEMENT(S)***

International: The Salvation Army, an international movement, is an evangelical part of the universal Christian church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the gospel of Jesus Christ and to meet human needs in His name without discrimination.

Fort Walton Beach: To respond to human needs with emphasis on the homeless, hungry, and those in despair who live in Okaloosa County or who are passing through; and to rehabilitate and restore dignity and quality of life to those cared for.

## ***SUPPORT FLORIDA STATE GOALS***

The State of Florida Salvation Army Strategic Planning Study completed several years ago, articulated the following Statewide Five Year Goals:

Goal #1- Improve the quality and effectiveness of all Salvation Army programs in the Florida Division.

Goal #2- Increase the public's awareness of the Army's mission and scope of operations.

Goal #3- Respond to continued growth and change in the state with new and innovative services.

Goal #4- Increase operational revenues from all sources to allow for needed expansion of services.

Goal #5- Replace or renovate and expand those facilities which are inadequate.

Goal #6- Recruit and train additional volunteers, soldiers, staff and officer personnel.

The Task Force judged that the Florida Statewide Goals were certainly applicable to the Greater Fort Walton Beach area. However, emphasis would need to be placed on certain goals over others, because of the unique needs of this community. Support of these goals is covered in a subsequent section on the Plan of Action.

## ***EVALUATE HISTORICAL TRENDS***

The enclosed trend charts indicating levels of Corps activities make it abundantly clear that the Corps has not grown to meet the needs of the community when the significant population growth and state of the national economy are considered.

## ***CURRENT PROGRAMS AND FACILITIES***

The Corps' headquarters and shelter facilities are located on Beal Parkway in downtown Fort Walton Beach, with the Thrift Store several miles away in Mary Esther. A warehouse that supports the Thrift Store is leased and also is separated from the Corps headquarters by several miles.

The facilities are totally inadequate to meet the current and projected needs of the community, as will be discussed in the following section. Further, the headquarters and shelter buildings are antiquated and in a state of poor condition. A professional assessment should be made before any extensive repairs or renovation are undertaken to determine if this is economically feasible. It may well make more sense to raze the buildings and start anew, or sell the property and acquire a new location at which all of the Corps' facilities could be consolidated.

The following charts indicating levels of Corps activities again make it clear that the Corps has not grown to meet the needs of the community, when the significant population growth and state of the national economy are considered.

The Fort Walton Beach Salvation Army Corps programs are the classical "core" programs associated with Corps in every community. They are:

League of Mercy

Comprehensive Assistance

Social Development

Group Worship

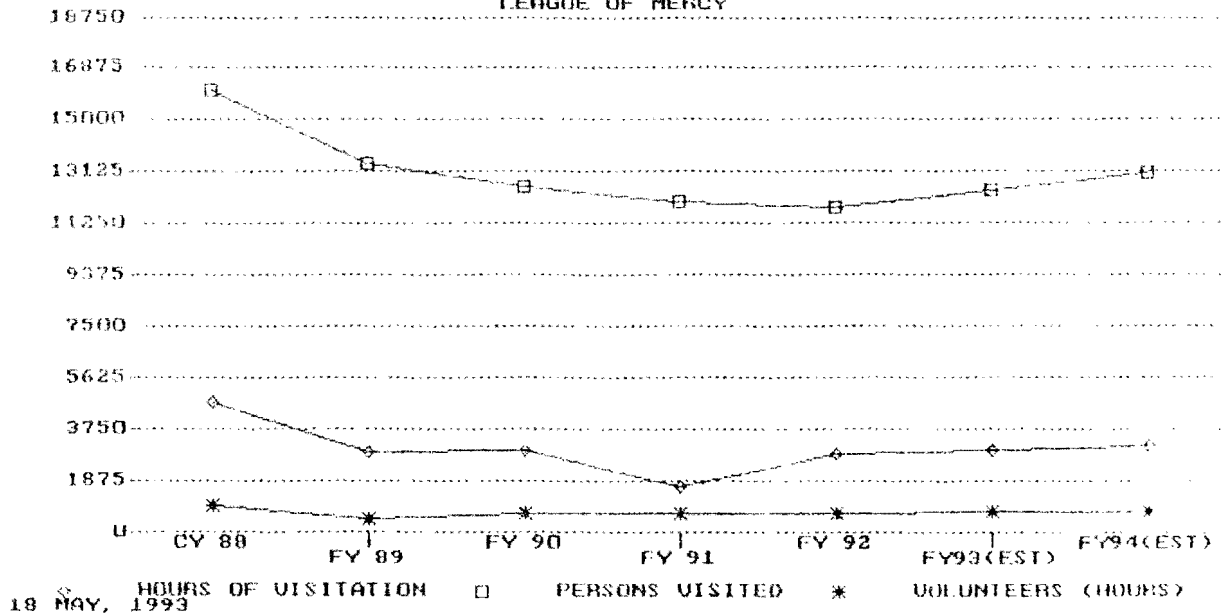
Christmas

Sunday School Outpost



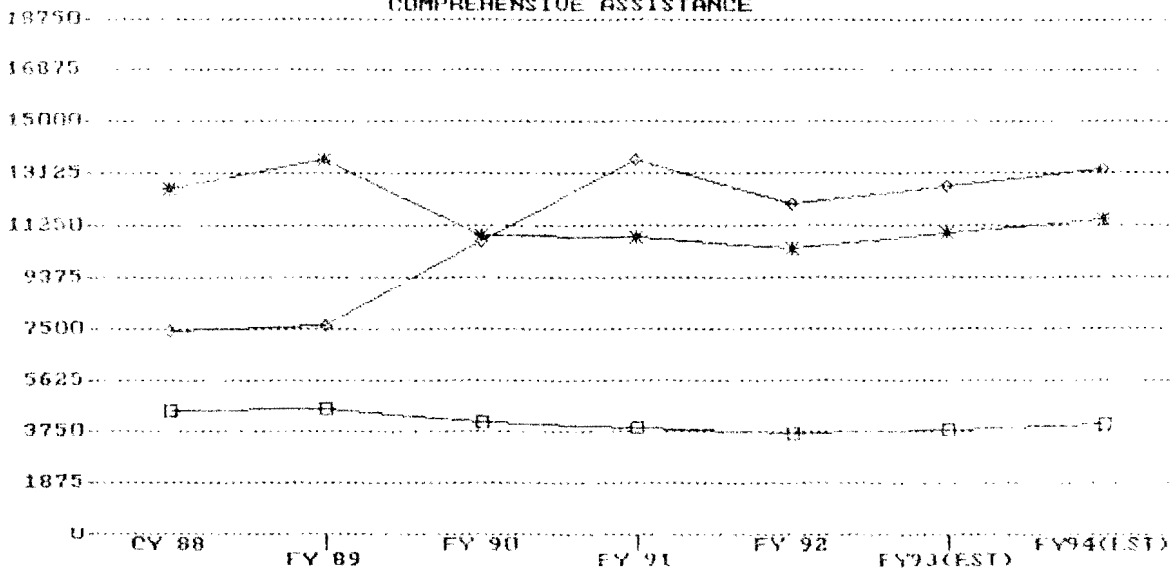
# SALVATION ARMY SERVICES - 1988 TO 1992

LEAGUE OF MERCY



# SALVATION ARMY SERVICES - 1988 TO 1992

## COMPREHENSIVE ASSISTANCE

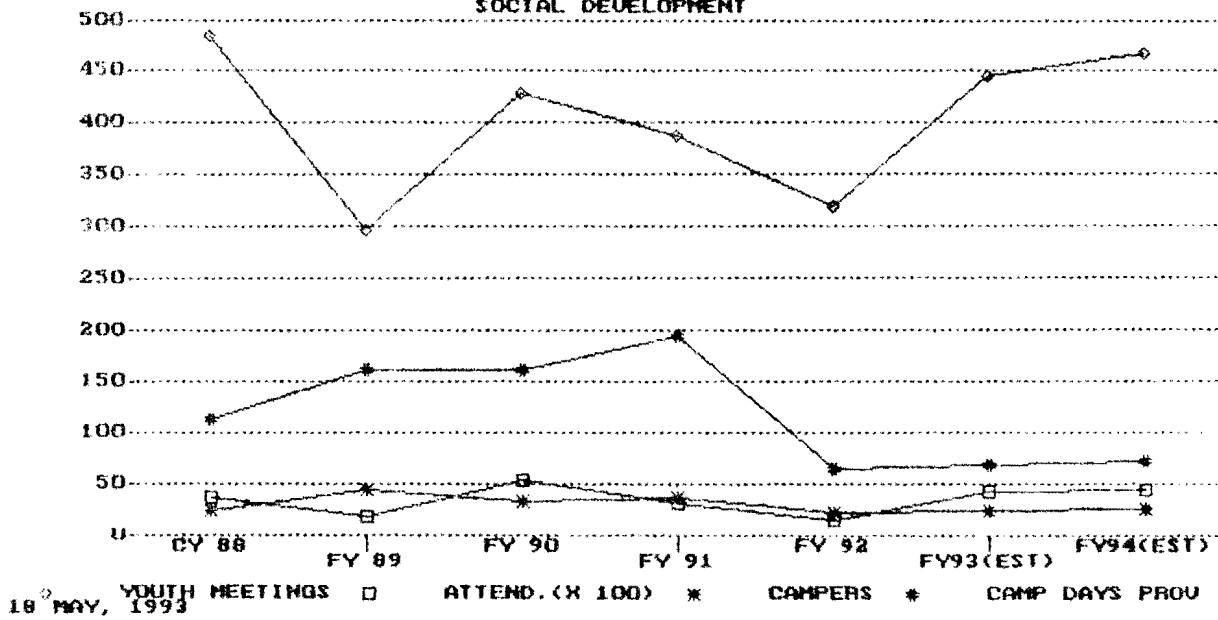


18 MAY, 1993

PERSONS ASSISTED   
  LODGINGS PROVIDED   
 \* MEALS SERVED (LODGE)

# SALVATION ARMY SERVICES - 1988 TO 1992

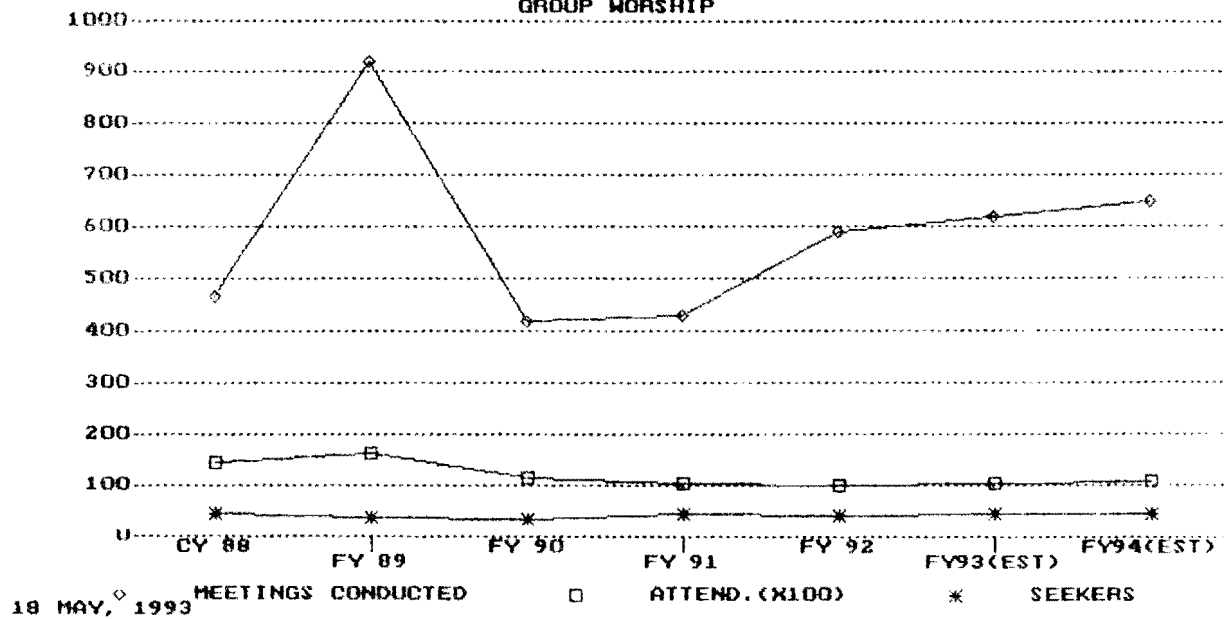
## SOCIAL DEVELOPMENT



18 MAY, 1993

# SALVATION ARMY SERVICES - 1988 TO 1992

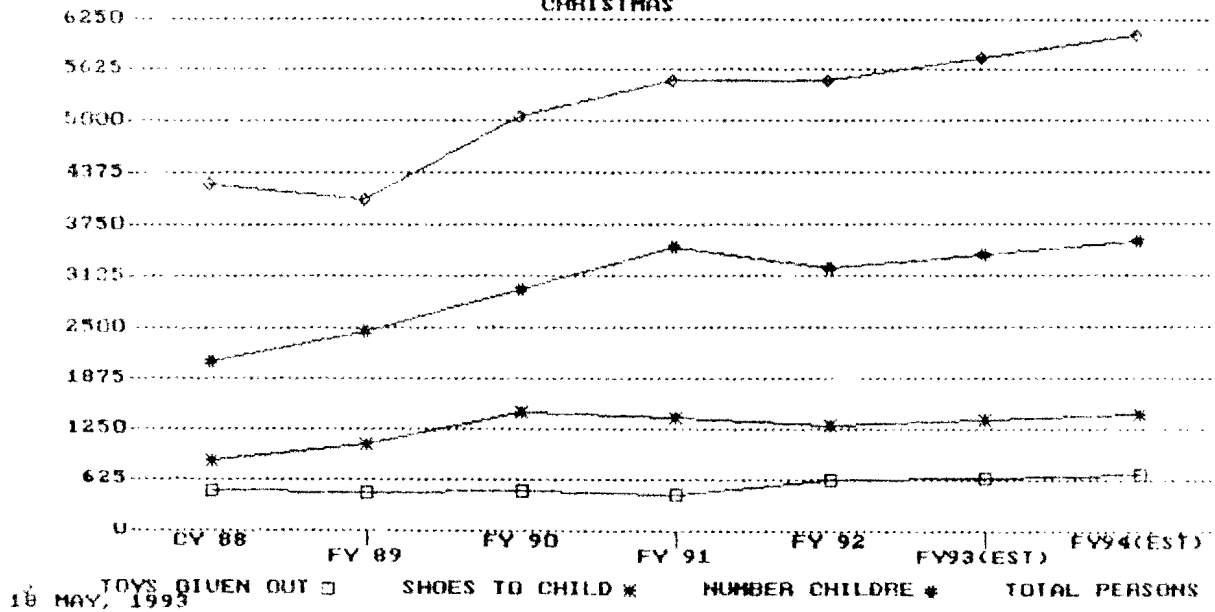
## GROUP WORSHIP



18 MAY, 1993

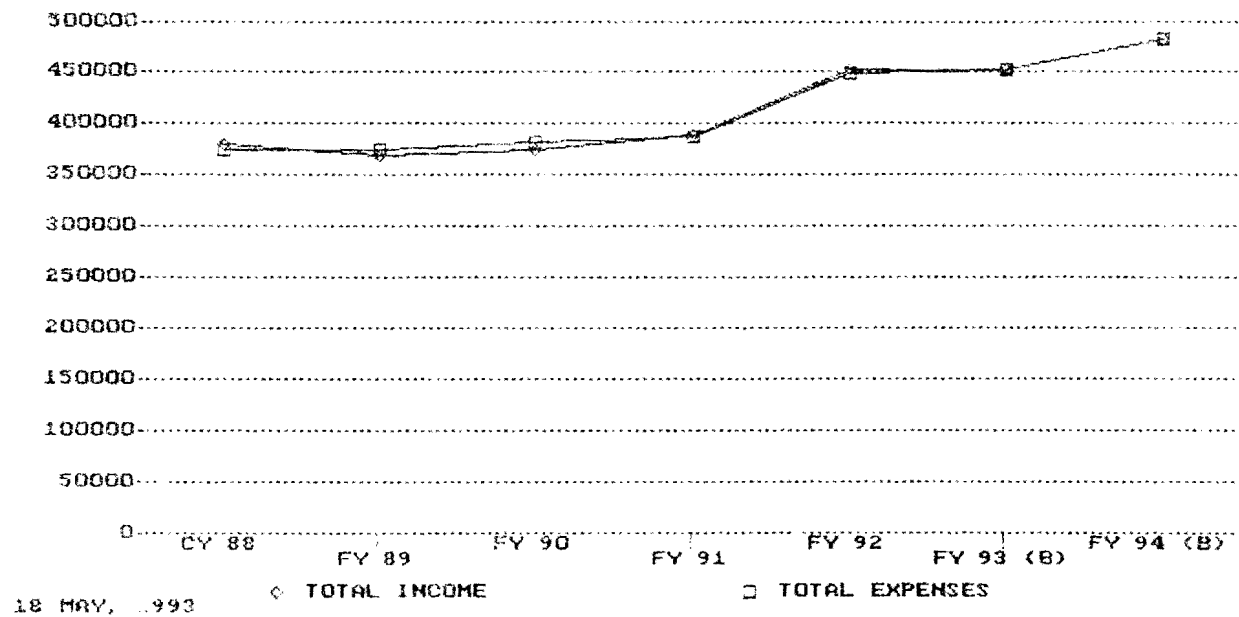
# SALVATION ARMY SERVICES - 1988 TO 1992

CHRISTMAS



18 MAY, 1993

SALVATION ARMY FINANCIAL STATEMENT  
 INCOME VS EXPENSES



II

SALARMY.SVC  
17-May-93

SUMMARY OF SERVICES PROVIDED  
CALENDAR YEAR 1988 TO 1994 (FY93 & FY94 ESTIMATED)

	CY 88	FY 89	FY 90	FY 91	FY 92	FY93(EST)	FY94(EST)	AVERAGE	NOTES
LEAGUE OF MERCY									
HOURS OF VISITATION	4,682	2,868	2,949	1,602	2,814	2,956	3,102	2,926	
PERSONS VISITED	16,000	13,376	12,513	11,983	11,785	12,374	12,993	13,003	
VOLUNTEERS (HOURS)	957	449	664	637	669	702	737	628	1
COMPREHENSIVE ASSISTANCE									
PERSONS ASSISTED	7,413	7,598	10,667	13,592	11,992	12,592	13,221	11,011	2
LODGINGS PROVIDED	4,497	4,582	4,066	3,841	3,614	3,795	3,984	4,053	2
MEALS SERVED (LODGE)	12,537	13,575	10,674	10,805	10,390	10,910	11,455	11,506	2
SOCIAL DEVELOPMENT									
YOUTH MEETINGS	483	296	427	367	318	444	466	403	3
ATTEND. (X100)	35.51	17.70	52.11	30.35	13.73	42.20	44	34	3
CAMPERS	24	43	32	36	22	23	24	29	
CAMP DAYS PROVIDED	112	160	160	193	64	67	71	116	
OUTSIDE GROUPS	1	2	2	2	1	1	1	1	4
ATTENDANCE ALL GROUPS	1,834	809	160	250	34	88	93	474	4
HOURS	252	160	153	168	96	101	106	149	
GROUP WORSHIP									
MEETINGS CONDUCTED	464	517	417	429	586	615	646	582	
ATTEND. (X100)	143.77	162.04	112.14	100.95	96.48	101.30	106.37	117.58	
SERVERS	43	37	33	44	40	42	44	40	
CHRISTMAS									
TOYS GIVEN OUT	4,215	4,031	5,029	5,468	5,468	5,741	6,028	5,140	
LUNCHES TO CHILDREN	469	455	464	433	609	639	671	534	
NUMBER CHILDREN ASSISTED	843	1,060	1,437	1,367	1,295	1,360	1,428	1,255	
TOTAL PERSONS ASSISTED	2,070	2,453	2,955	3,462	3,197	3,357	3,525	3,003	
WOMEN'S SCHOOL OUTPOST									
BIBLE STUDY MEETINGS	37	65	45	38	0	0	0	26	5
BIBLE STUDY MEETINGS	1,191	1,500	1,500	620	0	0	0	667	5

12

- NOTE 1: 1992 DOES NOT INCLUDE ONE CASE OF LONG TERM CARE.  
 NOTE 2: 1992 REFLECTS DECLINE DUE TO LACK OF FACILITIES FOR FAMILIES.  
 NOTE 3: 1988-1991 INCLUDE SUMMER DAY CAMP.  
 NOTE 4: 1992 REFLECTS DISCONTINUING 24 MEETINGS.  
 NOTE 5: ATTENDANCE DISCONTINUED IN 1992.

ARMYFIN.LCD  
17-May-93

SUMMARY OF CASH TRANSACTIONS  
1988-1994 (BUDGET)

INCOME	CY 88	FY 89	FY 90	FY 91	FY 92	FY 93 (B)	FY 94 (B)
PUBLIC SUPT	183,462.37	190,234.49	215,351.01	238,375.31	282,341.65	269,300.00	213,494.00
INTERNAL SUPT	43,205.59	50,814.65	58,403.20	61,795.98	50,880.36	49,898.00	120,087.00
SALVAGE	113,161.24	86,200.00	58,107.85	48,000.00	78,289.80	35,000.00	85,000.00
UNITED WAY	39,500.00	39,502.06	40,923.00	40,351.00	39,876.91	46,100.00	61,800.00
TOTAL INCOME	379,329.20	366,751.20	372,785.06	388,522.29	451,388.72	450,298.00	480,381.00
EXPENSES	CY 88	FY 89	FY 90	FY 91	FY 92	FY 93 (B)	
STAFF COMPENSATION	114,886.23	108,769.88	98,410.90	112,735.53	128,616.51	161,241.00	180,340.00
PROGRAM & GEN EXP	235,538.45	241,379.60	258,101.90	249,410.55	288,701.96	261,076.00	268,884.00
PAYMENTS TO HDQTRS	22,338.48	22,518.48	23,443.63	24,250.98	29,024.50	27,981.00	31,157.00
TOTAL EXPENSES	372,763.16	372,667.96	379,956.43	386,397.06	446,342.97	450,298.00	480,381.00
SURPLUS/DEFICIT	5,566.04	-5,916.76	-7,171.37	2,125.23	5,045.75	0.00	0.00

NOTE: FY 90 ADJUSTED TO DELETE COST OF MENS LODGE.



## ***ASSESSMENT OF NEEDS***

Based on a study done for the Fort Walton Beach Salvation Army in 1986 by the firm McDowell, Skelton & Associates of Atlanta GA., the most critical needs in the local community in descending order of frequency were identified as :

- Shelter for the Homeless
- Food for the Poor
- Emergency Services
- Low Income Housing
- Disaster Relief
- Youth Activities
- Clothing, Furniture for the Poor
- Family Counseling
- Referral Network
- Medical Care for the Indigent
- Drug & Alcohol Rehabilitation & Counseling
- Public Transportation

The Task Force agreed that while these needs may have described the situation in 1986, they should be discussed with the incumbent Fort Walton Beach Salvation Army Commander, Major Tanner, to bring them up to date for 1993. This resulted in an assessment of most critical needs now and in the five year plan, as follows:

### ***SHELTER***

There are no facilities for families. The current capability is for approximately four men, and perhaps two women. The need for shelter is pressing and growing. The immediate need is for 18 beds for men and 12 for women; growing to 24 and 18 respectively. There should be 2-4 rooms for families. In some instances, there is a requirement to care for people for as long as 2-3 weeks.

## ***FAMILY SERVICES***

This program area encompasses the main activity of the FWB Army. It includes:

- \* Meals - Currently serving approximately 30 meals/day to those being sheltered. The current capability is very limited; the dining area and kitchen need major upgrading.
- \* Emergency Medical Care - Often transients have severe medical problems that require immediate medical attention. This entails emergency tooth extractions, prescription drugs, burials, etc. to solve crisis situations. Today, there is no program on a regular basis, to provide medical help, viz, Doctors signed up to handle these emergency cases. A new county program to provide an after-hours clinic with 24 doctors contributing their service, is very encouraging to the Corps Commander.
- \* Youth Activities - The lack of athletic facilities, such as playgrounds and ballfields, at the Salvation Army, limit its capability to serve children of the families being cared for. Although there are such facilities in the area, they are not under Army control, and thus, present supervision and transportation issues.
- \* Counseling - There is no professional counseling currently available at the Corps, to deal with Drug and Alcohol Rehabilitation or other Family Counseling. Although there are other agencies such as Bridgeway, Alcohol Anonymous, Waterfront Rescue, et al, the Corps requires the capability to provide immediate care for those being sheltered.
- \* Food Distribution - There are a number of food distribution programs in the area, and together with the Salvation Army, they are meeting the current needs of the poor and transients in the community. The Corps often refers those qualified, to the Health and Rehabilitation Services (HRS) for food stamps.
- \* Low Income Housing - There is a definite need in the community for low income housing. However, there are other agencies that are working this problem, such as the Public Housing Authority, Coalition for the Homeless, HRS, etc. Therefore, the Corps if it were able to meet its immediate and forecast needs for short-term shelter, would and should defer to these other agencies for long-term low income housing.
- \* Disaster and Emergency Relief - In any natural disaster, the Salvation Army has an important role to play. The Army has the responsibility to respond with all of its resources, including volunteers, food, prescription drugs, clothing, equipment, funds for utility bills, etc. The Fort Walton Beach Corps was a major contributor to the relief actions taken in response to Hurricanes Hugo and Andrew and will be expected to do so for any disaster that may occur in the future. The current field kitchen, which has and can be an important part in any emergency action response, is in a state of disrepair. Since the field kitchen is an important supplement to other response agencies, it should be fully capable.

\* Happy Houses - Although not specifically identified in the 1986 study, these temporary homes for foster children have a definite place in the Fort Walton Beach Community of 1993. Currently there are four, each caring for 4-5 children who are awaiting some type of foster parent or adoption action. The Happy Houses are funded in part by the HRS and managed by a local church. This is the type of project that the Salvation Army should be responsible for if it had the resources. Another need identified by the HRS is a Youth Shelter that would provide a temporary home for errant teenagers. Here again, the lack of resources prevents the Salvation Army from fulfilling its responsibilities.

\* Other - The other needs identified in the 1986 study but not addressed in this Strategic Planning Study, were a Referral Network and Public Transportation System. While both of these are important to the total human services support in the community, they are not the prime responsibility of the Salvation Army. Major Tanner, the local Corps Commander acknowledged the importance of both in serving the needs of the community and placed his hope that agencies would cooperate and coordinate their activities in each of these to the best interests of all.

## ***PLAN OF ACTION***

The ISP Task Force has outlined those actions it judges necessary to meet the current and future human and spiritual needs of the community, and the recommended action agency and time-frame in which the action should take place. The necessary actions are listed under the applicable state goals. It is imperative that the Corps Advisory Board place these actions in priority without delay.

State Goal #1: Improve the quality and effectiveness of all Salvation Army programs in Florida.

Action- Evaluate programs Yearly  
Agency- Advisory Board Program Committee  
Timeframe-Annually

Action-Establish & define goals/each program  
Agency-Advisory Board Program Committee  
Timeframe-September 1993

Action-Establish criteria for Advisory Board Members  
Agency- Executive Committee  
Timeframe-September 1993

Action-Establish rotation system for Advisory Board  
Agency-Executive Committee  
Timeframe-September 1993

State Goal # 2: Increase the public's awareness of the Army's mission and scope of operations.

Action-Establish a Public Relations Committee  
Agency-Advisory Board  
Timeframe-September 1993

Action-Develop a public relations plan (yearly)  
Agency-Public Relations Committee  
Timeframe-September 1993

Action-Establish & maintain media contact  
Agency-Public Relations Committee  
Timeframe-Continuous

State Goal # 3: Respond to continued growth and change in the state with new and innovative services.

Action-Determine area needs  
Agency-Advisory Board  
Timeframe-September 1993

Action-Prioritize needs  
Agency-Advisory Board  
Timeframe-September 1993

Action-Establish programs to meet needs  
Agency-Advisory Board  
Timeframe-September 1993

Action-Determine resource requirements  
Agency-Advisory Board  
Timeframe-September 1993

State Goal # 4: Increase operational revenues from all sources to allow for needed expansion of services.

Action-Update campaign feasibility study  
Agency-Budget & Finance Committee  
Timeframe-September 1993

Action-Conduct capital campaign  
Agency-Advisory Board  
Timeframe-1994 Committee

Action-Improve Fund Raising Programs  
Agency-Budget & Finance Committee  
Timeframe-Continuous

Action-Increase Thrift Store Profit  
Agency-Salvage Sub-Committee  
Timeframe-Continuous

Action-Pursue Grants  
Agency-Budget & Finance Committee  
Timeframe-Continuous

State Goal # 5: Replace or renovate and expand those facilities that are inadequate.

Action-Obtain an adequate Corps headquarters  
Agency-Advisory Board  
Timeframe-1995-1996

Action-Consolidate salvage operations  
Agency-Salvage Sub-committee  
Timeframe-1993

Action-Obtain adequate shelter facilities  
Agency-Advisory Board  
Timeframe-1994-1995

State Goal # 6: Recruit and train additional volunteers, soldiers, staff and officer personnel.

Action-Develop Advisory Board recruiting strategy  
Agency-Advisory Board  
Timeframe-1993

Action-Recruit Volunteer Coordinator  
Agency-Commander  
Timeframe-1993

Action-Recruit Volunteers for Fund Raisers  
Agency-Advisory Board  
Timeframe-Continuous

Action-Establish Adequate Accounting System  
Agency-Budget & Finance Committee  
Timeframe-Immediate

EVA BURROWS  
GENERALKENNETH HOESLER  
TERRITORIAL COUNSELOR

# The Salvation Army

FOUNDED IN 1865 BY WILLIAM BOOTH

FLORIDA DIVISIONAL HEADQUARTERS  
3101 LAKE ELLEN LANE  
TAMPA, FLORIDA 33618Madras Area  
P.O. BOX 276912  
TAMPA, FL 33698-0912  
Telephone: 813/962-6611LT. COLONEL JOHN BUSBY  
DEPARTMENT CHIEF

January 22, 1992

Major Larry Tanner  
FT. WALTON BEACHRE: STRATEGIC PLANNING

Dear Major Tanner:

Your request for some information on Strategic Planning has been brought to my attention. We like to be as helpful as we can but the strategic plan for Ft. Walton Beach will need to be developed by your Advisory Board committee with your leadership and guidance.

May I suggest that first of all you should start with the Mission Statement. Then ask yourself and your committee, "What strategy will we use in fulfilling "The Mission" of The Army in Ft. Walton Beach?". The strategic plan then documents the course of action that defines how the organization will fulfil its mission and objectives as it deals with critical issues.

The Statewide Strategic Plan has defined these issues. A copy of the Statewide Strategic Plan Objectives is attached.

The next question is, do these same issues, as stated in the Statewide statement, pertain to our local situation. If so which of these can we address and then what strategy will we use in addressing them in the programs now in existence, or to be initiated on the local level.

The attached workbook will be of assistance to you in relating the state objective to your local situation.

The material attached "Strategic Planning - The Key to Institutional Advancement" will be of assistance to you and your committee.

The eight steps listed in the attached information provides a road map for you as you proceed with this project.

1. Articulate your mission and goals.
2. Evaluate your strengths and weaknesses.
3. Evaluate your opportunities.
4. Determine your optimum scenario.
5. Determine your financial plan.
6. Prepare a plan of action.
7. Implement the strategic plan.
8. Evaluate your progress.

contd.....

Strategic Planning - Ft. Walton Bch. Jan 22, 1992 contd...

We are not sending you an sample of what has been done in other locations as we believe that you and your staff will examine your own needs and be creative in producing the requested Strategic Plan.

Sincerely,



Orval Taylor, Commissioner (R)  
DIRECTOR OF DEVELOPMENT

/vng

EVA BURROWS  
GENERAL



KENNETH L. HODDER  
TERRITORIAL COMMANDER

# The Salvation Army

Founded in 1865 by William Booth

LT. COLONEL JOHN BUSBY  
DIVISIONAL COMMANDER

201 BEAL PARKWAY, S.E.  
P.O. BOX 1117      PHONE 243-4531  
FORT WALTON BEACH, FLORIDA 32549

MAJOR LARRY TANNER  
COMMANDING OFFICER

October 19, 1992

Mr. Jim Chitwood  
Okaloosa Walton Community College  
100 College Boulevard  
Niceville, FL 32578

Re: Strategic Planning

Dear Mr. Chitwood:

Our Divisional Office has requested that we conduct a study and plan for the Fort Walton Beach Okaloosa County area.

We request the skills and service of the Institute of Senior Professionals in helping us complete this request.

Thank you for your attention and support.

Sincerely,

*Larry Tanner*  
Major Larry Tanner      *LTn*  
Commanding Officer





## *Appendix C*

### Trip Report to Salvation Army Units

I. Panama City: with Capt. J.R. Hartsook on April 27, 1993, the following general information was obtained:

- A. Geographic Area: Bay, Washington, Holmes, Gulf and Franklin Counties.
- B. Strategic Plan: See copy of "Strategic Plan Worksheet"; and copy of "Long Range Planning Study Report and Agenda for Action", (done by Lanier Associates, consultant), both completed in 1992. On file at OWCC/ISP.
- C. Major Service Areas:
  - (1) Domestic Violence & Rape Services.
  - (2) Human Needs (food, clothing, etc.).
  - (3) Corrections Program (semi-halfway house).
- D. Fund Raising:
  - (1) Local Advisory Board (\$85,000).
  - (2) Christmas (bell & empty stocking-\$158,000).
  - (3) Thrift Store (\$75,000).
  - (4) Letter Appeals.
  - (5) Grants for Corrections and Shelter Programs.
- E. Mission Statement: See Long Range Planning Report on file.
- F. Publicity:
  - (1) Newspapers.
  - (2) Mail.
  - (3) Billboards.
  - (4) Agressive Advisory Board.

Notes: (1) Budget \$1,7000,000 for 1992/93

(2) New Commander June 1992

(3) Does not work with United Way

(4) Six physical locations

(5) Corrections program all 5 counties (incl elec monitoring)

(6) Hope to kick off capital financial campaign soon

II. Pensacola: with Capt. R. Bohlman on April 29, 1993, the following information was obtained:

A. Geographic Area: Escambia County (99.9%). If Santa Rosa County asks for help, Pensacola would respond.

B. Strategic Plan: None as such. The basis of their current operation was a needs study, and a financial study. The specific needs of their area were determined, goals were set, and a campaign feasibility study was completed. The first financial study was done by a private firm (Cargill Associates) and they advised that the necessary funds could not be raised. A second study was done by Jack McDowell, a Salvation Army employee from Atlanta (tel 404 587-5292) and he advised that he could organize the campaign with the Advisory Board and raise the necessary funds. The campaign was just completed. Their goal of \$497,000 was exceeded; they raised well over \$600,000.

C. Major Service Areas:

- (1) Family Assistance (housing for men, women and children).
- (2) Community Center (gym, pool and sports teams) for recreation and character building.
- (3) Emergency Assistance (food, clothing, etc.).

D. Fund Raising: - other than special campaign

- (1) United Way (\$200,000).
- (2) Christmas Drive (bells & letters).
- (3) Ongoing Local Appeals.

E. Mission Statement: same as International Salvation Army

F. Publicity:

- (1) Advisory Board.
- (2) Local Newspapers.
- (3) Billboards.
- (4) Letters.

Notes:

- (1) Budget \$700,000 for 1992/93
- (2) New Commander June 1992
- (3) Strong Advisory Board raises much in funds
- (4) People stay in shelter for up to three months
- (5) Corrections program closed: lack of support
- (6) Seven physical locations
- (7) Thrift Store loses money
- (8) Works very close with United Way: largest \$

(9) Salvation Army Hq provides much guidance, eg, "Fund Raising Guide", "Operational Guide", etc.

(10) Grizzard Advertising (800 241-9351) supplies all mail out material

(11) United Way in Pensacola has clearing house for services in area

Comments: Operations vary a great deal between locations, based on local determination of needs. Source of funds vary by location. Both leaders felt strongly that determination of local needs is first step in any plan. Strong, active Advisory Board is critical to success of program.

## APPENDIX D

## 1990 FINAL CENSUS COUNT

<i>Okaloosa</i>	143,776
<i>Cinco Bayou</i>	322
<i>Crestview</i>	9,886
<i>Destin</i>	8,080
<i>Fort Walton Beach</i>	21,471
<i>Laurel Hill</i>	543
<i>Mary Esther</i>	4,139
<i>Niceville</i>	10,507
<i>Shalimar</i>	341
<i>Valparaiso</i>	4,672
<i>Unincorporated</i>	84,105

POPULATION ESTIMATES AND PROJECTIONS  
BY AGE FOR OKALOOSA COUNTY, 1989-2000

	<i>Census</i>	<i>Estimate</i>	<i>Projection</i>	<i>Projection</i>	<i>Projection</i>
<i>Age</i>	<i>1980</i>	<i>1989</i>	<i>1990</i>	<i>1995</i>	<i>2000</i>
<b>Total</b>	109,920	157,517	162,437	184,194	201,876
0-14	26,242	34,235	35,035	39,719	41,028
15-24	24,360	26,937	27,033	27,612	30,119
25-44	32,404	54,470	56,890	62,165	62,798
45-64	20,541	29,318	30,193	38,105	47,798
65 +	6,373	12,557	13,286	16,593	20,133
18 +	76,763	116,064	120,076	136,611	151,726

## ***ADDITIONAL OBSERVATIONS***

The Advisory Board requires revitalization with emphasis on inclusion of members who are considered to be leaders in the community and influential in the local business arena. Board members must include representatives from at least business, banking, real estate development, military, politics and churches. Top-level leaders are essential.

The local Army, particularly the Advisory Board, must insure that the area populace understands and appreciates the work done by the Army in the area. An aggressive but tasteful publicity campaign is essential.

The Army's needs, both financial and facilities, must be determined by the Advisory Board. This having been done, these needs must be effectively communicated to the leadership in the local area. Only when the leadership is convinced of the validity of the needs, will it be possible to mount an effective capital fund raising campaign in the community.

As a result of discussions with the commanding officers of the Panama City and Pensacola Corps, it is apparent that the Army does not consider Santa Rosa or Walton Counties in their geographical assignment area. Additionally, Okaloosa County is divided into north and south areas by the Eglin AFB reservation. While the bulk of the people in Okaloosa County reside in the southern area, the northern ( Crestview ) area is growing more rapidly and the projected population growth shows this more rapid growth to be accelerating. Based on these facts, it would appear prudent for the Florida Division of the Salvation Army to consider establishment of two army corps for Santa Rosa, Okaloosa, and Walton Counties: one for the portion of those counties south of the Eglin AFB reservation and one for the portion to the north.

Based on the financial data provided during the course of this strategic planning study, it appears that the accounting method used by the Fort Walton Beach Corps is not sufficiently definitive. In both income and expense areas, it appears that the definition of what sources/expenditures fall into various categories, is not standardized and changes from year to year. It is therefore impossible to accurately track income/expenses from an historical standpoint. The Advisory Board should establish, preferably through the use of a professional Certified Public Accountant, standardized definitions and an adequate accounting system.

The current salvage operation is not cost-effective in that the 6000 square foot warehouse that serves the Thrift Store is located several miles from the store. Also, the warehouse is being leased for \$1200./month and is not adequate for the sorting, classifying, repairing and storing of goods brought in for ultimate transportation to and sale at the Thrift Store. Further, the Thrift Store itself is inadequate. Because there is insufficient storage area, some of the goods for sale must be stored outside in the elements which causes rapid deterioration. There also is a lack of customer parking space.

During the course of this strategic planning study, the ISP Task Force noted that there are a number of agencies in the Okaloosa County area providing human services. Upon inquiry it was determined that there is no single agency coordinating the activities of all. The HRS often refers those in need to the Salvation Army while they process applications for the state/federal aid available to the eligible. There is a sort of "networking" that does operate, but its effectiveness is not fully known.