

# LISLE WOODRIDGE FIRE DISTRICT STRATEGIC PLAN

2016 - 2018



# Lisle Woodridge Fire District Strategic Plan

2016 - 2018

Prepared by:

Northern Illinois University's Center for Governmental Studies

The findings and conclusions presented in this report are those of the NIU project team alone and do not necessarily reflect the views, opinions, or policies of the officers and/or trustees of Northern Illinois University.



NORTHERN ILLINOIS UNIVERSITY

**Center for  
Governmental Studies**

*Outreach, Engagement, and Regional Development*

November 1, 2015

RE: 201-2016 Strategic Plan—Lisle Woodridge Fire District

Dear President Frank,

On behalf of the Center for Governmental Studies at Northern Illinois University, I am pleased to present this 2016-2018 Strategic Plan and Summary Report to the Lisle Woodridge Fire District.

The plan reflects the organization's commitment to strategic planning, and to delivering measurable results. I appreciate the dedicated effort put forth by you, the Board of Trustees, and senior staff.

I also want to thank Chief Freeman and Deputy Chief Krestan for their assistance and support during the process.

Yours truly,

A handwritten signature in black ink, appearing to read "Craig R. Rapp". The signature is fluid and cursive, with a large initial "C" and "R".

Craig R. Rapp

Senior Associate

President, Craig Rapp LLC

# TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY</b>	<b>1</b>
<b>STRATEGIC PLAN SUMMARY 2016-2018</b>	<b>1</b>
<b>STRATEGIC PLANNING PROCESS</b>	<b>2</b>
<b>DEFINING STRATEGIC PRIORITIES</b>	<b>6</b>
<b>DETERMINING SUCCESS: DEFINING THE KEY OUTCOME INDICATORS</b>	<b>6</b>
<b>KEY OUTCOMES, INDICATORS, TARGETS BY PRIORITY</b>	<b>7</b>
<b>IMPLEMENTING THE VISION: STRATEGIC INITIATIVES AND ACTION PLANS</b>	<b>9</b>
<b>STRATEGIC PLANNING PARTICIPANTS</b>	<b>10</b>

## EXECUTIVE SUMMARY

The Lisle Woodridge Fire District engaged in a strategic planning process over two months and three public meetings between April 1 and June 1, 2015. The sessions yielded a draft strategic plan for the three-year period 2016-2018.

The strategic plan consists of four strategic priorities, which are the highest priority issues for the next three years; a series of desired outcomes, which provide a vision of success, key outcome indicators, which will be monitored to determine success; and a set of performance targets, which define the successful outcome.



The Board engaged in two major efforts to examine their operations, and the needs and expectations of their customers. One, an environmental scan, was conducted by staff, examining the current conditions of District operations and the external influences affecting those operations. The second was a stakeholder forum, which was held on April 9. The forum provided insights into the needs and expectations of customers and stakeholders.

On May 9 the Board and senior staff held a retreat, and began the process of developing the strategic plan. The group reviewed the previously gathered information, and also examined the organization's strengths, weaknesses, opportunities and threats (SWOT analysis), identified the major challenges facing the Lisle Woodridge Fire District, and adopted the set of four strategic priorities, outcomes, indicators and targets.

On June 11, the group reviewed the priorities, KOI's, and targets, and developed a set of strategic initiatives for each priority. The initiatives are the projects and programs necessary to achieve the outcomes identified.

The strategic priorities, key outcome indicators, targets and initiatives are summarized on the following page.

## LISLE WOODRIDGE FIRE DISTRICT-STRATEGIC PLAN SUMMARY 2016-18

STRATEGIC PRIORITY	DESIRED OUTCOME	KEY OUTCOME INDICATOR (KOI'S)	TARGET	STRATEGIC INITIATIVES
Financial Sustainability  <b>FINANCE</b>	Adequate fund balance	Year-end fund balance	Meet/achieve/maintain fund balance policy	a) Comprehensive review of all funds b) Reduce operating Costs 2% Annually c) Comprehensive Analysis of Non-Property Tax Revenue d) 3 – 5 Year Financial Plan
	Operating cost reductions	Operating costs	2% reduction	
	Revenue enhancement	Revenues	10% increase of non-property tax revenue	
Community Involvement  <b>CUSTOMER</b>	Stakeholder know who we are & what we do	Focus groups/surveys	75% of responses affirm knowledge of LWFD	a) Develop a community feedback program b) Create a targeted public education program c) Create a targeted public information program
	Increased public education	FRIENDS program & CPR AED certif.	Participation increases by 10% in both programs	
	Increased public information	Outgoing information & communications	Increase mainstream media exposure, website hits by 25%	
Operational Effectiveness  <b>OPERATIONS</b>	Demonstrated excellence in service delivery	Meet or exceed consensus standards- NFPA/ISO/CPSE	Accreditation	a) Complete Accreditation Process b) Implement injury reduction strategy c) Evaluate staffing model
	Efficient staffing	Calls and shift deployment	Appropriate staffing levels determined	
	Safe work environment	Loss time	Reduction of 5% in loss time	
Workforce Development  <b>WORKFORCE</b>	Competent qualified officers	Officers standards	Demonstrates knowledge and performance commensurate with level of responsibility in rank	a) Develop performance evaluation process b) Implement comprehensive officer training program c) Implement training program standards
	Trained workforce	Training standards	100% meet min. established/ consensus standards	
	Accurate assessment of employee performance	Performance evaluations	100% evaluations completed in 12 mo. period	

# LISLE WOODRIDGE FIRE DISTRICT STRATEGIC PLANNING PROCESS

## Overview

Strategic planning is a process that helps leaders examine the current state of the organization, determine a desired future state, establish priorities, and define a set of actions to achieve specific outcomes. The process followed by the Lisle Woodridge Fire District was designed to answer four key questions: (1) Where are we now? (2) Where are we going? (3) How will we get there? (4) What will we do?

## Environmental Scan - Assessing the Current Environment

To begin the strategic planning process, the senior staff conducted an environmental scan, which is a review of the components of the external and internal environments that impact performance. Included in the scan was a detailed review and summary of finance, operations, staffing, facilities and equipment. The scan revealed that the most difficult challenges facing the District were pensions, flat or limited growth of EAV, and equipment maintenance and replacement. The scan was presented to the Board on April 28, and used as foundation and background for the strategic planning retreat.

## Stakeholder Focus Group Forum - Reaching out to the Communities Served

In order to understand the needs and expectations of citizens and stakeholders, a focus group of thirty-one stakeholders was convened on April 9. The focus group followed a facilitated community forum approach, employing the use of audience participation technology to collect answers to a series of questions in real time—which enabled a robust discussion of group responses.

Key results that provided meaningful input to the strategic planning retreat were:

- More than 50% of the focus group/forum participants have been in the Lisle-Woodridge Fire District more than 20 years
- Over 80% of participants had received services from the LWFD
- 100% stated that quality is the most important consideration when evaluating service delivery
- Emergency medical services were judged to be either critically important (80%) or very important (17%)
- The most important priorities for the LWFD were identified as: training, response time and maintenance/quality of equipment
- Major challenges cited by the group were: pensions, growth of EAV, and maintaining/replacing equipment
- Tax burden was viewed by a majority as relatively reasonable
- To address financial challenges, the group advised to use a combination of spending cuts and revenue raising approaches, protecting highest value services
- Collaboration and consolidation was strongly supported for all LWFD services

## Strategic Plan Development – SWOT, Setting Priorities, Defining Outcomes

On May 9, the LWFD leadership team held a retreat for the purpose of developing a strategic plan. As part of the exploration of “Where are we now?” the group was challenged to define the current organizational culture and its value proposition—understanding that an organization’s culture, and the value proposition it puts forth provide the foundation for the way in which services are delivered and strategic direction is set.

The three value propositions and four core cultures are summarized below:

### Three Value Propositions

*Operational Excellence (Wal-Mart, Southwest Airlines)*

- They adjust to us (command and control)

*Product/Service Leadership (Apple, Google)*

- They ‘ooh and ‘ah’ over our products/services (competence)

*Customer Intimacy (Nordstrom, Ritz-Carlton)*

- We get to know them and solve their problems/satisfy their needs (collaborative)

### Four Core Cultures

*Control Culture (Military - command and control)*

- Systematic, clear, conservative
- Inflexible, compliance more important than innovation

*Competence Culture (Research Lab – best and brightest)*

- Results oriented, efficient, systematic
- Values can be ignored, human element missing, over planning

*Collaboration Culture (Family-teams)*

- Manages diversity well, versatile, talented
- Decisions take longer, group think, short-term oriented

*Cultivation Culture (Non-profit/religious group-mission/values)*

- Creative, socially responsible, consensus oriented
- Lacks focus, judgmental, lack of control

The group engaged in an extended discussion regarding the value proposition and the relationship to the culture. While there were a variety of different perceptions regarding the value proposition, it was generally believed that while the customer intimacy reflects the current approach, operational excellence is important and will continue to be important for financial stability, therefore it should be the primary value proposition, with customer intimacy as a secondary focus. The group will need to continue this discussion—and in particular, how it will affect the implementation of the strategic plan.

The team then conducted a brief review of their Mission, Vision and Guiding Principles. In each case, they felt that the statements were up to date, and reflected the current reality. They are listed below:



#### MISSION STATEMENT:

*The primary mission of the Lisle Woodridge Fire District is to provide a variety of services designed to protect the lives and property of those people within the District from the adverse effects of fires, sudden medical emergencies or the exposure to dangerous conditions caused by man or nature.*

#### VISION STATEMENT:

To be recognized by our community and employees as:

- A model of excellence in providing fire protection, emergency medical services and related services.
- A District dedicated to continuous improvement in every detail of the service we provide.
- A District that fosters an environment of tolerance, trust and involvement.
- A District responsive to the community's needs and concerns.

#### GUIDING PRINCIPLES:

We believe:

- We exist to help people
- In respect for all people
- That people are our most important asset
- That continuous improvement is accomplished one step at a time
- In responsible use of our resources

Following the mission, vision and guiding principles discussion, the group conducted an assessment of the environment within which the LWFD operates. This was done via a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis: a process that examines the organization's internal strengths and weaknesses, as well as the opportunities and threats in the external environment. To facilitate this, a SWOT questionnaire was distributed to the Board and senior management team in advance of the planning session. The SWOT process revealed the most frequently mentioned characteristics in each area:

<b>STRENGTHS</b> Personnel, resources (apparatus/equipment), leadership, quality service	<b>WEAKNESSES</b> Vision/planning, morale, resources, communications
<b>OPPORTUNITIES</b> Consolidation, collaboration, community involvement	<b>THREATS</b> Funding, pension liability, staff/service reduction, external politics/public perception

The group then engaged in an exercise using the summarized SWOT data. They compared strengths with opportunities and weaknesses with threats, to determine which opportunities would maximize strengths, and which weaknesses would be exacerbated by the threats. This effort helped to crystalize the current challenges and opportunities facing the community. The results of this analysis are listed below:

#### **STRENGTHS - OPPORTUNITIES**

(Make good things happen)

- Consolidation (similar agencies)
- Collaboration (other non-governmental bodies)
- Community Involvement (public education, enhanced marketing, communications)

#### **WEAKNESSES - THREATS**

(Keep bad things from happening)

- Finances (funding, resources, planning)
- Operations (morale, resources)

This led to the identification of a broad set of issues and challenges facing the community:

#### **ISSUES/CHALLENGES**

- Consolidation
- Collaboration
- Financial sustainability
- Operational continuity
- Community involvement
- Future of EMS
- Mobile integrated healthcare
- Succession planning
- Employee development/training
- Equipment and facility funding
- Staff turnover/recruitment (retention/quality)
- Diversity of workforce

Once the current challenges were identified, the group discussed the issues that were most important to the success of the District in the next three years. In addition, they reviewed the results of the environmental scan and the stakeholder focus group/forum. From that discussion, a set of four Strategic Priorities emerged. They are:

- **Financial Sustainability**
- **Community Involvement**
- **Operational Effectiveness.**
- **Workforce Development**

## DEFINING THE STRATEGIC PRIORITIES

In order to clarify the meaning of each priority in the context of LWFD, the group identified key concepts for each.

### **Financial Sustainability**

Living within our means and balancing our budget, while working to maintain current service levels and facility quality. We will balance short and long-term needs against the need to comply with our adopted financial policies

### **Community Involvement**

Promoting a clear image and brand to the public and our stakeholders. Through public education, targeted media relations and stakeholder engagement, we will enhance understanding and awareness of our purpose.

### **Operational Effectiveness**

We will make efficient use of resources and manage risks while meeting consensus standards, achieving desired response times and minimizing loss of property and life.

### **Workforce Development**

Employee development and training toward the goal of ensuring capable, qualified leaders, effective management of performance, and the engagement of staff for ideas and continuous improvement.

## DETERMINING SUCCESS: DEFINING KEY OUTCOMES

After identifying strategic priorities, the group focused on developing a set of desired outcomes. Once the outcomes were established, Key Outcome Indicators (KOI's) were defined and Performance Targets were developed. KOI's are indicators of the desired outcomes that were established. Performance Targets define successful outcomes, expressed in measureable terms.

Clarifying outcomes provides organizational focus by establishing a limited set of desired outcomes and performance targets for achievement for each strategic priority. The alignment created between outcomes and strategic priorities is important, not only for clarity, but also for maintaining a disciplined focus on the desired results.

## KEY OUTCOMES, INDICATORS, AND TARGETS BY PRIORITY

### FINANCIAL SUSTAINABILITY

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**Outcome: Adequate fund balance**

KOI: Year-end balance

Target: (1) Meet/achieve/maintain fund balance policy

**Outcome: Operating cost reductions**

KOI: Operating costs

Target: 2% reduction

**Outcome: Revenue enhancement**

KOI: Revenues

Target: 10% increase of non-property tax revenue

### COMMUNITY INVOLVEMENT

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**Outcome: Stakeholders know who we are and what we do**

KOI: Focus groups/surveys

Target: 75% of responses affirm knowledge of Lisle Woodridge Fire Department

**Outcome: Increased public education**

KOI: FRIENDS program and CPR AED certifications

Target: 10% increase in participation—both programs

**Outcome: Increased public information**

KOI: Outgoing information and communications

Target: 25% increase in mainstream media exposure and website hits

## **OPERATIONAL EFFECTIVENESS**

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**Outcome: Demonstrated excellence in service delivery**

KOI: Meet or exceed consensus standards—NFPA/ISO/CPSE

Target: Accreditation

**Outcome: Efficient staffing**

KOI: Calls and shift deployment

Target: Appropriate staffing levels determined

**Outcome: Safe work environment**

KOI: Loss time

Target: Reduction of 5% loss time

## **Workforce Development**

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**Outcome: Competent qualified officers**

KOI: Officer standards

Target: Demonstrates knowledge and performance commensurate with level of responsibility in rank

**Outcome: Trained workforce**

KOI: Training standards

Target: 100% meet minimum established/consensus standards

**Outcome: Accurate assessment of employee performance**

KOI: Performance evaluations

Target: 100% evaluations completed in a 12 month period

## IMPLEMENTING THE VISION: DEVELOPING STRATEGIC INITIATIVES AND ACTION PLANS

To successfully address the strategic priorities and achieve the intended outcomes expressed in the KOI's, it is necessary to have a focused set of actions, including detailed implementation steps to guide organizational effort. The Lisle Woodridge Fire District accomplished this through development of strategic initiatives for each priority—listed below. Strategic initiatives are broadly described, but narrowly focused activities that are aligned with the priorities, and targeted to the achievement of outcomes expressed in the targets.

### **Financial Sustainability**

- a. Comprehensive review of all funds
- b. Reduce operating Costs 2% Annually
- c. Comprehensive Analysis of Non-Property Tax Revenue
- d. Develop a 5 Year Financial Plan

### **Community Involvement**

- a. Develop a community feedback program
- b. Create a targeted public education program
- c. Create a targeted public information program

### **Operational Effectiveness**

- a. Complete Accreditation Process
- b. Implement injury reduction strategy
- c. Evaluate staffing model

### **Workforce Development**

- a. Develop performance evaluation process
- b. Implement comprehensive officer training program
- c. Implement training program standards



## STRATEGIC PLANNING PARTICIPANTS

The strategic plan was developed with the hard work and dedication of many individuals. The Board led the way, defining a direction and a set of outcomes that are important to the community. The Trustees and senior staff all spent time engaged in new ways of thinking to come up with a set of plans that will help the Board successfully measure and achieve the outcomes they defined.

### Board of Trustees

President	Brent Frank
	James Lowe
	Tom Althoff
	John Perry
	Joan Costin

### Fire Commissioners

Chairman	Dennis Callan
	Jack Kelly
	Mark Vavruska

### District Staff

Fire Chief	Thomas Freeman
	Nancy McClain
	Keith Krestan
	Dan Anderson
	Barb Beshears
	Scott Spinazola
	James Weaver
	Jeff Johnson
	Pat Reynolds
	Dave Johnsen
	Rodney Homerding
Labor	Tim Capua