

STRATEGIC PLANNING RETREATS

Strategic Planning Retreats: Are They Effective?

Chris S. Geiger, Captain

Clackamas County (OR) Fire District No.1

Milwaukie, Oregon

January 2008

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 _____

Abstract

Clackamas County Fire District No.1 holds annual Strategic Planning Retreats (SPRs).

The problem was there was no system in place for measuring SPR effectiveness. The purpose of the research was to determine if the SPRs were valuable planning tools. Descriptive research was used to answer the research questions: Are Strategic Planning Retreats utilized by other public and private organizations? How is the effectiveness of Strategic Planning Retreats measured? What are the benefits and negative aspects of Strategic Planning Retreats?

Procedures were a literature review, expert interviews, and field surveys. Research revealed that only 13% of organizations surveyed conducted strategic planning in an off-site “retreat” location. Effectiveness is measured by benchmarking, prioritizing, outcome measurement, and annual reporting. Positive aspects included team building. Negative aspects include cost, internal polarization, and potential negative public image. Recommendations included holding SPRs on site in-district.

Table of Contents

Abstract.....	3
Table of Contents.....	4
Introduction.....	5
Background and Significance	6
Literature Review.....	9
Procedures.....	15
Results.....	17
Discussion.....	20
Recommendations.....	23
References.....	25
Appendix A (In-Class Survey).....	28
Appendix B (Expert Interviews).....	29
Appendix C (Expert Opinion Letter & Reply)	36
Appendix D (Public Fire Organization Survey Respondents).....	38
Appendix E (Private Corporation Survey Respondents)	39
Appendix F (External Mail Survey Instrument).....	40
Appendices G ¹ - G ⁷ (External Mail Survey Results)	41

Introduction

Public organizations and private corporations have utilized the concept of Strategic Planning Retreats (SPRs) for many years. In many organizations, the holding of annual SPRs has become tradition for key leaders and top executives. The original intent behind these retreats—first in wartime, and then later in the business environment—was to chart a course for success and then plan a winning strategy in an environment that was free from distractions, interruptions, and sometimes even danger.

Clackamas County Fire District No.1 (CCFD1) holds SPRs annually at off-site locations. The problem faced by CCFD1 is that there currently is no system in place for measuring the effectiveness of the annual SPRs. Also, holding the SPRs at an off-site “retreat” location may even result in several negative consequences, and in fact, be counter-productive. If the outcome of the retreats cannot be measured, then the practice is ineffective and a waste of staff time and taxpayer money. The purpose of this research is to determine if the SPRs conducted by CCFD1 are valuable tools that utilize methods resulting in successful planning decisions.

Recommendations based on research findings will be made to the fire chief for future consideration. Descriptive research will be used to answer the following four research questions:

1. Are Strategic Planning Retreats utilized by national fire organizations, neighboring fire departments, and local large private businesses?
2. How is the effectiveness of Strategic Planning Retreats measured by these organizations?
3. What are the benefits of Strategic Planning Retreats?
4. What are the negative aspects of Strategic Planning Retreats?

Background and Significance

Clackamas County Fire District No.1 (CCFD1) is an accredited agency with the Commission on Fire Accreditation International and is the second largest fire district in the state of Oregon. CCFD1 protects approximately 165,000 citizens in an area encompassing almost 200 square miles in northwestern Clackamas County. It is part of the Portland metropolitan urban growth area that has a population of more than 1.5 million. Included in the CCFD1 service area are the cities of Milwaukie, Oregon City, Happy Valley, and Johnson City, as well as the unincorporated areas of Oak Lodge, Clackamas, Sunnyside, Redland, Carver, Logan, Holcomb, Beavercreek, Highland, and Clarkes. The Insurance Services Office in 2004 awarded CCFD1 with a district-wide rating of “3.” In 2006 CCFD1 responded to 15,157 calls for emergency service (Neroulas, 2007). The annual operating budget for Fiscal year 2007 is \$25 million. The Mission Statement of CCFD1 reads, “To safely protect life and preserve property” (CCFD1, 2005, p.1).

CCFD1 is organized into four administrative divisions consisting of a staff of about 200 sworn, civilian, and volunteer employees. Twelve career and two volunteer fire stations are strategically located throughout two geographical battalions: Battalion 2 in the north, and Battalion 3 in the south. Career personnel staffing includes eleven engine companies, two ladder truck companies, a rescue ambulance, and two battalion chiefs. All fourteen career companies are paramedic staffed and equipped. Under the current collective bargaining agreement with IAFF Local 1159 career personnel work a 53 hour work week in a three platoon duty cycle. Daily on-duty operational staffing for both battalions is 43 firefighters.

The Special Operations Division within CCFD1 supports a technical rescue team that provides in-district and regional response to swiftwater, structural collapse, vehicle extrication,

high-angle rope, confined space, and trench collapse incidents. The CCDF1 technical rescue team is a member of Oregon State Urban Search and Rescue (USAR) Task Force No.1 (OR-TF1).

Like many public fire departments, CCFD1 utilizes an annual off-site “retreat” format when conducting organizational strategic planning. Since about 1996, fire administrators and key executives have met at an out-of-town location for two to three days to facilitate the strategic planning (goal-setting/action plan) process. The Strategic Planning Retreats (SPRs) are generally attended by executives, division managers, and administrative staff members. Specifically, the fire chief and his command staff, the finance director, and representatives from the local firefighters labor union are present at each SPR.

The problem presently faced by CCFD1 and the topic of this research project is the absence of a mechanism to measure the effectiveness of the SPR after the event. That is, no objective analysis of decisions or plans made during the SPR is conducted, leaving attendees unsure if anything positive or constructive was accomplished. In an internal email distributed to invitees prior to the 2005 SPR, the purpose of the three-day retreat was stated “to launch an understanding of what and where we are as a District.” However some recipients of the communication were confused because the statement was vague and contained no clear purpose for the retreat. Additionally, no agenda was included with the email so attendees had little idea as to what would be discussed, leaving them ill-prepared to participate and present information. After the SPR was concluded, no benchmarks had been established so progress made toward goals and objectives could not be measured.

Resources must be allocated and expended to conduct annual SPRs including time, money, and personnel. Time lost costs money that can never be regained or recovered.

The direct cost to CCFD1 of conducting the SPR in fiscal year 2006 was \$2,314 with wages paid to attendees for the two days totaling approximately \$19,937. In 2005, CCFD1 spent \$2,502 directly on the SPR for that year with wages paid to attendees for the two days totaling approximately \$20, 922.

In addition to the fact that public funds are being spent on an event that has no clear benefit or measurable advantages to the organization, past attendees attest that alcoholic beverages were routinely consumed by employees while at the SPRs. Because the SPRs are conducted and recognized as official business meetings, salaried employees continue to draw their pay and benefits, and are therefore technically still “on-the-clock.” As government employees who are constantly viewed with increasingly strict scrutiny by the media as well as the public—and subsequently held to higher standards of moral conduct—the participation or allowance of this behavior may be ethically questionable.

As a result of this research and recommendations, policy and practice changes can be made by determining if off-site SPRs are effective or even necessary during strategic planning efforts. This applied research project directly relates to the course goal of the National Fire Academy Executive Leadership (EL) class by teaching the chief fire executive how to conceptualize and employ key processes used by effective executive-level managers. Further, Section 7 of the EL student manual emphasizes the benefits of a fire department conducting an Organizational Capability Analysis (OCA) as a strategy “to determine its overall strengths and weaknesses” (Federal Emergency Management Agency [FEMA], 2005, p. SM 7-3). An OCA or similar exercise should be conducted during the SPR event. Additionally, responding appropriately and in a timely manner to the emerging issue of effective strategic planning for the fire service is an Operational Objective of the United States Fire Administration.

Literature Review

A literature review was conducted to ascertain the existing body of knowledge and material published on the subject of organizational strategy, planning, and retreats. Specifically, the purpose of the search was to examine the history of and current practices related to Strategic Planning Retreats (SPRs) and it included searches of both fire service and non-emergency service related sources. To supplement the literature review and provide broad perspectives from various viewpoints, several formal interviews were conducted with persons from the corporate private sector, fire service organizations, and local government. Each individual was consulted as an expert in the field and was carefully chosen to provide a certain opinion.

The word “strategic” (taken from the Greek word “*stratēgia*”) is a combined derivation of two words: “army” and “lead” or simply, “to lead an army” (Wikipedia, 2007, ¶ 1). During the Athenian Democracy the Greeks referred to a military commander as a “*stratēgos*” (Wikipedia, 2007, ¶ 1). Merriam-Webster (2004) defines “strategy” as to “carefully devise a plan toward accomplishing a goal” (p.1233). Webster also defines “planning” as a “method for achieving an end” or, “a detailed program for the provision of some service” (p. 947).

The theory of “strategic planning” originated in the private sector, where it became essential as a means of identifying strategies for increasing corporate profits. It can be defined as “a set of concepts, procedures, and tools designed to assist leaders and managers in accomplishing organizational goals” (Bryson, 1988, p.22). What has become standard practice in the business world, government administrators at the federal, state, and local levels of public (and even non-profit) organizations have utilized the benefits of strategic planning. King & Cleland (1978) define strategic planning as “the development of objectives and the linking of the objectives with the resources which will be employed to attain them” (p.6). The International

City/County Management Association considers the strategic planning model as a “road map” for accomplishing identified organizational goals (ICMA, 2002, p.63). Other authorities describe it as a dynamic and ever-expanding instrument created to be a “hiking trail into the future” (Wallace, 2006, p.28). The National Fire Protection Association (NFPA) advocates using long-range strategic planning as a management tool “to lead the fire department to operate at a higher level” (Grant & Hoover, 1994, p.317). For years, basic fire administration principles have included the steps of planning, organizing, implementing, and evaluating to be able to forecast service level demands, anticipate threats and other emerging issues (Carter & Rausch, 1977).

Strategic goals should be prioritized and then matched with available fiscal resources through the normal budget process. Efforts should be made to focus on evidence-based results, and not merely activity levels. “There is a temptation in governmental management to confuse effort with outcomes, to treat the amount of activity as the end result” (Johnson et al., 2007, p.5).

In an article by Kramer (1979) highlighting the benefits of organizational planning using the Management By Objectives concept, top fire department managers “decide what key tasks need to be done and set objectives, mutually agreed on, which will be achieved...during a stated time period, usually a year” (p.13). Kramer also emphasizes the importance of gaining input from employees at all levels of the department when establishing organizational goals, by noting that “...members are far more willing to work toward an objective they helped establish” (p.15). Further, Gordon (2005) believes that senior officials should announce and ensure that “everyone gets to be heard” (p.9). Research by Kefalas (1996) confirms Kramer’s position. Kefalas found that morale can suffer during strategic planning if subordinates and employees from lower levels are not asked to participate in the goal-setting process. Through a survey, he determined that

employees who attend SPRs generally supported the retreat concept, while employees that were not invited to attend placed little value in it. Ironically, action plans secondary to strategic planning have the greatest affect on employees not involved in the planning process. In another article, Kefalas recommends soliciting input from employees that will be asked to accomplish goals established at the SPR. “In most cases, the people who will be performing the work will usually know the best way to do it” (1997, p.74). The Center for Applied Research agrees: “If you exclude stakeholder (employee) groups, you run the risk that the planning you create will flounder in implementation because it does not reflect their concerns” (1999, p.1). Even Abraham Lincoln agreed with the notion of empowering capable employees with responsibility and authority. During his presidency, he would frequently solicit the opinion of his aides and subordinates. If their recommendations aligned with his philosophies, he would usually implement their plan and let them proceed, with the satisfaction that it was their idea, and not necessarily his own (Phillips, 1992). By creating a clear, mutual understanding of what needs to be accomplished and focusing on the outcome desired rather than the methods used, employees will develop ownership. Managers can establish and identify the parameters of the goal, but should let the employees decide on the route that leads to accomplishment (Covey, 1989). If this does not happen, internal employee polarization may result.

Goal-measurement and benchmarking are key elements to effective strategic planning. Because CCFD1 does not measure progress, outcomes, or goals after each SPR, progress toward or achieving success remains largely undetermined. The primary reason strategic planning fails in an organization is a lack of implementation and outcome measurement after the retreat, (Bacal, 2007, ¶ 8). A high-water mark reached in service delivery can represent a spike, but is not as important as maintaining a baseline trend toward a set goal. “All organizations can set and

achieve a goal once, but unless they can sustain their efforts, they won't survive" (Coleman, 1997, p.31). Measuring progress after goal setting during an SPR is crucial. Springer suggests that "Six to eight weeks after the retreat, the facilitator should assist in evaluating progress. Have the goals been met? What impact did the retreat have?" (1990, p.20).

The word "retreat" can be traced as far back as the 15th Century during the reversal of military power of the Ottoman Empire (Wikipedia, 2007, ¶ 2). By definition, retreat means to withdraw, especially from what is difficult, or "to a place of privacy or safety" (Merriam-Webster, 2004, p.1065). The practice of military strategy retreats is not new. History proves that military leaders planning war strategy from a place of protection has occurred for years. After the stunning Confederate defeat at Gettysburg during the Civil war, General Robert E. Lee "retreated" to Richmond, Virginia on August 8, 1863 to devise a new plan with Southern President Jefferson Davis (Denney, 1992). On May 18, 1944 U.S. Army General Dwight D. Eisenhower and Commander Trafford Leigh-Mallory "retreated" to London with British Prime Minister Winston Churchill to strategize the upcoming German attack and invasion at Normandy, France (Schlesinger, 1993).

Presidents and other high-ranking government officials have also come to rely on the safety and sanctuary of retreat compounds. In 1942 President Franklin D. Roosevelt dedicated a sizeable wooded reserve in a secluded location of rural Maryland (only eight miles from the National Fire Academy campus) as a place to escape from "the heat and political pressures of the city" (Infoplease.com, 2007, ¶ 6). Originally named "Shangri-La" after a U.S. Navy warship, it was eventually renamed "Camp David" by President Dwight D. Eisenhower in honor of his grandson. The strategic hideaway has been used extensively by every U.S. president since then. On July 29, 2007 President Bush and incoming British Prime Minister Gordon Brown met at the

Camp David retreat “in the tranquility of the Catoctin Mountains” to discuss “terror threats, the wars in Iraq and Afghanistan, the crisis in Darfur, and stalled economic trade,” (“Brown meeting,” 2007).

Even contemporary theorists advocate the idea of taking a detached and global view of an organization before making critical management and planning decisions. In their book *Leadership on the Line*, Heifetz and Linsky use “the balcony” metaphor when describing how to make an assessment of the current situation. “The only way you can gain both a clearer view of reality and some perspective on the bigger picture during the fog of war is by distancing yourself away from the fray” (2002, p. 53). Author and Fire Chief Jack Snook (1988) wrote that the purpose behind the utilization of the management retreat in the fire service was:

To provide an ideal environment which maximizes the potential of key staff in order that they might plan and organize resources, prioritize the expenditure of time and money, review past accomplishments, assess current status of the organization and develop a comprehensive road map as to where the organization is going in the future (p.23).

But some experts in the private sector question the overall value in terms of the costs versus the benefits of conducting SPRs at all. As reported in the Harvard Business Review, Frisch and Chandler (2006) purport that “Off-site retreats collectively cost U.S. companies hundreds of millions of dollars annually in lost salaries alone” (p.2). The authors also contend that the effectiveness of retreats is debatable and cite that agendas of SPRs often include information and issues that are ambiguous or speculative in the organization. “And it is rare that a team can look back six or twelve months later and say that the retreat truly changed the way business is done” (p.2).

Another key factor for fire executives to consider when contemplating the retreat format for strategic planning should be the current local political climate. Decision-makers should possess a keen awareness of the community's perspective of the organization's reputation, and base the decision whether to hold SPRs on the proverbial "headline" test. Over time, the perception by the public and the expectations of government change. Starting in the 1970's the American public began to voice increasing expectations in government ethical conduct, service quality, and fiscal accountability. The new business plans for public organizations called for less bureaucracy and more entrepreneurial spirit, along with budgets that focused on evidence-based results and not merely historical funding (Osborne & Gaebler, 1992). Now, it is generally assumed that local governments will be financially responsible and exercise a greater degree of spending discipline with public money. Even critics agree that a trust is given freely by the public. Accordingly, when deciding if, and planning how, SPRs will be conducted, the taxpayer's perception of the concept itself should be considered. The decision to hold SPRs should be defensible to the public in terms of cost versus benefit. And to an even greater extent than cost, if at any time alcohol is permitted to be consumed by employees participating at the SPR, the behavior of those employees should be monitored, managed, and controlled if necessary. Ethical behavior—by itself—should not necessarily be the final test. "Honesty by itself is not enough," stated former Supreme Court Justice Louis Brandeis. "The appearance of integrity must be concomitant," (Gordon, 2005, p. 15).

Procedures

Research Methodology:

Descriptive research was used to obtain the answers to the four research questions. First, a search for all published material available on the subject of strategic planning and business management was conducted. The review of literature began at the Learning Resource Center (LRC) at the National Fire Academy (NFA) and subsequently led to several visits to local public and college libraries in the Portland, Oregon area. Then, a number of structured personal interviews were conducted with experts representing public and private sector viewpoints. Finally, to determine the prevalence and value perceived of the Strategic Planning Retreat (SPR) concept, an in-depth survey was distributed to targeted organizations and the data collected analyzed and graphed.

Research Process:

Step One: Literature Review. While on campus at the National Emergency Training Center, the online card catalog at the LRC was explored using the subject terms: “organizational, strategic, planning, retreats.” This investigation revealed several EFOP research papers on file as well as several articles in fire journals. Additionally, a general internet search was conducted using the “Google” search engine with the same subject terms. Several visits to local city, county, and college libraries in the Portland area were conducted to research Questions #2, #3, and #4 regarding business management and strategic planning.

Step Two: In-class NFA Survey. A draft “Strategic Planning Retreat Survey” instrument was created while on campus at the NFA (See Appendix A). This survey instrument was given to fellow students in the Executive Leadership (EL) class. Distributing the survey instrument to classmates in the EL class accomplished two things: First, after comments and feedback from

students, it validated the survey instrument for content and clarity. Second, because all NFA resident courses are comprised of fire officers from across the United States, a solid foundation of preliminary data was obtained relating to the research questions associated to the practice of SPRs by fire departments.

Step Three: Structured Personal Interviews. Eight personal interviews with experts from public fire departments, educational institutions, private corporations, and consulting firms were conducted to ascertain answers to the research questions (See Appendices B and C). Furthermore, each person interviewed was asked a series of identical questions from a prepared questionnaire form to assure consistency among the answers.

Step Four: External Survey. To assess the efficacy and determine the perceived value of conducting SPRs, an external survey instrument (See Appendix F) was mailed to several public and private organizations including seven public fire departments, two recognized national fire organizations, and four prominent and highly successful business corporations (See Appendices D and E). The fire departments selected for the external survey were carefully chosen because of either their close geographic location or similarities in organizational composition to those of CCFD1. The two nationally-recognized organizations were selected for their overall contribution to the fire service and respected leadership positions. The four private companies were chosen based on their Northwest location and overall global corporate success.

Assumptions and Limitations: It is generally assumed that only larger progressive organizations (private and public) utilize advanced and modern business management tools such as the strategic planning model. It is understood that facilitating the strategic planning process requires a staff of employees drawing on various resources within the organization. If a larger survey sample had been collected, the results may have been diluted with unusable data by

smaller fire departments indicating that they did not use a strategic planning model or a retreat method. This research does not attempt or claim to identify the strategic planning practices of all Oregon fire departments. Further, this research does not attempt or claim to identify the strategic planning practices of even a random sample of all U.S. fire departments. The goal of this research is to capture and illustrate the value that each of the chosen organizations place on the “off-site” retreat format when undertaking strategic planning efforts. A deliberate decision was made not to utilize the Krejcie/Morgan sample formula when determining the scale and extent of the mail survey (FEMA, 2005). Therefore, the results are limited in scope to only those organizations surveyed.

Definitions & Terms: No ambiguous or technical terms are contained herein that are not already defined within the text of this paper itself.

Results

Are Strategic Planning Retreats (SPRs) effective? Results from the applied research conducted in the literature review, structured interviews, and external surveys provided the specific answers to the four research questions.

Research Question 1: Are SPRs utilized by national fire organizations, neighboring fire departments, and local large private businesses? Of the 13 external mail surveys sent all were returned with useful information for a response rate of 100% (See Appendix G¹). Nine respondents (69%) indicated that they held SPRs while the remaining four (31%) indicated they did not (See Appendix G²). All four respondents indicated that the reason they did not conduct formal SPRs was that strategic planning was an ongoing organizational process that occurred throughout the year. Of the nine organizations that conducted SPRs, only two (13%) held the

SPRs off-site out-of-town, both of which were private companies (See Appendix G³). Of the 21 surveys distributed to classmates of the EL class, 14 were returned with usable data for a response rate of 66%. Only five (28%) of the EL classmates stated that their organizations held SPRs and of those all indicated that the sessions were held locally in-town or on-site.

Research Question 2: How is the effectiveness of Strategic Planning Retreats measured by these organizations? In their responses, all 13 organizations indicated that the success of strategic planning efforts was accomplished by using terms and phrases such as “prioritization, outcomes, benchmarking, performance measurement,” and “annual reporting.” Eight of the 13 (61%) included references to the budget process when assessing strategic planning effectiveness. Asked if an agenda was posted prior to the SPR, nine respondents (82%) replied “yes” (See Appendix G⁴). Nine organizations (90%) stated that performance benchmarks were measured at specific time intervals after each SPR (See Appendix G⁵). Seventy-five percent of the organizations surveyed replied that they publish an annual report (See Appendix G⁶).

When interviewed, many of the experts replied in the same way. Two business consultants and both university representatives confirmed that goals and objectives must be revisited for effectiveness sometime after the SPR. The International City/County Management Association advocated “data collection” as one tool to measure success (Gordon, 2005). One fire service expert stated that, “It is fairly easy to measure the effectiveness of strategic planning if goals are clearly outlined and measurable. They must be tested for effectiveness, and not just efficiency. Either you accomplished the goals, or you didn’t” (R. Bruegman, personal communication, December 17, 2007).

Research Question 3: What are the benefits of Strategic Planning Retreats? All but two of the eight experts believed in some benefit to holding SPRs and used words and phrases such

as “to escape, to relax, to team-build, no distractions” and “less stress” in their conversations. Others made references to creating a “social environment” in which they thought strategic planning should occur. Many recited the “balcony” or “helicopter” theory for gaining an accurate assessment of the current situation. The two dissenting expert opinions claimed that the costs and other risks associated with SPRs outweighed the perceived benefits that could be gained. Both maintained that the same strategic planning goals could be established without leaving the locale.

Research Question 4: What are the negative aspects of SPRs? The research identified three potential negative outcomes that could result from an organization utilizing the off-site SPR concept.

1. Cost: All experts interviewed admitted that holding SPRs off-site at a retreat location comes with an associated cost. Specifically, food, lodging, facilitation, wages, travel, and supplies all must be budgeted and considered carefully when making the decision to hold an off-site SPR.

2. Internal polarization: Employees that were not invited to (or asked to provide input for) the SPR held little regard for the concept. In contrast, employees attending the SPRs thought the idea of retreats off-site had considerable value. Fueled by this lack of ownership, morale can plummet because employees at lower levels of the organization can be left to feel that their individual contribution means little.

3. Poor public perception: Because of the official nature of the meetings, the practice of top-level fire administrators meeting at an off-site retreat location (like a destination resort) for two or three days, drinking alcoholic beverages while conducting public business could be unfavorable in the public eye. Of the 13 external survey respondents the majority (60%)

answered “no” to the question of alcohol consumption allowances during SPRs. The only respondents that answered “yes” to this survey question were three private companies. Of the 14 respondents to the EL in-class survey, none (0%) indicated an allowance for alcohol consumption at SPRs. The Oregon Government Standards and Practices Commission responded to a letter asking for an opinion on the issue of alcohol consumption by public employees. The Commission replied that its authority only applied to specific government business matters. The letter concluded with, “The issues raised in your letter do not appear to involve these areas of Commission jurisdiction” (See Appendix C).

Discussion

The evidence strongly indicates that viable organizations (such as fire departments) must plan strategically for their long-term survival and sustainability (Carter & Rausch, 1977). Fire administrators must prepare for the future by accurately anticipating service level demands and then effectively allocating and deploying resources to meet those needs. Strategic planning must be employed as a management tool to reach organizational goals (King & Cleland, 1978). However, research indicates that there are several drawbacks when conducting top-down hierarchical Strategic Planning Retreats (SPRs) off site and/or with little input from subordinates. Specifically, with the accelerated rate of change in cultural composition of the fire service (and the associated need for ownership and “buy-in” from all employees) effective planning strategies must include viewpoints and opinions from all levels of the fire department (Kefalas, 1996).

The concept of off-site Strategic Planning Retreats (SPRs) was accepted and promoted with greater emphasis in the early-eighties through the mid-nineties than it is today. Articles published by Kramer (1979), Snook (1988), and Springer (1990) all mention the advantages of

strategic planning at an off-site retreat location because of the perceived stresses that occurred during normal organizational growth. Indicating a general philosophy to follow the successful use of the SPR concept by the private sector, many fire departments adopted the idea into their own business models. The initiative corresponded with the time period when many fire administrators were feeling the pressure to be more accountable and efficient with the ever-dwindling tax dollars, when “tax limits” was the dreaded new catch phrase. Following the lessons learned and accomplishments of their private-sector peers, fire executives and municipal leaders began working diligently to be regarded as models of government efficiency—more productive, less wasteful, and responsive to the needs of the public (Osborne & Gaebler, 1992).

However, there clearly exists some dissonance between the generally accepted corporate thinking of the eighties and nineties to the contemporary management and business philosophies of today. Recent articles by Frisch (2006), Kefalas (2006), Coleman (2007), and The Center for Applied Research (1999) indicate that there are risks to be accepted by actually holding SPRs in the current climate. Similarly, nowhere in the latest edition of the 118 page *Strategic Planning for Local Government* publication does the word “retreat” even appear (Gordon, 2005) as the concept is not advocated. Nor does the famous professor of business management, Henry Mintzberg, use the term or the advocate the concept of “retreat” anywhere his popular textbook “*Mintzberg on Management*” (Mintzberg, 1989). The results of the external mail survey seem to bolster this finding. Only two (15%) of survey respondents held SPRs off-site/out-of-town and away from the administrative headquarters. Three of the respondents (23%) did not even hold SPRs but stated instead that strategic planning was an ongoing process undertaken by staff throughout the year. Insight gained from interviews with experts in business strategy and government practices confirms that holding SPRs on-site is the prevailing new trend, with

strategic planning in the public sector most often accomplished by the organization as a continuous process.

Research also disclosed that the distinction between “strategic planning” and the practice of holding strategic planning sessions off-site and out-of-town in a true “retreat” setting confuses some participants. It appears that the lines blurred in the eyes of some of the survey respondents and experts interviewed, as their answers related more to the concept of strategic planning and not necessarily about out-of-town “retreats.” Two conclusions can be drawn from this: First, the wording on the survey questionnaire may have been too vague or poorly worded. Second, respondents confused (or saw no difference in) strategic planning as a continuous internal process, versus holding planning retreats off-site.

To avoid the potential negative impacts associated with holding off-site SPRs, an alternative would be for an organization to adopt the practice of an annual “Futures Conference.” Pioneered by Fire Chief Randy Bruegman in 1999, the Futures Conference is held on-site or within the jurisdiction during normal business hours, and includes all employees. Along with the event announcement, an agenda is distributed giving participants the opportunity to prepare for the activities planned. The conference is the perfect place for the organization to rewrite or overhaul its Mission Statement, Values, and Vision. The concept not only sends a strong message of unity from management, but moreover, creates an environment that encourages all employees to participate. “You can throw out some options, then sit back and watch the debate” (Bruegman, personal communication, December 17, 2007).

Off-site SPRs can be an effective management tool if the potential negative aspects are anticipated and accepted by the organization. A better question that should be asked is if SPRs are the best use of taxpayer money? In other words, can the same outcomes in organizational

strategic planning be achieved without the possible negative ramifications and added expense of holding them off-site. Clackamas County Fire District No.1 (CCFD1) currently holds SPRs annually at off-site out-of-town locations. Therefore, the risks identified in this research could negatively impact the organization. Also, no process is in place (such as benchmarking, annual reporting, or outcome measurement) to determine the overall effectiveness of the strategic planning effort.

Recommendations

The results of this research illustrates that effective strategic planning is crucial for meeting the future growth demands of the Fire District in its essential role as a public emergency services provider. However, CCFD1 should reconsider the current practice of holding Strategic Planning Retreats (SPRs) off-site at out-of-town locations. Because of several potential negative aspects (as previously described) of conducting strategic planning in the retreat format, it is recommended that strategic planning be transitioned into a continuous internal process. Further, it is recommended to the fire chief and Board of Directors to:

1. Forecast service level demands and set strategic goals to meet them, while anticipating threats and other emerging issues that could inhibit or prevent reaching those goals.
2. Prioritize the strategic goals and match available tax revenues and other financial resources to the extent possible. Budget allocations should be decided on evidence-based outcomes, and not just activity levels or historical funding.
3. Track progress and report on the status of strategic goals, programs, special projects, and other accomplishments. Use the data collected to publish an Annual Report. Use the Annual Report and other benchmarking tools to measure specific outcomes and overall effectiveness of the strategic planning process.

4. Include input from employees from all levels of the organization during the strategic planning and goal setting process to ensure employee ownership and avoid internal polarization.

Future researchers may want to consider examining the best practices of strategic planning and the benefits of holding off-site retreats versus an ongoing, on-site process. More research is needed in the area of employee motivation and its affect on strategic planning decisions. The reader is further encouraged to investigate specific municipalities and jurisdictions with proven and effective strategic planning models.

#

References

- Bacal & Associates. (2007). *The most common reason strategic planning fails*. Retrieved August 28, 2007 from <http://www.work911.com/planningmaster/faq/fail/htm>
- Brown meeting aims for rapport* (2007, July 30). *The Oregonian*, p. A12
- Bryson, J.M. (1988). *Strategic planning for public and nonprofit organizations: A guide for strengthening and sustaining organizational achievement*. p.22. San Francisco, CA: Jossey-Bass Publishers.
- Carter, H.R. & Rausch, E. *Management in the fire service*. (2nd ed.) National Fire Protection Association. Batterymarch Park, MA: Author.
- Center for Applied Research. (1999). *Some do's and don'ts for planning retreats in loosely coupled systems*. Retrieved July 14, 2007 from <http://www.cfar.com>.
- Clackamas County Fire District No.1 (2005). *Five Year Strategic Plan—2005-2010*. Milwaukie, OR: Author.
- Coleman, R.J. (1997). The chief's clipboard: Benchmarking on the road to success. *Fire Chief Magazine*, July 1997.
- Covey, S.R. (1989). *The seven habits of highly effective people. Powerful lessons in personal change*. New York, NY: Simon & Schuster Publishers.
- Denney, R.E. (1992). *The civil war years: A day by day chronicle*. p 315. New York: NY. Gramercy Books.
- Frisch R. & Chandler, L. (2006). Best practice off-sites that work. *Harvard Business Review*, Retrieved on August 3, 2007 from <http://harvardbusinessonline.hbsp.harvard.edu>
- Federal Emergency Management Agency (2005). *Executive Leadership: EL Student manual*. National Fire Academy. Emmitsburg, MD: Author.

- Gordon, G.L. (2005). *Strategic planning for local government*. (2nd ed.). Washington, DC: ICMA University Publishing.
- Grant, N.K. & Hoover, D.H. (1994). *Fire Service Administration*. National Fire Protection Association. Quincy, MA: Author.
- Heifetz, R.A. & Linsky, M. (2002). *Leadership on the line: Staying alive during the dangers of leading*. Boston, MA: Harvard Business School Press.
- Infoplease.com (2007). *The history of Camp David*. Retrieved September 24, 2007 from <http://www.infoplease.com/spot/campdavid1.html>.
- International City/County Management Association (2002). *Managing fire and rescue services*. Municipal management series. Washington, DC: ICMA University Publishing.
- Johnson, J.J. et al. (2007). *Tualatin Valley Fire & Rescue Strategic Plan*. Aloha, OR: Author.
- Kefalas, J. E. (1996). *Perception of fire department retreats at varying levels of the organization*. Executive fire officer program. Applied research project. National Fire Academy. Emmitsburg, MD: Author.
- Kefalas, J. E. (1997). Retreat, but do it right! Organizing a retreat for your officers might seem simple but there are pitfalls waiting for the unwary. *Fire Chief*. September 1997.
- King, W. R. & Cleland, D.I. (1978). *Strategic planning and policy*. New York, NY: Van Nostrand-Reinhold Publishing.
- Kramer, W.M. (1979). Management by objectives in the fire service. *The International Fire Chief*, May 1979.
- Mintzberg, H. (1989). *Mintzberg on management*. New York, NY: Collier-McMillian Publishing.

- Merriam-Webster's collegiate dictionary* (11th ed.) (2004). Springfield, MA: Merriam-Webster Publishers.
- Neroulas, E. & Roche, K. (2007). National Run Survey. *Firehouse*. July 2007. p. 73.
- Osborne, D. & Gaebler, T. (1992). *Reinventing government: How the entrepreneurial spirit is transforming the public sector*. Reading, MA: Addison-Wesley Publishing.
- Phillips, D.T. (1992). *Lincoln on leadership—Executive strategies for tough times*. New York, NY: Time-Warner Books.
- Schlesinger, A.M. (1993). *The almanac of American history*. p. 497. New York, NY: Barnes & Noble Book Publishers.
- Springer, A.M. (1990). Spring forward by retreating: Retreats to shape the future. *American Fire Journal*, August 1990.
- Snook, J. W. (1988). Staff retreats: A powerful management tool. *Journal of the International Association of Fire Chiefs*. p. 23. March/April 1988.
- Wallace, M. (2006). *Fire department strategic planning—Creating future excellence*. (2nd ed.). Tulsa, OK: PenWell Corporation, Fire Engineering Books.
- Wikipedia: The free encyclopedia (2007). *Strategy: word definition*. Retrieved October 2, 2007 from <http://en.wikipedia.org/wiki/Strategy>
- Wikipedia: The free encyclopedia (2007). *Retreat: word definition*. Retrieved October 2, 2007 from http://en.wikipedia.org/wiki/Ottoman_Empire

APPENDIX A
In-Class Survey



EXECUTIVE FIRE OFFICER PROGRAM
Executive Leadership

CHRIS S. GEIGER
May 2007

IN-CLASS STUDENT SURVEY
Strategic Planning Retreats

1. Number of career personnel in your department? _____
2. Does your department hold Strategic Planning Retreats (SPRs)? ☐ Yes ☐ No
3. If yes, how often is the SPR held? _____
4. How long is the SPR? _____ Do attendees stay overnight? ☐ Yes ☐ No
5. Who attends each SPR? _____
6. Is an agenda posted prior to the SPR? ☐ Yes ☐ No
7. Where is the SPR located? (in district, out of town, at a resort, etc.)

8. Is alcohol consumed by attendees at any time during the SPR? ☐ Yes ☐ No
9. Are outcomes or benchmarks measured before the next SPR? ☐ Yes ☐ No
10. In your opinion, are SPRs an effective management tool, and do you see results after each SPR? ☐ Yes ☐ No

APPENDIX B Expert Interviews

Mark Chubb, MPA,
Portland State University
Mark O. Hatfield School of Government
503 SW Mill Street #670E
Portland, OR 97207

Interviewed: October 16, 2007
Portland, Oregon
90 minutes

1. What is the concept behind conducting Strategic Planning Retreats (SPRs)?
To achieve strategic thinking from a "helicopter" perspective, detached from the action of the office. To establish outcomes and expectations for the organization.
2. How long has SPR concept existed in the business/corporate environment?
I remember hearing about it in the early 90's.
3. Is there a benefit to conducting the SPR away from town (off-site)?
It provides executives an opportunity to catch your breath. Think of it as a "calibration" that occurs every year. Sometimes being in the office environment we get too saturated with all sorts of inputs. Having the retreat away from the office can provide an escape to from distractions and think clearly.
4. Can the same outcome be achieved by conducting the SPR in town (on-site)?
It's possible. You could save on the cost of putting on the retreat by having it in the office
5. What are the organizational benefits of conducting SPRs?
It accomplishes strategic planning in a more relaxed social environment.
6. Are there any negative aspects of conducting SPRs?
The cost of hosting the event must be closely balanced with the expected benefits. Because values in our society are mounted to a sliding scale, what was "OK" ten years ago might not be accepted by the public today.
7. How can the effectiveness of SPRs be measured by an organization?
By seeking a critical review of the situation sometime after the retreat. To ask the question, "did the retreat facilitate the goal?"
8. Can it be possible that some organizations use the SPR as an employee reward?
Yes. Why wouldn't they?

Expert Interview

James E. Kefalas, EFO, CFO
Fire Service Consultant
4811 SE Wanda Court
Milwaukie, OR 97267

Interviewed: October 3, 2007
Oregon City, Oregon
60 minutes

1. What is the concept behind conducting Strategic Planning Retreats (SPRs)?
To prioritize projects and evaluate resources. To create a repetition of goal setting in a highly social environment. Otherwise, progress is not measured. It narrows the scope of the planning process.
2. How long has SPR concept existed in the business/corporate environment?
About twenty to twenty-five years. I first heard it being used in Phoenix.
3. Is there a benefit to conducting the SPR away from town (off-site)?
I believe a retreat relaxes people. They are more formal in the office and less likely to express an opinion. If you go somewhere overnight, they tend to loosen up and you get to know them better.
4. Can the same outcome be achieved by conducting the SPR in town (on-site)?
I don't think so, not in the office. Maybe a satellite location or neighboring town. It doesn't have to be a true "retreat" but just some place not in the office.
5. What are the organizational benefits of conducting SPRs?
A retreat is less sterile. There are fewer distractions, in fact I make people check their pagers at the door. You encourage participation.
6. Are there any negative aspects of conducting SPRs?
Yes, a decreased protection level at home, because all the fire commanders are at the retreat. And it can cost quite a bit to hold the retreat somewhere other than at home.
7. How can the effectiveness of SPRs be measured by an organization?
By asking line (operations) employees if things have gotten better since the last retreat. I'd ask them if the "hot button" issues had been resolved. You set the goals and then measure them later.
8. Can it be possible that some organizations use the SPR as an employee reward?
It is possible, but that's also team building.

Expert Interview

Richard Gooding
Corporate Business Consultant
Strategic Advantage Inc.
8533 North 16th Place
Phoenix, AZ 85020

Interviewed: August 15, 2007
By Telephone
25 minutes

1. What is the concept behind conducting Strategic Planning Retreats (SPRs)?
To allow the employees the ability to think differently than in the daily office environment, ringing telephones, email and pages, not at work. It allows for greater creativity when planning for the future.
2. How long has SPR concept existed in the business/corporate environment?
I began teaching it in the early 1990's.
3. Is there a benefit to conducting the SPR away from town (off-site)?
I believe so, it gets them (the employees) away from work—there's no distractions. People just think and behave differently away from the office, less stress or intimidation.
4. Can the same outcome be achieved by conducting the SPR in town (on-site)?
Possibly, but the people are not as "open" when they are in the office around other employees. But, times do change and many companies don't do retreats any more.
5. What are the organizational benefits of conducting SPRs?
In addition to those others, there is team building. They can encourage participation and executive development in some employees.
6. Are there any negative aspects of conducting SPRs?
Yes, there is the cost in direct dollars, and the time lost out of the office.
7. How can the effectiveness of SPRs be measured by an organization?
By establishing measurable goals with time limits, like long range plans versus twelve month plans. There must be performance measures in place, otherwise you won't know if you have accomplished anything during the retreat.
8. Can it be possible that some organizations use the SPR as an employee reward?
Absolutely. It's a common practice with many companies.

Expert Interview

Linda F. Willing
Fire Service Consultant
RealWorld Training & Consulting
PO Box 148
Grand Lake, CO 80447

Interviewed: December 11, 2007
By telephone
30 minutes

1. What is the concept behind conducting Strategic Planning Retreats (SPRs)?
The idea was to remove employees from their comfort zones and to kind of "mix it up" a bit.
2. How long has SPR concept existed in the business/corporate environment?
I started reading about it and hearing about it being used in the mid-eighties.
3. Is there a benefit to conducting the SPR away from town (off-site)?
The retreat concept allows the employees to be removed from daily distractions around the office. It was designed to kind of "wake up the routine" when strategic planning.
4. Can the same outcome be achieved by conducting the SPR in town (on-site)?
I think so, however people at the retreat will be influenced by the constant distractions of normal everyday business. Some fire departments do strategic planning all the time. However, true strategic planning should be revisited about every five years.
5. What are the organizational benefits of conducting SPRs?
Fewer distractions when strategic planning. The distractions can influence outcomes.
6. Are there any negative aspects of conducting SPRs?
Yes, the cost versus the benefits achieved. The idea is to create a balance between professionalism and leisure. The "sleep-over" practice, or drinking can sometimes be problematic.
7. How can the effectiveness of SPRs be measured by an organization?
Use a system. Use a system that measures the performance and evaluates achievement of goals in a timely way.
8. Can it be possible that some organizations use the SPR as an employee reward?
Oh, how can it not? You are a special guest invited to participate in this off-site event. Of course it's a special reward. And, you're still getting paid!

Expert Interview

Tom Dowling
Oregon State University
College of Business
200 Bexell
Corvallis, Oregon 97331-2603

Interviewed: November 15, 2007
By telephone
45 minutes

1. What is the concept behind conducting Strategic Planning Retreats (SPRs)?
The idea is to take employees away from the office and get a fresh view from them when making long-range plans for the business. I believe it is a product of the revolutionary ideas that was the way of thinking in terms of competition. It was the real buzz word in the corporate world for a long time.
2. How long has SPR concept existed in the business/corporate environment?
The mid-eighties...nineteen-eighty two, eighty-three maybe?
3. Is there a benefit to conducting the SPR away from town (off-site)?
There could be a benefit in terms of a relaxed atmosphere. If employees are away from the office they tend to be a little more relaxed.
4. Can the same outcome be achieved by conducting the SPR in town (on-site)?
Most likely, yes. Retreats are not that common any more. They have an associated cost. It's probably OK in a business environment, put in a public organization like you're saying, probably not. Depends of the governing Board I suppose.
5. What are the organizational benefits of conducting SPRs?
Well, if you accomplish strategic planning, which you should, it would be that. But you don't have to "retreat" to do it. You can conduct strategic planning internally.
6. Are there any negative aspects of conducting SPRs?
Retreats are expensive, or can be. Staff time, travel if it's out of town, meals, lodging, and a good facilitator...all this costs money. You could count lost productivity, also—lost time away from work.
7. How can the effectiveness of SPRs be measured by an organization?
Whether the strategic planning occurs during a retreat, or is accomplished as an ongoing process, certain goals must be measured. Any time you set a goal within an organization, you have to measure its progress, otherwise you have no idea if it's been achieved.
8. Can it be possible that some organizations use the SPR as an employee reward?
Yes, most larger companies do.

Expert Interview

Randy R. Bruegman, MIFireE, CFO
Fire Chief (Past I-CHIEFS President)
Fresno Fire Department
450 "M" Street
Fresno, CA 93721

Interviewed: December 17, 2007
By Telephone
30 minutes

1. What is the concept behind conducting Strategic Planning Retreats (SPRs)?
It was introduced in consulting work as an attempt at a less-autocratic and more responsive way of doing business.
2. How long has SPR concept existed in the business/corporate environment?
In the early eighties. It really became the "topic of the day."
3. Is there a benefit to conducting the SPR away from town (off-site)?
I never really saw a benefit to it. I never did it. I couldn't find a way to justify the expense other than as a "bonding experience."
4. Can the same outcome be achieved by conducting the SPR in town (on-site)?
Yes, absolutely. There is no valid reason to incur the associated costs.
5. What are the organizational benefits of conducting SPRs?
Well, I guess you could say that the employees can't be interrupted...but they still can.
6. Are there any negative aspects of conducting SPRs?
First is the expense of it. And, there is the sense of exclusion of firefighters not invited to attend. Also there can be a perception problem by the public. Research shows that about thirty-percent of the public already questions how we do business. This just reinforces their suspicions. As for drinking, you must have strict rules on business versus pleasure.
7. How can the effectiveness of SPRs be measured by an organization?
It is fairly easy to measure the effectiveness of strategic planning if goals are clearly outlined and measurable. They must be tested for effectiveness, and not just efficiency.
8. Can it be possible that some organizations use the SPR as an employee reward?
Yes.

Expert Interview

Robert O'Neill, Jr.
International City/County Management Association
777 North Capitol Street, NE
Suite 500
Washington, DC 2002-4201

Interviewed: September 4, 2007
By Telephone
15 minutes

1. What is the concept behind conducting Strategic Planning Retreats (SPRs)?
We learned from the private sector the lessons when strategic planning. The model used by many government organizations today remains consistent across the United States.
2. How long has SPR concept existed in the business/corporate environment?
For about thirty years.
3. Is there a benefit to conducting the SPR away from town (off-site)?
Not really. The concept and the process are what is important, not where it occurs.
4. Can the same outcome be achieved by conducting the SPR in town (on-site)?
Yes.
5. What are the organizational benefits of conducting SPRs?
Retreats can offer an interpersonal dynamic that wouldn't occur in the workplace.
6. Are there any negative aspects of conducting SPRs?
If participants don't acknowledge that strategic planning involves change, then there will be resistance. Also, all levels of the organizations should be represented in the planning process, not just the "leaders."
7. How can the effectiveness of SPRs be measured by an organization?
Through data collection and outcome measures.
8. Can it be possible that some organizations use the SPR as an employee reward?
It is possible.

APPENDIX C
Expert Opinion Letter & Reply

July 30, 2007

State of Oregon
Government Standards and Practices Commission
885 Summer Street NE, 2nd Floor
Salem, OR 97301-2522

I am a career fire captain with a municipal fire department, and a graduate student writing a research paper on the effectiveness of Strategic Planning Retreats. This letter is to request a written informal staff opinion on the subject of alcohol consumption by public employees while attending off-site retreats.

My research primarily explores the economic and practical benefits of government agencies holding annual planning retreats, and moreover, if performance benchmarks are measured after each retreat. However, while doing some preliminary work on the project, I learned that it is common for some employees to consume alcoholic beverages while attending these events.

These retreats are generally attended by executives, managers, union representatives and other administrative employees. The retreats are held at off-site locations (typically a resort or conference center) and are two or three days in duration. Because the employees are required to attend, they continue to receive wage and benefit compensation during these retreats—technically remaining “on-the-clock.”

Question: Is the consumption of alcoholic beverages by any public employee while receiving compensation attending an off-site Strategic Planning Retreat unethical in Oregon?

This request for information is for a school research project only and should not be considered a complaint about a specific Oregon public employer. Any response received from your staff will be included in my research paper. The final research paper will be on file in the library at the National Fire Academy in Maryland, and also made available on the internet. I appreciate any assistance you can provide.

Very sincerely,

Chris S. Geiger
20175 S. Homestead Drive
Oregon City, OR 97045
(503) 632-8235

Opinion Letter Reply



Oregon

Theodore R. Kulongoski, Governor

Oregon Government Standards
and Practices Commission
885 Summer St. NE, 2nd Floor
Salem, OR 97301-2522
(503) 378-5105
FAX (503) 373-1456
E-mail: gspc.mail@state.or.us
Web Site: www.gspc.state.or.us

August 7, 2007

Chris S. Geiger
20175 S Homestead Dr.
Oregon City, OR 97045

Dear Mr. Geiger:

The Oregon Government Ethics Commission (Commission) has received your request for an opinion regarding the consumption of alcoholic beverages by a public employee while receiving compensation for attending an off-site Strategic Planning Retreat.

The Commission's jurisdiction is very specific and relates to matters involving Oregon Lobby Regulation laws pursuant to ORS 171.725, executive session provisions of Oregon Public Meetings law pursuant to ORS 192.660 and Oregon Government Ethics law, which prohibits use of public office for personal gain pursuant to ORS Chapter 244.

The issues raised in your letter do not appear to involve these areas of Commission jurisdiction. I am sorry that we will not be able to help you with your concerns.

Sincerely,

Ronald A. Bersin
Executive Director

ethicsmacF

APPENDIX D
Public Fire Organization Survey Respondents

Canby Fire District No.62
Chief Ted Kunz
PO Box 909
Canby, OR 97013

U.S. Fire Administration
Gregory B. Cade, Administrator
16825 S. Seton Avenue
Emmitsburg, MD 21727

Eugene Fire & EMS Department
Chief Randy Groves
1705 W. 2nd Avenue
Eugene, OR 97402

International Association of Fire Chiefs
President James B. Harmes, CFO
117 High Street
Grand Blanc, MI 48439

Portland Fire & Rescue
Chief Dave Sprando
55 SW Ash Street
Portland, OR 97201

Salem Fire Department
Chief Greg Keller
370 Trade Street SE
Salem, OR 97301

Tualatin Valley Fire & Rescue
Chief Jeff Johnson
20665 SW Blanton Street
Aloha, OR 97007

Vancouver Fire Department
Chief Don Bivins
7110 N.E. 63rd Street
Vancouver, WA 98661

Fresno City Fire Department
Chief Randy R. Bruegman
450 "M" Street
Fresno, CA 93721

APPENDIX E
Private Corporation Survey Respondents

Recreational Equipment Incorporated (REI)
Executive Department
Jan Thiemens
PO Box 1938
Sumner, WA 98390

Alaska Airlines, Inc.
SEAEC
Maria Koenig
P.O. Box 68900
Seattle, WA 98168

Nike World Headquarters
Strategic Planning Department
Andrew Campion
One Bowerman Drive
Beaverton, OR 97005

Starbucks Coffee Inc.
Corporate Information Office
Brian Crynes
2401 Utah Avenue South
Seattle, WA 98134-1436

APPENDIX F
External Mail Survey Instrument



EXECUTIVE FIRE OFFICER PROGRAM
Field Research Questionnaire

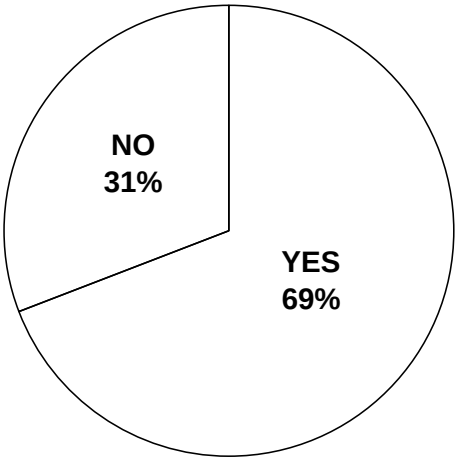
1. Number of career personnel in your department?
2. Does your department conduct Strategic Planning Retreats (SPRs)? ☐ Yes ☐ No
3. How often is the SPR conducted?
4. Where is the SPR located? ☐ In town/On-site ☐ Out of town/Off-site.
5. Is an agenda posted prior to the SPR? ☐ Yes ☐ No
6. Who is invited to attend each SPR?
7. How long is the SPR? Do attendees stay overnight? ☐ Yes ☐ No
8. Are outcomes or benchmarks measured before the next SPR? ☐ Yes ☐ No
9. How are benchmarks or outcomes measures after the SPR?
10. Does your organization publish an Annual Report?
11. What are the total costs incurred to conduct each SPR (Facilities, lodging, food, facilitator, materials, staff time, travel, etc.)?
12. At any time are alcohol beverages allowed to be consumed by attendees during the SPR?
☐ Yes ☐ No
13. Do you consider SPRs to be a valuable tool that results in effective planning decisions in your organization? ☐ Yes ☐ No

APPENDIX G¹
External Mail Survey Results

Organization Surveyed	Career Staff	Hold SPR	Town/ Site	Alcohol Bevs	SPR Effective
Canby (OR) Fire District No.62	18	Yes	In/On	No	Yes
Eugene (OR) Fire Department	219	No	--	--	--
Portland (OR) Fire & Rescue	723	Yes	In/On	No	Yes
Salem (OR) Fire Department	155	Yes	In/On	No	Yes
Tualatin Valley (OR) Fire & Rescue	410	Yes	In/On	No	Yes
Vancouver (WA) Fire Department	205	No	--	--	--
Fresno (CA) Fire Department	435	Yes	In/On	No	Yes
International Association of Fire Chiefs	52	Yes	In/On	No	Yes
U.S. Fire Administration	180	No	--	--	--
Nike Inc.	30,000	Yes	Both	Yes	Yes
Alaska Airlines, Inc.	10,000	Yes	Out/Off	Yes	Yes
Recreational Equipment Inc. (REI)	13,000	Yes	Out/Off	Yes	Yes
Starbucks Coffee Inc.	150,000	No	--	--	--

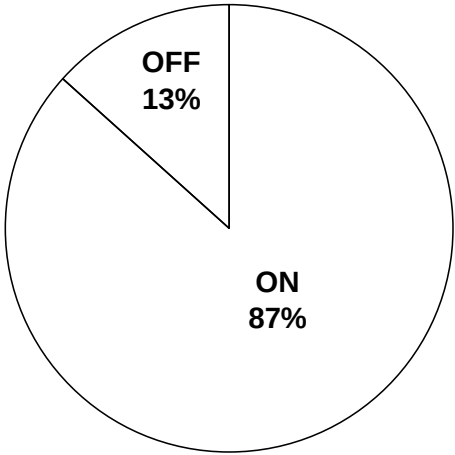
APPENDIX G²

SURVEY QUESTION #2
Are SPR's Conducted by the Organization



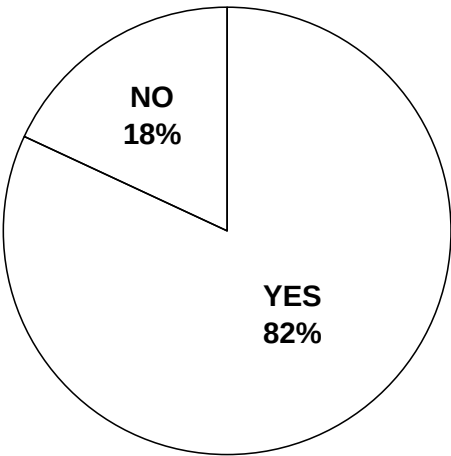
APPENDIX G³

SURVEY QUESTION #4
Are SPR's Conducted On or Off Site



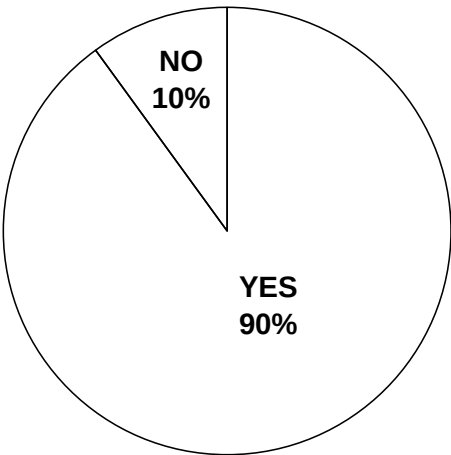
APPENDIX G⁴

SURVEY QUESTION #5
Is Agenda Posted Prior to SPR



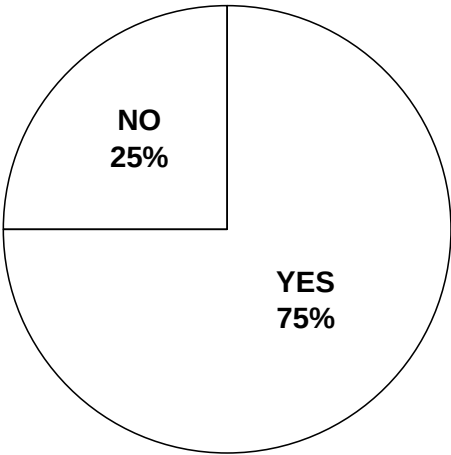
APPENDIX G⁵

SURVEY QUESTION #8
Are Benchmarks Measured



APPENDIX G⁶

SURVEY QUESTION #10
Is an Annual Report Published



APPENDIX G⁷

SURVEY QUESTION #12
Is Alcohol Allowed at SPR's

