

Strategic planning: the what, how, and why

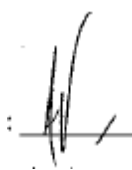
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## Certification Statement

I hereby certify that this paper constitutes my own product, that where the language of others is set forth, quotation marks so indicate, and that appropriate credit is given where I have used the language, ideas, expressions, or writings of another.

Signed: \_\_\_\_\_  \_\_\_\_\_

Date: \_9/30/2017\_\_\_\_\_

## Abstract

Strategic planning has long been a successful process for setting organizational goals and priorities. The problem was that the St. Pete Beach Fire Department (SBFD) did not have a strategic plan. The purpose of this research was to identify the components necessary to the development of a strategic plan and how to implement the process within the SBFD. Descriptive research was utilized to answer the following research questions: (a) what are the necessary components of a strategic plan? (b) how are strategic plans developed and implemented within fire departments with similar resources? (c) what are the anticipated benefits of strategic planning within the SBFD? Procedures included: (a) analysis of discovered local and national fire department strategic plans and printed material on the subject matter, (b) electronic survey distributed to departments with similar resources, (c) electronic survey distributed to SBFD command officers, company officers, and line personnel. The research resulted in: (a) the identification and understanding of several fire department strategic plans and printed material identifying necessary components, (b) the identification and understanding of how departments with similar size and resources of SBFD developed and implemented strategic plans, (c) an understanding of the broad range of potential benefits which could be anticipated within SBFD. Recommendations included: (a) provide an education campaign to all SBFD members, critical city administrators, and elected officials to ensure complete understanding and importance of the strategic planning process, (b) further research and consider the utilization of an external consultant to complete a strategic planning process for SBFD, (c) actively engage in the strategic planning process if use of an external consultant proves to be unrealistic.

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### Strategic planning: the what, how, and why

Since the mid-1960's, corporate leaders have referred to strategic planning as "the one best way" for organizations to develop and implement strategies that enhance the competitiveness of each business. The goals of these early planning systems were to identify the best strategies for businesses and to provide step-by-step instructions to carry out these strategies. (Mintzberg, 1994) Slowly over time, strategic planning has found its way into the fire service as more leaders begin to recognize the similarities between the corporate world and management of their fire departments. Fire departments are utilizing strategic planning to address the issues and problems faced today as well as those that could develop in the foreseeable future. (Wallace, 2009)

Unfortunately, many fire departments are reactive and only handle issues and problems as they occur. Even though the St. Pete Beach Fire Department (SBFD) has a current mission statement and vision statement, it still falls into the category as reactive as opposed to proactive. The problem is the St. Pete Beach Fire Department does not have a strategic plan. By not having a strategic plan, SBFD runs the risk of being unprepared for issues and problems that the future holds thus threatening the future success of the department and the safety of the citizens in which they are entrusted to protect and serve. The purpose of this research is to identify the components necessary to the development of a strategic plan and how to implement the process within the St. Pete Beach Fire Department.

Descriptive research was utilized to answer the following research questions: (a) what are the necessary components of a strategic plan? (b) how are strategic plans developed and implemented within fire departments with similar resources? (c) what are the anticipated benefits of strategic planning within the St. Pete Beach Fire Department.

## Background and Significance

The City of St. Pete Beach is a barrier island community located in Pinellas County, Florida, just off the mainland of the City of St. Petersburg and located just south of the City of Treasure Island. The city is bordered by Boca Ciega Bay on the north and east, and by the Gulf of Mexico on the south and west. The city was incorporated in 1957 when the Towns of Pass-a-Grille, Don Cesar, Belle Vista, St. Petersburg Beach and an unincorporated area of Pinellas County consolidated into the City of St. Petersburg Beach. The name was shortened in 1994 to the City of St. Pete Beach to eliminate confusion with the City of St. Petersburg. The City of St. Pete Beach currently comprises of 2.2 square miles and has a permanent population of 10,032 people. With over 3,000 vacation accommodations, the city is a popular winter residence for people living in other parts of the United States, Canada, and Europe. The City of St. Pete Beach is a full-service city and provides traditional services including contracted police services, fire protection as well as EMS; maintenance of parks, streets and other infrastructure; water, sewer, storm water and sanitation services; an aquatics center as well as a recreation center; library and cultural facility centers. (City of St. Pete Beach, 2016)

The City of St. Pete Beach Fire Department (SBFD) is a fully paid fire department consisting of two stations and a total of 35 personnel (Fire Chief, Fire Marshal, three District Chiefs, six Fire Lieutenants, 24 Firefighter / EMT- Paramedics). The three District Chiefs, six Fire Lieutenants, and 24 Firefighter / EMT- Paramedics are assigned to three shifts of 11 personnel on each. All Lieutenants and Firefighter / EMT-Paramedic personnel are bargaining unit members represented by the IAFF Local 4966 (Pinellas County Professional Firefighters). The fire chief, fire marshal, and district chiefs are considered management employees (administrators) and not included in the bargaining unit.

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The department provides an all-hazards emergency service including fire suppression, non-transport emergency medical response, a water-based extrication team, fire inspections based on the NFPA Life safety Code, public education for fire safety, hurricane preparedness, pool safety, CPR training, free home fire safety surveys, and free smoke detectors and installation. SBFD currently operates two ALS rescue companies, an ALS squad company, a BLS truck company and a district chief incident commander responding out of two stations with a minimum staffing of nine personnel.

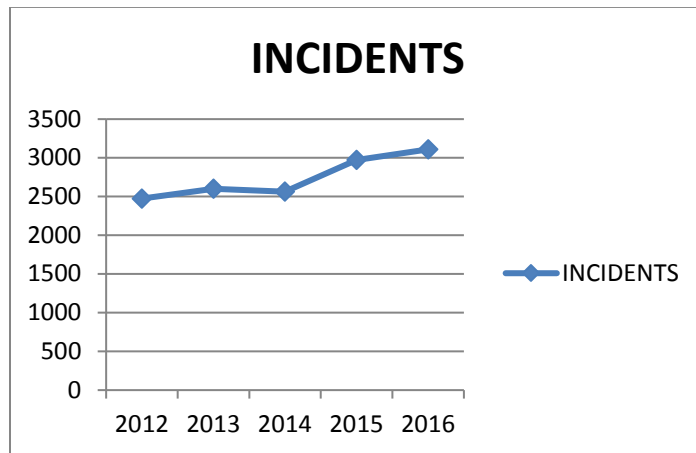
SBFD is one of 19 municipal and independent special district fire departments serving the citizens and visitors of Pinellas County. All 19 agencies participate in an automatic aid agreement which ensures that the closest available unit responds to all emergency fire or EMS calls, regardless of location or jurisdiction. In fiscal year 2014/2015, these agencies responded to 163,143 emergency calls countywide. (Pinellas County Florida, 2015) During this period, SBFD responded to 2297 emergency calls in their first due area. (City of St. Pete Beach, 2016)

As with most fire departments nationwide, SBFD is continually tasked with providing the most effective and efficient emergency services to a diverse community with increasing demands in an ever-changing environment. In fact, call volume for SBFD has increased 22.75% over the past five years with no additional resources or staffing added to the department (see Table 1). (City of St. Pete Beach, 2016) Due to the lack of a formalized strategic plan, SBFD has been forced to take a reactive approach to these increasing demands even though many of these could have been easily projected. If a strategic plan had been in place, SBFD could have potentially learned from past experiences, improved current operations, and been better prepared for probable future issues.



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Table 1: SBFD emergency incidents 2012 - 2016



Strategic planning is the best way for fire service professionals to prepare for and address the changing environment. As with the examples of the introduction of EMS into the fire service, hazardous materials response, and the threat of terrorism, fire departments must have a plan for the future now and not wait until one is forced as a means of addressing a problem or an increased responsibility. (Firehouse, 2008) While strategic planning is the title most commonly connected to this type of process, others have used terms such as “proactive futuring” to describe the process of accessing the big picture issues in which they hope to proactively prepare for. Regardless of the title, these processes have continued to spread through many fire departments over the past 10 years as fire service leaders continue to look for ways to ensure that their department visions are in line with current and future community needs. (Wallace, 2009)

While there is no need to micromanage the process, executive fire service leaders must take an active role in strategic planning for many reasons including organizational buy-in. While many leaders actively participate, others take a hands-off approach due to issues such as a lack of time or interest to get involved, or because they underestimate the significance of the process and its potential impact on the organization. (Mittenthal, 2002) Possibly because of their lack of

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experience with strategic planning, others lack the risk-taking abilities and the innovation or experimentation to lead such a process as described within Unit 11, of the Executive Fire Officers Program (EFOP) course Executive Leadership offered by the National Fire Academy. In this unit, the benefits of each are described and how each aspect can be critical to the success of fire service leaders and the organizations in which they lead. Specifically, it is noted that experimenting can widely increase the odds of generating ideas that produce results. (Federal Emergency Management Agency, 2015) Whether the process delivered real results for the community, the government and the organization is the true test of strategic planning. (Rogers, 2012)

The importance of strategic planning within the fire service is illustrated by the strategic plan for the United States Fire Administration (USFA). The USFA, through the strategic planning process, has outlined five operational goals. Strategic planning strikes at the core of nearly all five of the operational goals. Specifically, individual departments strategic planning processes can accomplish goal two, promote response, local planning and preparedness for all hazards, and goal three, enhance the fire and emergency services capabilities for response to and recovery from all hazards. By strategically analyzing and planning for all hazards as described in goals two and three, individual departments can contribute to the USFA's long-term strategy for safety and security of the American people. (Federal Emergency Management Agency, 2013)

## Literature Review

The literature review focused on the background and intent behind strategic planning in both the fire service and other applications to further understand the importance of such a process. The many components necessary for a comprehensive strategic plan were reviewed in

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both fire service and corporate settings. Also, implementation techniques critical to the achievement of goals and objectives were identified. Furthermore, the overall benefits of successful strategic planning were documented. New thoughts and techniques including the possible advantages of utilizing external consultants completed the literature review research.

## Background (What)

Since the mid-1960's, the corporate world has been utilizing a process to develop and implement strategies that would enhance the competitiveness of businesses and ensure their profitability. It was in these early years that Fredrick Taylor, a scientific management pioneer, determined that the best way to accomplish this goal was to separate thinking from doing by creating a new staff of specialist called strategic planners. These planning specialist were to produce the best strategies for success along with step-by-step instructions to carry out these strategies. (Mintzberg, 1994)

Termed "strategic planning," this process has been confused with other types of planning modalities over the years including operating plans, business plans, and case statements. A strategic plan, as defined by Richard Mittenenthal (2002) of the TCC Group in their briefing paper on the subject, "is a tool that provides guidance in fulfilling a mission with maximum efficiency and impact." (p.2) For the strategic planning process to be successful, the final plan should articulate specifically identified goals and describe the actions and resources needed to accomplish them. Kevin Jump (2012) had an even simpler way to define strategic planning in his research paper on the subject where he described it with the help of a song verse from George Harrison's song *Any Road*, "If you don't know where you're going any road will take you there." He utilized this song lyric to illustrate that an organization has to understand where it wants to go before it determines how to get there.

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While most in the corporate world utilize strategic plans to maximize efficiency to produce a higher profit, the fire service and other nonprofits utilize such plans to keep up with the ever-changing environment in which they function. As identified by Michael Reece (2015) in his research on the topic, the fire service environment has continued to become more chaotic with drastic changes occurring in the political landscape and economic arenas. With these reasons and others, strategic planning processes have been adapted for use in the fire service, especially over the past 15 years, as a way for fire service leaders to identify big-picture issues in which they may be facing now and in an undefined future. The fire services continue to change over time due to the community's identification of changing needs and its decision that the fire department could and should be able to provide services to meet those needs. (Wallace, 2009) Fire service leaders must have a plan for the future and not wait until problems present themselves that force leaders to address them. A great real-life example of such problems dealt with the evolvement of EMS responses within the fire service as well as responses to hazardous materials and terrorism incidents post September 11<sup>th</sup>, 2001. (Firehouse, 2008)

## Components (How)

While researching the topic of strategic planning, David Moody (2010) found that The International City / County Management Association (ICMA) defined it as a process of investigation, learning, and implementation in a collaborative environment with an end goal of progression and evolvement of an entire organization. The important part of that definition is understanding all the components that go into this investigation, learning, and implementation. Most organizations start the investigation process by conducting a SWOT (strengths, weaknesses, opportunities, and threats) analysis. The SWOT analysis should include input from both internal and external stakeholders. This important first step allows organizations to

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determine what items they are good at, what things they need to further develop or address, where potential new opportunities exist, and what threatening items they should be aware of that may present issues in the future. (McGrath & McGrath, n.d.) Reese (2015) found that organizations can identify goals and objectives to reach their departments desired future by completing such an analysis due to the ability to build on strengths, address long-standing weaknesses, address emerging issues and take advantage of opportunities.

Other organizations choose to either first develop a mission statement and vision statement for their department or reinforce existing ones. Mittenthal (2002) simply describes a mission statement as an organizations purpose. It should answer in the most basic terms, why an organization exists and what they do. If a mission statement already exists within an organization, it should be reviewed to ensure that it is obtainable and that it is aligned with the results of the SWOT analysis upon completion. An unobtainable organizational mission cannot objectively produce measurable goals or action steps thus placing the overall success of the strategic planning process in jeopardy. (Keirn, 2015) Some strategic plans are solely mission-based, tying each component of the plan into the mission statement of the organization. This is done to ensure that the organization is always operating in the service of their mission. (Mohr, n.d.)

A vision statement differs slightly from a mission statement in regards to the fact that it tends to focus on the desired future state of a department rather than what the department is currently doing. Mittenthal (2002) explains that a vision statement should be explicit, straight forward and concise answering the simple question, “where do we want to be.” The vision should be a collective description of what the members of the organization hope that it will look like and become in the future. It is said that people naturally want to make a difference in an

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organization and leave it better than they found it. (Wallace, 2009) A vision statement reflects this organizational desire.

Once an organization has completed and reviewed the SWOT analysis along with mission and value statements, they typically move on to setting goals and objectives. The two terms, goals and objectives are typically used interchangeably, but goals are more comprehensive and far-reaching than objectives. Both should clearly state what an organization hopes to accomplish. (Mittenthal, 2002) By setting a clear set of goals, after completing an honest appraisal of an organizations strengths and weaknesses through the SWOT analysis, departments can illustrate what's important, what is relevant, and what is actionable in their environment. (TAB, n.d.) In addition to these key factors, goals and objectives must be concrete and measurable to ensure an organization knows when they reach them. (Mohr, n.d.)

While goals and objectives can be both short and long-term, organizations must identify strategies and tactics to accomplish them regardless of the time frame. However, some authors of research on the topic of strategic planning feel that the “how,” which is the strategies and tactics, do not belong in a strategic plan. They feel that a strategic planning is simply the “what” while operation planning should be reserved for the “how.” (Firehouse, 2008) Others feel that strategies and tactics do belong in the strategic planning document because they answer the question “how will we accomplish our work.” In less basic terms, strategies and tactics identify sets of activities needed to achieve the goals and objectives previously identified through the strategic planning process. (Mittenthal, 2002)

Regardless of if a strategic plan consists of strategies and tactics, one should always include some way to measure the results such as a follow-up, evaluation, or ongoing monitoring. Strategic plans are typically based on the assumption that the world is supposed to hold still or

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stay on a projected course while a plan is being developed and implemented. (Mintzberg, 1994)

This, of course, is typically not the case which further enhances the need for continual follow-ups. Many times, no matter how well thought out a strategic plan is, the best long-range plans are wrong when the time comes. However, maintaining an effective strategic plan with continual monitoring will ensure the organization is pointed in the right direction and refocuses on the many moving targets. (Wallace, 2009) These evaluation based components within the strategic planning process will ensure the organization plan is meeting its desired outcome, moving it in the proper direction, if it needs to be adjusted to reach expected outcomes, or if it needs to discard the plan altogether. (Miller, 2012) The true test of any strategic planning process within the fire service is whether or not the process delivered real results for the community, the government, and the organization. (Rogers, 2012)

## Implementation (How)

While the components of a strategic plan are important, the plan itself can be worthless without a proper and workable implementation. Along with the strategies and tactics, an implementation plan is an organizations “user’s guide” to the strategic plan. Many times an implementation plan spells out items such as cost, duration, priority order and accountability for each strategy and tactic defined in the strategic plan. As Mittenthal (2002) describes, components such as “missions and visions are essential to inspiring commitment to your organization, (but) they may be seen as hollow unless accompanied by an organized description of activities needed to fulfill desired aims.” (p.7)

Organizational buy-in at all levels can also impact the successful implementation of even the best and most thought out strategic plan. Moody (2010) found that within the King George County, Department of Fire Rescue and Emergency Services organization, department leaders

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had to raise awareness as to the importance of having a strategic plan as a first step to buy in.

While many emergency services employees are well versed in both the fire and medical sides of their professions and organizations, few are familiar with the strategic planning side and the need for such a process. Education, especially in the lower ranks, can be critical to successful implementation. (Reece, 2015) Many times, lower level firefighters do not have the luxury of the larger picture and must have a degree of trust that the leadership is considerate of the impact on them. (Miller, 2012) Education is a tool for ensuring this is communicated thus producing buy-in at all levels. As Kevin Jump (2012) found, “without buy-in, your plan is doomed to failure or to sit on a shelf and not be implemented or useful.” (p.42)

Strategic plans typically identify needed changes within an organization which has been a struggle for many organizations over the years. But change is critical as no organization can continue to shackle itself to the same goals, programs and operating methods that it has relied on for years or since its start in some cases. (Mittenthal, 2002) To this point, the strategic planning process should only be exercised within departments that are ready and committed to change. Conflicts will typically exist within organizations not ready and committed to change. To combat this, organizations must identify change management practices and reference them as the planning process moves forward. (Jenaway, 2014)

## Benefits (Why)

The benefits of strategic planning can be wide-reaching. While in the corporate world strategic planning is typically focused on financial benefits, the fire services benefits are more focused on operations and the ability to address the changing environment. As fire service professionals, it is critical to have a plan for the future rather than wait until it is forced due to a



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current problem that presents itself. Strategic planning allows for this by enabling fire service professionals to learn to think strategically. (Firehouse, 2008)

In terms of thinking strategically, fire service leaders can utilize the strategic planning process to develop a vision for future needs of the organization in addition to identifying and overcoming current organizational operational deficiencies. (Reece, 2015) Completing a strategic plan should not be out of necessity. It should be completed out of a desire to improve the organization now and into the future. (Keirn, 2015) In many cases, these improvements involve change and a need for funding increases. Because of this, organizations look to strategic plans and the planners themselves to be able to articulate their cases to governing officials with an evidence-based approach. (Rogers, 2012) Articulating the organizational purpose and vision to governing officials is a key responsibility of fire service leaders with strategic planning providing a needed tool to accomplishing such. Many times, these decision makers utilize this information to identify the organizations priorities and tie them to their community, thus developing action plans and finally developing a rationale behind how they allocate resources. (McGrath & McGrath, n.d.)

## New Thoughts

Many things have changed since the thought of strategic planning hit the scenes back in the mid-1960s. Some have even questioned the effectiveness of strategic planning, especially in the business and academic worlds. Many times their arguments revolve around the misunderstanding that strategic planning and strategic thinking are mutually exclusive. As Henry Mintzberg found, strategic planning is simply a process that seeks to create order, data and information. It does not facilitate or promote vision, strategy or creativity. (Rogers, 2012) But while strategic planning may not generate strategies, if viable ones are given, it can make

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them operational thus providing an instrument to inform and support decision-makers.

(Mintzberg, 1994)

Those that do believe in the effectiveness of strategic planning have many options as to how to complete the process. These days, many chose to utilize external consultants to complete the process for a variety of reasons. While many organizations have individuals with strategic planning experience, often times they lack the ability to be objective, disciplined, or simply don't have the time to commit to the process. (Mittenthal, 2002) This is where external consultants are able to come in and facilitate the development of a clear mission, vision, and obtainable goals. (Keirn, 2015) However, it should not be assumed or expected that the consultant will take full responsibility for the development of the strategic plan. In addition, it is not the consultants' job to communicate the value of the planning process to the organizations members or generate enthusiasm. The consultant simply focuses on the process and facilitates its completion while the organization itself holds the other responsibilities. (Mittenthal, 2002)

While many would like "the same old fire service as the glory years of the 60s", it is not. Today, fire service leaders are forced to identify what they are doing, why they are doing it, and change if current practices are ineffective or problematic. (Jenaway, 2014, p.3) In many cases, strategic planning is a great way to accomplish these tasks based on its ability to identify an organization's strengths and weaknesses while also enabling it to identify new opportunities or the causes of current or anticipated problems. Strategic plans can provide a blueprint for growth and revitalization allowing an organization to determine where it is, where it wants to go and chart a course to get there. (Mittenthal, 2002) An organizations decision to develop a strategic plan is basically choosing to either create a path forward towards a desired future, or reacting to a past and dealing with the associated consequences. (Miller, 2012) In very basic terms, the

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development of an effective strategic plan is an important part of creating excellence within any organization. (Wallace, 2009)

## Procedures

The research for this applied research project was conducted utilizing a descriptive research method with a focus on the identified research questions: (a) what are the necessary components of a strategic plan? (b) how are strategic plans developed and implemented within fire departments with similar resources? (c) what are the anticipated benefits of strategic planning within the St. Pete Beach Fire Department (SBFD)?

The procedures portion was designed to give readers a detailed description of how this writer determined the common components that are necessary to develop a strategic plan to set organizational goals and priorities, and how other fire departments of similar size and resources are developing and implementing such plans. Also, potential benefits to SBFD were analyzed based on results in other like fire departments after implementation of a strategic planning process.

### Question 1: What are the necessary components of a strategic plan?

The research began with an internet search of fire department related strategic plans. The search was broadened to include corporate related strategic plans based on information gathered during the literature review section of this research indicating a similarity between the components of such plans. Analysis of all discovered local and national strategic plans and processes was conducted. Also, information was obtained from several U.S Fire Administrations Applied Research Projects on the subject of strategic planning.

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In addition to the listed procedure, information that was obtained during the research for question two was utilized to further answer question one. Detailed procedures for this action are described with research question two.

Limitations of this research were directly related to the availability of searched information on the internet. While all searches conducted utilized the commonly accepted title “strategic planning,” some departments or organizations may title their programs with an unsearched name. Also, all discovered and analyzed information is assumed to be current and factual.

Question 2: How are strategic plans developed and implemented within fire departments with similar resources?

A list of all fire departments throughout the state of Florida was obtained from the Division of State Fire Marshal. The list contained the department’s name, department type, website if applicable, number of fire stations, and number of active firefighters/personnel. To compile a representative sample list of fire departments with similar resources as SBFD, the list was reviewed to find two stations or less career or mostly career departments with a comparable amount of firefighters/personnel. Once departments were identified with similar resources, e-mail addresses for department contacts were obtained utilizing internet searches or contact phone numbers.

A detailed survey was developed based on information gathered from the literature review and research question one, utilizing SurveyMonkey.com® with a link to the survey sent to all obtainable department contacts compiled previously via email (see Appendix A). The survey (see Appendix B) contained eight questions addressing the existence of a strategic plan,

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components, administration, processes, and benefits. These questions were asked to analyze and better understand current plans and thoughts from department leaders of comparably sized organizations. The survey was sent out to all applicable departments on June 28, 2017, with a follow-up email sent on July 28, 2017, to obtain additional survey completions. The survey was left open until the results were analyzed on August 11, 2017. Results were then placed into several tables for illustrational purposes and any comments received were placed as notes.

In addition to the survey, departments were also asked to provide a copy of their departments' strategic plan if one was available and if they were willing to share. Also, responders were asked to provide their contact information if they were willing to entertain follow-up questions. While not part of the detailed procedures of this project, information obtained during internet searches relating to the literature review section was utilized due to limited examples of strategic plans and information available from the surveyed departments.

Limitations of this research were directly related to the surveyed departments and their willingness to respond. Due to the use of e-mail, it is possible that not all intended recipients received the survey information. Also, assumptions are made that all received information is factual and complete.

Question 3: What are the anticipated benefits of strategic planning within the St. Pete Beach Fire Department?

After the completion of all research and analysis of data for research questions one and two, a detailed survey (see Appendix C) was developed utilizing SurveyMonkey.com® to be utilized as an internal feedback instrument within the SBFD. The survey was sent out to all SBFD employees on August 21, 2017, with a follow-up e-mail, sent on September 21, 2017, to

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obtain additional survey completions. The survey was left open until the results were analyzed on September 29, 2017. The e-mail (see Appendix D) consisted of background information on the research project as well as background information on strategic planning in general. A survey link was also included. Results were placed into a table for illustrational purposes and any comments received were placed as notes highlighting specific points submitted by employees.

The intent of the internal survey was to determine the experience level each employee had with strategic planning and to determine the acceptance level of such a process within SBFD. Survey questions were developed to determine support level within the SBFD to provide recommendations to address the problem statement, which had a high degree of potential success. Employees were also surveyed on potential benefits they felt would result from such a process. Also, employees were provided an opportunity to ask any questions or request additional information about the process in general before completing the survey.

Limitations of this research were directly related to the surveyed employees and their willingness to respond. Due to the use of e-mail, it is possible that not all intended recipients received the survey information promptly based on time-off and other factors. Also, assumptions are made that all received information is factual and complete.

## Results

During this research project, question one, *what are the necessary components of a strategic plan?*, was researched in a two-step process. Initially, an internet search was conducted to locate fire department related strategic plans and later broadened to include corporate related strategic plans based on information gathered during the literature review section of this

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research. The internet searches resulted in numerous fire department strategic plans as well as several corporate based plans. The located strategic plans were limited to five for analyzation purposes, and a brief description of each plan and its components are listed below:

City of Auburndale Fire Rescue – The City of Auburndale Fire Rescue’s strategic plan covers a five-year period from 2017 through 2021. The document starts off with an executive summary including a letter from the fire chief, introduction, and history of the department. A majority of the document is committed to the explanation of the process the department used for developing a community-driven strategic plan as defined by the Commission on Fire Accreditation International (CFAI). Detailed procedures of how the department invited community members into the fire department in order to complete an external and internal SWOT analysis based on the Center for Public Safety Excellence (CPSE) standard is included. The document describes how they utilized this procedure to assist with CPSE accreditation and to create goals and objectives with detailed strategies and tactics to serve as their guiding principles for the next five years. All of this information is included in the document along with a mission statement, vision statement, and core values. The document is concluded with a detailed description of the completed SWOT analysis. (City of Auburndale, 2017)

City of Miami Beach Fire Department – The City of Miami Beach Fire Department’s strategic plan covers a five-year period from 2015 through 2020. The plan was created by the Center for Public Safety Excellence, an external consultant. The document starts off with an executive summary including a letter from the fire chief, introduction, and organizational background. This is followed by an explanation of the process the department used for developing a community-driven strategic plan as defined by the Commission on Fire Accreditation International (CFAI). The department also identified four intended benefits of their strategic

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plan including the building of a shared vision, short-term direction, the setting of goals and objectives, and the optimization of resources. A mission statement, vision statement, and values are included along with department-wide expectations both internal and external. The department also identifies seven key intended outcomes (KIO) for the entire process followed by 18 goals and objectives. Included within each goal and objective is a timeline, critical tasks, KIO, and the division which is assigned to accomplish each. The document is concluded with a detailed description of a completed SWOT analysis. (City of Miami Beach, 2015)

Fort Lauderdale Fire Rescue – The Fort Lauderdale Fire Rescue’s strategic plan covers a five-year period from 2014 through 2018. The plan was created by the Center for Public Safety Excellence, an external consultant. The document starts off with an introduction explaining the process and how its foundation is based on community and membership input. It goes on to define the community-driven strategic planning process and how this plan is tied to the City of Fort Lauderdale’s strategic plan which covers the same period and includes ten goals directly related to public safety. These 10 goals are defined and referenced at the end of the document. A detailed organizational background follows along with findings of both the community groups input as well as the members. A detailed SWOT analysis is included which identifies critical issues and service gaps as well as strategic initiatives. Nine goals and objectives were provided along with timeframes, who they are assigned to, critical tasks, and funding estimates for each. The document is concluded with performance measures along with a detailed description of success based on the strategic plan. (City of Fort Lauderdale, 2014)

Winter Park Fire Rescue Department – The Winter Park Fire Rescue Department’s strategic plan covers a five-year period from 2016 through 2021. The plan was created by the Center for Public Safety Excellence, an external consultant. The document starts off with an introduction



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explaining the process and how its foundation is based on community and membership input. It goes on to define the community-driven strategic planning process. The findings of a group of external stakeholders follow along with the same information from a group of internal stakeholders. Information from the internal group was utilized to develop a SWOT analysis which is included in the document along with the mission, values, and offered programs and services of the Winter Park Fire Rescue Department. Critical issues and service gaps along with strategic initiatives were included. Eight goals and objectives were provided along with timeframes, who they are assigned to, critical tasks, and funding estimates for each. The document is concluded with performance measures along with a detailed description of success based on the strategic plan. (Winter Park Fire Department, 2016)

Amtrak (corporate) – Amtrak's strategic plan covers a five-year period from 2014 through 2018. The document begins with an introduction and executive summary. Included within this section are letters from the Chairman of the board and the President/CEO along with a corporate overview and new simplified mission statement and vision. Prior notable achievements from previous strategic plans are also included. The President/CEO makes it clear in his letter that the purpose of the strategic plan is to make "bold changes in order to shape their future." In regards to that, a change agenda is presented and described. The next section involves values and leadership philosophy encompassing three key areas including the team they build, the culture they maintain, and the philosophy behind their business. Corporate strategic themes and goals are presented and identified as financial excellence, customer focus, and safety and security. Based on those themes and goals, six strategic objectives are listed. The document is concluded with a corporate strategy management plan and a corporate strategy management map presented as a roadmap to shape the future and implement the change agenda. (Amtrak, 2014)

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Question two, *how are strategic plans developed and implemented within fire departments with similar resources?*, was answered by seeking out background information from fire departments in regards to their own experiences with the strategic planning process if applicable. Research for this question began with obtaining a list of every fire department located in the State of Florida from the Division of State Fire Marshal. The list, containing 477 fire departments, was analyzed to determine departments with similar resources as SBFD such as two or less stations and a comparable amount of personnel within a career or mostly career department. This resulted in a total of 81 like departments (see Appendix E) in which were researched further to obtain e-mail contact information when possible. An email was sent out to each of the 81 identified departments containing background information on the project and a link to a SurveyMonkey.com® survey. In addition, departments were asked to provide a copy of their current strategic plan document if one existed. Of the 81 identified departments, only 15 responded and completed the survey which was open from June 28, 2017 through August 11, 2017.

While the results were limited due to the minimal participation level, it was determined that over 70% of the departments that responded either had a strategic plan or they were in the process of developing one. Of the 11 departments that stated they either had a plan or were developing one, only one fire department provided a copy of a strategic plan for review. Fire Chief Michael Swanson from the City of Eustis provided two strategic plans for review via e-mail on June 29, 2017. While Chief Swanson did not have a current strategic plan for the City of Eustis Fire Department, he provided a plan he previously developed while with the North Collier Fire Control & Rescue District along with a strategic plan for the City of Eustis itself which he is

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currently updating. The North Collier Fire Control & Rescue District (NCFR) and the City of Eustis strategic plans are summarized below:

North Collier Fire Control & Rescue District – The NCFR plan covers a five-year period from October 2015 through September 2020. The department mission statement and vision statement lead off the document along with a commitment statement to the districts employees and residents/community. The majority of the planning document deals with a detailed department overview focusing on each division within the district. Financial issues are identified and addressed in regards to public facilities, apparatus replacement schedule, capital improvements and general financial highlights. Goals over the five-year period of the document are identified and broken down by year. The strategic plan is wrapped up with an overall summary.

City of Eustis – The City of Eustis strategic plan is for the city as a whole and only covers the period of one year, 2013 through 2014. However, the plan does identify future priorities and actions beyond 2014. The planning document starts off with a vision statement and mission statement. A majority of the document deals with the identification of three goals with identified strategies and actions for each. Prior accomplishments are also identified and listed. The document ends with the City of Eustis core values.

Of the 11 departments involved with strategic planning, over 80% are handling the process with in-house staff while less than 20% are utilizing an external consultant. One of the departments utilizing an external consultant was Coconut Creek Fire Department. Fire Chief Jeffery Gary responded via e-mail (see Appendix F) on June 29, 2017, that they are utilizing an external consultant “due to lagging behind in the planning process.” He stated that they were working on a request for proposals (RFP) to bring in a consultant. He provided two samples of

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RFP's for my review. After reviewing both documents, it was determined that the information provided did not assist in answering the three research questions presented in this project.

Also, like departments were asked who had input in their strategic planning process with almost 100% identifying the fire chief. Only one department indicated that their fire chief did not have direct input in the strategic planning process. The other provided choices ranged from just over 72% down to 18% with command staff and command officers receiving the next highest percentages. Only two departments indicated that they utilize input from community representatives to complete their strategic plans making this the lowest identified group with input (see Table 2). Although offered, no respondents added any additional groups or individuals that had input in their strategic planning process. While one comment was included, it did not relate to the specific question.

Table 2: Representatives with input on the strategic planning process (surveyed fire departments)

Department Responses	
Fire Chief	10 (90.91%)
Command Staff (Assistant / Deputy / District / Battalion	8 (72.73)
Command Officers	8 (72.73%)
Line Personnel	7 (63.64%)
Governing Body	5 (45.45%)
City / County Administration	4 (36.36%)
Community Representative	2 (18.18%)
Survey not returned or not answered	70

Surveyed departments were also asked what key components are included within their strategic planning process. Most departments agreed that an introduction with an organizational background, mission and vision statements, and strategic goals should be included in the final document. These three provided choices received over 81% agreeance while the other choices received between 72% and 18%. Input from both external and internal members received the lowest support with only two departments identifying this as a key element (see Table 3). Although offered, no respondents added any additional key components within their strategic planning process.

Table 3: Key components of the strategic planning process (surveyed fire departments)

Department Responses	
Introduction / Organizational Background	9 (81.82%)
Department Mission / Vision Statement	9 (81.82%)
Purpose / Objectives	8 (72.73%)
Input (external / internal)	2 (18.18%)
SWOT (strength, weaknesses, opportunities, threats) Analysis	6 (54.55%)
Strategic Issues	7 (63.64%)
Strategic Goals	9 (81.82%)
Tactics	5 (45.45%)
Evaluation	5 (45.45%)
Survey not returned or not answered	70

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After determining the key components of the departments surveyed strategic plans, tools in which they used to develop and implement those plans were identified. While none of the provided choices received overwhelming support, three, including strategic plans from similarly sized fire departments, internal surveys, and committee input did receive over 66% support. Only one department utilized external surveys while 44% provided department-wide informational meetings (see Table 4). Although offered, only one department provided any additional tools to assist with development and implementation. That department indicated they utilized information for all their divisions during the development and implementation process.

Table 4: Tools to assist with the development and implementation of strategic plans (surveyed fire departments)

Department Responses	
Strategic plans from similarly sized fire departments	6 (66.67%)
Survey (external)	1 (11.11%)
Survey (internal)	6 (66.67%)
Committee Input	6 (66.67%)
Department wide informational meeting	4 (44.44%)
Survey not returned or not answered	72

Surveyed departments overwhelmingly responded that they had buy-in to the strategic planning process and its implementation. Over 88% of the departments stated they received buy-in while only one department stated that they did not.

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Finally, departments were asked what benefits they have realized as a result of the strategic planning process. Departments were asked for their comments as no choices or examples were provided. Several departments spoke of the advantages of developing a clear vision for the department along with prioritized goals to achieve that vision. Several others found advantages in identifying weaknesses that they were able to address in pursuit of focused goals and objectives. In regards to budgeting, departments noted the advantages of utilizing the strategic planning process for effective long-range capital planning and budget justification. Departments also described the strategic planning process as an educational piece providing cohesiveness, ownership, and pride within the department and the community. A detailed summary of all responses is included within Appendix G of this research project.

After the completion of all research and analysis of data for questions one and two, question three, *what are the anticipated benefits of strategic planning within the St. Pete Beach Fire Department?*, was answered with a combination of questions one and two's results and an internal feedback instrument provided to all SBFD employees.

The internal feedback instrument was provided via city e-mail addresses to all SBFD employees including administrators. The e-mail provided all 34 SBFD employees with background information on the research project as well as background information on strategic planning in general. Also, a link was provided to a SurveyMonkey.com® survey. The 35<sup>th</sup> member of SBFD is the author of the research project and did not participate in the internal survey. Of the 34 SBFD employees emailed, only 14 responded and completed the survey which was opened from August 21, 2017, through September 29, 2017.

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While results were limited due to the minimal participation level, it was determined that a majority of SBFD employees are familiar with the process of strategic planning. It was also determined that a majority of SBFD employees are familiar with the departments' current mission and vision statements. Overwhelming support of over 92% was found when asked if employees would be willing to participate in the development of a strategic plan. The results also showed that all 14 employees that responded to the survey would be supportive of new ideas and new opportunities to achieve goals outlined during a potential strategic planning process.

Employees were also asked what benefits they would like to see realized from the utilization of a strategic planning process. Employees were provided a list of eight possible benefits of strategic planning with all receiving majority support (see Table 5). Although offered, no respondents added any additional benefits of strategic planning in the comment field.

Table 5: Benefits from the utilization of a strategic planning process (SBFD employees)

Members Responses	
Clearly defined organizational goals and objectives	13 (92.86%)
Communicated goals and objectives to the departments members	11 (78.57%)
Established time frames for reaching organizational goals and objectives	9 (64.29%)
Accountability for reaching organizational goals and objectives	12 (85.71%)



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Development of a sense of member ownership of organizational goals and objectives	11 (78.57%)
Increased member efficiency and effectiveness resulting in increased productivity	12 (85.71%)
Increased member satisfaction	10 (71.43%)
Solved major organizational problems and issues	11 (78.57%)

The internal feedback instrument concluded with questioning the SBFD employees on what is most important to them in regards to processes. They were to choose between the WHAT we are doing as a department, HOW we are doing things in our department, or the WHY we are doing things at our department. The majority decided that the HOW was most important to them while the remainder of the employees split between the WHAT and the WHY. A detailed summary of all responses from the internal feedback instrument is included within Appendix H of this research project.

Based on the combination of results for all three research questions, the following recommendations were made:

- (a) Provide an education campaign to all SBFD members, critical city administrators, and elected officials to ensure complete understanding and importance of the strategic planning process.

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(b) Further research and consider the utilization of an external consultant to complete a strategic planning process for SBFD.

(c) Actively engage in the strategic planning process if the use of an external consultant proves to be unrealistic.

## Discussion

The literature review and the results section have shown not only the need and benefits of strategic planning in the fire service but also the necessary components needed for completion of a comprehensive plan. Also, the analyzation of both the literature and results of the defined research questions has shown a readiness from the membership of SBFD to support a strategic planning process as well as a willingness to be open to the change necessary for the successful implementation of such a plan.

### Need for strategic planning / Benefits

As William Jenaway (2014) described, many members within the fire service want it to be “the same old fire service as the glory years of the 60s,” but that is just simply not the case. (p.3) Fire departments are being asked to do more with less each year even with fire and EMS incidents increasing. SBFD is no different with a call volume increase of over 22% over the last five years and no additional staffing added to address this increase or the additional responsibilities. (City of St. Pete Beach, 2016) With these and other factors continuously causing concerns and issues for fire service professionals, strategic planning has become a more popular tool to allow these professionals to think strategically. (Firehouse, 2008) Also, strategic plans can provide a blueprint for growth and revitalization for many departments. (Mittenthal, 2002)

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Fire service professionals are becoming more familiar with the process of strategic planning. In fact, over 71% of SBFD members said they were familiar with the process. With this familiarity, more fire service leaders are determining that the strategic planning process could be beneficial to their organizations. In a survey of similarly sized fire departments to SBFD, it was determined that over 70% of the departments either had a current strategic plan or were developing one. Michael Reece (2015) had similar results while studying the topic finding that over 63% of departments that responded to his external survey had a strategic plan.

Many fire departments across the country have found strategic planning to be beneficial to their organization. Some surveys have returned numbers as high as 95% of departments utilizing strategic planning as stating the process has contributed to their organization's success. (Reece, 2015) While some organizations have utilized the process for accreditation purposes such as the Auburndale Fire Rescue Department, others simply find the seemingly endless list of benefits to enticing to pass up. In simple terms, the strategic planning process should be completed out of a desire to improve an organization now and into the future. (Keirn, 2015)

In more detailed terms, many departments first utilize the strategic planning process to clearly define the mission, vision, and values of their organization. Several surveyed departments, similarly sized to SBFD, spoke of these items along with the ability to prioritize goals and objectives to achieve those identified missions, visions, and values. Reece (2015) found similar results when over 87% of respondents to his survey stated that establishing organizational goals and objectives consistent with their organization's mission was a benefit in which they hoped to accomplish through strategic planning. Internally, SBFD members also overwhelmingly agreed with over 92% identifying clearly defined organizational goals and objectives as the most important potential benefit to the potential strategic planning process.

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### Components

While development and updates to an organizations mission statement, vision statement, and values are all important components of the strategic planning process, others have been identified as critical as well. Out of the four fire department based strategic plans reviewed while answering research question one, all included a SWOT (strengths, weaknesses, opportunities, and threats) analysis. The SWOT analysis allows organizations to determine what items they are good at, what things they need to further develop or address, where new opportunities exist, and what threatening items they should be aware of that may present issues in the future. (McGrath & McGrath, n.d.) The importance of this step is shown by a majority of similarly sized fire departments to SBFD utilizing this component (55%) as well as a majority in Reece's (2015) survey on the topic (75%). After completion of this important step, Guy Keirn (2015) found it important to ensure the organization's mission and vision are aligned with the SWOT analysis and obtainable before completion of the next step, establishing goals and objectives.

As previously described in this section, a majority of fire department strategic plans are goals based and include identified goals and objectives based on the organization's mission and vision. Both goals and objectives should state what an organization hopes to accomplish. (Mittenthal, 2002) These goals and objectives, based on the honest appraisal of the organization's strength and weakness, can illustrate what's important, what is relevant, and what is actionable. (TAB, n.d.) They should also be concrete and measurable to ensure the organization knows when they reach them. (Mohr, n.d.) This will provide accountability for reaching organizational goals and objectives which over 85% of SBFD members felt was a clear benefit of the strategic planning process. To ensure this accountability, cities such as Miami

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Beach, Fort Lauderdale, and Winter Park identify both timeframes and who they are assigned to for each stated goal and objectives.

## Implementation

Research and review of all documented information seem to indicate buy-in as a major factor in the successful implementation of both the strategic planning process and obtainment of the goals and objectives identified as a result of the process. Buy-in can be obtained in many different ways, but as David Moody (2010) found within the King George County Fire Rescue Department (KGFRES), leaders had to first raise awareness as to the importance of having a strategic plan. It seems that although many members of the emergency services are well versed in their profession, few are familiar with the strategic planning side and the need for such a process making education critical to successful implementation. (Reece, 2015) While it seems that SBFD employees are more familiar with the process then most with over 71% saying they are, further education is still important even with over 92% of employees saying they are already supportive of such a process. KGFRES, in fact, had 82% of the membership that strongly agreed that having a strategic plan would be beneficial before the awareness campaign by leaders. (Moody, 2010) Buy-in is simply too important to not only the department membership but with critical city administrators and elected officials as well. Like Kevin Jump (2012) found, without buy-in, strategic plans are doomed to failure or to simply never be implemented even if completed.

Another tool to assist with the successful implementation of both the strategic planning process and completion of goals and objectives tied to the plan seems to be the use of an external consultant. Some organizations find that internal members lack the strategic planning

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experience, the ability to stay objective and disciplined, or simply don't have the time to commit to the process. (Mittenthal, 2002) This is why many fire departments, including three of the four researched departments during question one of this project, have utilized external consultants such as the Center for Public Safety Excellence. In fact, the only researched department not to utilize their services, Auburndale Fire Rescue, based their internally created plan on the same components as the external consultant utilized.

While less than 20% of surveyed similar departments to SBFD utilized external consultants, which is in line with Reece's (2015) survey showing only 43%, it still may be the most logical choice for many departments. In his June 29<sup>th</sup>, 2017 email (see Appendix F) response, Fire Chief Jeffery Gary of the Coconut Creek Fire Department stated they were utilizing an external consultant "due to lagging behind in the planning process." Also, while researching the topic in 2015, Fire Chief Guy Keirn decided that the best choice for completing a strategic plan for the Pinellas Park Fire Department was an external consultant. Chief Keirn contracted a consultant to help facilitate their strategic plan based on creating a clear mission, vision, and creating obtainable goals. (Keirn, 2015)

After reviewing the material and information obtained from the literature review and the results of this research project, strategic planning appears to be a valuable tool for many organizations looking to improve their current operations as well as identify a path for future success. This is accomplished by identifying strengths, weaknesses, opportunities, and threats by soliciting feedback from both internal and external stakeholders. Taking this information and creating goals and objectives will pave a path for the future. There is no reason to reinvent the wheel. Plenty of successful and unsuccessful strategic plans are available for reference along with the assistance of external consultants. Learning from others success and failures will ensure

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successful development and implementation of the strategic planning process within SBFD. The decision to develop or not develop a strategic plan within an organization is choosing to create a plan towards a desired future or reacting to a past and dealing with its consequences. (Miller, 2012)

## Recommendations

To address the absence of a strategic plan within the St. Pete Beach Fire Department and as determined by the results of this project, the following recommendations are made:

- (a) Provide an education campaign to all SBFD members, critical city administrators, and elected officials to ensure complete understanding and importance of the strategic planning process.

As a result of the research, it is recommended that a robust and informative educational campaign is provided to all members of SBFD, critical city administrators, and elected officials. While a majority of SBFD members responded that they knew of the strategic planning process, employee buy-in has been shown to be critical in the successful implementation of the strategic planning process in other fire departments and the corporate world. The employees will represent the internal stakeholders and must have a complete understanding of the what, how, and why of strategic planning.

In regards to critical administrators and elected officials, support is needed from both of these city internal groups due to their abilities to both fund and support the entire strategic planning process and implementation. While many may have a basic understanding of the strategic planning process or may have even participated in one, others may not. Regardless, they will need to have an understanding of the departments' goals for completing such a process

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as well as the anticipated benefits. Utilization of this research project for these purposes as well as many of the referenced documents is strongly encouraged.

- (b) Further research and consider the utilization of an external consultant to complete a strategic planning process for SBFD.

Many benefits of the use of external consultants were identified during this research project. Also, several extensive strategic plans which were reviewed while answering the projects research questions showed the quality and comprehensiveness of plans developed by consultants. While only a few of the surveyed fire departments utilized consultants, the make-up and dynamics of SBFD make the use of a consultant a viable option. Several benefits in regards to this approach stated within the literature review were the ability for the consultant to stay more objective and more disciplined than the internal staff and the fact that the internal staff may not have the time to complete the project. This recommendation will prevent those items from being barriers in regards to the completion of a strategic plan for SBFD.

Even with this recommendation, the first stated recommendation is critically important. As described in the literature review, the consultant is not responsible for gathering support or excitement for the strategic plan. The consultant only focuses on the process. Also, the cost of such a consultant would have to be agreed to and supported by critical city administrators and elected officials. Once agreed upon, this process will more than likely begin with the development of a Request for Proposal (RFP). This research project and several of the included references should be utilized in the development of this RFP especially the strategic plans reviewed from the Fort Lauderdale Fire Rescue Department and the City of Miami Beach Fire Department based on the quality and comprehensiveness of these plans developed by an external consultant.



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- (c) Actively engage in the strategic planning process if the use of an external consultant proves to be unrealistic.

Because of the make-up and dynamics of SBFD, it is recommended that an external consultant is hired to complete the strategic planning process. However, if that recommendation is not supported by any of the internal stakeholders previously identified, SBFD should immediately engage in the strategic planning process with in-house staff. The stated benefits of strategic planning are too important to ignore and the process must continue in any way possible. While more difficult to complete in-house, plenty of information on the process is included in this research project along with many examples to assist SBFD staff. Because of its similarity in size to SBFD, the City of Auburndale Fire Rescue strategic plan should be utilized as a template for completion of an in-house plan.

Organizational change is needed within the SBFD to meet the ever-changing environment of fire and EMS services. The three identified recommendations should assist SBFD in the development of a strategic plan to serve as a roadmap for future improvements. Continued follow-up should occur to ensure progress is being made towards the goal of the development of a strategic plan. Further research on this subject should focus on the use of external consultants and possible funding mechanisms for their services such as grants.

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## Appendix A

## E-mail to Representative Sample Fire Departments

Dear Fire Service Colleague:

My name is Adam Poirrier and I'm a District Fire Chief with the City of St. Pete Beach, FL Fire Department. I'm currently completing my fourth year of the Executive Fire Officers Program at the National Fire Academy and was hoping you could possibly assist me with a short eight question survey. Through research, I have determined that your Fire Department is of similar size and resources as the City of St. Pete Beach.

Like most Fire/EMS providers, we are continuously seeking out ways to improve our operations. My fourth year paper is focused around the development and implementation of a strategic planning process. The information you provide via the survey link below will be of great importance in the development of such a process. Once complete, I would be more than happy to share any information including the completed applied research project should you be interested.

Also, if your department has a strategic plan, I would greatly appreciate if you could share a copy for my review. If possible, please e-mail it to me at [apoirrier@stpetebeach.org](mailto:apoirrier@stpetebeach.org).

The survey instrument can be accessed at:

<https://www.surveymonkey.com/r/8BKK5NN>

If you are unable to "click" on the link above for access, please cut and paste the link into your Web browser.

Thank you very much for your time and I look forward to being of assistance to your department should the need ever arise. Thanks again!!

*Adam Poirrier*

District Fire Chief

St. Pete Beach Fire Rescue

7301 Gulf Blvd

St. Pete Beach, FL 33706

(727)363-9206

(727)804-5934 (cell)

## Appendix B

## Sample Fire Department Feedback Instrument

## 1. Does your department currently have a strategic plan?

- ☐ Yes
- ☐ No
- ☐ In the process

## 2. If you answered "Yes" or "In the process" to question # 1, please continue with the survey. Was your departments strategic plan developed by in house staff or an outside consulting firm?

- ☐ In house
- ☐ Outside consulting firm

Other (please specify)

## 3. Who has input in the development of your strategic plan?

- ☐ Fire Chief
- ☐ Command Staff (Assistant / Deputy / Division / District / Battalion)
- ☐ Company Officers
- ☐ Line Personnel
- ☐ Governing Body
- ☐ City / County Administration
- ☐ Community Representatives

Other (please specify)

## 4. What key components are included in your strategic plan?

- ☐ Introduction / Organizational Background
- ☐ Department Mission / Vision Statement
- ☐ Purpose / Objectives
- ☐ Input (external / internal)
- ☐ SWOT (strengths, weaknesses, opportunities, threats) Analysis

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- ☐ Strategic Issues
- ☐ Strategic Goals
- ☐ Tactics
- ☐ Evaluation

Other (please specify)

### 5. What tools were utilized to assist with the development and implementation of your strategic plan?

- ☐ Strategic plans from similarly sized fire departments
- ☐ Survey (external)
- ☐ Survey (internal)
- ☐ Committee Input
- ☐ Department wide informational meeting

Other (please specify)

### 6. Overall, did you have department wide "buy-in" to the strategic planning process and implementation?

- ☐ Yes
- ☐ No

### 7. What benefits has your department realized as a result of the strategic planning process?

### 8. Please enter your email address if you are willing to be contacted for follow up questions regarding your survey answers.

Done



## Appendix C

## SBFD Internal Feedback Instrument

1. Are you familiar with the process of strategic planning?

- ☐ Yes
- ☐ No

2. Are you familiar with our departments mission statement and vision statement?

- ☐ Yes
- ☐ No

3. Would you be willing to participate in the development of a strategic plan for our department?

- ☐ Yes
- ☐ No

4. Would you be supportive of "new ideas" and new opportunities in order to achieve goals outlined during the strategic planning process?

- ☐ Yes
- ☐ No

5. What benefits would you like to see realized from the utilization of a strategic plan within our department?

- ☐ Clearly defined organizational goals and objectives
- ☐ Communicated goals and objectives to the departments members
- ☐ Established time frames for reaching organizational goals and objectives
- ☐ Accountability for reaching organizational goals and objectives
- ☐ Development of a sense of member ownership of organizational goals and objectives
- ☐ Increased member efficiency and effectiveness resulting in increased productivity

## Strategic planning

- ☐ Increased member satisfaction
- ☐ Solved major organizational problems and issues

Other (please specify)



6. What is most important to you, **WHAT** we are doing as a department, **HOW** we are doing things at our department, or **WHY** we are doing things at our department?

- ☐ WHAT
- ☐ HOW
- ☐ WHY

DONE

## Appendix D

### E-mail to SBFD Employees

Hello All,

As you may know, I'm currently completing the Executive Fire Officer Program at the National Fire Academy. As a requirement of this program, I'm working on my 4<sup>th</sup> Applied Research Project related to my most recent course titled, Executive Leadership. The topic of my research must relate to the program in which I just completed and be an issue or subject that could benefit our fire department. I have decided on the topic of Strategic Planning due to the fact that we do not currently have a plan developed or in place and there is a high potential benefit to our department if one were implemented. Strategic plans have been utilized since the mid-1960's by corporate leaders as a way to devise and implement strategies that would enhance the competitiveness of each business and maximize profits. In the fire service, these planning processes are used as a way to define the departments' mission and vision. Typically, the strategic planning process will consist of a SWOT (strengths, weaknesses, opportunities, threats) analysis which will identify strategic issues, goals, and objectives along with the tactics to achieve these goals and objectives. Many fire departments have found that by incorporating strategic planning within their department, they are better prepared to predict and manage changes leading to long term success.

As with many processes, I see great benefits from allowing employees to be involved in the early stages and provide feedback prior to implementation. This holds especially true with new concepts such as strategic planning. In fact, most departments have listed employee "buy-in" as a critical factor in the successful implementation of a strategic plan. Having said that, I would greatly appreciate your input and assistance with this research project.

I have developed a short survey in regards to this topic and the possible utilization of such a process within our department. The survey is only 6 multiple choice questions and will not take you much time to complete. Your feedback will provide me with extremely valuable information in order to complete this project and hopefully initiate such a process in the near future. The link to the survey is below:

<https://www.surveymonkey.com/r/GVSWRDH>

If you have any questions or would like additional information on this subject, please feel free to ask me. Thanks you in advance for your time and feedback!!!

*Adam*

## Appendix E

## Representative Sample Fire Departments Contact List

<b>DEPARTMENT NAME</b>	<b>CONTACT NAME</b>	<b>CONTACT EMAIL</b>
Auburndale Fire Department	Ronnie Hall	<a href="mailto:rhall@auburndalefl.com">rhall@auburndalefl.com</a>
Avon Park Fire Department	Jason Lister	<a href="mailto:jlister@avonpark.cc">jlister@avonpark.cc</a>
Bartow Fire Department	Jay Robinson	<a href="tel:(863)534-5044">(863)534-5044</a>
Boca Grande Fire Department	C.W. Blosser	<a href="mailto:bocafire302@comcast.net">bocafire302@comcast.net</a>
Brooksville Fire Department	Stan Mettinger	<a href="mailto:smettinger@cityofbrooksville.us">smettinger@cityofbrooksville.us</a>
Callaway Fire Department	David Joyner Jr.	<a href="mailto:djoyner@cityofcallaway.com">djoyner@cityofcallaway.com</a>
Cape Canaveral Vol Fire Dept	David Sargeant	<a href="mailto:info@cityofcapecanaveral.org">info@cityofcapecanaveral.org</a>
Captiva Island Fire Control	Rich Dickerson	<a href="mailto:rdickerson@captivafire.com">rdickerson@captivafire.com</a>
Cocoa Beach Fire Department	Ryan Duckworth	<a href="mailto:fire@cityofcocoa-beach.com">fire@cityofcocoa-beach.com</a>
Coconut Creek Fire Rescue	Christine Laurie	<a href="mailto:claurie@coconutcreek.net">claurie@coconutcreek.net</a>
Daytona Beach Shores	Website Contact	Website Contact
Defuniak Springs Fire Department	Charles Burney	<a href="mailto:charlesb@defuniaksprings.net">charlesb@defuniaksprings.net</a>
Destin Fire Control District	Kevin Sasser	<a href="mailto:contact@destinfire.com">contact@destinfire.com</a>
East Niceville Fire District	Michael Wright	<a href="mailto:chief13@enfd.net">chief13@enfd.net</a>
Edgewater Department of Fire	Stephen Cousins	Website Contact
Eustis Fire Department	Michael Swanson	<a href="mailto:swanaonm@ci.eustis.fl.us">swanaonm@ci.eustis.fl.us</a>
Fernandina Beach Fire Rescue	Ty Silcox	<a href="mailto:tsilcox@fbfl.org">tsilcox@fbfl.org</a>
Fort Myers Shore Fire Rescue	David Duncan	<a href="tel:(239)694-2833">(239)694-2833</a>
Fort Walton Beach Fire Dept		<a href="tel:(850)833-9565">(850)833-9565</a>
Glendale Volunteer Fire Dept	Kevin Dell	Website Contact
Greenacres Fire Rescue	Marc Pure	<a href="mailto:groupps@ci.greenacresfl.us">groupps@ci.greenacresfl.us</a>
Groveland Fire Department	Willie Morgan	<a href="mailto:willie.morgan@groveland-fl.gov">willie.morgan@groveland-fl.gov</a>
Gulfport Fire Department	James Marenkovic	<a href="mailto:jmarenkovic@mygulfport.us">jmarenkovic@mygulfport.us</a>
Haines City Fire Department	Ryan Russell	<a href="mailto:ffrussell23@yahoo.com">ffrussell23@yahoo.com</a>
Holly Hill Fire Department	Jim Bland	<a href="mailto:firechief@hollyhillfl.org">firechief@hollyhillfl.org</a>
Indian River Shores Fire	Mark Shaw	<a href="mailto:chall@irspsd.org">chall@irspsd.org</a>
Jacksonville Beach Fire Dept	David Whitmill	Website Contact
Jupiter Island Fire Rescue	Bob Garlo	<a href="mailto:publicsafety@tji.martin.fl.us">publicsafety@tji.martin.fl.us</a>
Key Biscayne Fire Rescue	Eric Lane	<a href="mailto:elang@keybiscayne.fl.us">elang@keybiscayne.fl.us</a>
Lake Mary Fire Department	Frank Cornier	<a href="mailto:tpalmer@lakemaryfl.com">tpalmer@lakemaryfl.com</a>
Lake Wales Fire Department	Joe Jenkins	<a href="mailto:jjenkins@cityoflakewales.com">jjenkins@cityoflakewales.com</a>

## Strategic planning

Lealman Fire District	Steve Wunderle	<a href="mailto:swunderle@lealmanfire.com">swunderle@lealmanfire.com</a>
Lighthouse Point Fire Department	David Donzella	<a href="mailto:ddonzella@lighthousepoint.com">ddonzella@lighthousepoint.com</a>
Live Oak Fire Department	Chad Croft	<a href="mailto:ccroft@cityofliveoak.org">ccroft@cityofliveoak.org</a>
Longboat Key Fire Rescue	Paul Dezzi	<a href="mailto:pdezzi@longboatkey.org">pdezzi@longboatkey.org</a>
Longwood Fire Rescue	Michael Peters	<a href="mailto:mpeters@longwoodfl.org">mpeters@longwoodfl.org</a>
Lynn Haven Fire & Emergency	John Delonjay	<a href="mailto:firedept@cityoflynnhaven.com">firedept@cityoflynnhaven.com</a>
Maderia Beach Fire Department	Derrl O'Neal	<a href="mailto:doneal@maderiabeachfl.gov">doneal@maderiabeachfl.gov</a>
Madison Fire Rescue	Bruce Jordan	<a href="mailto:info@cityofmadisonfl.com">info@cityofmadisonfl.com</a>
Maitland Fire Department	Kimberly Neisler	<a href="mailto:kneisler@itsmymaitland.com">kneisler@itsmymaitland.com</a>
Marathon Fire Rescue	John Johnson	<a href="mailto:johnsonj@ci.marathon.fl.us">johnsonj@ci.marathon.fl.us</a>
Marco Island Fire Rescue	Mike Murphy	<a href="mailto:fire@cityofmarcoisland.com">fire@cityofmarcoisland.com</a>
Marianna Fire Rescue	Nakeya Lovett	<a href="mailto:lovettn@cityofmarianna.com">lovettn@cityofmarianna.com</a>
Midway Fire District	Johnathan Kanzigg	<a href="mailto:jonathan.kanzigg@midwayfire.com">jonathan.kanzigg@midwayfire.com</a>
Milton Fire Department	John Reble	<a href="mailto:fire@mymiltonflorida.com">fire@mymiltonflorida.com</a>
Minneola Fire Rescue		Website Contact
Mount Dora Fire Department	Timmons Griner	<a href="mailto:grinert@cityofmountdora.com">grinert@cityofmountdora.com</a>
Navarre Beach Fire Department	Mike Howard	<a href="tel:(850)939-2448">(850)939-2448</a>
New Port Richey Fire Department	Christopher Fitch	<a href="mailto:fitchc@cityofnewportrichey.org">fitchc@cityofnewportrichey.org</a>
Newberry Fire Department	Ben Buckner	Website Contact
Niceville Fire Department	Walter Mayville	<a href="mailto:tmayville@niceville.org">tmayville@niceville.org</a>
North Bay Fire Control District	Byron Bennett	<a href="mailto:babennett@northbayfd.org">babennett@northbayfd.org</a>
North Lauderdale Fire Rescue	Rodney Turpel	<a href="mailto:rturpel@nlauderdale.org">rturpel@nlauderdale.org</a>
North Palm Beach Fire Rescue	J.D. Armstrong	<a href="mailto:firechief@village-npb.org">firechief@village-npb.org</a>
Okaloosa Island Fire District	Robert Tilley	<a href="mailto:chief@oifd.org">chief@oifd.org</a>
Okeechobee Fire Department	Herb Smith	<a href="mailto:hsmith@cityofokeechobee.com">hsmith@cityofokeechobee.com</a>
Oldsmar Fire Rescue	Dean O'Nale	<a href="mailto:donale@myoldsmar.com">donale@myoldsmar.com</a>
Orange Park Fire Department	Alvin Barker	<a href="mailto:firechief@orangeparkfire.com">firechief@orangeparkfire.com</a>
Palatka Fire Department	Mike Lambert	Website Contact
Panama City Beach Fire Dept	Alexander Baird	<a href="mailto:abaird@pcgov.org">abaird@pcgov.org</a>
Pinellas Suncoast Fire District	John Mortellite	<a href="mailto:j.mortellite@psfrd.org">j.mortellite@psfrd.org</a>
Plant City Fire Rescue	Daniel Azzariti	<a href="mailto:dazzariti@plantcitygov.com">dazzariti@plantcitygov.com</a>
Ponce Inlet Fire Rescue	Dan Scales	<a href="mailto:dscales@ponce-inlet.org">dscales@ponce-inlet.org</a>
Quincy Fire Department	Curtis Bridges	<a href="mailto:cbridges@myquincy.net">cbridges@myquincy.net</a>
Safety Harbor Fire Department	Joe Accetta	<a href="mailto:jaccetta@cityofsafetyharbor.com">jaccetta@cityofsafetyharbor.com</a>
Sanibel Fire & Rescue District	Matt Scott	<a href="mailto:sfrd@sanibelfire.com">sfrd@sanibelfire.com</a>
Sebring Fire Department	Bobby Border	<a href="mailto:bobbyborder@mysebring.com">bobbyborder@mysebring.com</a>
South Daytona Fire Department	David Giles	<a href="mailto:dgiles@southdaytona.org">dgiles@southdaytona.org</a>
South Pasadena Fire Department	Emery Culverhouse	<a href="mailto:eculverhouse@mysouthpasadena.com">eculverhouse@mysouthpasadena.com</a>

## Strategic planning

Springfield Fire Department	Brandon Walls	<a href="mailto:bwalls@springfield.fl.gov">bwalls@springfield.fl.gov</a>
St. Augustine Fire Department	Carlos Aviles	<a href="mailto:cityfire@citystaug.com">cityfire@citystaug.com</a>
Starke Fire Department	Gary Wise	<a href="mailto:sfr@bradfordcountyfl.gov">sfr@bradfordcountyfl.gov</a>
Stuart Fire Rescue	David Dyal	<a href="tel:(772)600-1287">(772)600-1287</a>
Tarpon Springs Fire Department	Scott Young	<a href="mailto:tsfr@tsfr.us">tsfr@tsfr.us</a>
Tavares Fire Department	Richard Keith	<a href="mailto:rkeith@tavares.org">rkeith@tavares.org</a>
Temple Terrace Fire Department	Ian Kemp	<a href="mailto:ikemp@templeterrace.com">ikemp@templeterrace.com</a>
Tequesta Fire Rescue	Joel Medina	<a href="mailto:mspeigl@tequesta.org">mspeigl@tequesta.org</a>
Tice Fire District		Website Contact
Treasure Island Fire Department	Frank Fernandez	<a href="mailto:fire@mytreasureisland.org">fire@mytreasureisland.org</a>
Upper Captiva Fire Rescue	Robert Kinniry	<a href="mailto:uppercapfd@aol.com">uppercapfd@aol.com</a>
Zephyrhills Fire Rescue	Brian Swartout	<a href="mailto:firechief@fire.zephyrhills.fl.us">firechief@fire.zephyrhills.fl.us</a>

## Appendix F

Chief

As an EFO alumn I am always happy to assist with a fellow. I am working on an RFP to bring in a consultant as we have been lagging behind in the planning process. Not sure if it would be of help but I have several sample RFP's including scope.

Good luck and let me know if you need anything else.

Jeff

**Jeffery Gary**

Fire Chief

Fire Marshal

**City of Coconut Creek**

4800 W. Copans Rd.

Coconut Creek, FL 33063

954-545-6617

954-420-5855 fax

[www.coconutcreek.net](http://www.coconutcreek.net)



## Appendix G

## Representative Sample Fire Departments Detailed Feedback Results

**1) Does your department currently have a strategic plan?**

Department Responses	
Yes	5 (33.33%)
No	4 (26.67%)
In The Process	6 (40.00%)
Survey not returned or not answered	66

**2) If you answered “Yes” or “in the process” to question # 1, please continue with the survey. Was your departments’ strategic plan developed by in house staff or an outside consulting firm?**

Department Responses	
In House	9 (81.82%)
Outside Consulting Firm	2 (18.18%)
Survey not returned or not answered	70

**3) Who has input in the development of your strategic plan?**

Department Responses	
Fire Chief	10 (90.91%)



## Strategic planning

Command Staff (Assistant / Deputy / District / Battalion	8 (72.73)
Command Officers	8 (72.73%)
Line Personnel	7 (63.64%)
Governing Body	5 (45.45%)
City / County Administration	4 (36.36%)
Community Representative	2 (18.18%)
Survey not returned or not answered	70

Additional comments provided by departments:

- The City of Eustis continues to develop and work on the plan.

**4) What key components are included in your strategic plan?**

Department Responses	
Introduction / Organizational Background	9 (81.82%)
Department Mission / Vision Statement	9 (81.82%)
Purpose / Objectives	8 (72.73%)
Input (external / internal)	2 (18.18%)
SWOT (strength, weaknesses, opportunities, threats) Analysis	6 (54.55%)
Strategic Issues	7 (63.64%)
Strategic Goals	9 (81.82%)
Tactics	5 (45.45%)

## Strategic planning

Evaluation	5 (45.45%)
Survey not returned or not answered	70

**5) What tools were utilized to assist with the development and implementation of your strategic plan?**

Department Responses	
Strategic plans from similarly sized fire departments	6 (66.67%)
Survey (external)	1 (11.11%)
Survey (internal)	6 (66.67%)
Committee Input	6 (66.67%)
Department wide informational meeting	4 (44.44%)
Survey not returned or not answered	72

Additional comments provided by departments:

- Information from all divisions

**6) Overall, did you have department wide “buy-in” to the strategic planning process and implementation?**

Department Responses	
Yes	8 (88.89%)
No	1 (11.11%)
Survey not returned or not answered	72

**7) What benefits has your department realized as a result of the strategic planning process?**

Comments provided by departments:

- All members have a clear vision of the department's goals and are able to better help achieve those goals. Several weaknesses were identified and were able to be addressed, such as, increased water rescue capabilities, and purchase of the department's first aerial apparatus, among other things.
- It gave us an opportunity to evaluate our department as to where we are where we are going and where we want to be. It gave us priorities, then a plan on how we want to get there.
- Cohesiveness, Ownership, and Pride
- Not complete yet
- Remodeling of Station and replacement of apparatus.
- When completed, the hope is to have it as an educational piece for personnel as well as public.
- Found weaknesses and focused goals
- Allows effective long-range capital planning and budgeting
- Short term-reorganization to make the organization for efficient-long term I am hoping to instill in our political governing body the need for increased staffing and operational capabilities.
- Budget justification

**8) Please enter your email address if you are willing to be contacted for follow-up questions regarding your survey answers.**

- [achilders@madeirabeachfl.gov](mailto:achilders@madeirabeachfl.gov)
- [maustin@cityofcocoabeach.com](mailto:maustin@cityofcocoabeach.com)
- [swansonm@eustis.org](mailto:swansonm@eustis.org)
- [john.reble@ci.milton.fl.us](mailto:john.reble@ci.milton.fl.us)
- [donale@myoldsmar.com](mailto:donale@myoldsmar.com)
- [jonathan.kanzigg@midwayfire.com](mailto:jonathan.kanzigg@midwayfire.com)

## Appendix H

## SBFD Internal Feedback Detailed Results

**1) Are you familiar with the process of strategic planning?**

Members Responses	
Yes	10 (71.43%)
No	4 (28.57%)

**2) Are you familiar with our departments' mission statement and vision statement?**

Members Responses	
Yes	11 (78.57%)
No	3 (21.43%)

**3) Would you be willing to participate in the development of a strategic plan for our department?**

Members Responses	
Yes	13 (92.86%)
No	1 (7.14%)

**4) Would you be supportive of “new ideas” and new opportunities in order to achieve goals outlined during the strategic planning process?**

Members Responses	
Yes	14 (100%)

No	0 (0%)
----	--------

**5) What benefits would you like to see realized from the utilization of a strategic plan within our department?**

Members Responses	
Clearly defined organizational goals and objectives	13 (92.86%)
Communicated goals and objectives to the departments members	11 (78.57%)
Established time frames for reaching organizational goals and objectives	9 (64.29%)
Accountability for reaching organizational goals and objectives	12 (85.71%)
Development of a sense of member ownership of organizational goals and objectives	11 (78.57%)
Increased member efficiency and effectiveness resulting in increased productivity	12 (85.71%)
Increased member satisfaction	10 (71.43%)
Solved major organizational problems and issues	11 (78.57%)

- 6) What is most important to you, WHAT we are doing as a department, HOW we are doing things at our department, or WHY we are doing things at our department?**

Members Responses	
WHAT	3 (21.43%)
HOW	8 (57.14%)
WHY	3 (21.43%)