



Ohio Fire Chiefs' Association

Ohio's Premier Fire & Emergency Service Leadership Association

REPORT ON STRATEGIC PLANNING WORKSHOP

September 11- 13, 2014
Deer Creek State Park, Ohio

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INTRODUCTION

The Board of Directors and staff of the Ohio Fire Chiefs' Association met September 11 through 13, 2014, to review the Ohio Fire Chiefs' Association's current Strategic Plan (developed in 2008) and to build on that plan to make it relevant to today's environment. The board represents a diverse group of fire chiefs from departments of varying sizes and budgets across Ohio. The members ranged widely in age and experience, providing a broad set of perspectives to inform the process.

The 2008 plan laid out clear goals, strategies and objectives, many of which have been met by the OFCA, out of a natural organizational development and occasionally by happenstance. Priorities have evolved during the ensuing six years, either because goals have been met, or external and internal forces have evolved over time. This new Strategic Plan reflects a nuanced view of work done in the past six years, acknowledging progress in some areas, while reinforcing some goals that still need to be addressed.

The following is an outline of the elements of the strategic planning session, with appendixes where necessary to illustrate the evolution of some of the steps in the process of identifying strategies, objectives and tactics, setting priorities, developing a time line, and identifying responsible parties.

MISSION OF THE OHIO FIRE CHIEFS' ASSOCIATION

The first exercise in the process entailed reviewing the existing Mission Statement of the OFCA, written approximately 6 years ago to see if it still resonates with the current board.

MISSION STATEMENT FROM 2008:

The Ohio Fire Chief's Association represents, educates and supports the leadership of Ohio's fire and emergency services.

MISSION EXERCISE:

The group pulled from that statement words they felt were still relevant, and talked about how they achieve those actions as an organization. They agreed that the following primary elements of OFCA's mission still resonate:

- **Represent**
- **Educate**
- **Support**

The group then identified these activities as key to achieving those actions:

Represent

- promote fire services
- provide voice
- advocacy

Educate

- information network
- improve fire services/personnel
- communicate

Support

- promote
- advocate
- leadership
- ensure safety
- provide a vision
- teamwork

The group remarked that "leadership" was a key component of their mission, leading by example and through actions such as initiating education programs and providing a vision for the profession.

They also agreed that the term “fire service” limits the scope of the organization’s reach, as less than half of the elements of their support and advocacy has to do specifically with fire issues. The consensus was to remove the word “fire” from the statement.

RESULT - 2014 MISSION STATEMENT:

The Ohio Fire Chiefs’ Association exists to improve the safety of Ohio by leading, representing, educating and supporting Ohio's emergency services.

VISION OF THE OHIO FIRE CHIEFS’ ASSOCIATION

The group reviewed the current Vision Statement from the 2008 Strategic Plan. It reads:

The Ohio Fire Chiefs’ Association will be the premier fire and emergency services association in the State of Ohio *by...*

- *Providing dynamic leadership in public safety issues,*
- *Promoting quality educational and career development opportunities,*
- *Responding to the needs of our membership,*
- *Promoting the value of the organization to current and potential members,*
- *Serving as the lead advocate on safety and legislative issues affecting Ohio’s fire and emergency service,*
- *Reaching out to continually inform, renew and invigorate membership,*
- *Promoting positive relationships with stakeholders in Ohio and beyond.*

The bulleted items listed below the main statement read as goals that have guided the organization in the past six years, and that are generally reflected in the body of the new Strategic Plan. While they can be appended to the new Vision Statement, by definition a Vision Statement is an aspiration and focused on the “what” an organization will be, rather than the “how” it will accomplish that. The recommendation is to keep the new Vision Statement focused, and to let the new Strategic Plan unfold the actions identified by the group as salient to achieving its goals in the next 12-24 months.

The group spent time brainstorming their ideas of how the OFCA would look in 5 to 10 years, focusing on the aspirations of the board for the future.

VISION EXERCISE:

The OFCA will:

- be a change agent for fire service in Ohio
- develop leadership
- anticipate threats
- prepare the next generation
- be a trusted resource
- be reputable
- be a leader
- be an innovator
- (remove word "fire", leave emergency services)

Key terms that resonated most with the group included “innovator” and “trusted resource.” (Removing “Ohio” implies a more global reach, worthy of the effort of this group, but also worthy of revisiting in future plans.)

NEW VISION STATEMENT: The OFCA will be the leading innovator and trusted resource in emergency services.

OFCA CORE VALUES

The group spent time brainstorming their ideas of the OFCA’s Core Values, the principles that guide every action of the organization.

The Core Values listed in the 2008 Strategic Plan report are:

- Compassion
- Diversity
- Excellence
- Integrity
- Leadership
- Professionalism
- Respect
- Stewardship

While these are salient and admirable qualities, core values should be beliefs that drive an organization’s actions, rather than general character traits. Here is what the 2014 group brainstormed as core beliefs:

- We conduct ourselves with professionalism
- We strive for safety of our communities and our personnel
- We believe in service before self
- We are respected
- We honor our traditions

- We conduct ourselves with integrity
- We are good stewards of our resources
- We are passionate service providers
- We are models of excellence and innovation
- We believe in maintaining a top reputation

And here is what they decided on as the key values of the current OFCA:

NEW CORE VALUES:

- **We honor our traditions**
- **We conduct ourselves with integrity**
- **We are good stewards of our resources**
- **We are passionate service providers**
- **We are models of excellence and innovation**

These core values should drive every action of the group. If an action doesn't reflect one of these, it should be eliminated. Adversely, if one of these values has no actions tied to it, perhaps it's time to revisit the plan.

EXAMINATION OF STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

Next, the group did an analysis of the strengths and weaknesses (internal) structure, opportunities and threats (external environment) of the organization that could have an impact on the organization's ability to successfully realize its mission. Here are the results of their brainstorming:

OFCA Strengths

- Education opportunities for members
- Testing/assessment programs
- Response resources
- Relationships with other associations
- Legislative/lobbying abilities
- Leadership/subject experts
- Our conference
- Our magazine

OFC A Weaknesses

- Message clutter
- Peer mentoring could be better
- Lack of members
- Lack of marketing strategy, message reach
- Broad base of constituents too diffuse
- Perception that we aren't relevant
- Perception of elitism

OFC A Opportunities

- Peer support
- Insurance industry collaboration
- Other safety related organizations
- Membership growth
- Opportunities to market better
- New ways to market conference

OFC A Threats

- Exclusivity perception
- Message clutter
- Changes in networking strategies
- Generational differences (younger, less time, use different technologies)

2014 GOALS

The group was asked to examine the above SWOT items and identify goals for the organization that could exploit the strengths, take advantage of unmet opportunities, or overcome weaknesses or outside threats to the organization. Then, they were asked to review the goals from the 2008 Strategic Plan to insert any they felt had not been adequately addressed by their brainstorming. Here is a list of their goals. Increase visibility of services

- Maintain/enhance alliances with stakeholders
- Continue being a leading voice
- Broaden scope of conference
- Increase number of issues of magazine
- Change perception of organization's exclusivity
- Add value to services
- Increase membership
- Increase participation
- Maintain value and relevance of organization
- Take advantage of technology
- Make education/professional development more relevant and accessible
- Increase financial stability

Based on voting by the members for their top three goals, here are the main goals of the Strategic Plan for 2015-16:

GOALS FOR 2015-16:

- 1. Increase OFCA's financial stability**
- 2. Increase OFCA's membership**
- 3. Make education/professional development more relevant and accessible**
- 4. Increase visibility of services**
- 5. Maintain value and relevance of organization**

DEFINING STRATEGIES, OBJECTIVES AND TACTICS

Several breakout sessions were held during the planning process. The group was divided into 5 smaller groups, each assigned one goal. Each group was asked to examine its assigned goal and to answer the following questions:

- How do you currently try to achieve this goal?
- What other things could you do to accomplish this goal?

They were asked to refer to the new Mission, Vision and Core Value statements, to make sure everything on their list reflected those guiding messages.

A second breakout session asked each group to look at the 2008 Strategic Plan and add any elements of that plan to their list of ideas.

A third breakout session gave each group their goals with outlined strategies and their lists of objectives. They were asked to review each action they listed, and make sure the actions followed the SMART rule (were specific, measurable, assignable, relevant, and time-related.)

After each breakout, the sub groups reported back to the group at large, who had opportunity to add to or comment on the lists generated.

Following is a summary of the goals, strategies, objectives and (where available) tactics identified by the end of this process:

GOAL I: INCREASE FINANCIAL STABILITY

Strategy I-1: Increase revenue through programs and services

Objective I-1-A: By January 1, 2016, executive director will develop detailed plan to market administrative services to other organizations (develop fee structure))

Objective I-1-B: Ask membership committee to address feasibility of tiered membership pricing structure

Objective I-1-C: Appoint "revenue committee" comprised of executive director, conference director, at least one vendor, and 3 board members to conduct feasibility study for corporate dues structure (by January 1, 2016).

-Tactic- once study is complete, alert vendors to outcome

Objective I-1 D: Sell advertising on OFCA website

Strategy I-2: Protect and utilize investments

Objective I-2-A: At close of each fiscal year, executive director will evaluate finances to determine funds available for investing

-Tactic - executive director will work with investment counselor to determine best/most appropriate investment strategies, tapping vendor resources if possible

-Tactic- use partner organizations to leverage investments if possible

Objective I-2-B: Appoint finance committee to address financial responsibilities

Objective I-2-C: Finance committee will determine feasibility of implementing a legacy program for OFCA members (by January 1, 2017)

Strategy I-3: Target one-time funding sources

Objective I-3-A: Executive director will explore and pursue the possibility of hiring a grant writer to investigate grant opportunities for specific programs

GOAL II: INCREASE OFCA MEMBERSHIP

Strategy II-1: Enhance ease of use of services for members

Objective II-1-A: Develop incentives to increase electronic program sign-up

Objective II-1-B: Staff to list related organizations across state and investigate best practices

Strategy II-2: Identify non-members and design membership incentives to attract them

Objective II-2-A: Executive director develops membership drive with incentives by January 2015; increase membership by 10% over 2 years

-Tactic-develop communications plan for membership drive (1/15)

-Tactic-staff, with board input, to revise membership brochure to include new incentives by January 2015

-Tactic-offer pro-rated memberships when implemented (by conference)

-Tactic-offer discounts for first year members

-Tactic-discount for qualifying members when they take a course

Objective II-2-B: Use district directors and county champions to help by identifying potential members

Objective II-2-C: Work with education committee to develop Fire Chief 101 program. If you attend, get a free membership (roll out at 2015 conference). Goal: 50% membership of non-members who attend

Objective II-2-D: Staff to develop trial membership plan: offer 4 per district, coordinated by district directors. Require/encourage them to attend at least one meeting or event. Goal: 50% renewal of those who sign up

Strategy II-3: Build relationships and connections with non-members

Objective II-3-A: Membership committee to develop survey to determine what these specific non-members need/want. Determine best methods to survey: in person, via email or snail mail.

-Tactic-collect lists of lapsed members, and people who have attended but never joined; these will be primary targets in the next 24 months

Objective II-3-B: Develop county champion/district directors program to:

-Tactic-supply names of key constituents for surveying by January 1, 2015

-Tactic-make personal contacts/face-to-face meetings

-Tactic-deliver Welcome Wagon packets

-Tactic-provide opportunities for conference calls to make connections

Objective II-3-C: Develop promotion reward program: district directors provide staff names of those with new promotions; staff sends congratulations letter from board president; county champion or district director does follow-up with those newly promoted

GOAL III: MAKE EDUCATION PROGRAMS MORE RELEVANT AND ACCESSIBLE

Strategy III-1: Design programs and services for those with limited resources

Objective III-1-A: Use survey results (see Goal #3) to design new programs

-**Tactic-** education committee reviews survey results by February 15 and plan future programs

-**Tactic-** present ideas on new programs to board by June 15, 2015

Objective III-1-B: Increase availability/ease of attending (timing, flexibility)

-**Tactic-**offer weekends, lower costs and increase frequency/reach in districts

Objective III-1-C: Develop and promote programs to appeal to smaller organizations

-**Tactic** – with education committee, develop program on life safety initiatives (health, driving, safety, Maxwell)

-**Tactic-**with education committee, develop programs for career members and for volunteers

-**Tactic-** offer officer development program

Objective III-1-D: Manage costs; find ways to reduce them for attendees

-**Tactic-** present larger percentage of programs in districts - reduce travel/lodging

-**Tactic-** procure grant to help underfunded? State Farm? (give to grants committee?)

-**Tactic-** grants are available; check with other states to see their best practices on funding programs

Strategy III-2: Take programs to constituents

Objective III-2-A: Highlight conference, OFCA offerings on webinars or video for online consumption (who will produce? check cost/benefit)

Objective III-2-B: Plan education programs for other stakeholders (i.e. legislators)

-**Tactic-** present Fire Chief 101 for legislators and others (township administrators, city managers, others)

-**Tactic-**develop policy making/lobbying 101 for Fire Chiefs (could be part of new Fire Chief 101)

Strategy III-3: Initiate alliances with other organizations

Objective III-3-A: Staff to contact state parks (ODNR)

Objective III-3-B: Staff to check into grants through ODNR & SFM

Objective III-3-C: OFCA board to research other states' best practices

-**Tactic-**create list of what members should look for

-**Tactic-** report at board meetings

-**Tactic-** ongoing with reviews in November/May

GOAL IV: INCREASE VISIBILITY OF OFTA SERVICES

Strategy IV-1: Develop comprehensive marketing plan

Objective IV-1-A: Executive director to investigate feasibility of hiring marketing firm or intern to develop and implement comprehensive marketing plan for OFCA

-Tactic- determine direction by January 2016

-Tactic- budget and implement plan by March 2016

-Tactic- include in new marketing materials by 2016

Objective IV-1-B: Staff plus 2-3 board members to form marketing committee

Objective IV-1-C: Executive director and board assemble final strategic plan and overlay Right Rain and other resources to assure all identified issues are addressed.

Objective IV-1-D: Sell/distribute apparel (member benefit?) (Promote as part of marketing plan)

Strategy IV-2: Embrace innovative technology

Objective IV-2-A: Staff and foundation education committee develop online method to ID prospective members at time of course registration.

-Tactic- staff/TCS to update web site to include page to capture data

-Tactic- initiate statistical information clearing house -dept. profile member login

-Tactic- CBA upload with ability to view -add wage fields for each position

-Tactic- basic benefit fields check box

-Tactic- data points ID/approved at November board meeting

-Tactic- data page to be built and up by December 2014; data collected January 2015

-Tactic- post-course evaluation and data to be forwarded by staff to district director; district director makes personal follow-up for recruitment. (by January 2016)

Objective IV-2-B: Include membership interest cards in all communications

-Tactic- disseminate new marketing materials (2016)

Objective IV-2-C: Develop content resources for Facebook, Twitter and update regularly

Objective IV-2-D: Build and promote online training opportunities

Strategy IV-3: Build new alliances with like-minded organizations; refresh existing ones

Objective IV-3-A: District director to identify representatives from each district to form subcommittee; will develop proposal for board approval at January 2015

Objective IV-3-B: Foundation education committee to partner with district directors to develop education offerings that meet interests of region (2015).

Objective IV-3-C: Target and develop program with/for two new groups per year, i.e. Civil Service Commission

GOAL V: MAINTAIN VALUE AND RELEVANCE OF OFCA

Strategy V-1: Keep current with trends

Objective V-1-A: Volunteer and education committees partner to develop and hold two pilot Fire Officer 1 classes designed for volunteer/small combo departments by December 2016

Objective V-1-B: Committee reviews pilot class and adjust as needed; offer revised FO1 class to volunteer/combo depts. by June 2017; class given as needed

Objective V-1-C: Education committee to continue with current courses and review every 2 years; staff to market; hold as needed.

Objective V-1-D: Education committee to keep abreast of current trends and offer courses to membership as opportunities present themselves

Strategy V-2: Enhance legislative relationships

Objective V-2-A: Maintain existing working relationships with legislative leaders

Objective V-2-B: Legislative agent and appropriate members meet annually or as needed with legislators to discuss current issues

Objective V-2-C: Legislative committee to email contact info of legislators to members and provide "hot sheet" for them to discuss the OFCA positions

-Tactic – ensure continuity of messages.

-Tactic- encourage members to meet annually with their legislators

Strategy V-3: Be responsive to constituents

Objective V-3-A: Board to develop a roster of 20 mentors from various size departments; offer free shepherding service to members via marketing plan; have program up and running by December 2017

Objective V-3-B: Board to develop position statements for public use

-Tactic- within 2 weeks of issuance, staff to place board position statements on website and social media outlets (to be part of Communications plan)

-Tactic- prioritize issues and educate fire service to contact their legislators

Objective V-3-C: All committees to recruit diverse members (small/med/large departments) to committee membership

-Tactic- have 50% of committee diverse by December 2018

Objective V-3-D: Board to develop roster of subject matter experts to provide advice and counsel to members.

-Tactic- market via marketing plan; available by December 2018

Objective V-3-F: Develop problem resolution system

ASSESSMENT

The one area we did not touch upon during our session (as we ran out of time) was the role of assessment in planning. Ideally, we would have discussed ways to determine what methods to use to determine whether you have succeeded in achieving the goals you set forth.

Some outcomes will present obvious results. Ideally, you can look at each goal and identify the measures that will indicate success. Some elements to examine include:

- Behavior of stakeholders
- Increase in stakeholder knowledge
- Change in stakeholder beliefs
- Increase in stakeholder awareness/frequency of responses to messaging
- Expression of stakeholder satisfaction

Some ways to measure these outcomes include:

- Key metrics such as attendance numbers, membership, website visits
- Cost/benefit analysis
- Media coverage
- Message reach/quantity of impressions
- Surveys (questionnaires)
- Qualitative analysis (focus groups, in person interviews)

For each goal, it will be helpful to identify the ways you will determine the level of success achieved, to more accurately identify goals, strategies and objectives for the next Strategic Plan.

SUMMARY

The biggest challenge to any strategic plan is keeping it alive and useful, and not putting it in a drawer. Ways to avoid this fate include involving, at the outset, those who are invested in the process and responsible for the actions. Committee, staff or board meetings to examine the objectives/tactics and further define or polish them can help keep focus and enthusiasm. The ability to track successes is also an advantage.

It is recommended that the OFCA staff and board appoint a strategic planning committee to evaluate this plan, and to review it regularly (ideally monthly, or at least quarterly.) This committee could include board members and staff, but also other relevant stakeholders.

A key ingredient to a good plan insures that every action taken directly flows from the mission, vision and core values of the organization. These statements or mantras should be the reference point for everything the organization does going forward, and a good guidepost for what stays in the plan.

Attached is a time line and list of responsible parties assigned to each task. This document will help to build a calendar of activities, and to quickly determine whether the plans are realistic, or whether some items must be delayed. Also attached is a list of actionable items listed according to level of determined importance and suggested time frame in which to complete them. This provides another way to look at the action plans.

Include those who are responsible for action items in planning, so they understand what is expected of them. Committees, such as education and membership, will need to be aware of those action items under their purview; they should report to the board their progress in achieving those actions.

On occasion, some objectives and tactics overlap. While most duplication has been combined, there may be ways to simplify objectives once they arrive at the desk of the responsible person or committee. One tactic that repeated in several areas is that of surveying other similar organizations for “best practices”, in membership development, education, funding, etc. It makes sense to combine these questions into a single survey process.

Two additional ideas surface: Among the core values are “passionate service providers” and “excellence in innovation”. I think these values may be those that can drive your growth in the next two years. Gauging your actions on the basis of “passion” and “innovation” could make a huge difference in how you design programs, and how you communicate them.

Finally, this strategic planning process encompasses a view of approximately 24 months. Life changes fast and you will want to **renew** your planning process at least every two years, but preferably annually. While many of the items in this plan mirror the plan from 2008, some priorities have shifted; and with every new leadership group, the OFCA will have new opportunities for fresh insights and renewed energy.

Thank you for allowing me to help the OFCA identify its goals, clarify its mission, and continue its essential work in the emergency services profession. It has been an honor to serve you.

With respect,

Nancy Nolan