FY 2020 – 2024
STRATEGIC PLAN
August 16, 2019

RE: FY 2020-2024 Strategic Plan- Lisle-Woodridge Fire District

Dear President Frank,

I am pleased to present the 2020-2024 Strategic Plan and Summary Report to the Lisle-Woodridge Fire District. The plan reflects the organization’s priorities, commitment to measurable results and the delivery of quality services.

It has been a pleasure assisting the District with this important project. The Board and staff displayed clear thinking, dedication and focused effort.

I particularly wish to thank Chief Keith Krestan for his leadership and Deputy Chief Steve Demas for his help and support during the process.

Yours truly,

Craig R. Rapp
President
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EXECUTIVE SUMMARY

From April through August 2019, the Lisle-Woodridge Fire District Board of Trustees and senior leadership team engaged in a strategic planning process. The process resulted in a strategic plan covering FY 2020-2024.

The plan consists of four strategic priorities—the issues of greatest importance to the District over the next three years. Associated with each priority is a set of desired outcomes, key outcome indicators, and performance targets, describing expected results and how the results will be measured. The plan also includes strategic initiatives that will be undertaken to achieve the targeted outcomes.

The planning effort began with an examination of the operating environment, followed by collection of stakeholder feedback, and a SWOT analysis. On June 28, 2019, the Board and senior leadership team held a day-long strategic planning session. They developed a set of priorities, key outcomes and performance targets, and confirmed the organization’s vision, mission and guiding principles.

Based upon those priorities, the District’s senior staff met in July and August 2019 to identify a set of strategic initiatives and develop detailed action plans. The strategic priorities, key outcome indicators, performance targets and strategic initiatives are summarized below and on the following page.
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OUR VISION

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 communities needs and concerns.

OUR MISSION

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 exposures to dangerous conditions caused by man or nature.

OUR 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
STRATEGIC PLANNING PROCESS

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? The process is divided into a development phase and an implementation phase. The full process is depicted below.

### DEVELOPMENT

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<th>Where we are</th>
<th>Where we’re going</th>
<th>How we’ll get there</th>
<th>What we’ll do</th>
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### INITIATING THE PROCESS – SETTING EXPECTATIONS, REVIEWING CURRENT SITUATION

The strategic planning process began with coordination meetings between the consultant and senior staff in April and May 2019. The meetings included an update on the status of the previous strategic plan, a review of the upcoming strategic planning process, an examination of the vision, mission and value statements, plans for conducting community engagement, and whether the Standards of Cover Analysis prepared as part of the District’s Commission on Fire Accreditation International (CFAI) Accreditation process could serve as an environmental scan.

The consultant and staff concluded that the vision, mission and value statements were up to date, agreed to use the Standards of Cover for the environmental scan, and defined a process for conducting the community engagement activities.
Assessing the Current Environment – Community Engagement and Environmental Scan

To answer the question “Where are we now?”, the District’s strategic planning process continued with an examination of the operating environment in order to understand community challenges and to gather stakeholder opinions. As indicated, a community survey was undertaken to gather this information, and the Standards of Cover Analysis served as the environmental scan.

Stakeholder Survey

A stakeholder survey was conducted during May and early June 2019. The survey was deployed to a targeted group of stakeholders and placed on the websites of the Villages of Lisle, Woodridge and the Fire District. The survey employed the use of POLCO© technology, which enabled the District to validate respondent’s location and various demographic characteristics. Survey composition and results:

A 17 question (16 multiple choice, one open-ended) survey covering issues important to the current and future operations of the Lisle-Woodridge Fire District were posted.

The respondents see the District favorably:
- 67% say their impression of LWFD is excellent; 37% say good
- 54% say the quality of services is good; 37% say quality is about what they expect it to be

They said the most important things to them about the department are:
- Fast emergency response times – 68%    Well-trained firefighters – 63%

When evaluating fire services on the factors of cost, quality and speed they answered:
- Speed/Response – 68% | Overall quality of service – 21% | Cost/tax impact – 11%

They believe the cost of services is fair, but the response was mixed:
- 37% -no opinion | 32%- too expensive/slightly overpriced | 30% a bargain/appropriately priced

When questioned about use of financial resources and addressing pension liabilities, they said:
- Use property taxes/resources to maintain current service levels – 63%
- Address pensions via legislative reform –40%, but with some recognition that real change is difficult

When questioned about use of non-LWFD personnel to conduct fire services - e.g. contract, other entities, etc. they responded overwhelmingly that prevention and education should be considered, but not core operating functions such as suppression and medical response.
Environmental Scan

An environmental scan examines elements in the external and internal environments that impact organizational performance. The District, due to its efforts in 2019 to seek accreditation from the Center for Public Safety Excellence (CPSE) via the Commission on Fire Accreditation International (CFAI), had undergone a thorough examination of its operating environment. This effort produced a 283 page Community Risk Assessment Standard of Cover (CRA-SOC) which provides an evaluation of five years of service capabilities and performance.

It was determined that the (CRA-SOC) would serve as the environmental scan for the strategic planning process, supplemented by the CFAI Accreditation Report which summarizes the accreditation team’s evaluation, and provides a set of recommendations to the District.
Setting Direction: Mission, Vision, Value Proposition and Organizational Culture

On June 28, 2019, the Board of Trustees and senior staff, held a retreat to develop a strategic plan. As they addressed the question 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 core cultures are summarized as follows.

FOUR CORE CULTURES

Control Culture
(example: command and control)
Strengths: Systematic, clear
Weaknesses: Inflexible, compliance over innovation

Competence Culture
(example: best and brightest)
Strengths: Results oriented, efficient
Weaknesses: Values, human element can be ignored

Collaboration Culture
(example: teams)
Strengths: Manages diversity well, versatile
Weaknesses: Group think, short-term oriented

Cultivation Culture
(example: mission/values)
Strengths: Socially responsible, consensus oriented
Weaknesses: Lacks focus, judgmental

THREE VALUE PROPOSITIONS

Operational Excellence
• They adjust to us (command and control)

Product/Service Leadership
• They ‘ooh and ‘ah’ over our products/services (competence)

Customer Intimacy
• We get to know them and solve their problems/satisfy their needs (collaborative)
The group engaged in an extended discussion regarding the value proposition and its relationship to the culture. While there was general agreement between Board and staff, there were a variety of different perceptions regarding the value proposition.

It was generally believed that customer intimacy reflects much of the current approach, and operational excellence has been important and will continue to be important for operational stability, therefore it should be the primary value proposition, with customer intimacy as a secondary focus.

STRATEGIC PLANNING PROCESS

ASSESS CURRENT ENVIRONMENT
- Senior Management Review
- Previous Plan status
- Vision/Mission/Values
- Environmental Scan
- Stakeholder engagement
- SWOT Analysis

SET PRIORITIES, TARGETS
- Strategic Planning retreat
- Operating Environment - Culture, Value Proposition - Internal SWOT
- Challenges, Priorities
- Outcomes, KOI’s, Targets

IMPLEMENT THE PLAN
- Implementation Session - Strategic Initiatives - Action Plans
- Refine details
- Final Review, Approval
The group then directed their attention to their mission, vision and values statements. They agreed that the mission, vision and values statements were all up-to-date and did not require change. The mission, vision and values (referred to as guiding principles by the District) are listed below.

**MISSION STATEMENT**
Our mission 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 exposures 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;
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STRATEGIC PLANNING PROCESS

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IMPLEMENT THE PLAN
• Implementation Session - Strategic Initiatives - Action Plans
• Refine details
• Final Review, Approval
Reviewing the Environment, Setting Strategic Priorities

Following the culture, value and mission discussion, the leadership team continued the process of assessing the operating environment. 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 staff in advance of the planning session. The SWOT process revealed the most frequently mentioned characteristics in each area.

**STRENGTHS**
- Personnel
- Leadership team
- Strong, transparent financial position
- Service to the community
- Commitment to training, fitness and health
- Accreditation process

**WEAKNESSES**
- Staffing issue
- Pension obligations
- Budget issues
- Fleet/facilities
- Labor relations
- Fire prevention

**OPPORTUNITIES**
- Collaboration/consolidation
- Efficiency through technology
- Outreach/public education
- Training/succession planning
- Administrative support staff improvements
- Increased revenue

**THREATS**
- Pension funding obligations
- Operational costs outpacing new revenue
- Changes to demographics, population decline
- Non-property tax revenue
- Intergovernmental partners that don’t share commitment
The group took this information and identified those opportunities that would be helped the most by the organization’s inherent strengths and which external threats were most likely to exacerbate their weaknesses.

**STRENGTHS LEVERAGING OPPORTUNITIES**
(Make good things happen)
- Explore new sources of revenue through transparency with data analysis
- Collaboration
- Outreach, public education
- Increased revenue
- Training/succession
- Administrative support improvement

**WEAKNESSES EXACERBATED BY THREATS**
(Keep bad things from happening)
- Pension
- Operating costs
- Limited non-tax revenue
- Intergovernmental -shared commitment/vision/collaboration
- Demographics: billing, diversity (organization not reflective of community)
The group took the results of this exercise and engaged in additional brainstorming to determine the strategic issues and challenges facing the organization.

**STRATEGIC ISSUES/CHALLENGES**
- Non-tax revenue
- Collaboration: Intergovernmental, Village
- Finances—generally
- Pension
- Staffing—training
- Adequate staffing—key areas
- Collaboration with other entities
- Service level—maintain
- Operational response—effectiveness

Based upon the challenges and issues identified, a facilitated group discussion resulted in the identification of critical issues and priorities. The following priorities emerged as the most important for the next three years.

**STRATEGIC PRIORITIES**

**FINANCIAL SUSTAINABILITY**

**COMMUNITY INVOLVEMENT**

**OPERATIONAL EFFECTIVENESS**

**WORKPLACE DEVELOPMENT**
Defining the Priorities

To clarify the meaning of each priority, the group identified key concepts which were used to create guidance, and ultimately, definitions.

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.

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.

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.

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.

Key Outcomes, Indicators, and Targets by Priority

With definitions in place, the group agreed upon the most important outcomes to be achieved for each priority, defined Key Outcome Indicators (KOI’s), and developed Performance Targets. KOI’s define progress toward desired outcomes. Performance Targets define successful outcomes, expressed in measureable terms.

The alignment created between priorities, outcomes and targets is important, not only for clarity, but also for maintaining a disciplined focus on the desired results.
Financial Sustainability

a. **Outcome:** Prudent fiscal management of operations  
   **KOI:** Year-end financial results  
   **Target:** Balanced budget annually

b. **Outcome:** Full commitment to pension sustainability  
   **KOI:** ADC policy, Actuarially determined contribution policy  
   **Target:** Meet ADC policy-annually; 90% funded by 2040

c. **Outcome:** A sustainable fund balance  
   **KOI:** Annual test-5 yr. fund balance forecast  
   **Target:** Meet fund balance policy target annually

Community Involvement

a. **Outcome:** A safe community  
   **KOI:** Opioid o.d. vehicle accidents, slips & falls  
   **Target:** Decrease targeted incidents by 10% 2020-24

b. **Outcome:** Connected and engaged with the community  
   **KOI:** social media followers, website views  
   **Target:** Increase social media engagement (likes, shares & views) by 10% 2020-24

c. **Outcome:** The community understands our services  
   **KOI:** Engagement results, survey results  
   **Target:** Improve community understanding by 10% 2020-24 via response results
Operational Effectiveness

a. **Outcome:** Meet community service needs  
   **KOI:** Staffing ratios, Response times, Operational assessments  
   **Target:** Meet annual staffing targets by 2020-24, Meet response time targets

b. **Outcome:** Cost effective service delivery  
   **KOI:** Staffing utilization, materials/purchasing, benefits costs  
   **Target:** Budget increases at or below CPI change annually

c. **Outcome:** Demonstrated excellence in service delivery  
   **KOI:** Annual accreditation compliance reports  
   **Target:** Meet NFPA 1710 response standards by 12/2024

Workforce Development

a. **Outcome:** A well-trained workforce  
   **KOI:** Credentialed officers, NFPA benchmarks  
   **Target:** 90% of officers CPSE credentialed by 12/2024, 100% compliance w/ NFPA 1410 by 12/2024, >/= 90% meet/exceed expectations on perf evaluations

b. **Outcome:** A workforce that reflects the community  
   **KOI:** Diversity #’s in community, applicant pool  
   **Target:** Increase diversity of candidate pool

c. **Outcome:** A safe and healthy workforce  
   **KOI:** Safety statistics, fitness reports, wellness programs  
   **Target:** Duty injuries reduced annually by 25% 2020-2024, 100% compliance with fitness and wellness annual evaluation

STRATEGIC PLANNING PROCESS

**ASSESS CURRENT ENVIRONMENT**
- Senior Management Review
- Previous Plan status
- Vision/Mission/Values
- Environmental Scan
- Stakeholder engagement
- SWOT Analysis

**SET PRIORITIES, TARGETS**
- Strategic Planning retreat
- Operating Environment - Culture, Value Proposition - Internal SWOT
- Challenges, Priorities
- Outcomes, KOI’s, Targets

**IMPLEMENT THE PLAN**
- Implementation Session - Strategic Initiatives - Action Plans
- Refine details
- Final Review, Approval
Implementing the Vision –
Developing Strategic Initiatives and Action Plans

To successfully address the strategic priorities and achieve the intended outcomes expressed in the performance targets, it is necessary to have a focused set of actions, including detailed implementation steps to guide organizational effort.

The Lisle-Woodridge Fire District will accomplish this through a set of strategic initiatives. 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. On July 16th and 24th, the senior staff met to identify strategic initiatives. Following these sessions, staff worked to develop detailed action plans for each initiative.

Financial Sustainability
- Financial management system
- Annual budget process
- Actuarial analysis & audit
- Financial forecasting
- Examine alternative revenue sources

Community Involvement
- Safe community project
- Social media strategy
- Develop a marketing strategy regarding services

Operational Effectiveness
- Accreditation compliance reporting process
- Administrative and operational staffing analysis
- Evaluate improved effectiveness via cooperation and consolidation

Workforce Development
- CPSE officer development program
- Annual firefighter training validation
- Candidate diversity initiative
- Injury reduction strategy
- Fitness and wellness program
Strategic Planning Participants

The strategic plan was developed with the hard work and dedication of many individuals. The Board of Trustees and Board of Commissioners led the way, taking time out their schedules to commit to long-term thinking. They defined a direction and a set of outcomes that are important to the citizens, businesses and stakeholders with whom they partner and serve. The District’s senior staff supported the Board, offering an operational perspective as well as strategic thinking.

Board of Trustees
Brent Frank, President
Chad Chaffin, Trustee
Joan Costin, Trustee
John Perry, Trustee
Longry Wang, Trustee

Board of Fire Commissioners
Dennis Callan, Commissioner
Jack Kelly, Commissioner
Mark Vavruska, Commissioner

Senior Staff
Keith Krestan, Fire Chief
Steve Demas, Deputy Fire Chief
James Weaver, EMS Coordinator
Doug Mulford, Battalion Chief
Tim Capua, Battalion Chief
Scott Gray, Battalion Chief
Rodney Homerding, Maintenance Director
James Howard, Finance Director
Neil Berkowitz, Public Education
Joe Barnes, Union President
Matt Mieszala, Union VP