



South Metro Fire District Strategic Plan Overview

In 2025, South Metro Fire District embarked on a comprehensive long range strategic planning process to assess current efforts and status, build upon successes and partnerships, continue momentum in positive growth and services, and solidify a united path to further accomplishments and a vision for the future. The deliverables included a full Strategic Plan document with a Vision, Mission, Values, Key Focus Areas, Outcomes and Strategic Goals. A separate Implementation Plan with SMART Objectives, Action Steps and Metrics will follow; and strategic planning templates for ongoing work are being developed.

This report is a summary of the work completed through the process, the results and basic components of the strategic plan, and recommendations for future work and successful implementation.

Summary of Strategic Planning

A strategic plan is your guide and a roadmap to help the organization plan for future success. It describes a clear vision, with community-focused priorities that serve as a resource for the Board and staff to make decisions, allocate resources, and consider new and innovative approaches to service delivery. The plan sets high level policy direction about what is most important based on information we have available today and the trends, challenges, obstacles, and opportunities that may happen in the future. The Strategic Plan will also provide a longer-term view of major projects and issues facing the community.

A well-designed Strategic Plan answers four key questions:



Where are we NOW?
Where are we GOING?
HOW will we get there?
How will we KNOW?

Over the course of an eight (8) month process, Raftelis worked with community stakeholders, Board Members, leadership, and staff to ask these questions, collect the answers, and use that feedback to help craft the draft documents that the Board is considering at this meeting. Your strategic plan was designed as a living document that should be updated regularly to reflect changes that happen over time, to measure progress, and report on successes and lessons learned.

Process and Approach

With the knowledge that this Strategic Plan will be a living document that will serve as a guide to the future as well as a road map with milestones, a thoughtful and deliberate methodology was designed to create the final strategic plan. The process was based around six (6) main Activities:

- **Activity 1 – Process Design and Project Management**
- **Activity 2 – Research, Analysis and Document Review**
- **Activity 3 - Engagement and Outreach**
- **Activity 4 – Strategic Plan Meetings**
- **Activity 5 – Implementation Plan Meetings**
- **Activity 6 – Document Creation and Review**



An important part of the process was to fully engage the staff and stakeholders in conversations and to use that information to craft the strategic plan. Below is a graphic that shows the overall approach for engagement, and SMFR had two committees that were deeply involved in the process: the **Strategic Plan Committee** (a standing committee for the organization) and the **Steering Committee** (established for this specific process). The Appendix to the Strategic Plan has several reports that add context to the Research and Engagement Activities.





Strategic Plan Framework



The above graphic is an easy-to-understand overview of the Strategic Plan framework. The **Vision Statement** is the aspirational future for SMFR and is the achievement of all the challenging work in the strategic planning process. The **Mission Statement** is the purpose of the organization and provides guidance for each of the components. The **Key Focus Areas** are listed in *priority order* and are the most critical areas (the “big buckets”) for the organization to spend time and resources to achieve success and realize the Vision for the future, and the **Key Goals** are the major areas that integrate across those Strategic Priorities to provide direction.

Key Focus Areas

During the process, there were six Strategic Priorities that were discussed and defined – these are the most important areas for the organization to focus resources and time to accomplish outcomes that are positive and lead to the future. Each Strategic Priority has specific Outcomes that will be accomplished over time, Key Goals to focus the work, and SMART Objectives to guide the staff for allocation of time and resources. Each Strategic Priority has a description and outcomes listed in the Strategic Plan to offer more context and information.

Implementation Plan

There will be a separate Implementation Plan with actionable SMART Objectives, Action Steps and Metrics that is being developed by the team. There will be focus on both current projects as well as projects for future budget conversations. The implementation is built on the policy



direction in the strategic plan, and together they serve as a communication tool for the Board, staff, and community, directing operational decisions about projects, funding services, budgets, staffing and more.

The Implementation Plan is the tactical, operational, and administrative document that will guide the accomplishment of Strategic Goals through establishing and tracking SMART Objectives and Action Steps. In short, it takes the overall policy direction from the plan and puts actions to those words. Always following the Mission to gauge the right approach, an Implementation Plan adds context and detail to the big picture. It is an internal document which is consistently being added to, updated, and improved each time a team meets, so it is a separate document and not a part of the Strategic Plan.

With that context and detail comes focus and accountability. A good Implementation Plan will chart out a course of action steps that answer:

- 1) What will be done specifically?
- 2) Who will do that work?
- 3) By when will it be done?
- 4) What resources are needed to be successful?
- 5) What is our measurement of success?
- 6) What is the status of completion?

As with the Strategic Plan, a thorough and complete Implementation Plan might take several years to build out in detail, and with the existing work already completed, to continue to “fill in the blanks” moving forward. With practice and a commitment to making the document a true guide and a living road map, the Implementation Plan can serve as an effortless way for the Board, staff, and community to hear updates and reports on progress.

Next Steps

Monitoring and Measuring Progress

An important part of the implementation of the Strategic Plan is the monitoring and measuring of progress. Over the course of several years, as the plan continues to improve and become a part of the culture of SMFR, the Outcomes will be further refined, and relevant Metrics will be created to provide analytical insight into the measurement of achieving those Outcomes.

While those Metrics are being crafted and evaluated, the most important next steps include:

- 1) Establishing regular meetings within each Key Focus Area to discuss successes, lessons learned and upcoming SMART Objectives;
- 2) Creating quarterly Board updates on the progress of the plan; celebrating successes and accomplishments, sharing lessons learned, and getting feedback and direction from the Board for the coming quarter; and



- 3) Setting an annual team retreat as part of the budget planning process to review the Strategic Plan and set new Strategic Goals and SMART Objectives for the coming year as needed.

Integration of the Strategic Plan

The budget is the Strategic Plan with resources attached. As such, during each budget cycle the strategic plan should be considered, discussed, amended, and improved to make sure the budget reflects the priorities of the organization. In addition, all the Master Plans should be reviewed for integration into the Strategic Plan (or adapting the Strategic Plan based on the information in those Master Plans).

Recommendations

At Raftelis, we value the plans you create and consider these plans to be living documents, not something that just sits on the shelf. This is a significant investment for the team, and is the strategic framework that will guide operations, goals, budgeting, and communication for the next several years. To get the most out of the significant work SMFR has done, we recommend the following:

Publish the Strategic Plan to Tell Your Story You have an amazing, content rich and easy to read Strategic Plan that tells the story of the history, current status and future of your community! We recommend crafting a press release to share the plan, publishing that plan online, printing hard copies as needed, sharing the plan via social media, and establishing a page or location on your website for your community to follow your progress.

Process to update the Implementation/Work Plan Implementing the action steps for the key areas of focus is essential for success of the plan and manifests the vision and guide the mission. Our fundamental recommendation for the continuance of the plan is for ongoing meetings to update SMART Objectives, create Action Steps, and consider Metrics. The existing work has already created a thoughtful and deliberate approach to strategic implementation and staff assignments. This process ensures that the initial steps are taken for implementation, along with fostering champions of the plan and overall strategic vision among staff and community members.

Creation of Metrics (Measurable) How do you know the plan works? How do you know that your goals are being accomplished, and your vision is on its way to realization? Creating Metrics helps in providing tangible benchmarks for accomplishments. This not only allows staff to know they are on the right track, but also provides accountability for all stakeholders involved in the overall implementation of the plan.

Creation of a Forward-Facing Dashboard How would SMFR communicate the most important work being done with the Strategic Plan? How will you distill all the information into a manageable and easy to communicate platform to tell the story around what is most important? Having a forward-facing dashboard is a great means by which all involved in the plan, from the



staff working through projects and goals, to the community who has a decidedly profound stake in the future, having a dashboard that quickly and clearly shows the plan, the goals, and the progress is an essential tool.

Quarterly Board Reports/Update Meetings Consider these meetings a deep check-in on the progress of the goals and objectives as reported by the staff. Quarterly meetings outline status updates, produce tangible actions steps with measurable results and outcome, and are also forums for the staff, and the Board to celebrate success of the implementation of the plan, which in turn creates momentum for meeting and accomplishing its goals. This is especially important in continuing the work to set initial action steps for implementation.

Facilitated Annual Retreat with the Board If the past few years are an example, the world both inside and outside SMFR can change quickly. How do those changes impact the implementation of your Strategic Goals? What about the establishment of new Goals, or new Key Focus Areas? This is where an annual retreat to revisit the strategic plan is key. An annual retreat focused on a deep dive into the plan and the status of meeting the goals can keep the tenets of the plan fresh in the minds of the Board and staff; and ensure a positive return on your strategic plan investment.

Summary and Thank You

We want to thank the team at SMFR: the Board, the executive team, and the dedicated staff with whom we were able to interact and collaborate. The strengths and opportunities are exciting and tremendous, and your future is bright! This comprehensive Strategic Plan will be a cornerstone for planning and a guiding document for the foreseeable future. By ensuring the plan is a living document, it will become a part of the culture of SMFR and be a road map for your strategic journey.