



# SONOMA VALLEY FIRE & RESCUE AUTHORITY



## *2015-2020 Strategic Plan*

Facilitated by



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# SONOMA VALLEY FIRE & RESCUE AUTHORITY STRATEGIC PLAN Table of Contents

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## Executive Summary

It is my privilege to introduce the 2015-2020 Strategic Plan for the Sonoma Valley Fire & Rescue Authority (SVFRA). This second strategic plan represents our commitment to good stewardship of public resources and builds upon our previous successes. Our first plan covered the period 2009-2014, and, although the organization has experienced many changes since the first plan's inception, the SVFRA continues to operate with a strong work ethic and a high standard of public accountability.

The SVFRA contracted with the Center for Public Safety Excellence (CPSE) to facilitate a method to document the organization's path into the future through a "Community-Driven Strategic Plan." The following strategic plan was written in accordance with the guidelines set forth in the CFAI *Fire & Emergency Service Self-Assessment Manual*<sup>1</sup>.

The CPSE utilized the community-driven strategic planning process to go beyond the development of a document. It challenged the membership of the SVFRA to critically examine paradigms, values, philosophies, beliefs, and desires, and challenged individuals to work in the best interest of the "team." It further provided the membership with an opportunity to participate in the development of their organization's long-term direction and focus. Members of the organization's external and internal stakeholders' groups demonstrated commitment to this project and recognized the importance of aligning goals with the community's expectations.

This strategic plan, based on community and membership input, revisits the organization's Mission, Values, and Vision and sets forth a continuous improvement plan that offers a road map for a sustainable future.

This document also includes the goals and strategies from the earlier plan, along with corresponding achievements. Below are highlights of our accomplishments between 2009 and 2015:

- Created single governance structure through City of Sonoma Contract for Fire Protection and EMS Services with Valley of the Moon Fire Protection District.
- Transitioned to one operating budget.
- Established Fund Accounts, Capital Equipment Replacement Schedule, and Long-Term Building Maintenance Schedule.
- Adopted single, consolidated administrative policies and procedures manual.
- Reclassified EMS personnel on staffed ambulance to safety employees, resulting in six additional firefighters.
- Achieved 3-person staffing on all engines with introduction of volunteer stipend and firefighter exchange programs.
- Completed comprehensive remodel of Fire Station 2.
- Enrolled in Ground Emergency Medical Transportation (GEMT) and Intergovernmental Transfer (IGT) programs with the State of California to offset costs of providing care to Medi-Cal recipients.

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<sup>1</sup> Commission on Fire Accreditation International. (2009). *Fire & Emergency Service Self-Assessment Manual*. (8<sup>th</sup> Ed.)



- Revitalized ambulance membership with development of AMP (rebranding of FireMed program).
- Installed automated external defibrillators (AED) in City buildings and local schools.
- Created Labor-Management Committee to improve communications between management and labor by discussing and strategizing issues and opportunities.
- Developed new website and expanded social media presence.
- Created community disaster preparedness program.
- Expanded fire prevention services under the SVFRA.
- Upgraded existing equipment including acquisition of 3 new engines and a ladder truck.

In closing, I would like to thank all of the SVFRA employees who shared their thoughts and ideas throughout the planning process. Your honest feedback has been invaluable. Thank you also to the residents, elected officials, and our city and community partners who participated in this effort. Your input and support helped guide us and is critical to the success of this plan.

A handwritten signature in black ink, appearing to read "Mark Freeman".

Mark Freeman  
Fire Chief



## Organizational Background

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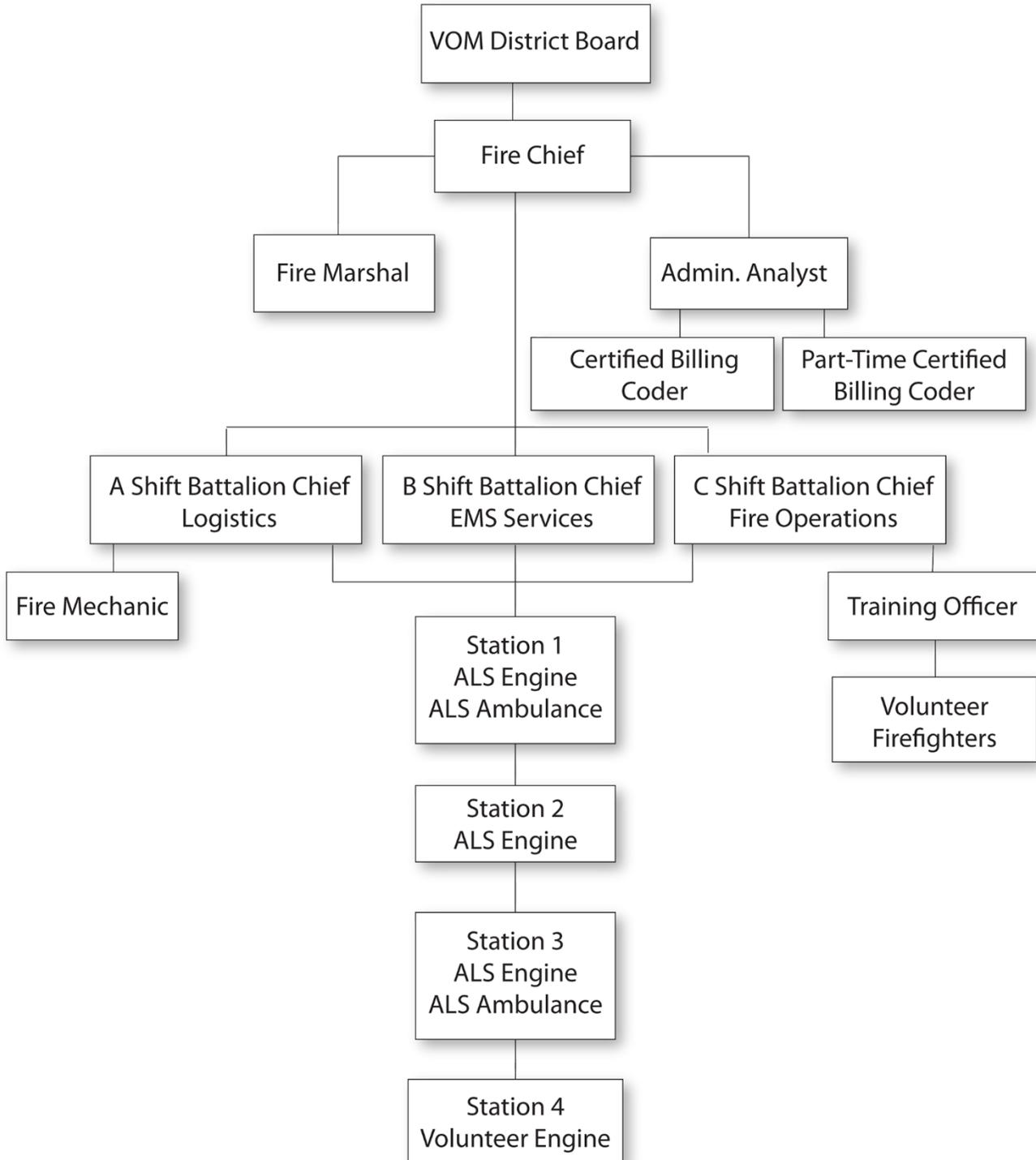
Sonoma Valley is located in southeastern Sonoma County in the heart of one of the world's premier wine producing regions. The scenic hills and agricultural valley provide a setting of unparalleled natural beauty for a multitude of visitor attractions, notably the annual 4<sup>th</sup> of July Parade and Fireworks Show and the Sonoma International Film Festival. Other destinations of interest include the historic Sonoma Plaza, Mission San Francisco Solano, General M. G. Vallejo Home, Sonoma Barracks, Sebastiani Theatre, Sonoma Valley Museum of Art, and the Blue Wing Inn of 1840. The rich and diverse cultural heritage of this desirable location is both a source of pride for residents and a pleasure for visitors.

The Sonoma Valley Fire & Rescue Authority (SVFRA) provides all-risk fire, rescue, and emergency medical services to the City of Sonoma and the Valley of the Moon Fire District communities of Agua Caliente, Boyes Hot Springs, Diamond A, El Verano, Feters Hot Springs, Temelec, and Seven Flags. Our service area covers 31.5 square miles, with a resident population of approximately 33,000. The SVFRA maintains four fire stations (three staffed with career personnel and one staffed by volunteers), an administrative office, and a maintenance facility. Daily staffing consist of 3 paramedic engine companies, 2 ALS ambulances and a Battalion Chief. The SVFRA also staffs an assortment of specialized equipment through the supplemental staffing of 47 dedicated volunteer firefighters. This equipment includes a ladder truck, rescue, water tender, and three additional fire engines.

From 2002 through 2011, the SVFRA operated under a joint-powers agreement (JPA) between the City of Sonoma and the Valley of the Moon Fire Protection District for joint purchasing, training and staffing. In 2009, both agencies saw the need to expand the focus of the JPA, which included the preparation of the first Strategic Plan. At that time, the JPA operated with two budgets and was governed jointly through an oversight committee composed of members of the City Council and the District Board of Directors. In addition to this Oversight Committee, the two agencies (City and District) also formed an Executive Board to review and adopt the Strategic Plan and to determine the long-term governance model as an outcome of that plan. Through collaborative discussions between the two agencies, it was determined that the most strategic and cost-effective model for sustainability of all-risk fire service was for the City of Sonoma to contract with the Valley of the Moon Fire District. This contract model resulted in the transfer of all City Fire and EMS employees to the District, which occurred in 2012. As we embark on this new generation of the strategic plan for 2015-2020, the SVFRA is a now a single governance agency with one operating budget. The District provides fire protection and emergency medical services to the City of Sonoma, while the City provides financial and treasury services to the District under a separate contract. Today, the SVFRA is a thriving and functional partnership between the City and the District. The SVFRA is an emerging model that is being closely monitored by other fire districts in the immediate area for potential replication.



## Organizational Chart





## Mission and Values

### Mission

The purpose of a mission statement is to answer the questions:

***Who are we? Why do we exist? What do we do? Why do we do it? For whom?***

A workgroup met to review those questions and assemble a mission statement that clearly reflects the SVFRA. The consensus of all stakeholders was that the following mission statement stands to represent the goals and philosophies of our organization.

**The Sonoma Valley Fire & Rescue Authority exists to protect the quality of life for present and future generations through interaction with our community, compassionate service and an atmosphere that encourages innovation, professionalism, and diversity.**

### Values

Values embraced by all members of an organization are extremely important, as they recognize the features that make up the personality of the organization. SVFRA's internal stakeholders agreed to the following values.

**Strategic  
Visible  
Flexible  
Responsive  
Accountable**

The Mission and Values are the foundation of this organization. Thus, every effort will be made to keep these current and meaningful so that the individuals who make up the SVFRA are guided by them in the accomplishment of goals, objectives, and day-to-day tasks.



## Vision

The final step in a strong strategic planning process is to establish a Vision moving forward through 2020. This vision is intended as a target of excellence to strive toward and provides a basis for the plan's goals and objectives.

### The Sonoma Valley Fire & Rescue Authority's 2015-2020 Vision

The vision of the SVFRA is to consistently demonstrate our values in fiscally sustainable mission delivery. This will be evident in our commitment to the organization's

**S**trategic plan direction, as determined by community input and broad organizational involvement, within our organization and regionally;

**V**isible and proactive public information and community outreach efforts;

**F**lexible workforce, appropriately staffed and well prepared to ensure organizational success in changing environments;

**R**esponsive leadership that will support the provision and maintenance of physical resources that enable all personnel to safely, efficiently, and effectively carry out their duties;

**A**ccountable personnel, throughout the organization and governing body, who will meet or exceed the community's expectations.

Our culture of continuous improvement will be widely recognized as we deliver our mission, live our values, accomplish our community-driven goals, and realize our vision.



## External Stakeholders

Development of the SVFRA strategic plan took place in June 2015, beginning with a meeting hosted by representatives from the CPSE and SVFRA for members of the community (external stakeholders). Input received from the meeting revolved around the community’s evaluation of the organization. Those present at this meeting were as follows:

Matt Atkinson <i>Chief, Glen Ellen FPD</i>	William Bradshaw <i>Sergeant, California Highway Patrol</i>	Lydia Cameron <i>George Ranch Community Association</i>	Toni Castrone <i>Sonoma Community Center</i>
David Cook <i>Mayor, City of Sonoma</i>	Rick Corcoran <i>The Fairmont Sonoma Mission Inn &amp; Spa</i>	Spencer Crum <i>Sergeant, Sonoma Police Department</i>	David Duncan <i>Diamond A Neighborhood Association</i>
Laurie Gallian <i>Mayor Pro Tem, City of Sonoma</i>	Anthony Gossner <i>Chief, Santa Rosa Fire Department</i>	J. J. Hernandez <i>Sonoma Developmental Center</i>	Michelle Heston <i>The Fairmont Sonoma Mission Inn &amp; Spa</i>
Colleen Kabeary <i>Vintage Sonoma</i>	William Lynch <i>Community Member</i>	Ray Mulas <i>Chief, Schell-Vista FPD</i>	Steve Page <i>Sonoma Raceway</i>
Bill Shubin <i>Chief, Kenwood FPD</i>	Patricia Shults <i>Sonoma Valley Chamber of Commerce</i>	Mike Stone <i>Community Member</i>	Paul Tuohy <i>Sonoma Valley Unified School District</i>
Kirk VanWormer <i>Battalion Chief, Cal Fire</i>	Veronica Vences <i>La Luz</i>	Doug Williams <i>Chief, Rincon Valley FPD</i>	Wayne Wirick <i>City of Sonoma</i>





## External Stakeholder Findings

A key element of the SVFRA's organizational philosophy is assuring a high level of commitment to the community. Therefore, the SVFRA invited community representatives to participate in a meeting focusing on the community's needs and expectations of the organization. The external stakeholders were asked to prioritize the programs offered by the organization through a process of direct comparison. Below is the ranking by majority scoring. These were utilized by internal stakeholders during discussions relating to future goals.

### *Community Priorities*

PROGRAMS	RANKING	SCORE
Emergency Medical Services	1	140
Fire Suppression	2	130
Rescue – Basic and Technical	3	114
Fire Prevention	4	68
Public Fire/EMS Safety Education	5	58
Hazardous Materials Mitigation	6	55
Domestic Preparedness Planning and Response	7	51
Fire Investigation	8	28



## Internal Stakeholders

The internal stakeholder work sessions were conducted to discuss the organization’s approach to community-driven strategic planning, with focus on the SVFRA’s Mission, Values, Core Programs and Support Services, as well as the organization’s perceived Strengths, Weaknesses, Opportunities, and Threats. The work sessions involved participation by organization representation in attendance, as named and pictured below.

Spencer Andreis <i>Battalion Chief</i>	Joe Boldt <i>Mechanic/Volunteer Captain</i>	Brian Brady <i>Director</i>	Jason Campbell <i>Firefighter</i>
Georgette Darcy <i>Administrative Analyst</i>	John Franceschi <i>Battalion Chief</i>	Mark Freeman <i>Fire Chief</i>	Dustin Garcia <i>Firefighter</i>
Carol Giovanatto <i>Sonoma City Manager</i>	Nick Greben <i>Director</i>	Ben Gulson <i>Engineer</i>	Richard Hanna <i>Volunteer Division Chief</i>
Bill Harper <i>Engineer, Union President</i>	DeAnna Hilbrants <i>Treasurer</i>	Alan Jones <i>Fire Marshal</i>	Rob Kingsford <i>Firefighter</i>
Sean Lacy <i>Captain</i>	Terry Leen <i>Director</i>	Kyle Lely <i>Engineer</i>	Scott Maxwell <i>Volunteer Engineer</i>
Joe Morrison <i>Captain</i>	Bob Norrbom <i>Battalion Chief</i>	Bill Norton <i>Director</i>	Trevor Smith <i>Engineer</i>
Jason Stayton <i>Engineer</i>	Gabe Stirnus <i>Engineer</i>	Sandra Walters <i>Certified Ambulance Billing Coder</i>	





## Internal Stakeholder Findings

### Programs and Services

The SVFRA internal stakeholders identified the following core programs provided to the community, as well as the services that enable the organization to deliver those programs:

#### Core Programs

Fire Suppression	Emergency Medical Services
Rescue – Basic and Technical	Public Fire/EMS Safety Education
Fire Prevention	Hazardous Materials Mitigation
Fire Investigation	Fleet Maintenance
Disaster Preparedness Planning and Response	

#### Supporting Services

Ambulance Billing Department	Dispatch/REDCOM
Mutual/Automatic Aid	Disaster Council
Local EMS Agency	Hospital
Board of Directors	City Governance
County Government	City Finance
Educational Institutions	Public Utilities
Volunteer Firefighters Association	Law Enforcement
Red Cross	Risk Management
Arson Task Force	Medical Director
Chaplain	Critical Incident Stress Debriefing (CISD)
Labor-Management Committee	Public Works
Vendors	Families
Training	Media
Information Technology (IT)	IAFF Local 3593
Administration	CAL FIRE



### Critical Issues and Service Gaps

After reviewing the SVFRA’s core programs and support services, and identifying internal strengths and weaknesses along with external opportunities and threats, two groups of internal stakeholders identified their primary critical issues and service gaps.

Group 1	Group 2
Succession planning	Financial sustainability
Recruitment/retention	Employer of choice
Fiscal sustainability	Demand outpacing resources
Training	Community involvement/expectations
Public outreach	Staffing
Staffing	Regionalization
Disaster preparedness	IT/networking
Infrastructure	Succession planning

### Strategic Initiatives

Data obtained from both internal stakeholder groups were analyzed and condensed to identify the organization’s strategic initiatives.

Financial/fiscal sustainability
Staffing/workforce planning
Succession planning
Recruitment/retention
Community outreach
Physical resources
Regionalization



## Goals and Objectives

In order to continuously achieve the mission of the SVFRA, realistic goals and objectives were established to enhance strengths, address identified weaknesses, provide a clear direction, and address the concerns of the community. These will be the focus of the SVFRA’s efforts as the organization progresses toward the future. Goals and objectives are not listed in priority order, as we believe that they are all equal in value to our organization.

<b>Goal 1</b>	<b>Develop a comprehensive and robust workforce plan that addresses staffing, recruitment, retention, and succession planning.</b>
<b>Objective 1A</b>	<b>Develop a revised staffing model to meet current and future community and operational demands.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Address current and future staffing level needs.</li> <li>• Conduct feasibility study to highlight methods for meeting staffing demands.</li> <li>• Identify funding mechanism to reinstate Training Officer position.</li> <li>• Evaluate ongoing availability of volunteers.</li> <li>• Modify staffing model based on current needs and impacts.</li> </ul>
<b>Objective 1B</b>	<b>Study recruitment and retention practices to attract the highest quality workforce.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Look for opportunities to increase number of applicants and support employee retention.</li> <li>• Analyze educational requirements, salaries and benefit packages with comparable agencies.</li> <li>• Continually review effectiveness of hiring and retention practices.</li> </ul>
<b>Objective 1C</b>	<b>Provide additional training and opportunities to prepare employees for career advancement</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Analyze employee’s knowledge, skills and abilities against community expectations and organizational needs.</li> <li>• Strategize new methods of recruitment, selection, promotion and training that address personnel development.</li> <li>• Establish mentor program to assist employees with career goals.</li> <li>• Revise Career Development Guide as needed.</li> <li>• Continue support of educational reimbursement program.</li> <li>• Research best practices and available resources to aid in the development of succession planning.</li> </ul>
<b>Objective 1D</b>	<b>Pursue recruitment opportunities for Station 4</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Study feasibility of utilizing interns to staff Station 4.</li> <li>• Evaluate options for rotating existing volunteer staff to serve this location.</li> <li>• Evaluate the need for site improvements to support staffing alternatives.</li> </ul>



<b>Goal 2</b>	<b>Enhance community outreach and public education programs</b>
<b>Objective 2A</b>	<b>Evaluate and expand the communication of major events with local/regional media outlets.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify a point of contact to communicate with local/regional outlets.</li> <li>• Develop a PSA policy.</li> <li>• Ensure all major events are publicized on our website.</li> </ul>
<b>Objective 2B</b>	<b>Expand social media presence.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Appoint responsible party to manage the social media program.</li> <li>• Release policy regarding social media use.</li> <li>• Expand to use all major and emerging social media platforms.</li> <li>• Evaluate the viability of online question/answer sessions.</li> </ul>
<b>Objective 2C</b>	<b>Ensure communications are available to the non-English speaking population.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Determine what internal and external resources are available to assist us in the communication of vital information to these residents.</li> <li>• Offer translated AMP brochures.</li> <li>• Ensure that appropriate training and educational opportunities are made available.</li> </ul>
<b>Objective 2D</b>	<b>Enhance delivery of the SCOPE and AMP programs within the community.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Expand outreach with community organizations.</li> <li>• Publish information on scheduled training sessions in local media.</li> <li>• Evaluate the current SCOPE training program and consider dividing it into modules.</li> <li>• Identify additional methods for marketing the AMP program to the community.</li> </ul>
<b>Objective 2E</b>	<b>Develop a community volunteer auxiliary program.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify interest in these programs.</li> <li>• Develop specific duties and responsibilities for each potential group.</li> </ul>
<b>Objective 2F</b>	<b>Continue and expand hands-only CPR/AED training to the public, including local schools.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify members trained in current practices that can deliver instruction.</li> <li>• Ensure that requisite training aids are available.</li> <li>• Ensure availability of training to employees/residents working in areas with community AEDs.</li> </ul>
<b>Objective 2G</b>	<b>Develop, produce, and disseminate an annual performance report.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• In January of each year, assign subject matter experts to compose their respective summaries of annual accomplishments from the previous year.</li> <li>• At the start of each year, compile those summaries along with organizational performance statistics, financial data, and photos as applicable to previous year.</li> <li>• Publish materials in hard copy and electronically, as appropriate.</li> </ul>



<b>Goal 3</b>	<b>Continue to provide well-maintained facilities, equipment, and technology to enable personnel to perform their jobs safely and efficiently.</b>
<b>Objective 3A</b>	<b>Identify the maintenance and improvements necessary to meet the needs of the department facilities over the next five years.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Form a committee to evaluate maintenance needs of department facilities.</li> <li>• Make recommendations for improvements.</li> </ul>
<b>Objective 3B</b>	<b>Identify any deficiencies in IT infrastructure.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Form an IT needs and improvements committee.</li> <li>• Identify opportunities to increase interoperability as technology changes.</li> </ul>
<b>Objective 3C</b>	<b>Identify the improvements and replacements required to maintain a constant state of readiness for all mobile equipment.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Evaluate current vehicle replacement schedule and revise as determined necessary.</li> <li>• Evaluate maintenance workload and revise as necessary.</li> <li>• Evaluate any current and future deficiencies in capital equipment (monitors/gurneys/SCBA/turnouts/etc.).</li> <li>• Develop a plan to accomplish this objective.</li> </ul>
<b>Objective 3D</b>	<b>Identify funding sources to meet this goal.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Evaluate current budget conditions and determine future needs.</li> <li>• Seek out grant opportunities.</li> <li>• Utilize SVFFA assistance via the 501(c)(3).</li> <li>• Seek out available private funding opportunities.</li> <li>• Consider regionalization/group purchasing options.</li> </ul>



<b>Goal 4</b>	<b>Maintain fiscal sustainability with the necessary budgeting mechanisms and equitable distribution of costs between agency partners.</b>
<b>Objective 4A</b>	<b>Establish a program to regularly communicate financial information to stakeholders such as staff, board and community.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Develop rolling forecast such as 3-year forecast outlining potential revenue/expense gaps.</li> <li>• Align with city philosophy and methodology for financial management and communication.</li> <li>• Develop communication program to share financial information in a comprehensible format.</li> <li>• Maintain an ongoing forecasting and communication program.</li> </ul>
<b>Objective 4B</b>	<b>Evaluate capital infrastructure and establish a long-term plan for funding.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Review and refine long-term building maintenance schedule.</li> <li>• Develop schedule for replacement and maintenance of information technology assets.</li> <li>• Create annual schedule (aligned with city methodology) to fully fund maintenance and replacement needs.</li> <li>• Once fully funded, maintain annual funding levels and evaluate annually.</li> </ul>
<b>Objective 4C</b>	<b>Explore future budgetary opportunities.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Evaluate additional revenue opportunities (EMS, administrative, prevention, fleet maintenance, outsourcing services, grants, special tax assessments, etc.).</li> <li>• Research opportunities to reduce or offset expenses.</li> <li>• Prioritize opportunities and execute selected options.</li> <li>• Review regularly.</li> </ul>



<b>Goal 5</b>	<b>Pursue additional partnerships with neighboring agencies to enhance services</b>
<b>Objective 5A</b>	<b>Identify the benefits of shared services.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify areas where potential cost and productivity improvements can be realized (i.e. training, administration, prevention, fleet maintenance and physical resources).</li> <li>• Identify how service levels can be improved within each community.</li> <li>• Evaluate ways that progressive fire service ideas could enhance services within the community.</li> </ul>
<b>Objective 5B</b>	<b>Ensure that members of all departments and communities are given the opportunity to provide input and participate in the process.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify and support stakeholders.</li> <li>• Disseminate information to stakeholders.</li> <li>• Evaluate findings and make recommendations.</li> </ul>
<b>Objective 5C</b>	<b>Incrementally implement changes that enhance delivery of service throughout the region.</b>
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Establish a review process to justify that recommended changes support the goal.</li> <li>• Actively work towards finding additional opportunities where services could be enhanced.</li> <li>• Maintain open lines of communication with stakeholders to ensure a commitment to the process.</li> </ul>



## Glossary of Terms and Acronyms

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<b>ALS</b>	Advanced Life Support
<b>CFAI</b>	Commission on Fire Accreditation International
<b>CPSE</b>	Center for Public Safety Excellence
<b>Customer(s)</b>	The person or group who establishes the requirement of a process and receives or uses the outputs of that process; or the person or entity directly served by the department or agency.
<b>Efficiency</b>	A performance indication where inputs are measured per unit of output (or vice versa).
<b>EMS</b>	Emergency Medical Services
<b>Environment</b>	Circumstances and conditions that interact with and affect an organization. These can include economic, political, cultural, and physical conditions inside or outside the boundaries of the organization.
<b>IAFF</b>	International Association of Fire Fighters
<b>Input</b>	A performance indication where the value of resources are used to produce an output.
<b>Mission</b>	An enduring statement of purpose; the organization's reason for existence. Describes what the organization does, for whom it does it, and how it does it.
<b>Outcome</b>	A performance indication where qualitative consequences are associated with a program/service; i.e., the ultimate benefit to the customer.
<b>Output</b>	A performance indication where a quality or number of units produced is identified.
<b>Stakeholder</b>	Any person, group, or organization that can place a claim on, or influence the organization's resources or outputs, is affected by those outputs, or has an interest in or expectation of the organization.
<b>Strategic Plan</b>	A long-range planning document that defines the mission of the agency and broadly identifies how it will be accomplished, and that provides the framework for more detailed annual and operational plans.
<b>Strategic Planning</b>	The continuous and systematic process whereby guiding members of an organization make decisions about its future, develop the necessary procedures and operations to achieve that future, and determine how success is to be measured.
<b>Strategy</b>	A description of how a strategic objective will be achieved. A possibility. A plan or methodology for achieving a goal.
<b>Vision</b>	An idealized view of a desirable and potentially achievable future state - where or what an organization would like to be in the future.



## APPENDICES



**Appendix I: 2009-2014 SVFRA Goals and Strategies with Corresponding Status**

**Goal 1: Financial Sustainability**

SVFRA seeks to retain financial sustainability with the necessary budgeting mechanisms and an equitable distribution of costs between agency partners.

Strategy	Key Implementation Tasks	Status
<p>1. Establish a single operating budget for SVFRA for greater efficiency</p>	<ul style="list-style-type: none"> <li>• Merge City Fire &amp; EMS into one budget.</li> <li>• Obtain approval for the merged authority line-item budget from VOM Board &amp; City Council</li> <li>• Determine the level of cost sharing by the parties</li> </ul>	<ul style="list-style-type: none"> <li>▶ Fire &amp; EMS merged into one budget.</li> <li>▶ Combined budget approved and in place for 4 years.</li> <li>▶ Cost share formula was determined and implemented by the transition team.</li> </ul>
<p>2. Create a five-year financial forecast and update it as necessary to guide the Authority’s annual budgetary decisions</p>	<ul style="list-style-type: none"> <li>• Create a five-year financial forecast</li> <li>• Report update to the governing body</li> <li>• Request authorization for mid-term adjustments when necessary</li> <li>• Update forecast annually to reflect changes in revenue</li> </ul>	<ul style="list-style-type: none"> <li>▶ Decision made not to forecast with extreme market fluctuations due to recession.</li> <li>▶ Mid-year adjustments have not been necessary – organization controlling expenditures.</li> <li>▶ Have been successful with short-term, one-year forecasts.</li> </ul>
<p>3. Create a five-year capital budget and determine the sources of funding for each Capital Project</p>	<ul style="list-style-type: none"> <li>• Determine funding for the capital equipment and apparatus replacement schedule</li> <li>• Explore &amp; obtain funding for priority needs</li> <li>• Establish internal service fund for future purchases</li> <li>• Update capital budget annually to reflect changes in needs</li> </ul>	<ul style="list-style-type: none"> <li>▶ Established Fund Accounts and allocated reserves to each.</li> <li>▶ Identified and developed a Capital Equipment Replacement Schedule.</li> <li>▶ Identified and developed a Long-Term Building Maintenance Schedule.</li> <li>▶ Have not yet been successful in funding annual contributions as outlined in the aforementioned schedules.</li> </ul>
<p>4. Explore funding sources to support services provided by SVFRA</p>	<ul style="list-style-type: none"> <li>• Examine costs &amp; benefits of various funding sources (including paramedic assessment district concept)</li> </ul>	<ul style="list-style-type: none"> <li>▶ Enrolled in GEMT and IGT reimbursement programs to offset the costs associated with providing care for Medi-Cal recipients.</li> <li>▶ Actively promoting the Ambulance Membership Program in an effort to increase subscriptions.</li> </ul>
<p>5. Secure a multi-year contract with Infineon Raceway (now Sonoma Raceway) to provide emergency medical services</p>	<ul style="list-style-type: none"> <li>• Negotiate contract</li> <li>• Review contingency plan to anticipate actions if contract is not renewed</li> </ul>	<ul style="list-style-type: none"> <li>▶ Contract with raceway ended July 14, 2013.</li> </ul>



**Goal 2: Governance and Organization**

SVFRA seeks to have an effective governance structure that supports excellence in service delivery and transitions the organization to a single employer for future employees.

Strategy	Key Implementation Tasks	Status
1. Research and consider various governance options, including: a. One JPA organizational structure b. Contract between agency partners for fire, rescue & emergency services	<ul style="list-style-type: none"> <li>• Prepare report</li> <li>• Discuss with governing bodies</li> <li>• Make determination</li> </ul>	<ul style="list-style-type: none"> <li>▶ The City of Sonoma signed a contract for services with the VOMFPD that commenced on February 1, 2012.</li> </ul>
2. Create a unified set of written administrative policies and procedures	<ul style="list-style-type: none"> <li>• Identify policies &amp; procedures needed</li> <li>• Revise policies &amp; procedures (as needed)</li> <li>• Adopt a standard set of policies &amp; procedures</li> <li>• Create a single administrative manual</li> <li>• Review manual on an annual basis to ensure that policies &amp; procedures are up to date</li> </ul>	<ul style="list-style-type: none"> <li>▶ SVFRA has adopted a policy manual with Lexipol.</li> <li>▶ Policies are revised according to State and Federal regulations, and changes to SVFRA practices.</li> <li>▶ Manual is reviewed as needed.</li> </ul>

**Goal 3: Service Delivery**

SVFRA seeks to continue providing efficient firefighting, rescue, medical, fire prevention, and community emergency response services.

Strategy	Key Implementation Tasks	Status
1. Provide community emergency & disaster preparedness programs to support community self sufficiency	<ul style="list-style-type: none"> <li>• Involve SVFRA in community AED program</li> <li>• Implement SCOPE (Sonoma Citizens Organized to Prepare for Emergencies)</li> <li>• Promote public education</li> <li>• Support Sonoma Citizens' Disaster Council</li> </ul>	<ul style="list-style-type: none"> <li>▶ AEDs installed in City buildings and all schools valley wide.</li> <li>▶ SCOPE program implemented.</li> <li>▶ Disaster council supported with SVFRA representation assigned to a Fire Captain.</li> </ul>
2. Increase the level of fire prevention services in the community	<ul style="list-style-type: none"> <li>• Continue school-based fire safety</li> <li>• Expand resources to support public outreach about wildland fires, home fire safety &amp; other issues</li> <li>• Develop wildland fire protection plan</li> </ul>	<ul style="list-style-type: none"> <li>▶ SVFRA makes fire safety visits to local schools annually during Fire Prevention Week.</li> <li>▶ Developed a Wildland Pre-attack Plan for the Eastern portion of Sonoma Valley. Plan includes a public education component with evacuation plans.</li> </ul>
3. Conduct community-wide disaster drills to keep emergency management protocols current & effective	<ul style="list-style-type: none"> <li>• Involve public safety, City employees &amp; community members</li> <li>• Maintain grant eligibility and fulfill grant criteria</li> <li>• Practice Incident Command System (ICS) training</li> <li>• Engage the community in a disaster drill</li> </ul>	<ul style="list-style-type: none"> <li>▶ Fire Captain assigned to Disaster Preparedness.</li> <li>▶ Have conducted annual EOC drills for City staff.</li> <li>▶ Have provided NIMS, SEMS and ICS training to staff and elected officials.</li> </ul>



<p>4. Create &amp; implement a public education outreach program</p>	<ul style="list-style-type: none"> <li>• Develop public communication strategy</li> <li>• Develop materials for public distribution</li> <li>• Work with City to agree on information flow to external sources</li> </ul>	<ul style="list-style-type: none"> <li>▶ New website includes public resources and a social media component.</li> <li>▶ SCOPE program materials made available to the public.</li> </ul>
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**Goal 4: Staffing**

SVFRA strives to attract and retain skilled members and appropriate staffing levels in all positions.

Strategy	Key Implementation Tasks	Status
<p>1. Evaluate current administrative functions &amp; structure to ensure that they are adequate to support the organization’s mission</p>	<ul style="list-style-type: none"> <li>• Identify functions that must be performed (e.g. budgeting, accounting, personnel, purchasing, etc.)</li> <li>• Create a job analysis form to be completed by admin. staff</li> <li>• Create flow charts of key administrative functions, including time required for each step</li> <li>• Identify tasks not being completed in a timely manner</li> <li>• Identify changes in processes that would save time</li> <li>• Identify staffing needs</li> </ul>	<ul style="list-style-type: none"> <li>▶ This is an ongoing process that has identified the following staffing needs:               <ul style="list-style-type: none"> <li>• Training Officer - 1 FTE</li> <li>• Fire Inspector - 0.5 FTE</li> </ul> </li> <li>▶ Existing employee cross- trained as a Certified Ambulance Billing Coder in 2014.</li> </ul>
<p>2. Strive to achieve the goals in the staffing plan identified in the Standards of Response Coverage</p>	<ul style="list-style-type: none"> <li>• Develop funding mechanism for 3-0 staffing on all engines</li> <li>• Obtain grants (e.g. SAFER grants) to provide funding for staff salaries</li> <li>• Use more part-time firefighters on Engine 3 to emulate Engines 1 &amp; 2</li> <li>• Convert M-303 rescue unit to safety employees</li> </ul>	<ul style="list-style-type: none"> <li>▶ 3-0 staffing on all engines accomplished by utilizing Volunteer Firefighters through a stipend program</li> <li>▶ Conversion of M-303 to safety employees completed, resulting in 6 additional firefighters.</li> </ul>
<p>3. Develop &amp; implement a succession plan that ensures we have qualified &amp; trained members who will be eligible for higher-level positions</p>	<ul style="list-style-type: none"> <li>• Review &amp; revise career development guide</li> <li>• Create educational opportunities through a partnership with employees</li> <li>• Provide opportunities for training experience in administrative positions to build skill sets</li> </ul>	<ul style="list-style-type: none"> <li>▶ Career development guide has been revised.</li> <li>▶ Created and implemented tuition reimbursement program for employees who wish to pursue educational opportunities.</li> </ul>
<p>4. Ensure that all members meet all federal, state, local &amp; other mandates</p>	<ul style="list-style-type: none"> <li>• Strengthen existing training program</li> <li>• Modify training program to meet changing requirements from the Federal Government, State of California, OSHA, NFPA, or other mandating agency</li> <li>• Annually evaluate the training program to ensure that it is compliant with federal, state, local &amp; other mandates</li> </ul>	<ul style="list-style-type: none"> <li>▶ The Operations Battalion Chief has been temporarily assigned to take on the duties of the training officer, as there is currently insufficient funding to fill this position.</li> </ul>



<p>5. Identify &amp; implement methods to improve the flow of communication between personnel</p>	<ul style="list-style-type: none"> <li>• Identify internal communication methods to keep SVFRA personnel regularly informed</li> <li>• Use the identified communication methods to provide information to personnel</li> <li>• Twice annually, evaluate the communication methods to determine effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>▶ Labor-Management Committee established to discuss and solve SVFRA issues as they arise.</li> <li>▶ Captains meetings held annually.</li> <li>▶ Shift meetings occur on a regular basis.</li> <li>▶ Administrative staff meetings are held monthly.</li> </ul>
<p>6. Recruit &amp; retain more volunteer/part-time firefighters to serve the needs of the SVFRA</p>	<ul style="list-style-type: none"> <li>• Provide opportunities for qualified part-time, cross-trained employees to fill open spots on engines</li> <li>• Maintain a market pay structure for part-time employees</li> <li>• Emphasize part-time recruitment for Station 4 response area</li> <li>• Annually evaluate recruitment strategies for part-time (volunteer) firefighters</li> </ul>	<ul style="list-style-type: none"> <li>▶ SVFRA has initiated a Firefighter Exchange Program with neighboring agencies to fill sleeper shifts.</li> <li>▶ Part-time Firefighters have transitioned to a Volunteer Stipend Program to address ACA impacts.</li> <li>▶ SVFRA currently developing strategies to recruit more Volunteers for Station 4.</li> </ul>
<p>7. Develop &amp; implement a plan to increase the number of bilingual employees to provide emergency services to non-English speakers</p>	<ul style="list-style-type: none"> <li>• Provide training to employees in Spanish</li> <li>• Recruit bilingual employees</li> <li>• Explore bilingual pay incentives</li> <li>• Annually evaluate effectiveness of bilingual initiatives</li> </ul>	<ul style="list-style-type: none"> <li>▶ Spanish version of Rosetta Stone® software purchased for employee training.</li> </ul>

**Goal 5: Facilities, Equipment, Technology and Apparatus**

SVFRA seeks to have well-maintained facilities, equipment, technology, and apparatus that enable personnel to perform their jobs safely and efficiently.

Strategy	Key Implementation Tasks	Status
<p>1. Create a comprehensive facilities plan that identifies the maintenance &amp; improvements necessary to meet the needs of the department over the next ten years</p>	<ul style="list-style-type: none"> <li>• Gather existing information on improvements needed in SVFRA facilities</li> <li>• Identify information gaps &amp; determine how to obtain the information</li> <li>• Prepare a ten-year plan</li> <li>• Annually evaluate &amp; update ten-year plan to meet current conditions</li> </ul>	<ul style="list-style-type: none"> <li>▶ Identified and developed a Long-Term Building Maintenance Schedule.</li> </ul>
<p>2. Relocate &amp; build Station 2 to better serve the needs of the community</p>	<ul style="list-style-type: none"> <li>• Secure funding for rebuilding of Station 2</li> <li>• Identify the new location</li> <li>• Obtain preliminary plans</li> <li>• Secure utilities</li> <li>• Initiate bid process for construction</li> <li>• Construct Station 2</li> </ul>	<ul style="list-style-type: none"> <li>▶ Station 2 was renovated in 2013 at its current location.</li> </ul>
<p>3. Retrofit Station 3 to meet ADA guidelines &amp; accommodate gender equity needs</p>	<ul style="list-style-type: none"> <li>• Secure funding for Station 3 retrofit</li> <li>• Obtain preliminary plans</li> <li>• Initiate bid process for retrofit</li> <li>• Begin retrofit</li> </ul>	<ul style="list-style-type: none"> <li>▶ Plans have been designed.</li> <li>▶ Offices have been converted to individual dorms.</li> </ul>



<p>4. Create a capital equipment &amp; apparatus replacement schedule</p>	<ul style="list-style-type: none"> <li>• Conduct inventory of all equipment &amp; determine remaining life of each item</li> <li>• Create a schedule for replacing each item</li> <li>• Integrate replacement schedule into capital budgeting process</li> <li>• Annually evaluate replacement schedule to determine if changes need to be made</li> </ul>	<ul style="list-style-type: none"> <li>▶ Equipment inventory data entered in SVFRA records management system for tracking and replacement.</li> <li>▶ Identified and developed a Capital Equipment Replacement Schedule.</li> <li>▶ Fund account created for capital equipment in March of 2015.</li> </ul>
<p>5. Create &amp; implement a multi-year information technology strategic plan that will guide the SVFRA into the future</p>	<ul style="list-style-type: none"> <li>• Identify ways to collaborate with the City's IT plan</li> <li>• Identify opportunities to increase interoperability as technology changes</li> <li>• Ensure SVFRA is working toward the same communication platform as the City</li> </ul>	<ul style="list-style-type: none"> <li>▶ SVFRA participated in a group purchase of a new phone system, providing interoperability between the City and SVFRA.</li> </ul>
<p>6. Ensure a constant state of readiness for all mobile equipment</p>	<ul style="list-style-type: none"> <li>• Maintain funding for a full-time mechanic</li> </ul>	<ul style="list-style-type: none"> <li>▶ Maintenance Shop now provides service to outside agencies as an additional funding source.</li> </ul>



## Appendix II: Community Assessment

### Community Expectations

Understanding what the community expects of its fire and emergency services organization is critically important to developing a long-range perspective. With this knowledge, internal emphasis may need to be changed or bolstered to fulfill the community needs. In certain areas, education on the level of service that is already available may be all that is needed. Following are the expectations of the community's external stakeholders:

(in priority order)

1. Timeliness. Rapid response time.
2. Well trained. Provide excellent training for all employees.
3. Public outreach. Public education. Educational materials for the public. Community based safety programs.
4. Professional. Professional, but sensitive, response to victim's concerns.
5. Operational readiness. Respond effectively to medical emergencies and other rescue situations.
6. Properly equipped. Maintain equipment in response ready condition.
7. Strong community ties. Community involvement. Visible in the community when not on emergency.
8. Safety. Personnel safety.
9. Customer service. Appropriate interaction with clients.
10. Communication.
11. Emergency response and mitigation.
12. Operate in a fiscally responsible fashion. Remain and strive to be transparent in the usage of public funding, but also in operations and decision making.
13. Provide for life safety.
14. Put out fires.
15. Continue to provide a safe and preventive community.
16. It is expected that an ambulance be available to respond to medical emergencies.
17. Transparency.
18. Protect property.
19. Proficient in suppression, EMS, rescue, etc.
20. Control – taking over.
21. Ability to prioritize emergencies.
22. Show a true concern for the public that you serve.
23. Maintain the combination of paid and volunteers, and keep the volunteers active in all aspects of the department.
24. Complete the job – start to finish.
25. Strong area knowledge.



26. Protect the environment.
27. Prevention program.
28. Consistency – systematic.
29. Internal assessments to keep resources (people, equipment, and technology) at appropriate levels.
30. Plan for and prepare for the range of potential threats to homes and businesses.
31. Response in sufficient force (numbers) in major emergencies.
32. Must be prepared to deal with a natural disaster and accommodate the number of elderly people who will be affected in the disaster. Develop a community resource list.
33. Maintain operations as current with other agencies.
34. Work well with other EMS agencies.
35. Equipment and manpower sufficient to do the job – or communicate to community about critical needs.
36. Assurance that the buildings constructed provide fire and life safety considerations.
37. Control pensions and benefits that are beneficial to the employees and the tax payer.
38. To evacuate residents in the hills when necessary in the event of fire.
39. Fire service leadership and cooperation with other fire agencies.
40. Responsive.
41. Assurance that buildings are properly maintained.
42. Develop leadership inside the department to carry out future plans.



### Areas of Community Concern

The planning process would be incomplete without an expression from the community regarding concerns about the organization. Some areas of concern may in fact be a weakness within the delivery system, while some weaknesses may also be misperceptions based upon a lack of information. The SVFRA will focus on this area during the 2015-2020 strategic plan.

- Do they respond at the appropriate level needed? “Medical only calls don’t need a ladder truck,” etc.
- Do they have enough staff?
- Are they well-funded?
- Staffing.
- Infrastructure.
- Stability of ambulance service.
- Budget.
- Succession planning – grow your own.
- Morale – need to maintain above average.
- Budget – fiscally sustainable?
- Are we meeting customer expectations? What are they?
- Plan to involve community in disaster planning.
- Is communication with the public adequate?
- Are the needs of the public being met?
- Budgets.
- Having enough/the right tools.
- Recruitment – finding talent.
- Response times.
- Drought – dry – more fire.
- Funding.
- Department is equipped with appropriate resources—again, people and equipment.
- Fiscally accountable to constituents – ability to “tell the story” and be engaged – so when resources are necessary, the community is supportive.
- Ability to maintain a high level of training and experience with the resources available.
- Maintaining consistent quality service through multiple management transitions.
- Some concern with respect to transitions in political leadership.
- Managing multiple jurisdictions and department relationships without compromising services.
- Is the department spread too thin? Are there enough emergency responders available?
- Are staff properly trained on how to deal with customers of all ages?
- Are there enough emergency responders on duty in a major emergency (locally)?



- How many, not on duty, live too far away to come in for major emergencies – earthquake, wildfire, etc.?
- Can Sonoma Valley pay enough so firefighters can live here?
- Binding information and services to non-English speaking community members.
- We have limited ambulance service/staffing. Consider outsourcing ambulance services to private companies: SLS/Faulk/Bells.
- AMP program isn't well-received.
- Don't let MOU/contract concerns and issues affect the service you provide.
- Staffing levels? Are the citizens getting what they are paying for?
- The entanglements of city government can make it difficult for a district.
- Financial accounting accurately addresses future costs.
- New state and federal rules make doing business difficult.
- Knowing where volunteers fit.
- Future staffing and availability of local volunteers.
- Past hiring of retired chief.
- Budget (future).
- Preparedness of future issues in a changing environment.
- Longevity of qualified personnel.
- Public relations.
- Salary (attracting qualified personnel).
- From all I observe, doing an excellent job. Is there money to do all to A+ that should be done?
- Adequate staffing levels.
- Recruitment and retention of volunteers.
- Enough funding to fulfill their mission.
- That during certain emergencies the response to remote areas may take too long (earthquake, massive fires).
- That the protocols for relatively remote areas are not communicated.
- Area of coverage, response times, education possibilities and training, succession leadership.
- Very happy with my dealings. Only concerned if "cutbacks" are coming.
- Concerned this may be a busy summer season.



### **Positive Community Feedback**

The CPSE promotes the belief that, for a strategic plan to be valid, the community's view on the organization's strengths must be established. Proper utilization and promotion of its strengths often helps an organization overcome or offset some of the identified weaknesses.

- Overall, the FD does a great job with the resources given.
- Have always responded in timely manner—from my experience—when called.
- Often hire locals.
- Pleasant and informative.
- Seem well-trained.
- Willing to reach out and work with others.
- Great efficiency.
- Local presence, role models, and inspiring professional vocations.
- Training and response time.
- Equipment in well-working order with a mind to efficient economies of scale.
- Organizational structure supported by the workforce.
- Department does excellent jobs responding to the few fires we have had in the hills.
- As a relatively new resident, I have a good impression from all that I've seen.
- Well-trained and dedicated.
- Community involvement.
- Very responsive to questions when called in and knowledgeable.
- Quick response times.
- Qualified personnel.
- Community involvement.
- Public relations.
- Ability to work with other fire departments (mutual aid).
- Current Board of Directors are strong and active.
- Administration staff work well with other agencies.
- They have moved in a positive direction with the annexation.
- They are leaders in our community.
- Well respected.
- Competent.
- Engaged.
- Cooperative.
- Leading.
- Great team atmosphere here in Sonoma.



- They work very well with other public safety departments.
- Very professional, very accommodating.
- I've worked a number of incidents with them and they seem well-trained and suited to deal with the encounter.
- There are still some firefighters with local roots. I'd like to see more.
- Still have volunteers – good!
- Fire museum and name Al Mazza on the firehouse.
- For the most part, customer service has been excellent.
- I appreciate the open communication with your staff.
- Response time has been good – just always concerned.
- Positive, professional image.
- Good community profile.
- Killer fireworks.
- Resource sharing and collaboration seems to be very good!
- Excellent and well-trained staff.
- Efficient use of resources and good budget management.
- Viewed as very positive within the community.
- Well respected and highly valued.
- Quick.
- Caring.
- Professionals.
- Well managed.
- Professional.
- Open to improvement.
- Desire to investigate itself for the purpose of improvement.
- Strong operationally.
- Good reputation.
- Good participation throughout the county.
- Willing to look at options for all programs.
- Department is always trying to make itself better.
- Great workforce.
- Well trained.
- Active in the community.
- Active volunteers.
- Works well with the fire community.
- Responsive.



- Proud of their job!
- Prepared.
- Very strong public image.
- Buildings and equipment all appear well cared for and maintained.
- Uniformed personnel are friendly and easy to work with.



## Other Thoughts and Comments

The Community was asked to share any other comments they had about the SVFRA or its services. The following written comments were received:

- Very happy with my dealings.
- Doing an outstanding job.
- Coordination of effort to efficiency of resources, workforce.
- Climate change, and the need for those who cannot afford the adaptations of the environment, should be provided education and understanding.
- Wildfires, extreme heat, storms – balance the unexpected.
- Thank you for doing community outreach.
- SVFRA is a key player in the total system.
- Great process! Thank you for the opportunity to participate.
- Thank you for welcoming and incorporating feedback as a part of future direction – it will ensure a sense of community.
- Continue to be present in the community through participation in various events – it is always good to see a friendly face from the safety department.
- Good job in setting a strategic plan, but always remember that the service provided is measured with more than just numbers and goals met.
- I think you all are fantastic! Thanks for doing what you do.
- Members of the department are heroes...which comes with very high expectations to meet all and divergent needs of the community. Remaining visible and engaged as community members is key.
- Thank you. Great process.
- We truly appreciate the department as we often seek for assistance being one of the largest businesses in the valley.
- Thank you for everything you do.
- Generally a strong department with good reputation.
- Employees (management) work well with others.
- This is a great department and I look forward to seeing how this process makes it even better.
- Awesome team!



### Appendix III: S.W.O.T. Analysis

The Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis is designed to have an organization candidly identify its positive and less-than-desirable attributes. Internal stakeholders participated in this activity to record their strengths and weaknesses, as well as the possible opportunities and potential threats.

#### Strengths

It is important for an organization to identify its strengths in order to be capable of providing the services requested by the community. Programs that do not match organizational strengths, or the primary function of the organization, should be reviewed to evaluate the rate of return on staff time and allocated funds. Through a consensus process, the internal stakeholders identified the strengths of the SVFRA as follows:

Constant State of Readiness (CSR)	Leadership
Equipment	Paramedic care/ALS service provided
Facilities	Morale
Training opportunities	Customer service
Labor/management relations	Relationship with the volunteer association
Political support	Future advancement opportunities
Employee retention	Financial management
Board of Directors	District Treasurer
Staffing flexibility—including use of neighboring volunteers	Relationship with neighboring fire agencies, SVH, Public Works, and Law Enforcement
Employee health and wellness	Community support/perception
Enhanced level of service through contract for services with the City	Employees - dual role (firefighter and paramedic certified)
Internal communications	Employee recognition improving
Lexipol Policy Manual	Relationship with city
Volunteer retention	Fire ground operations
Great fleet maintenance	Volunteer Firefighters Association fundraisers
Managing loss control	Fire prevention/Fire Marshal
City manager	Administrative Staff
Labor/Management Committee (LMC)	Statewide mutual aid participation (strike team)



**Weaknesses**

Performance within an organization depends greatly on the identification of weaknesses and how they are confronted. For an organization to continue to move progressively forward, it must not only be able to identify its strengths, but also those areas where it may function poorly. These areas of needed enhancements are not the same as threats to be identified later in this document, but rather those day-to-day issues and concerns that may slow or inhibit progress. The following items were identified by the internal stakeholders as weaknesses:

Lack of training officer	Recruitment/retention (both) Volunteers ↔ Full-time -Small candidate pool -Leaving for other organizations -Lower salary in comparison
Limited staffing/“stretched too thin”	
Limited public education	
Limited public outreach	
Limited revenue sources	Not enough use of media
Enforcement of fire prevention	Limited succession planning for: <ul style="list-style-type: none"> <li>• Fire Marshal</li> <li>• Fire Chief</li> </ul>
Limited funding/budget	
Policies, procedures, oversight of social media	Equipment replacement schedule (service life)
Limited promotional opportunities	Lack of bilingual members
Inability to consistently meet goal of three person engine staffing	Company officer initiative (change it up) additional/different scenarios
PCR program (FIREHOUSE)	Complacency
FIREHOUSE Records Management System	IT system/accessibility
Fire prevention staffing	Decrease in group training
Limited BC interaction with crews due to increased areas of responsibility	Firefighter exchange program/sleeper program (goal not reached 100% of the time)
Lack of apparatus replacement funding and facilities maintenance from district	Loss of institutional knowledge due to members leaving/retiring
Interagency training	Station 4/Diamond “A” staffing
Lack of annual employee physicals	Down-staffing engines for EMS calls
Pre-plans (outdated or non-existent)	



**Opportunities**

The opportunities for an organization depend on the identification of strengths and weaknesses and how they can be enhanced. The focus of opportunities is not solely on existing service, but on expanding and developing new possibilities both inside and beyond the traditional service area. The internal stakeholders identified the following potential opportunities:

Expansion of SVFRA	County Fire Services Project
Integrating community volunteers (non-safety) - Auxiliary	Providing additional fleet maintenance contracts, with additional staffing
S.V.F.F.A. 501(c)(3) status	Community paramedic program
First responder fees	Grants/regional
Social media/Public communication	Inter-facility transfer (IFT) contracts
Enhance volunteer recruitment through colleges	Enhancing city and district partnership with EMS revenue/debt
Commercial plan review and inspections in the county	Hands only CPR – including 7 <sup>th</sup> grade CPR program
Sonoma Valley Fund - obtaining/securing funds [grant opportunity for 501(c)(3) organizations]	Outside sponsor training – ACLS/CPR/officer classes, etc.
	Expand billing opportunity
Community fundraising	Succession planning/training for the future
Mentoring opportunities for increasing recruitment of personnel	Improve relationship with media (i.e. paper/radio)
Group purchasing	Growth of the AMP Program
Outreach to the Latino community	



**Threats**

To draw strength and gain full benefit of any opportunity, the threats to the organization, along with their risks and challenges, must also be identified in the strategic planning process. By recognizing possible threats, an organization can reduce the potential for loss. Fundamental to the success of any strategic plan is the understanding that threats are not completely and/or directly controlled by the organization. Some of the current and potential threats identified by the internal stakeholders were as follows:

Recruitment and retention of volunteer firefighters	Neighboring departments competing for new candidates
Pension reform	Misconceptions/negative press/media
ERAF reductions	Medicare/insurance reimbursement
County Municipal Service Review plan (loss of local control and decreased/reduced services)	Funding i.e. reduced tax revenue and increased cost of business
Large scale natural disaster	Natural disaster
Recruitment/retention of career firefighters	Economy
Rising cost of insurance	Changing demographics
Unfunded mandates	Aging infrastructure
Changing technology	Aging population (in and out of department)
Rising cost of living	Less Firefighters living in town
Potential political changes	Domestic terrorism
Loss of SVH ER	Affordable Care Act
Communications (MDCs) – lack of proper updates and needs improvement plus additional training	Change in Exclusive Operating Area 1 and cause/effect at dispatch



## Appendix IV: Implementation Plan

Priorities were identified by the Internal Stakeholders. The significance of the priorities is that they show intent as to timeframe for accomplishment.

### Goal 1: Develop a comprehensive and robust workforce plan that addresses staffing, recruitment, retention, and succession planning.

<i>Objectives</i>		<i>Critical Tasks</i>	<i>Status</i>	<i>Priority 1, 2, 3</i>
1A	Develop a revised staffing model to meet current and future community and operational demands	<ul style="list-style-type: none"> <li>• Address current and future staffing level needs.</li> <li>• Conduct feasibility study to highlight methods for meeting staffing demands.</li> <li>• Identify funding mechanism to reinstate Training Officer position.</li> <li>• Evaluate ongoing availability of volunteers.</li> <li>• Modify staffing model based on current needs and impacts.</li> </ul>		1
1B	Study recruitment and retention practices to attract the highest quality workforce	<ul style="list-style-type: none"> <li>• Look for opportunities to increase number of applicants and support employee retention.</li> <li>• Analyze educational requirements, salaries and benefit packages with comparable agencies.</li> <li>• Continually review effectiveness of hiring and retention practices.</li> </ul>		2
1C	Provide additional training and opportunities to prepare employees for career advancement	<ul style="list-style-type: none"> <li>• Analyze employee’s knowledge, skills and abilities against community expectations and organizational needs.</li> <li>• Strategize new methods of recruitment, selection, promotion and training that address personnel development.</li> <li>• Establish mentor program to assist employees with career goals.</li> <li>• Revise Career Development Guide as needed.</li> <li>• Continue support of educational reimbursement program.</li> <li>• Research best practices and available resources to aid in the development of succession planning.</li> </ul>		2
1D	Pursue recruitment opportunities for Station 4	<ul style="list-style-type: none"> <li>• Study feasibility of utilizing interns to staff Station 4.</li> <li>• Evaluate options for rotating existing volunteer staff to serve this location.</li> <li>• Evaluate the need for site improvements to support staffing alternatives.</li> </ul>		1



**Goal 2: Enhance community outreach and public education programs**

<b>Objectives</b>		<b>Critical Tasks</b>	<b>Status</b>	<b>Priority 1, 2, 3</b>
2A	Evaluate and expand the communication of major events with local/regional media outlets	<ul style="list-style-type: none"> <li>Identify a point of contact to communicate with local/regional outlets.</li> <li>Develop a PSA policy.</li> <li>Ensure all major events are publicized on our website.</li> </ul>		1
2B	Expand social media presence	<ul style="list-style-type: none"> <li>Appoint responsible party to manage the social media program.</li> <li>Release policy regarding social media use.</li> <li>Expand to use all major and emerging social media platforms.</li> <li>Evaluate the viability of online question/answer sessions.</li> </ul>		1
2C	Ensure communications are available to the non-English speaking population	<ul style="list-style-type: none"> <li>Determine what internal and external resources are available to assist us in the communication of vital information to these residents.</li> <li>Offer translated AMP brochures.</li> <li>Ensure that appropriate training and educational opportunities are made available.</li> </ul>		1
2D	Enhance delivery of the SCOPE and AMP programs within the community	<ul style="list-style-type: none"> <li>Expand outreach with community organizations.</li> <li>Publish information on scheduled training sessions in local media.</li> <li>Evaluate the current SCOPE training program and consider dividing it into modules.</li> <li>Identify additional methods for marketing the AMP program to the community.</li> </ul>		1
2E	Develop a community volunteer auxiliary program	<ul style="list-style-type: none"> <li>Identify interest in these programs.</li> <li>Develop specific duties and responsibilities for each potential group.</li> </ul>		3
2F	Continue and expand hands-only CPR/AED training to the public, including local schools	<ul style="list-style-type: none"> <li>Identify members trained in current practices that can deliver instruction.</li> <li>Ensure that requisite training aids are available.</li> <li>Ensure availability of training to employees working in areas with community AEDs.</li> </ul>		1



<b>Objectives</b>		<b>Critical Tasks</b>	<b>Status</b>	<b>Priority 1, 2, 3</b>
2G	Develop, produce, and disseminate an annual performance report	<ul style="list-style-type: none"> <li>• In January of each year, assign subject matter experts to compose their respective summaries of annual accomplishments from the previous year.</li> <li>• At the start of each year, compile those summaries along with organizational performance statistics, financial data, and photos as applicable to previous year.</li> <li>• Publish materials in hard copy and electronically, as appropriate.</li> </ul>		1

**Goal 3: Continue to provide well-maintained facilities, equipment, and technology to enable personnel to perform their jobs safely and efficiently.**

<b>Objectives</b>		<b>Critical Tasks</b>	<b>Status</b>	<b>Priority 1, 2, 3</b>
3A	Identify the maintenance and improvements necessary to meet the needs of the department facilities over the next five years	<ul style="list-style-type: none"> <li>• Form a committee to evaluate maintenance needs of department facilities.</li> <li>• Make recommendations for improvements.</li> </ul>		1
3B	Identify any deficiencies in IT infrastructure	<ul style="list-style-type: none"> <li>• Form an IT needs and improvements committee.</li> <li>• Identify opportunities to increase interoperability as technology changes.</li> </ul>		1
3C	Identify the improvements and replacements required to maintain a constant state of readiness for all mobile equipment	<ul style="list-style-type: none"> <li>• Evaluate current vehicle replacement schedule and revise as determined necessary.</li> <li>• Evaluate maintenance workload and revise as necessary.</li> <li>• Evaluate any current and future deficiencies in capital equipment (monitors/gurneys/SCBA/turnouts/etc.).</li> <li>• Develop a plan to accomplish this objective.</li> </ul>		1
3D	Identify funding sources to meet this goal	<ul style="list-style-type: none"> <li>• Evaluate current budget conditions and determine future needs.</li> <li>• Seek out grant opportunities.</li> <li>• Utilize SVFFA assistance via the 501(c)(3).</li> <li>• Seek out available private funding opportunities.</li> <li>• Consider regionalization/group purchasing options.</li> </ul>		2



**Goal 4: Maintain fiscal sustainability with the necessary budgeting mechanisms and equitable distribution of costs between agency partners**

<i>Objectives</i>		<i>Critical Tasks</i>	<i>Status</i>	<i>Priority 1, 2, 3</i>
4A	Establish a program to regularly communicate financial information to stakeholders such as staff, board and community	<ul style="list-style-type: none"> <li>• Develop rolling forecast such as 3-year forecast outlining potential revenue/expense gaps.</li> <li>• Align with city philosophy and methodology for financial management and communication.</li> <li>• Develop communication program to share financial information with a comprehensible format.</li> <li>• Maintain an ongoing forecasting and communication program.</li> </ul>		1
4B	Evaluate capital infrastructure and establish a long-term plan for funding	<ul style="list-style-type: none"> <li>• Review and refine long-term building maintenance schedule.</li> <li>• Develop schedule for replacement and maintenance of information technology assets.</li> <li>• Create annual schedule (aligned with city methodology) to fully fund maintenance and replacement needs.</li> <li>• Once fully funded, maintain annual funding levels and evaluate annually.</li> </ul>		1
4C	Explore future budgetary opportunities	<ul style="list-style-type: none"> <li>• Evaluate additional revenue opportunities (EMS, administrative, prevention, fleet maintenance, outsourcing services, grants, special tax assessments, etc.).</li> <li>• Research opportunities to reduce or offset expenses.</li> <li>• Prioritize opportunities and execute selected options.</li> <li>• Review regularly.</li> </ul>		1



**Goal 5: Pursue additional partnerships with neighboring agencies to enhance services**

<b>Objectives</b>		<b>Critical Tasks</b>	<b>Status</b>	<b>Priority 1, 2, 3</b>
5A	Identify the benefits of shared resources	<ul style="list-style-type: none"> <li>Identify areas where potential cost and productivity improvements can be realized (i.e. training, administration, prevention, fleet maintenance and physical resources).</li> <li>Identify how service levels can be improved within each community.</li> <li>Evaluate ways that progressive fire service ideas could enhance services within the community.</li> </ul>		1
5B	Ensure that members of all departments and communities are given the opportunity to provide input and participate in the process	<ul style="list-style-type: none"> <li>Identify and support stakeholders.</li> <li>Disseminate information to stakeholders.</li> <li>Evaluate findings and make recommendations.</li> </ul>		1
5C	Incrementally implement changes that enhance delivery of service throughout the region	<ul style="list-style-type: none"> <li>Establish a review process to justify that recommended changes support the goal.</li> <li>Actively work towards finding additional opportunities where services could be enhanced.</li> <li>Maintain open lines of communication with stakeholders to ensure a commitment to the process.</li> </ul>		2