Scope of Work – Organizational Strategic Plan Facilitation

The deliverable for the Strategic Plan scope will include the development of organizational Mission, Vision, and Values along with a comprehensive set of Goals, Objectives, and Critical Tasks that can be implemented throughout Medford Fire-Rescue. ESCI will facilitate the development of a Strategic Plan initiative that is linked to the recent Master Plan document as a supporting plan of action along with other organizational initiatives.

PHASE ONE

Task No. 1: Project Initiation & Scheduling
Activity: ESCI will develop a project plan and converse with the department’s project liaison to gain a comprehensive understanding of the goals and expectations for the strategic plan process. The project plan will be developed identifying:

- Local strategic planning team composition and recruitment
- Strategic planning workshop format
- Schedule
- Location and other logistical issues
- Potential impediments and organizational issues

This meeting will also help to establish working relationships, make logistical arrangements, determine an appropriate line of communications, and finalize contractual arrangements.

PHASE TWO

Task No. 2: Planning Workshop
Activity: ESCI will facilitate the development of an organizational strategic plan utilizing a local planning team (12 to 20 persons) that includes representatives of various levels and interests within the agency. The strategic planning process will involve a two and one half to three day strategic planning “retreat” to be held on consecutive days at an appropriate location within the community suitable for both full group sessions, as well as breakout small group work sessions.

Objective 1: Vision, Mission, and Values
ESCI’s experienced facilitators will guide the local planning team in the development of meaningful vision, mission, and values:

- Vision statements describe the way the organization views itself in the future
- Mission statement describes the purpose for which the organization exists
- Values enumerate the principles or ideas that are important to the members

ESCI will facilitate discussions that ensure participation by all present in order to stimulate challenging thought processes, prevent tangential discussion, and move the group to consensus. Consensus identification of key internal standards creates the moral and practical guidelines of the organization.
**Objective 2: Internal and External Assessments**

ESCI will guide the local planning group through the honest and objective assessment of internal issues and the assessment of external challenges, also known as the SWOT Analysis.

**Internal Assessment**
- Strengths of the organization
- Weaknesses of the organization
- Opportunities facing the organization
- Threats challenging the organization

Analyzing the strengths, weaknesses, opportunities for, and threats to the organization is the next critical step in the strategic planning process. Strengths are important as they represent areas of the organization to be built upon, and weaknesses are areas to be identified as potential sources for improvement. Opportunities are vital to the future of the organization and should be viewed as positive prospects for growth and enhancement, while threats must be identified and addressed in advance, where possible. Other critical issues facing the department may be identified by the strategic planning group at this point as well. These may include issues that the strategic planning group identifies as issues critical to the health and success of the organization.

**Objective 3: Goals and Objectives**

ESCI will guide the local planning team in the establishment of goals and objectives, critical tasks, and timelines that are imperative to the organization and the participation of individual members. This task will involve:

- Establishment of organizational goals that address the identified concerns of the external and internal customers over a four to five-year timeframe
- For each goal, the development of one or more measurable objectives that are written in such a manner as to describe the criteria by which an outcome is judged complete or successful
- Development of associated tasks for each goal and objective utilizing the format of identified measurable criteria
- Development of reasonable time for completion

Attainment of this task will be demonstrated by the establishment of realistic goals and objectives for the organization at this stage of the process. In order to meet the mission of the organization, the establishment of these goals is essential to providing the organization and the individual members with a clear direction.

The goals and objectives established during this process will become management tools and should be updated on a continuous basis as priorities change and as specific goals and/or objectives are achieved. The goals and objectives can then be used to identify what has been achieved and to denote changes within the community and the organization. Fastidiously following these goals and objectives will provide the department with the necessary direction and guidance into the future. This should also support the department by reducing the number of impediments, disruptions, and uncertainties for the organization and its members.

**Objective 4: Performance Measurements**

ESCI will direct the local planning team in discussions regarding performance measures that assist the organization in measuring their progress toward the organizational vision. This will be an ongoing
process, and may initially involve concepts of performance measurement that will require modifications in the collection of necessary data as the organization becomes more focused on measuring achievement and outcomes. The process may include:

- Identification of key performance areas
- Analysis of necessary and available performance data
- Preparation of performance measures from the following categories:
  - Input Measures
  - Output Measures
  - Outcome Measures

**PHASE THREE**

**Task No. 3: Publication of Final Strategic Plan Report**

**Activity:** ESCI will compile the results of the strategic planning work sessions and produce ten original publication quality versions of the final written Strategic Plan document. An electronic, editable version will also be provided on CD for further use and publication.