

IONA MCGREGOR FIRE PROTECTION AND RESCUE DISTRICT

# STRATEGIC PLAN *2021 - 2026*

FYE 2023 - UPDATE



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## Message from Fire Chief Comer

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It is a pleasure to present the 2021-2026 strategic plan. This was a community driven planning process that has positioned the district for continued progression and success. I would like to thank all the community members and internal stakeholders who contributed their thoughts and ideas during the planning process.

The planning process identified goals focusing on better communications; employee training and development; public education and community relations; developing facilities and equipment; and improving organizational management to name a few. The progress of this plan will be monitored and amended as needed to maintain currency.

This will be a living document and will serve as a management tool to guide your fire department to success and continual improvement. To that end, each year we will present an annual update to the plan to reflect any adjustments to the plan. These annual updates will be presented as appendices to the plan and placed on our website at [www.ionafiredistrict.com](http://www.ionafiredistrict.com).

We stand committed to the execution and realization of the vision contained herein.

Respectfully,  
Seth Comer  
Fire Chief

## Introduction

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The Iona McGregor Fire Protection and Rescue District (IMFD) provides an all-hazards approach in the protection of the lives and property of the residents, businesses, and visitors to the district within Lee County, Florida. IMFD is consistently working to achieve and/or maintain the highest level of professionalism and efficiency on behalf of those it serves, and thus, contracted with the Center for Public Safety Excellence (CPSE) to facilitate a method to document the district's path into the future via a "Community-Driven Strategic Plan." The following strategic plan was written with a basis in the Commission on Fire Accreditation International's (CFAI) fire and emergency service accreditation model and is intended to guide the organization within established parameters set forth by the authority having jurisdiction.

The CPSE utilized the community-driven strategic planning process to go beyond just the development of a document. It challenged the IMFD's members 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 IMFD with an opportunity to develop its long-term direction and focus. Members of the organization's community and district stakeholders' groups demonstrated commitment to this important project and remain committed to the document's completion and plan execution.



# IONA MCGREGOR FIRE PROTECTION AND RESCUE DISTRICT

## STRATEGIC PLAN

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### Organizational Background

The origins of the Iona McGregor Fire Protection and Rescue District (IMFD or “the district”) date back to 1945 when House Bill 757 created the Lee County Fire Control District. Lee County provided fire service until 1962, when they began paying the City of Fort Myers for fire control service. In April 1965, a volunteer fire department and rescue squad was created to meet the growing demand for service in the area known as Iona McGregor. In September 1965, the newly formed Iona McGregor Volunteer Fire Department and Rescue Squad was officially chartered as a nonprofit Florida corporation.

By the end of 1970, a fire station was constructed and, just a year later, 24-hour service began when the first fully paid employee went on duty. By the close of 1975, the district had grown in equipment and personnel, and voters had approved the Iona McGregor Fire Protection and Rescue

Service District's creation. In 1977, a second station was opened, and staffing grew by seven paid firefighters, a paid fire chief, a paid fire marshal, and a secretarial assistant.

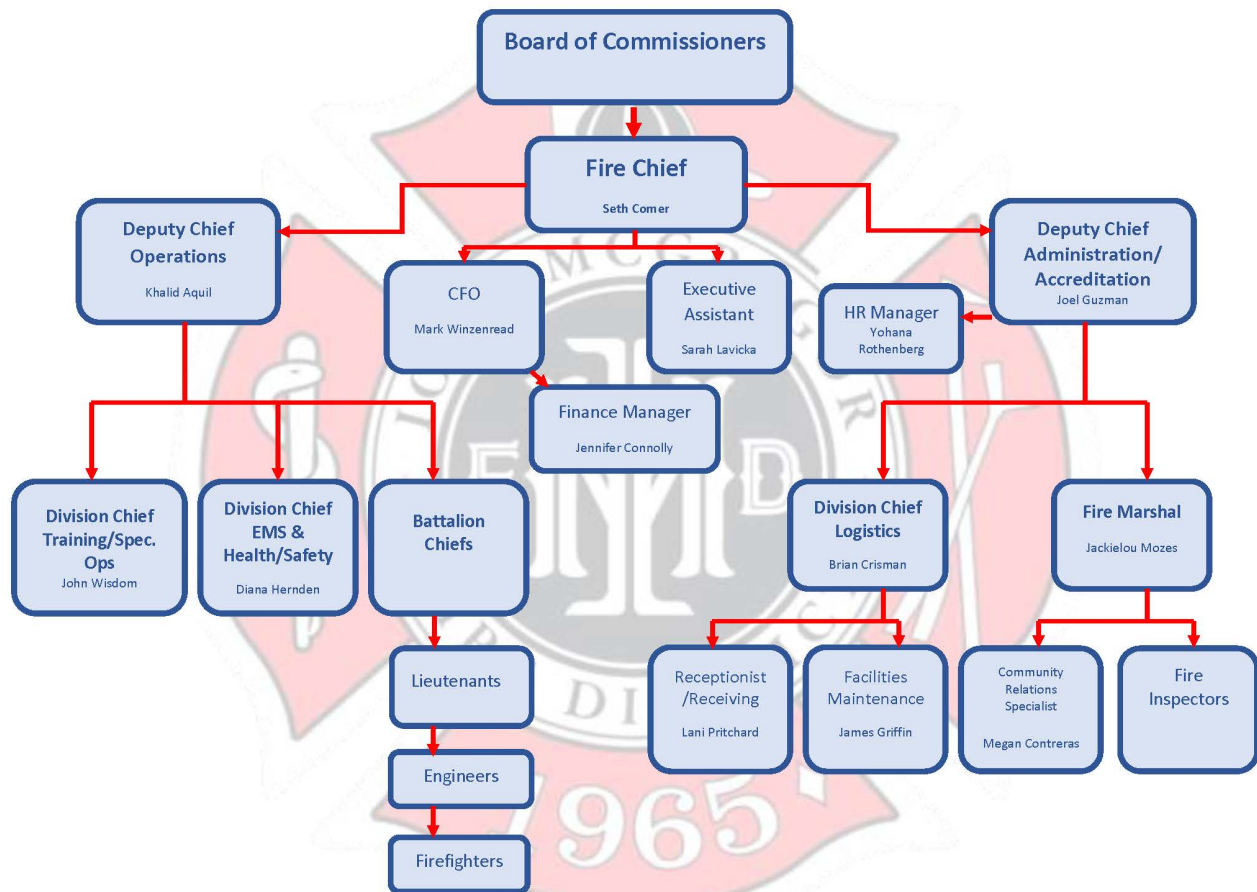


In 1983, voters approved a millage system for district funding. Growth in the district's population and a subsequent increase in call volume led to increased staffing throughout the 1980s. In 1990, a third station opened with offices, maintenance facilities, and a fitness and training center. A fourth station opened in 2003, and a fifth opened in 2010.

Today, the 100 personnel of the IMFD provide fire, rescue, and emergency services from five stations to nearly 80,000 residents within a jurisdiction of approximately 42 square miles of land and more than 20 miles of shoreline and canals.

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## Organizational Structure



Iona McGregor Fire District, Organizational Chart

for their future. A community-driven emergency service organization seeks to gather and utilize the needs and expectations of its community in the development and/or improvement of the services provided. To ensure that the community remains a focus of an organization's direction, a community-driven strategic planning process was used to develop this strategic plan.

A strategic plan is a living management tool that provides short-term direction, builds a shared vision, documents goals and objectives, and optimizes the use of resources. The process of strategic planning can be defined as "a deliberative, disciplined approach to producing fundamental decisions and actions that shape and guide what an organization (or other entity) is, what it does, and why."<sup>1</sup>

Effective strategic planning benefits from a consistent and cohesively structured process employed across all levels of the organization. Planning is a continuous process, one with no clear beginning and no defined end. While plans can be developed regularly, it is the process of planning

<sup>1</sup> See Definition, Purpose, and Benefits of Strategic Planning (Bryson 8)

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that is important, not the publication of the plan itself. Most importantly, strategic planning can be an opportunity to unify the management, employees, and stakeholders through a common understanding of where the organization is going, how everyone involved can work to that common purpose, and how progression and success will be measured.

## The Community-Driven Strategic Planning Process Outline

1. Define the programs provided to the community.
2. Establish the community's service program priorities and expectations of the organization.
3. Identify any concerns the community may have about the organization, along with aspects of the organization that the community views positively.
4. Revisit the mission statement, giving careful attention to the services and programs currently provided, and which can be provided in the future.
5. Revisit the values of the organization's membership.
6. Identify the internal strengths and weaknesses of the organization.
7. Identify areas of opportunity or potential threats to the organization.
8. Identify the organization's critical issues and service gaps.
9. Determine strategic initiatives for organizational improvement.
10. Establish a realistic goal and objectives for each initiative.
11. Identify implementation tasks for the accomplishment of each objective.
12. Determine the vision of the future.
13. Develop organizational and community commitment to accomplishing the plan.

## Process and Acknowledgements

The Center for Public Safety Excellence (CPSE) acknowledges and thanks the community and IMFD stakeholders for their participation and input into this community-driven strategic planning process. The CPSE also recognizes Fire Chief David Howard and the team of professionals who participated for their leadership and commitment to this process.

Development of this strategic plan began in August 2020 with a CPSE-hosted meeting with community members (as named in the following table). To ensure broad representation, the district identified community stakeholders comprised of some who reside or work within the coverage area, and some who were recipients of the IMFD's service(s).

Iona McGregor Fire Protection and Rescue District Community Stakeholders				
Mary Burns	John Dattilo	Robert Deyo	William Durkee	Mark Hackney
Deana Homsy	Matt Horton	Dena Kilgus	Marilyn Kranich	Scott Krieger
Yitzchok Minkowicz	Miriam Ortiz	Todd Porter	Cathi Sampson	Bernedette Sheeran
Walter Still	Sid Tracy	Justin Turnbull	LaVada Williamson	

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## Community Group Findings

A key element of the IMFD's organizational philosophy is having a high level of commitment to the community and recognizing the importance of community satisfaction. Thus, the district invited community representatives to provide feedback on services provided by the IMFD. Respondents were asked to provide a prioritized perspective of the IMFD's programs and services. Additionally, input was gathered during the meeting that revolved around community expectations and concerns (prioritized), as well as positive and other comments about the organization. Specific findings of the community stakeholders are provided in the appendix of this document. The district stakeholders utilized the community stakeholders' full feedback in understanding the current challenges encountered within the organization. Additionally, the community stakeholders' feedback provided a process to ensure alignment with the work completed on the organizational mission, values, vision, and goals for improvement.

## Community Priorities

To best dedicate time, energy, and resources to services most desired by its community, the district needs to understand what the customers consider to be their priorities. With that, the community stakeholders were asked to prioritize the programs offered by the IMFD through a process of direct comparison. The results were as follows:

Programs	Ranking	Score
Emergency Medical Services	1	141
Rescue – Basic & Technical	2	125
Fire Suppression	3	121
Domestic Preparedness Planning and Response	4	81
Hazardous Materials	5	66
Marine Rescue and Firefighting	6	64
Community Risk Reduction/Fire Prevention	7	63
Public Fire and Life Safety Education	8	58
Fire Investigation	9	37

*See Appendix 1 for a complete list of the community findings, including expectations, areas of concern, positive feedback, and other thoughts and comments.*

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## District Stakeholder Group Findings

The district stakeholder work sessions were conducted over three days in March 2021. These sessions served to discuss the organization's approach to community-driven strategic planning, focusing on the IMFD's mission, values, core programs, and support services. Additionally, focus was given to the organization's perceived strengths, weaknesses, opportunities, and threats. The work sessions involved participation by a stakeholder group representing a broad cross-section of the IMFD, as named and pictured below.

Iona McGregor Fire Protection and Rescue District Stakeholders				
James Andersen	Khalid Aquil	Todd Barber	Tre Bryant	Seth Comer
Megan Contreras	Brian Crisman	Nick Fischer	Alex Gonzalez	Joel Guzman
Rebecca Guzman	Diana Hernden	David Howard	Jason Martin	Marc Mascarelli
Jackielou Mozes	Martin Palijan	Dom Prochilo	Mike Quilty	Edwards Steffens
Dionne Streete	Brian Tansey	Mark Winzenread	John Wisdom	Joshua Wright



District Stakeholders

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## Mission

The mission provides an internal aspect of an organization's existence and, to a degree, an empowering consideration for all IMFD members. The purpose of the mission 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 revisit the existing mission and, after ensuring it answered the questions, the following mission statement was created, discussed, and accepted by the entire group:

**We exist to exceed the expectations of our community  
by protecting lives and property through exemplary emergency response,  
community risk reduction, and public outreach.**



District Stakeholders Work Session

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## Values

Values embraced by all organization members are extremely important, as they recognize the features that make up the personality and culture of the organization. A workgroup met to revisit the existing values and proposed a revision that was later enhanced further, as reflected here:

**PRIDE** | We have a passion for the fire service, and believe it is the most noble of professions. It is not about us. It is about the community we serve and the fire service. We further believe it is the ultimate privilege to represent the IMFD and strive for excellence in our delivery of services. This pride for our department drives us in the continual pursuit of excellence.

**COMPASSION** | Caring is not just a part of our job but is fundamentally who we are. The IMFD empathizes with the distress of our citizens and employees, and we are eager to assist.

**DIVERSITY** | We value the foundational necessity of diversity. We embrace a spectrum of personal attributes; welcome variance in thought and perspective; and advocate for equality in opportunity.

**PROFESSIONALISM** | In the pursuit of continuous professionalism, we invest in the development of personnel; are uncompromising in delivering excellent service; and are committed to community advocacy.

The mission and values are the foundation of this organization. Thus, every effort will be made to keep these current and meaningful so that they guide the individuals who make up the IMFD to accomplish goals, objectives, and day-to-day tasks.

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## Programs and Services

To ensure a deeper focus exists in determining issues and gaps within an organization, there must be a delineation between core programs and supporting services. Core programs are those core deliverables provided by the district. Supporting services are all the internal and external programs and services that help the IMFD deliver its core programs.

The importance of understanding the difference is that issues and gaps may exist in core programs or supporting services, and the district's strategic approach may bring forth different considerations for improvement. Additionally, supporting services may be internal or external to the organization and requires understanding how the difference impacts their location within the analysis of strengths, weaknesses, opportunities, and threats if identified. Finally, it is important that the district stakeholders understand that, to deliver the identified core programs, many local, state, and national supporting services support its delivery.

Through a facilitated brainstorming session, the district stakeholders agreed upon the core programs provided to the community and many of the supporting services that support the programs. This session provided the sought understanding of the differences and the important key elements of the delineation.



District Stakeholders Work Session

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## SWOT Analysis

Through a SWOT analysis (strengths, weaknesses, opportunities, and threats), an organization candidly identifies its positive and negative attributes. The SWOT analysis also provides an opportunity for an organization to evaluate its operating environment for areas in which it can capitalize and those that pose a danger. District stakeholders participated in this activity to record IMFD's strengths and weaknesses and the possible opportunities and potential threats. Information gathered through this analysis guides the larger issues and gaps that exist within the agency. The information gleaned will assist the agency in finding its broader critical issues and service gaps.

*Appendix 2 consists of the SWOT data and analysis collected by the district stakeholders.*



**District Stakeholders Work Sessions**

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## Critical Issues and Service Gaps

Following the identification and review of the IMFD's SWOT, two separate groups of district stakeholders met to identify themes as primary critical issues and service gaps (found in *Appendix 3*). The critical issues and services gaps identified by the stakeholders provide further guidance toward the identification of the strategic initiatives, which will ultimately lend direction for the development of goals, objectives, critical tasks, and timelines.



District Stakeholders Work Session

## Strategic Initiatives

Based on all previously captured information and the determination of critical issues and service gaps, the following strategic initiatives were identified as the foundation for developing goals and objectives.

Iona McGregor Fire Protection and Rescue District's Strategic Initiatives			
Internal Communications		Personnel Resources	Community Relations
Training	Physical Resources	Organizational Guidance	Accreditation

## Goals and Objectives

To continuously achieve the mission of the IMFD, realistic goals and objectives with timelines for completion must be established. These will enhance strengths, address identified weaknesses, provide a clear direction, and address the community's concerns. These should become a focus of the district's efforts, as they will direct the organization to its desired future while reducing the obstacles and distractions along the way. Leadership-established workgroups should meet and manage progress toward accomplishing these goals and objectives and adjust timelines as needs and the environment change. Regular reports of progress and changes should be shared with the IMFD's leadership.

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<b>Goal 1</b>	<b>Enhance internal communications to promote consistent messaging between all personnel.</b>	
<b>Objective 1A</b>	<b>Identify and remove barriers to communication to facilitate the development of policies and procedures.</b>	
<b>Timeframe</b>	FYE2023	<b>Assigned to:</b> Deputy Chief, Operations
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Establish a focus group to develop a survey to identify the current barriers.</li> <li>• Evaluate survey results.</li> <li>• Utilize focus group to develop an action plan to address communication barriers.</li> <li>• Develop a policy for internal communications (email, phone, text).</li> <li>• Design a training plan for the newly created policy.</li> <li>• Conduct training for the newly created policy.</li> <li>• Evaluate effectiveness of the policy on a yearly basis.</li> </ul>	
<b>Objective 1B</b>	<b>Incorporate available technology to improve accessibility to information.</b>	
<b>Timeframe</b>	FYE2023	<b>Assigned to:</b> DC Logistics
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Research and select video teleconferencing (VTC) options.</li> <li>• Obtain funding for implementation of VTC.</li> <li>• Develop an SOG and implement training of VTC.</li> <li>• Review <i>SharePoint</i> for accessibility.</li> <li>• Ensure <i>SharePoint</i> documents are current and applicable.</li> <li>• Develop and implement training for <i>SharePoint</i>.</li> </ul>	
<b>Objective 1C</b>	<b>Evaluate meeting frequency and audience required to improve communication efficacy.</b>	
<b>Timeframe</b>	Ongoing evaluation	<b>Assigned to:</b> Deputy Chief, Administration
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify types of meetings needed (admin, command staff, ops, special teams, daily shift meetings, etc.).</li> <li>• Analyze meeting format options, necessary frequency, and required audiences (in-person/virtual).</li> <li>• Identify responsible party for chairing various meetings.</li> <li>• Identify consistent format for meetings (agenda items, action items, minutes).</li> <li>• Implement a meeting schedule.</li> <li>• Review the efficiency of meetings.</li> <li>• Review the meeting schedule quarterly.</li> <li>• Revise the format as necessary.</li> </ul>	

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<b>Goal 2</b>	<b>Review personnel programs and resources to improve delivery to employees.</b>	
<b>Objective 2A</b>	<b>Improve information and access of departmental Behavioral Health Access Program (BHAP) to enhance and maintain personnel health.</b>	
<b>Timeframe</b>	FYE2023	<b>Assigned to:</b> DC EMS, Health & Safety
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Create a survey for evaluation of current program effectiveness.</li> <li>• Analyze results and identify gaps in the current program.</li> <li>• Amend current program, as needed.</li> <li>• Organize and execute an information rollout of program updates.</li> <li>• Review and reevaluate program structure and effectiveness after one year and every three years after.</li> </ul>	
<b>Objective 2B</b>	<b>Design and implement an employee evaluation program to support employee development.</b>	
<b>Timeframe</b>	FYE2023	<b>Assigned to:</b> Deputy Chief, Operations
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Research evaluation methods for employee performance evaluations.</li> <li>• Analyze and design formats for IMFD.</li> <li>• Finalize and implement employee performance evaluations.</li> <li>• Review for effectiveness and amend gaps annually.</li> </ul>	
<b>Objective 2C</b>	<b>Obtain quality employees to match community expectations.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> Deputy Chief, Administration
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Review current hiring and evaluation methods.</li> <li>• Define IMFD expectations for quality employees.</li> <li>• Insert values of expectations into the current probationary process.</li> <li>• Reassess with each hiring process.</li> </ul>	
<b>Objective 2D</b>	<b>Design and implement a succession program to guide the IMFD's growth and development.</b>	
<b>Timeframe</b>	FYE2024	<b>Assigned to:</b> Deputy Chief, Administration
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Evaluate current IMFD succession efforts.</li> <li>• Research industry best practices for succession.</li> <li>• Design and publish IMFD succession program.</li> <li>• Reevaluate on an annual basis.</li> </ul>	

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<b>Goal 3</b>	<b>Refine the public education and fire inspection programs to strengthen community relations.</b>	
<b>Objective 3A</b>	<b>Review current community programs to identify areas of improvement.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> Fire Marshal
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Survey community to identify their needs.</li> <li>• Research best practices for community programs.</li> <li>• Compare against current programs available.</li> <li>• Create improved programs, program structure, and design.</li> <li>• Explore funding as necessary.</li> <li>• Execute programs within the community.</li> <li>• Review programs every two years and revise as necessary.</li> </ul>	
<b>Objective 3B</b>	<b>Analyze existing fire inspection and code enforcement processes to explore areas for improvement.</b>	
<b>Timeframe</b>	FYE2022	<b>Assigned to:</b> Fire Marshal
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Evaluate current internal and external inspection processes for effectiveness.</li> <li>• Identify where the current programs could be improved through community surveys,</li> <li>• Research legislative requirements to identify best practices and industry standards.</li> <li>• Seek funding and approval for the development of new programs.</li> <li>• Create and implement new programs.</li> <li>• Review programs annually to determine efficacy.</li> <li>• Revised programs as necessary.</li> </ul>	
<b>Objective 3C</b>	<b>Review and revise external communication methods to better inform the community.</b>	
<b>Timeframe</b>	FYE2022	<b>Assigned to:</b> Fire Marshal
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Review current media policies.</li> <li>• Research industry standards for efficient external communications.</li> <li>• Create an outreach invitation and establish relationships.</li> <li>• Develop programs and policies.</li> <li>• Secure new funding.</li> <li>• Implement the newly modified program.</li> <li>• Review on an annual basis.</li> </ul>	

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<b>Goal 4</b>	<b>Develop a more comprehensive training program to better serve the evolving needs of our district.</b>	
<b>Objective 4A</b>	<b>Develop a standard mentorship program for the fire district to improve employee development.</b>	
<b>Timeframe</b>	FYE2025	<b>Assigned to:</b> DC Training
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify mentorship programs within other organizations.</li> <li>• Analyze, review, and revise the mentorship program to fit district needs.</li> <li>• Define the role and responsibilities of a mentor.</li> <li>• Define criteria to be a member.</li> <li>• Define who is eligible to enter as a mentee.</li> <li>• Develop the train-the-trainer program.</li> <li>• Seek approval and funding for program implementation.</li> <li>• Implement the mentorship program.</li> <li>• Review and revise mentorship program, as needed.</li> </ul>	
<b>Objective 4B</b>	<b>Increase access to live fire training to enhance fireground proficiency.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> DC Training
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify current and potential live-fire training locations/facilities.</li> <li>• Identify the number of 16- and 40-hour live-fire instructors.</li> <li>• Determine the number of instructors necessary to perform training.</li> <li>• Develop relationships with other agencies that have existing facilities.</li> <li>• Analyze the needs of the IMFD.</li> <li>• Research state/NFPA 1403 standards.</li> <li>• Develop training schedule.</li> <li>• Implement the training program.</li> <li>• Review annually to identify deficiencies.</li> <li>• Revise the program as needed.</li> </ul>	

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<b>Objective 4C</b>	<b>Develop a standard format for report writing to improve the quality of incident documentation.</b>	
<b>Timeframe</b>	FYE2023	<b>Assigned to:</b> Deputy Chief, Operations
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify current deficiencies in report writing.</li> <li>• Analyze statutory reporting requirements.</li> <li>• Develop a standard for report writing in accordance with best practice.</li> <li>• Train personnel on newly adopted report writing standard.</li> <li>• Implement the new report writing standard.</li> <li>• Review and revise adopted report writing standard through the ongoing QA process.</li> <li>• Conduct an annual comprehensive review of the report writing standard.</li> </ul>	
<b>Objective 4D</b>	<b>Expand focus on BLS training for all provider levels to improve patient outcomes.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> DC EMS, Health & Safety
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Analyze current standards and trends with BLS care.</li> <li>• Identify department deficiencies in relation to BLS care provision.</li> <li>• Develop a training program that addresses identified training deficiencies.</li> <li>• Seek approval for budgeting impact.</li> <li>• Implement the training program.</li> <li>• Annually review and revise the training program based on provider evaluations.</li> </ul>	

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<b>Goal 5</b>	<b>Further develop the district's physical resource management to better serve the needs of the personnel and community.</b>	
<b>Objective 5A</b>	<b>Improve district facilities to better meet the needs of emergency operations and service to the community.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> DC Logistics
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Research and identify needs of current district infrastructure.</li> <li>• Develop a plan to evaluate the district's training facilities and bay exhaust mitigation systems.</li> <li>• Analyze findings for actionable inadequacies.</li> <li>• Develop a plan of action to address deficiencies.</li> <li>• Seek funding/approval for improvements to district infrastructure.</li> <li>• Implement improved plans for district infrastructure.</li> <li>• Review district needs in accordance with state and federal statutes.</li> </ul>	
<b>Objective 5B</b>	<b>Review district's equipment compatibility with neighboring departments in support of continuity of service delivery.</b>	
<b>Timeframe</b>	Completed	<b>Assigned to:</b> DC Training
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify the equipment used by surrounding districts.</li> <li>• Analyze the district compatibility with other agencies' equipment.</li> <li>• Develop a list of equipment compatibility needs with other agencies.</li> <li>• Review compatibility with outside agencies annually.</li> </ul>	
<b>Objective 5C</b>	<b>Improve the district's information technology to better meet the needs of personnel and the community.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> DC Logistics
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify opportunities for software improvements.</li> <li>• Analyze current district software for deficiencies and improvement opportunities.</li> <li>• Research available software for replacement or upgrades.</li> <li>• Seek funding/approval for software purchases.</li> <li>• Develop a training program for new software.</li> <li>• Implement new software into the organization.</li> <li>• Review functionality of new software and revise, as needed.</li> </ul>	
<b>Objective 5D</b>	<b>Revise data entry protocols into PSTRAx to improve asset management.</b>	
<b>Timeframe</b>	FYE2023	<b>Assigned to:</b> DC Logistics
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Identify assets to be tracked.</li> <li>• Ensure accurate inventory list.</li> <li>• Input inventory data into PSTRAx.</li> <li>• Input maintenance schedule into PSTRAx.</li> <li>• Develop policy for use of PSTRAx.</li> <li>• Create training video/s for PSTRAx.</li> </ul>	

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<b>Goal 6</b>	<b>Refine organizational management to sustain the highest quality service to our community.</b>	
<b>Objective 6A</b>	<b>Review information systems to ensure production of usable data (e.g., ESO, Mobile Eyes, Aladtec, PSTRAX, etc.)</b>	
<b>Timeframe</b>	FYE2022	<b>Assigned to:</b> Deputy Chief, Operations
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Establish a focus group to decide what data needs to be collected and what performance measures to establish.</li> <li>• Decide what applications are required to capture what's needed.</li> <li>• Budget for newly identified applications.</li> <li>• Train the focus group on how to input data.</li> <li>• Focus group to provide training to the organization.</li> <li>• Identify individuals (one per station) who will review applications daily to ensure accurate input.</li> <li>• Revise as necessary based on the monthly report.</li> </ul>	
<b>Objective 6B</b>	<b>Evaluate existing policies and procedures to ensure they are accurate, necessary, and appropriately communicated.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> Fire Chief
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Establish a focus group and assign members specific portions of the policy.</li> <li>• Members will identify what policies need revision and/or creation.</li> <li>• Final draft to be presented to the focus group.</li> <li>• Final draft submitted for approval by the fire chief.</li> <li>• Approved policy changes will be emailed to all employees for implementation within 30 days.</li> <li>• Focus group to meet annually to review and revise as needed.</li> </ul>	
<b>Objective 6C</b>	<b>Implement a document management system to eliminate operational inconsistencies.</b>	
<b>Timeframe</b>	FYE2023	<b>Assigned to:</b> Fire Chief
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Utilize policy and procedures focus group to shop for a document management system.</li> <li>• Budget for a document management system.</li> <li>• Create a policy on the utilization of the document management system.</li> <li>• Schedule vendor to train the organization on the document management system.</li> <li>• Implement a schedule for employees to review and sign policies.</li> <li>• Document management system revisions will be tied to policies and procedures updates.</li> </ul>	

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## Goal 7

Prepare for, pursue, achieve, and maintain international accreditation to better serve our community and embrace excellence.

### Objective 7A

**Form team or committee structures with management components as needed to pursue and maintain accreditation.**

#### Timeframe

Completed

**Assigned to:** Deputy Chief, Administration

#### Critical Tasks

- Identify the needed team or committee structure(s) for the various components of the accreditation process.
- Create the management oversight positions to lead the teams or committees, as well as the process overall.
- Establish team or committee member criteria.
- Determine the composition of the teams or committees.
- Solicit participation to meet the composition of the teams or committees.
- Develop and complete the selection process.
- Provide the needed educational components provided through the CFAI to ensure the relevant members have the needed training.

### Objective 7B

**Develop a community-driven strategic plan.**

#### Timeframe

Completed

**Assigned to:** Deputy Chief, Administration

#### Critical Tasks

- Hold an external stakeholder meeting where community members provide feedback on program priorities, service expectations, concerns, and strengths perceived about IMFD.
- Provide internal stakeholder work sessions to evaluate (and update if necessary) the mission, vision, and values; determine internal strengths and weaknesses, external opportunities, and threats.
- Establish critical issues and service gaps. Determine specific strategic initiatives.
- Develop goals, objectives, critical tasks, and appropriate timelines, to include levels of measurability, to achieve over five years.
- Create a vision for the developed strategic plan.
- Publish and distribute the formal strategic plan to stakeholders as determined by the organization.

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<b>Objective 7C Implement the community-driven strategic plan.</b>	
<b>Timeframe</b>	Ongoing <b>Assigned to:</b> Deputy Chief, Administration
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Create a strategic planning subcommittee to review the draft strategic plan.</li> <li>• Provide internal stakeholder work sessions to evaluate (and update if necessary) the draft mission, vision, and values; determine internal strengths and weaknesses, external opportunities and threats; establish critical issues and service gaps.</li> <li>• Evaluate goals and objectives within the draft plan and further define critical tasks as needed to ensure clarity with each goal.</li> <li>• Determine a work plan for the accomplishment of each goal and implement the plan.</li> <li>• Annually evaluate objectives accomplished with the plan.</li> <li>• Report annual plan progress to internal and external stakeholders.</li> </ul>
<b>Objective 7D Conduct a community hazards and risk assessment and publish a Community Risk Assessment - Standards of Cover document.</b>	
<b>Timeframe</b>	Completed <b>Assigned to:</b> Deputy Chief, Administration
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Obtain instruction on hazard and risk assessment and standards of cover preparation.</li> <li>• Perform community hazards and risk assessment.</li> <li>• Evaluate historical community emergency response performance and coverage.</li> <li>• Establish benchmark and baseline emergency response performance objectives.</li> <li>• Establish and publish the Community Risk Assessment - Standards of Cover.</li> <li>• Maintain and annually update the Standards of Cover document.</li> </ul>
<b>Objective 7E Conduct and document a self-assessment of the district utilizing the CPSE/CFAI Fire and Emergency Services Self-Assessment Manual criteria.</b>	
<b>Timeframe</b>	FYE2022 <b>Assigned to:</b> Deputy Chief, Administration
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Obtain instruction on writing a CFAI self-assessment manual.</li> <li>• Assign self-assessment manual category and criterion writing to the district accreditation committee/team members as appropriate.</li> <li>• Review self-assessment and ensure all reference items are in order.</li> </ul>

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<b>Objective 7F</b>	<b>Achieve agency accreditation by the CFAI.</b>	
<b>Timeframe</b>	FYE2023	<b>Assigned to:</b> Deputy Chief, Administration
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Apply for “Candidate Agency” status with the CFAI.</li> <li>• Prepare for CFAI Peer Assessor Team visit.</li> <li>• Upload Strategic Plan, Standards of Cover, and Self-Assessment Categories and Criterion for review and comment by CFAI Peer Team.</li> <li>• Host CFAI Peer Team site visit for accreditation review.</li> <li>• Receive CFAI Peer Team recommendation to CFAI for Accredited status.</li> <li>• Receive vote during the CFAI hearings in favor of Accredited status.</li> </ul>	
<b>Objective 7G</b>	<b>Maintain accreditation with the CFAI.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> Deputy Chief, Administration
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>• Submit required Annual Compliance Reports.</li> <li>• Attend CFAI “Dayroom Discussion” web-meetings for continued education.</li> <li>• Participate in the accreditation process by providing “peer assessors” for external district review and identification of possible best practices.</li> <li>• Participate in the annual CPSE Excellence Conference for continued education and networking with other accreditation teams and accredited agencies.</li> <li>• Submit Annual Compliance Reports as required by CFAI policies.</li> <li>• Establish succession development of internal accreditation team in preparation for next accreditation cycle.</li> </ul>	

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## Vision

On the final day of the process, the CPSE presented a strategic plan vision of where the organization will be in the future if the strategic plan is accomplished. This is not to override the IMFD's global vision but rather to confirm the futurity of the work that the district stakeholders designed. This vision is intended as a target of excellence to strive toward and provides a basis for its goals and objectives.

"Vision is knowing who you are, where you're going, and what will guide your journey."

Ken Blanchard

Iona McGregor Fire Protection and Rescue District members are united in the pursuit of continuous improvement in all district operations.

Meeting or exceeding the needs and expectations of those within our district is evident in our commitment to community relations and demonstration of service delivery excellence.

Focusing on our internal communications, personnel relations, training and development, the provision of appropriate physical resources, and maintenance of organizational guidance ensures a world-class workforce.

Dedication to fulfilling our mission, living our values, and accomplishing our goals will guarantee that we bring this vision to fruition.

## Performance Measurement

To assess and ensure that an organization delivers on the promises made in its strategic plan, the organization's leaders must determine performance measures for which they are fully accountable. As output measurement can be challenging, the organization must focus on assessing progress toward achieving improved output. Organizations must be prepared to revisit and revise their goals, objectives, and performance measures to keep up with accomplishments and environmental changes.

- If you don't measure the results of your plan, you can't tell success from failure.
- If you can't see success, you can't reward it.
- If you can't reward success, you're probably rewarding failure.
- If you can't see success, you can't learn from it.
- If you can't recognize failure, you can't correct it.
- If you can demonstrate results, you can win public support.

Reinventing Government

David Osborn and Ted Gaebler

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To establish that the district's strategic plan is achieving results, performance measurement data will be implemented and integrated as part of the plan. An integrated process, known as "Managing for Results," will be utilized, which is based upon:

- The identification of strategic goals and objectives;
- The determination of resources necessary to achieve them;
- The analyzing and evaluation of performance data; and
- The use of that data to drive continuous improvement in the organization.

A "family of measures" typically utilized to indicate and measure performance includes:

- **Inputs** - Value of resource used to produce an output.
- **Outputs** - Quantifiable units produced which are activity-oriented and measurable.
- **Efficiency** - Inputs used per output (or outputs per input).
- **Service Quality** - The degree to which customers are satisfied with a program or how accurately or timely service is provided.
- **Outcome** - Qualitative consequences associated with a program/service, i.e., the ultimate benefit to the customer. Focused on the "why" of providing a service.

## The Success of the Strategic Plan

The district has approached its desire to develop and implement a strategic plan by asking for and receiving input from the community and members of the organization during the development stage of the planning process. To assist in developing this plan, the district used professional guidance to conduct a community-driven strategic planning process. This strategic plan's success will not depend upon the implementation of the goals and related objectives but on support received from the authority having jurisdiction, the members of the organization, and the community-at-large.

Provided the community-driven strategic planning process is kept dynamic and supported by effective leadership and active participation, it will be a considerable opportunity to unify district and community stakeholders. This can be accomplished through a jointly developed understanding of organizational direction, focusing on all vested parties working to achieve the mission, goals, and vision. Further consideration must be made on how the organization will measure and be accountable for its progress and successes.

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## Glossary of Terms, Acronyms, and Initialisms

<b>Accreditation</b>	A process by which an association or agency evaluates and recognizes a program of study or an institution as meeting certain predetermined standards or qualifications. It applies only to institutions or agencies and their programs of study or their services. Accreditation ensures a basic level of quality in the services received from an agency.
<b>BHAP</b>	Behavioral Health Access Program
<b>CERT</b>	Community Emergency Response Team
<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 organization.
<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>Input</b>	A performance indication where the value of resources is 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>SOG</b>	Standard Operating Guideline
<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.

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<b>Strategic Goal</b>	A broad target that defines how the agency will carry out its mission over a specific period. An aim. The result of an action. Something to accomplish in assisting the agency in moving forward.
<b>Strategic Objective</b>	A specific, measurable accomplishment required to realize the successful completion of a strategic goal.
<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 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>SWOT</b>	Strengths, Weaknesses, Opportunities, and Threats.
<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.

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## Works Cited

Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement*. Hoboken, New Jersey: John Wiley & Sons, Inc, 2018.

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## Appendix 1

### Community Expectations

Understanding what the community expects of its fire service 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's needs.

Respondents were asked to list, in priority order, up to five subjects relative to the expectations they have for the IMFD. Responses were then analyzed for themes and weighted. The weighting of the prioritized responses was as follows: if it was the respondent's first entry, then it received five weighted points. Weighting gradually decreased so that if it was the respondent's fifth entry, then it received one weighted point. The weighted themes were then sorted from the highest cumulative weight to the lowest cumulative weight and listed below. The numbers in the parentheses are the cumulative weighted value that correlated with the theme identified. While the themes are listed in prioritized, weighted order, all responses were important in the planning process.

### Community Expectations of the Iona McGregor Fire Protection and Rescue District (in priority order)

1. Quick Response (Weighted value: 75)
  - Rapid response time.
  - Speed of response to emergency events.
  - Appropriate response times.
  - Arrive promptly.
  - Rapid response to calls due to illness or fire alarm.
  - Immediate fast response.
  - Responsiveness to risks identified in the district.
  - Timeliness in response to potential risks.
  - With the large marina under construction, how will the department respond to emergencies or problems there?
2. Community Outreach/Involvement (Weighted value: 58)
  - Education of the community for fire safety, hurricane preparation, emergencies, and disasters.
  - Community involvement.
  - Provide input to the church about general needs in the community.
  - Provide community outreach to educate the general population on fire safety both at home and in public places.
  - Community understanding of the district's scope of service.
  - Educate the faith community about hurricane preparedness.
  - Provide CPR and AED training.
  - Public education of current fire regulations.
  - Offer interior inspections of residences/condos with owner approval.
  - Training for occupancy staff on proper use of fire extinguishers.
  - Provide educational materials for weekly/monthly newsletters.

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- Communication with stakeholders regarding potential risk.
  - Community understanding of response times.
  - Keep the community up to date.
3. District Personnel Training: (Weighted value: 46)
- Well-trained personnel.
  - Knowledge of how to handle emergency events.
  - Training for all members to keep skillsets high and current.
  - Trained fire, medical, and inspection staff.
  - Ongoing training to ensure personnel are qualified to do the job.
  - Adequate training and fitness of firefighters.
  - Knowledge of surroundings and the community.
  - Helpful firefighters that can problem solve.
  - Versatile crews that can rectify problems.
4. Values/Behavior (Weighted value: 22)
- Professionalism.
  - Dedication.
  - Positive attitude and conduct.
  - Kind and compassionate.
  - Ability to put people at ease during trauma.
5. Staffing/Benefits (Weighted value: 15)
- Well-staffed.
  - Proper staffing to do the job.
  - Continuing education and benefits for staff that show they are appreciated by the district and its residents.
6. Equipment (Weighted value: 13)
- Modern equipment that serves the characteristics of the area.
  - Needed equipment to do the job.
  - Proper tools for the job.
  - Properly working equipment for fire and rescue.
7. Fiscal Responsibility (Weighted value: 6)
- Efficient fire services.
  - Fiscal responsibility.
8. Rescue animals. (Weighted value: 3)
9. A tidy fire station. (Weighted value: 1)

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## Areas of Community Concern

The planning process would be incomplete without an expression from the community stakeholders 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, understanding, or incorrect information.

Respondents were asked to list, in priority order, up to five concerns they have about or for the IMFD. Responses were then analyzed for themes and weighted. The weighting of the prioritized concerns was as follows: if it was the respondent's first entry, then it received five weighted points. Weighting gradually decreased so that if it was the respondent's fifth entry, then it received one weighted point. The weighted themes were then sorted from the highest cumulative weight to the lowest cumulative weight and listed below. The numbers in the parentheses are the cumulative weighted value that correlated with the theme identified. While the themes are listed in prioritized, weighted order, all responses were important in the planning process.

The following are the concerns of the community stakeholders prioritized and weighted accordingly:

### Areas of Community Concern about the Iona McGregor Fire Protection and Rescue District (verbatim, in priority order)

1. Manpower/Staffing (Weighted value: 48)
  - Large district – although trying to be efficient, more manpower is needed.
  - Do they have enough staff?
  - During snowbird season, rescue squads are stretched thin.
  - Fully staffed?
  - Funding cuts or inadequate funding that will not provide the district with adequate resources.
  - That they have what they need to continue to do the great job that they do so well.
  - Does the district have the necessary personnel to staff all shifts throughout the district?
  - Possibility of a limited labor force.
  - Financial support.
  - Do they have adequate manpower to avoid exhaustion and burnout?
  - Are there any budget concerns that will cause disruption to staffing models?
  - Career incentives – wanting employees to stay.
  - Overtime/work environment with community growth – how does the district grow as well?
2. Facilities/Tools/Equipment (Weighted value: 37)
  - Facilities growth to keep up with district population growth.
  - Working equipment.
  - Do they really have the equipment they need to protect the Iona community?
  - Do they have updated technology?
  - That the fire crew has the appropriate fire protection equipment to do their job.
  - That they have the right tools to put out the fire.
  - Adequate equipment in the future due to budget cuts post-COVID.

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- Safety gear worn to prevent spread of germs when entering facilities.
  - Do they have adequate funding to maintain and update their equipment?
  - Does the district have all of the requirements to operate in existing buildings with regards to equipment and communications?
3. Code Enforcement/Inspections/Community Engagement (Weighted value: 27)
- More education seminars could be presented at community clubhouses.
  - I know so little about the district's services.
  - Do you know what the "file of life" is?
  - The building code department not working with the life safety department.
  - Many gated communities do not seem to be interested in having "outside" inspection of their development (often occupancies have common attics).
  - Fire door codes not the same for every business or facility.
  - Concern when a building goes through planning and passes, but then after fails inspection.
  - People not obeying rules which places neighbors at risk (grilling against the building).
4. Hostile Environment (Weighted value: 17)
- Is recruitment an issue given the current unrest in the United States?
  - Are you having a higher rate of retirement given the current unrest in the United States?
  - Concerned that COVID will spread through the firehouse.
  - Politics.
  - Do they feel supported by our community?
5. Training (Weighted value:14)
- Proper knowledge for the job.
  - Squads should spend more time touring areas, especially gated communities.
  - Do they have the training on how to help dementia and mental health patients – what to do, or not do?
  - Concern that there is not enough training.
  - Concerned that response teams may get confused on location as many communities have similar names.

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## 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. Needless efforts are often put forth in over-developing areas that are already successful. However, proper utilization and promotion of the strengths may often help the organization overcome or offset some of the identified weaknesses.

### Positive Community Comments about the Iona McGregor Fire Protection and Rescue District (verbatim, in no particular order)

- Good to see so many stations throughout our community, making service time efficient.
- Very courteous, polite, and friendly fire personnel when in the public.
- Fire inspections are very up-to-date. Any questions or concerns are addressed.
- They have always been accommodating and have our best interest.
- All stations appear clean and well maintained.
- Pride of personnel evident in uniforms, overall conduct, and appearance.
- Professionalism – appear trained and retained.
- They have a thankless job and are taken for granted by too many people.
- Tremendous effort every time they are dispatched.
- The rescue squad handles senior citizens very well.
- Department members understand the area that they are responsible for.
- Knowledge and training seem to exceed expectations.
- Training of new employees and continued training yearly.
- Equipment maintained.
- Interaction that I have had with the fire department has always been positive.
- I think they do a good job. I always hear good things about them.
- Very tidy station.
- Great response times.
- Fire inspectors are getting better at their job – no code violations.
- Courteous to businesses and others.
- Good equipment.
- We've had timely and a good response from fire personnel.
- They have been compassionate.
- They have been professional and knowledgeable.
- In dealing with the fire district, I have found them to be responsive, helpful, and understanding.
- Community presence – we appreciate the high visibility of district personnel within our community.
- Professionalism – interactions with district personnel are always exceptional.
- Community outreach – we have always enjoyed trips to the firehouse with cub scouts, etc.

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- Great team.
- Responds in a timely manner.
- Very nice and friendly.
- Jackielou Mozes is an amazing great representative of a dedicated and caring community advocate.
- Communication with local residents/businesses.
- Response times to potential risks.
- Personnel responding to calls for service are found to be professional.
- Inspectors are helpful in providing information when requested and during inspections.
- Equipment is always clean and appears to be in working order.
- Classes I have attended have always been led by experienced instructors.
- Timely, well-trained, courteous, caring, and personable individuals.
- I and my family have been personally impacted and are recipients of both fire and EMS services. They conducted themselves in a very professional, courteous, and kind manner. I cannot express adequately my deep gratitude for these heroes.
- They have responded skillfully and compassionately when I call with health crisis and church.
- Freely offer advice and instruction to the church.
- Supported us as we sought their findings of need within the community as we developed a senior center.
- They provided a beloved neighbor a gift card to a restaurant, which she turned over to me to provide meals for the sick and homebound.
- From experience, the crews have arrived promptly to my business.
- They have professionally taken care of customers.
- They have done a good job with teaching younger kids in the district about fire safety. They also gave the kids a chance to tour the trucks.
- Have been great help with my church – from building inspections, emergency responses to incidents, hurricane preparation speakers, and training about AEDs – great job!
- The staff is well prepared and do a great job when called.
- Fire/Rescue has a tough job. I pray for them when I hear the siren.
- The participation in events that are attended by the department. The community, especially the children, love interaction with the firemen.

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## Other Thoughts and Comments

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

### Other Community Comments about the Iona McGregor Fire Protection and Rescue District (verbatim, in no particular order)

- Overall, a well-run District.
- Would love to tour a station and see how the crews live, eat, and work.
- Could the District come and comment on activity in our HOA? We would welcome a presentation.
- They bring the fire trucks to my church which is a highlight for the kids.
- Very happy with the work they do.
- As a business operator, we have had interactions with the department on multiple occasions and each occurrence has been pleasant and professional.
- Facilities that I have visited are always clean.
- They are a great partner in mission to the community.
- Promptness is key, and I thank you for being so quick to arrive on the scene.
- Do on-line instructional training on how to clean your oven so that the house doesn't fill with smoke and fire department called. Lol
- Really appreciate the quality of fire/rescue staff and programs that our area offers! Thank you to the citizens for paying taxes and the leadership that uses the funds wisely. I do hear of the concern of many fire districts in Lee County. I hope we can maintain fire/rescue district connection with the community.

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## Appendix 2

### Strengths

It is important for any organization to identify its strengths to ensure that it can provide the services requested by the community and that strengths are consistent with the issues facing the organization. Often, the identification of organizational strengths leads to the channeling of efforts toward primary community needs that match those strengths. Programs that do not match organizational strengths, or the primary function of the organization, should be seriously reviewed to evaluate the rate of return on staff time and allocated funds.

Through a consensus process, the district stakeholders identified the IMFD's strengths as follows:

Strengths of the Iona McGregor Fire Protection and Rescue District	
Education program reimbursement	Equipment - new and up-to-date
Big budget / stable tax base	Dedicated personnel
High-quality prevention program	Positive labor management relationship
Positive organizational culture	Proactive training department
Open-minded to change	Independent tax district
Strong community relations with neighboring districts/general public	Progressive advanced life support (ALS) program
Diverse career path opportunity	Good water supply
Depth of education across staffing	Physically fit personnel
Regional reputation	Diversity
Collaboration with surrounding agencies	Employee retention
Institutional knowledge	Competitive compensation
Motivated employees	Exceptional delivery of services
Accountability of probationary employees	Supportive fire commissioners
Strong community CPR program	Voluntary Employees Benefit Association plan
Good use of social media	Special teams
Well-funded capital replacement program	Newer fleet
Well-funded reserves	Great maintenance program
Marine Emergency Response Team program	Minimal to no debt
Cancer prevention measures	When we are at full staffing
Succession	Facilities maintenance
Dependent coverage	Educational leave
National level instructors	Health Savings Account seed money

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## Weaknesses

For any organization to either begin or to continue to move progressively forward, it must not only be able to identify its strengths but also those areas where it functions poorly or not at all. 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 district stakeholders as weaknesses:

Weaknesses of the Iona McGregor Fire Protection and Rescue District	
Minimum staffing	Reliance on ad valorem tax dollars
Inconsistent accountability	No performance evaluations
IT streamlining	Lack of maternity/paternity policy
No 'fit for duty' policy	Lack of facility maintenance
Reliance on offsite vehicle maintenance	Operational inconsistency (tactically)
Aging workforce	Complacency
Lack of behavioral health access program	Internal communication inconsistencies
Inadequate training facilities	Succession (lieutenant position and above)
SOG updates	Live fire training
Mentorship	Inconsistent report writing
HR training	Data collection
Rescue trucks – replacement	Current station locations
Internal demographics do not match community demographics	Lack of policy requiring employees to become paramedics within a time period
Difficulty in accessing prefire plans	Un-defined acting lieutenant periods -eligibility to test
Scope of responsibility thins resources	Functional consolidation
Burnout	Salary and benefits-driven applicants
Occupational carcinogen exposure management	Equipment compatibility with neighboring agencies
Mutual aid responsibilities	Lack of email checking by employees

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## 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 district stakeholders identified the following potential opportunities:

Opportunities for the Iona McGregor Fire Protection and Rescue District	
Develop a recruiting program targeting college athletes and military personnel	Ride along with outside agencies to assess how other organizations deliver emergency services
Lee County Fire Chief's Association meeting – increase attendance	Obtain grants for public education and community education, programs in organization
Presenting to homeowners associations	Involved with more civic groups
Create community emergency response team (CERT)	Developing explorer program
Conference attendance	EMS/hospital time/experience
Community paramedicine	Water safety program
Falls prevention program	Pursue continued education/certifications
Interagency training	Countywide leadership
Community need-based outreach (i.e., food drives, toy drives)	In-home inspections
Public/private partnerships	Disaster preparedness education
Consolidation	Annexation

## Threats

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 district stakeholders were as follows:

Potential Threats to the Iona McGregor Fire Protection and Rescue District	
Pandemic	Availability of supplies
Consolidation with other districts	Number of qualified applicants
Annexation	Natural disasters / incidents
Retirement changes	Increased demand for services
Strong economy / weak economy	Facility and network security
Longevity health	Increased automatic aid calls
Social changes that affect human resources	Baby boomers retiring / aging of our community
Rising medical and insurance costs	Changes in environmental regulations impacting fire apparatus
Future civil unrest	State and federal unfunded mandates
Reliance on ad valorem tax dollars alone	Political issues, state and local
Population growth impact on services	Economic inflation / rising operational costs

# STRATEGIC PLAN 2021 - 2026

## Appendix 3

The following information is the raw data comprised from the deliberation of the two workgroups. The information in each table is linked to a strategic initiative that the overall group, by consensus, determined was something that the district should pursue for change and continuous improvement.

### Critical and Service Gap Issues Identified by the District Stakeholders

Initiative Link	Group 1	Group 2
<b>Internal Communications</b>	<b>Internal Communications</b> <ul style="list-style-type: none"> <li>- Positive or negative of email communications</li> <li>- Inconsistency of messaging</li> <li>- Accountability</li> <li>- Technology utilization</li> </ul>	<b>Internal Communications</b> <ul style="list-style-type: none"> <li>- Email</li> <li>- Chain of command (disseminating info)</li> <li>- Effective use of meetings</li> <li>- Shift to shift communications</li> <li>- Integrity of messaging</li> <li>- Apathy</li> </ul>

Initiative Link	Group 1	Group 2
<b>Personnel Relations</b>	<b>Human Resources</b> <ul style="list-style-type: none"> <li>- Staffing (operations)</li> <li>- Recruitment / retention</li> <li>- Succession</li> <li>- Live fire training</li> <li>- Fit for duty</li> <li>- Diversity</li> <li>- Formal coaching and mentoring programs</li> </ul>	<b>Personnel Resources</b> <ul style="list-style-type: none"> <li>- Performance evaluations</li> <li>- Record keeping (HR records)</li> <li>- Lack of comprehensive BHAP</li> <li>- Succession</li> <li>- Complacency</li> <li>- Accountability</li> <li>- Overtime management</li> </ul>

Initiative Link	Group 1	Group 2
<b>Community Relations</b>	<b>Community Relations</b> <ul style="list-style-type: none"> <li>- Disaster preparedness education</li> <li>- Public/private partnership</li> <li>- CERT</li> <li>- Explorer program</li> <li>- Media relations</li> <li>- Code enforcement</li> <li>- Communication methods</li> <li>- Communication education</li> </ul>	<b>Public Relations</b> <ul style="list-style-type: none"> <li>- Community outreach to homeowners associations and faith-based organizations</li> <li>- Community training (CPR, fire extinguisher)</li> <li>- Community education (car seat)</li> <li>- Inspections/code enforcement</li> <li>- Home inspections (courtesy)</li> </ul>

# STRATEGIC PLAN 2021 - 2026

Initiative Link	Group 1	Group 2
Training	N/A	Training <ul style="list-style-type: none"> <li>- Mentorship</li> <li>- Live fire</li> <li>- Report writing</li> <li>- EMS training (BLS)</li> </ul>

Initiative Link	Group 1	Group 2
Physical Resources	N/A	Physical Resources <ul style="list-style-type: none"> <li>- Inadequate training facilities</li> <li>- Equipment compatibility (with neighboring districts)</li> <li>- Bay exhaust systems</li> <li>- Aging rescue trucks</li> <li>- Inventory management</li> <li>- IT (budget/accounting)</li> </ul>

Initiative Link	Group 1	Group 2
Organizational Guidance	Organizational Management <ul style="list-style-type: none"> <li>- Lack of data collection</li> <li>- Operational inconsistencies</li> <li>- Validated method of performance evaluations</li> <li>- SOG review</li> <li>- Diversification of revenue</li> <li>- Control of expenditures</li> </ul>	Organizational Documents <ul style="list-style-type: none"> <li>- SOG updates</li> <li>- Missing policies</li> <li>- Procedures</li> <li>- Document consolidation</li> <li>- Document management system</li> </ul>

# 2023 UPDATE

## Appendix 4

<b>Goal 1</b>	<b>Enhance internal communications to promote consistent messaging between all personnel.</b>
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<b>Objective 1A</b>	<b>Identify and remove barriers to communication to facilitate the development of policies and procedures.</b>
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<b>Timeframe</b>	FYE-2024	<b>Assigned to:</b>	DC Guzman
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- The formal meeting occurring on a weekly basis between all supervisors and subordinates has greatly decreased barriers of communications.
- Consistent contact between Battalion Chiefs and their Lieutenants have allowed for better flow of information. As stated in Objective 4C- a formal annual meeting between each Battalion Chief and their Lieutenants will continue to identify barriers to communication.
- The implementation and training of the new document management system (PowerDMS) had to be postponed. The District's goal is to implement and train the organization on PowerDMS in FYE 2024. Once implemented, this will assist in better communication and accessibility of policies and procedures. Currently the administration staff is utilizing PowerDMS to review and revise policies and SOGs.

<b>Objective 1B</b>	<b>Incorporate available technology to improve accessibility to information.</b>
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<b>Timeframe</b>	FYE 2024	<b>Assigned to:</b>	DC Crisman
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- The District has created a library of training videos that is in the District's Sharepoint site.
- The DC of EMS, Health and Safety has been working with staff on developing the best platform to stream and record EMS training. The goal is for this to be completed in FYE 2024.
- The District has a yearly subscription to the Fire Engineering training video library that it makes available to all employees.
- On June of 2023 the District began subscription to the International Fire Service Training Association (IFSTA) library of fire department textbooks and manuals. This subscription-based program provides access for every member of the District and new editions are automatically added to the library at no additional cost. This ensures we have the latest version of all IFSTA training manuals.

<b>Objective 1C</b>	<b>Evaluate meeting frequency and audience required to improve communication efficacy.</b>
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<b>Timeframe</b>	Revise as necessary	<b>Assigned to:</b>	DC Aquil
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- Meetings are occurring at various levels within the organization with increased efficiency, and a more formal approach. All division leaders are having regular, agenda driven meetings with their respective Deputy Chief. Battalions Chiefs are having weekly (Friday meetings with Deputy Chief-Operations). The daily rounds conducted by Battalion Chiefs allows for continuous communication with company officers and sharing of necessary information, inclusive of what is directed by Deputy Chief-Operations. Additionally, it is

prudent to implement a minimum, of one formal annual shift officer meeting, with additional meetings to occur as needed. This planning will allow for staffing support to facilitate the shift officer meetings.

<b>Goal 2</b>	<b>Review personnel programs and resources to improve delivery to employees.</b>
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<b>Objective 2A</b>	<b>Improve information and access of departmental Behavioral Health Access Program (BHAP) to enhance and maintain personnel health.</b>
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<b>Timeframe</b>	FYE 2024	<b>Assigned to:</b>	DC Hernden
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- The Policy for the Critical Incident Stress Management Program was updated in 2022.
- FYE 2024 The District's personnel need to be trained in the BHAP program.
- Four new peer support team members were added in 2023 for a total of eight.
- The District will reach out to retirees for interest in participation in the peer support team.
- DC Hernden is revising station flyers with resource and contact information of the BHAP.
- The District needs to develop a policy for the management of the union and administrative bulletin boards within the stations.
- The District has identified Lieutenant Marrero as the future Chaplain of IMFD. The District will budget for LT Marrero to receive chaplain training and he will be mentored by Estero FD's chaplain as part of his training.
- HR Manager Rothenberg and DC Hernden will continue to work on a line of duty policy/SOG.
- Develop a marketing and training program to help employees better understand and utilize the BHAP (FYE2024)

<b>Objective 2B</b>	<b>Design and implement an employee evaluation program to support employee development.</b>
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<b>Timeframe</b>	FYE 2024	<b>Assigned to:</b>	DC Aquil
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- After further research and evaluation, the District plans to purchase and implement a web-based system called Essential Personnel (EP). EP will assist with data driven evaluations, credential management, 360-degree feedback, and awards management. The goal of the District is to continue to build strong teams, ensure safety and wellness for our staff, and advance the professional capabilities of the organization. The build out is approximately two months once initiated, and it is slated for purchase in fiscal year 2023-2024.

<b>Objective 2C</b>	<b>Obtain quality employees to match community expectations.</b>
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<b>Timeframe</b>	Ongoing	<b>Assigned to:</b>	DC Aquil
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- The most recent hiring process occurred between February and April of 2023, with personnel starting employment on May 1st. All employees recently hired are performing to the expectations of the community and the District.

<b>Objective 2D</b>	<b>Design and implement a succession program to guide the IMFD's growth and development.</b>	
<b>Timeframe</b>	FYE-2024	<b>Assigned to:</b> DC Guzman
<ul style="list-style-type: none"> <li>– The goal of the District is to develop a comprehensive Officer Development Manual, by FYE2024, to assist the District in succession planning.</li> <li>– District administrative personnel are currently working with City of Fort Myers Fire Department on their Officer Development Program. There may be an opportunity for the county fire departments to cooperate in a county wide officer development program.</li> </ul>		

**Goal 3 Refine the public education and fire inspection programs to strengthen community relations.**

<b>Objective 3A</b>	<b>Review current community programs to identify areas of improvement.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> Fire Marshal Mozes
<ul style="list-style-type: none"> <li>– July 2023 Evaluations were created to identify external stakeholder needs.</li> <li>– Fall program was developed and implemented.</li> <li>– A Drowning prevention program was developed and became the 2023 Summer Safety Campaign.</li> <li>– For 2025, the District is considering creating a mascot for the organization to use during pub ed events.</li> <li>– Every year during the District's Back to school program, firefighters are positioned at various locations on the first day of school holding banners to remind drivers that school is back in session and to watch their speed, and the roadway.</li> <li>– Due to public needs identified in pub ed events, the District implemented an adult fire program that encompasses all things fire safety for adults including dryer fires.</li> <li>– Evaluate programs every two years.</li> </ul>		

<b>Objective 3B</b>	<b>Analyze existing fire inspection and code enforcement processes to explore areas for improvement.</b>	
<b>Timeframe</b>	2-3 years	<b>Assigned to:</b> Fire Marshal Mozes
<ul style="list-style-type: none"> <li>- The District plans to implement the utilization of the Occupancy Vulnerability Assessment Profile (OVAP) scoring for determining existing inspection frequencies based on building risk beginning in calendar year 2024. As part of this implementation, inspection frequencies will be reduced for locations that have scored moderate to low on the OVAP, reflecting the lower level of risk associated with those buildings.</li> </ul>		

<b>Objective 3C</b>	<b>Review and revise external communication methods to better inform the community.</b>	
<b>Timeframe</b>	18-24 months	<b>Assigned to:</b> CRS Contreras
<ul style="list-style-type: none"> <li>– The Community Relations Specialist revised the District's social media, and media policy.</li> <li>– The District acquired and implemented the software Archive Social to ensure our organization's communications are saved enabling staff to respond to records request and remain compliant with state statutes.</li> <li>– The District hosted an open house February of 2023</li> </ul>		

- In April of 2023 the District hosted Camp Braveheart, its annual women’s empowering program for school age girls. The program has been a success and many fire departments around the US are sending leaders to our programs to assist in replicating it in their organizations.
- The District is continuing to look for opportunities to have safety messaging in local community newspapers. The District is looking to implement a “Chief’s Message” in the community papers. The Chiefs Message can also be posted in our social media feed. (FYE 2024)

<b>Goal 4</b>	<b>Develop a more comprehensive training program to better serve the evolving needs of our District.</b>
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<b>Objective 4A</b>	<b>Develop a standard mentorship program for the fire District to improve employee development.</b>
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<b>Timeframe</b>	36-48 months	<b>Assigned to:</b>	DC Guzman
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- The District will look to complete an official mentorship program by 2025.

<b>Objective 4B</b>	<b>Increase access to live fire training to enhance fireground proficiency.</b>
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<b>Timeframe</b>	12-18 months	<b>Assigned to:</b>	DC Wisdom
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- The District has partnered up with Bonita Springs Fire District and secured access to their Burn building. This will enable the District to regularly schedule and provide live burn training for our firefighters.
- The District continues to increase their cadre of Live Fire Instructors to be self-sufficient in providing live fire training in accordance with the National Fire Protection Association (NFPA).
- The District will begin Live burns in September 2023.

<b>Objective 4C</b>	<b>Develop a standard format for report writing to improve the quality of incident documentation.</b>
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<b>Timeframe</b>	18-24 months, ongoing	<b>Assigned to:</b>	DC Hernden/Aquil
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- In January 2023 the District was able to train all personnel on the new EMS report writing standard.
- The NFIRS (Fire) documentation SOG will be completed and implemented by end of 2023-2024 fiscal year.

<b>Objective 4D</b>	<b>Expand focus on BLS training for all provider levels to improve patient outcomes.</b>
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<b>Timeframe</b>	FYE 2024	<b>Assigned to:</b>	DC Hernden
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- EMTs are now included in all medical training.
- The District will develop an annual EMT and Paramedic performance evaluation.

<b>Goal 5</b>	<b>Further develop the District's physical resource management to better serve the needs of the personnel and community.</b>
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<b>Objective 5A</b>	<b>Improve District facilities to better meet the needs of emergency operations and service to the community.</b>
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<b>Timeframe</b>	Ongoing	<b>Assigned to:</b>	DC Crisman/Hernden
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- For 2023-2024 the goal of the District is to remodel station 71 and 72 from the damaged caused by Hurricane Ian.
- Every year Division Chief Crisman and Maintenance Technician Griffin will assess all stations for deficiencies, maintenance, and improvement needs, that will yield projects, which will be budgeted for.
- DC Hernden is exploring funding options for apparatus mounted exhaust mitigation systems. DC Hernden is in the process of obtaining pricing and potential grant funding for the project. The potential of placing the systems on in-house EMS units will be looked at.
- The District is obtaining bids to improve landscaping at station 73 and 74 to mitigate erosion and fervent future damage.
- The District is obtaining bids to replace LED lighting at stations 73 and 74.

<b>Objective 5B</b>	<b>Review District's equipment compatibility with neighboring departments in support of continuity of service delivery.</b>
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<b>Timeframe</b>	Completed	<b>Assigned to:</b>	DC Wisdom
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<b>Objective 5C</b>	<b>Improve the District's information technology to better meet the needs of personnel and the community.</b>
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<b>Timeframe</b>	Ongoing	<b>Assigned to:</b>	DC Crisman
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- Once the remodel of station 72 and 71 are completed, the logistics division will implement a new building maintenance software
- The District's administrative staff was trained and began using the document management system PowerDMS. Floor personnel will be trained on the program in FYE2024.
- Employee ID system (Can-tech) was updated
- The fuel master system was implemented.
- 2<sup>nd</sup> phase of the upgrade of the portable and mobile radios have been scheduled by Lee County Communications Department.

<b>Objective 5D</b>	<b>Revise data entry protocols into PSTRAX to improve asset management.</b>
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<b>Timeframe</b>	18-24 months	<b>Assigned to:</b>	DC Crisman
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- DC Crisman will work on the development and training of and SOG for the use of PSTrax.

<b>Goal 6</b>	<b>Refine organizational management to sustain the highest quality service to our community.</b>
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<b>Objective 6A</b>	<b>Review information systems to ensure production of usable data (e.g., ESO, Mobile Eyes, Aladtec, PSTRIX, etc.)</b>
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<b>Timeframe</b>	Ongoing	<b>Assigned to:</b>	DC Guzman
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- The District's administration has fully implemented the National Fire Operations Reporting System to assess the impact or the organization's response availability, capability, and operational effectiveness on the outcome of a fire and other emergencies. The system assisted greatly in the revision of the CRA-SOC. The system was also instrumental during the accreditation process.

<b>Objective 6B</b>	<b>Evaluate existing policies and procedures to ensure they are accurate, necessary, and appropriately communicated.</b>
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<b>Timeframe</b>	12-18 months	<b>Assigned to:</b>	Executive Assistant Lavicka
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- The District's administration staff is currently reviewing and revising policies and procedures using PowerDMS.
- The District will assign policies and SOG to employees of the District to read, acknowledge, and sign once they are trained on PowerDMS.

<b>Objective 6C</b>	<b>Implement a document management system to eliminate operational inconsistencies.</b>
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<b>Timeframe</b>	18-24 months	<b>Assigned to:</b>	Executive Assistant Lavicka
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- The document management system Power DMS has been implemented with the District's administration staff. It will be rolled out to the floor personnel in FYE 2024.

<b>Goal 7</b>	<b>Prepare for, pursue, achieve, and maintain international accreditation to better serve our community and embrace excellence.</b>
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<b>Objective 7A</b>	<b>Form team or committee structures with management components as needed to pursue and maintain accreditation.</b>
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<b>Timeframe</b>	Done	<b>Assigned to:</b>	DC Guzman
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<b>Objective 7B</b>	<b>Develop a community-driven strategic plan.</b>
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<b>Timeframe</b>	Done	<b>Assigned to:</b>	DC Guzman
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<b>Objective 7C</b>	<b>Implement the community-driven strategic plan.</b>
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<b>Timeframe</b>	3 months, on-going	<b>Assigned to:</b>	DC Guzman
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- This is an ongoing process. The District has developed workflows to implement and manage the Strategic plan.

<b>Objective 7D</b>	<b>Conduct a community hazards and risk assessment and publish a Community Risk Assessment - Standards of Cover document.</b>
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<b>Timeframe</b>	Updated in 2023	<b>Assigned to:</b>	DC Guzman
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<b>Objective 7E</b>	<b>Conduct and document a self-assessment of the District utilizing the CPSE/CFAI Fire and Emergency Services Self-Assessment Manual criteria.</b>	
<b>Timeframe</b>	August 30, 2023	<b>Assigned to:</b> DC Guzman
	<ul style="list-style-type: none"> <li>Completed the SAM in March 2023 and uploaded to the CFAI SharePoint site. SAM was approved and verified by the CFAO peer assessment team.</li> </ul>	
<b>Objective 7F</b>	<b>Achieve agency accreditation by the CFAI.</b>	
<b>Timeframe</b>	4 months	<b>Assigned to:</b> DC Guzman
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>Apply for “Candidate Agency” status with the CFAI. (Done)</li> <li>Prepare for CFAI Peer Assessor Team visit. (Done)</li> <li>Upload Strategic Plan, Standards of Cover, and Self-Assessment Categories and Criterion for review and comment by CFAI Peer Team. (Done)</li> <li>Host CFAI Peer Team site visit for accreditation review. (Done)</li> <li>Receive CFAI Peer Team recommendation to CFAI for Accredited status. (Done)</li> <li>Receive vote during the CFAI hearings in favor of Accredited status. (Scheduled for August 30, 2023)</li> </ul>	
<b>Objective 7G</b>	<b>Maintain accreditation with the CFAI.</b>	
<b>Timeframe</b>	Ongoing	<b>Assigned to:</b> DC Guzman
<b>Critical Tasks</b>	<ul style="list-style-type: none"> <li>Submit required Annual Compliance Reports.</li> <li>Attend CFAI “Dayroom Discussion” web-meetings for continued education.</li> <li>Participate in the accreditation process by providing “peer assessors” for external District review and identification of possible best practices.</li> <li>Participate in the annual CPSE Excellence Conference for continued education and networking with other accreditation teams and accredited agencies.</li> <li>Submit Annual Compliance Reports as required by CFAI policies.</li> <li>Establish succession development of internal accreditation team in preparation for next accreditation cycle.</li> </ul>	