

TRAINING PROPOSAL

14 March 2008

To: Rapid City Fire Department
Rapid City, SD

Subject: Delivery of a five or seven day training course for Rapid City Fire Department

DATE

The proposed date of the training is May 12-20, 2008.

COURSE CONTENT

The proposed training will include Strategic Planning, Project Management and Long Term Recovery Planning. The course material is adapted from three National Fire Academy courses (Executive Planning, Financial Management and Long Term Recovery Planning) currently taught at the National Emergency Training Center in Emmitsburg, Maryland. I will provide additional information concerning the course content upon request.

TRAINING AIDS

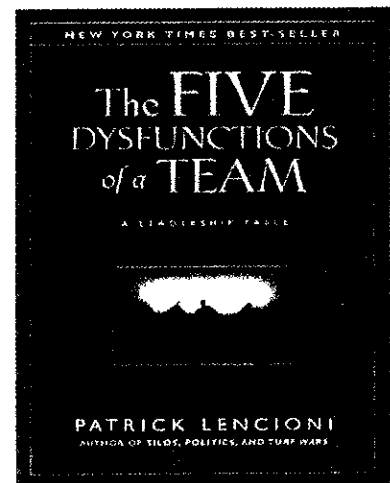
In addition to the training, I will provide student manuals, CDs with reference material, selected articles and a certificate of completion for each student. I will also provide the course videos, slides and wall charts.

PRE-COURSE READINGS

The Five Dysfunctions of a Team: A Leadership Fable by Patrick M. Lencioni. This book is available from Amazon for \$16.47. Once I am provided with a tentative roster, I will mail strategic planning articles for each student to be read before the training begins.

COSTS

The total cost of the five day Planning course is \$3,500. This includes printing costs, transportation and instruction. The amount may be paid after the course is completed and an invoice submitted.

**REFERENCES**

In the last two years I have provided the training to Belton, MO, Riverside County CA, Sonora/CDF CA, Citrus County FL, Iona-McGregor Fire District FL, Cheatham County TN, Hillsborough EMS NJ, USCG Port Arthur TX and Frederick County MD.

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Education

National Fire Academy

- Graduate of the National Fire Academy's Executive Fire Officer Program
- Completed seventeen resident courses from the National Fire Academy and the Emergency Management Institute

University of Houston

- Department of Political Science: Completed thirty graduate hours towards a Masters Degree in Public Administration
- Business School: Completed courses in Accounting, Business & Computer Sciences
- Bachelor of Arts Degree in Political Science

South Texas College of Law

- Twenty-seven Post Graduate hours at South Texas College of Law

Houston Community College

- Courses in Management, Business and Fire Technology

National and State Fire Academies

- U.S. Coast Guard Academy, Texas A & M, National Fire Academy

Professional Experience

National Fire Academy Instructor

- Lead Instructor "Executive Planning"
- Lead Instructor "Fire Service Financial Management"
- Lead Instructor "Pre-Disaster Long-Term Recovery Planning"
- Lead Instructor "Partnering for Fire Defense & Emergency Services Planning"
- Course developer of Financial Management, Executive Planning, Long-Term Recovery Planning & Partnering for Fire Defense & Emergency Services Planning

Houston Fire Department

- Acting District Chief with fire suppression responsibilities
- *Senior Captain assigned to suppression division*
- Assistant Coordinator over the Hazardous Material Response Team
- Training Officer assigned to HFD Training Academy

Antarctica Fire Department

- Shift supervisor responsible for McMurdo Station & Ice Airfield
- Department training specialist

U. S. Coast Guard

- Planning Specialist
- Law Enforcement Boarding Officer
- Lead instructor of Maritime Law Enforcement
- Hazardous Materials Specialist & Pollution Investigator

Houston Community College

- Lead instructor of fire technology courses
- Responsible for developing the skills of other instructors

Leadership Positions

Shift Supervisor

Employed as the shift supervisor for the Antarctica Fire Department providing emergency services and training for McMurdo Station and Ice Airfield

Fire Ground Officer

Leader of firefighters in rescue, prevention and suppression activities in the Houston Fire Department

Assistant Coordinator of Hazardous Material Response Teams

Coordinated the training and support functions for three shifts of HMRT personnel

National Fire Academy Instructor

Train chief officers and their staffs in the principles of Financial Management, Strategic Planning and Pre-Disaster Long-Term Recovery Planning

National Fire Academy Course Developer

Selected as the subject matter specialist and contractor to rewrite four NFA courses: Fire Service Financial Management (1995), Executive Planning (1999, 2003), Partnering Fire Defense and Emergency Services Planning (2005) and Pre-Disaster Long-Term Recovery Planning (2007)

Lead Instructor of Fire Sciences

Trained firefighters, officers and fellow instructors at Houston Community College and the Houston Fire Department Training Academy

United States Coast Guard

Served as section leader, planning specialist, pollution investigator, instructor of federal law enforcement procedures and boarding officer qualifications

In 2006 the Chief Warrant Officer Appointment Board selected me as the number one candidate for advancement to Chief Warrant Officer

Course Outline

Source: National Emergency Training Center, NFA Executive Planning Course

Value of Planning

Planning and Budgeting

Activity: How does your organization plan?

Types of plans

Defining of Strategic Planning

Projects toward a desired outcome

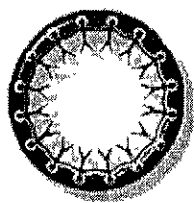
Keys to Strategic Planning

Three Strategic Planning models

1. John Bryson
2. Mark Wallace
3. University Associates: Applied Strategic Planning

Applied Strategic Planning (nine steps)

1. Planning to plan - Time, Responsibilities, Commitment, Mandates & Assumptions
 - a. Leader selection
 - b. Team members
 - c. Resources
2. Values scan - How values influence planning, Elements of a value audit
 - a. Dr. Jack McConnell video
 - b. Ms. Alice Coles video
3. Mission formulation - Question mission should address, Evaluating mission statement
4. Strategic business model - Vision, Current Reality & Creative Tension, Power of Vision, Backwards Thinking & the Merlin Factor, How to develop vision, Why creating vision is difficult, Power of Vision, Discovering strategy, Critical Success Factors & Critical Success Indicators
 - a. Model comparison
 - b. Vision activity
 - c. Vision (video clips)
5. Performance audit - SWOT analysis, Environmental assessments
6. Gap analysis - Measuring the gap, Is it feasible? Is there a challenge?
7. Integrating action plans - Integrating the plan with other plans, policies and procedures
8. Contingency planning - Value of contingency planning, Buford as a contingency planner
9. Implementation - Project Management



Vision Leadership

Strategic Planning Project Management

"Vision without action is a dream. Action without vision is simply passing the time. Action with Vision can change the world." Joel Barker

The ultimate function of prophecy is not to tell the future, but to make it. Your successful past will block your visions of the future." Joel Barker



Strategic Planning is the process by which the guiding members of an organization envision their future and develop the necessary procedures and operations to achieve that future. Strategic Planning has the potential of empowering individuals and teams to create their chosen futures. This is not a course on predicting future events. Instead, strategic planning creates the ideal future for individuals, organizations and/or communities. Historically, this type of planning has overcome the impossible, united people with common aspirations and accomplished modern marvels. The course offers instruction of a nine-step model that seeks to identify a process that transforms preferred outcomes into current reality.

Members of your organization will receive instruction in the fundamentals of Strategic Planning and Project Management. This training is based on the two-week Executive Planning course delivered at the National Emergency Training Center (FEMA). The complete Executive Planning course consists of seven modules. Recognizing time and travel constraints, students will receive instruction in the two most important modules of the EP course, strategic planning and project management. The training focuses on the Applied Strategic Planning model that is currently utilized by the NETC and FEMA. The model is especially valuable with its emphasis on vision and the ability to exercise personal control to determine one's ideal outcome. Project management provides the means of implementing the strategic plan. It offers the planner a number of "tools" to identify the work to be completed, a schedule to monitor the work, a responsibility matrix, a contingency table and the application of Microsoft's Project Management. Each member attending the training will receive a copy of the student manual on strategic planning and project management. They will also receive a copy of the planning model with explanations on each of the nine steps.

Target audience

Great ideals and visions that improve services and products may originate from any member of the organization. The critical element concerns the leader's ability to recognize, apply and communicate that vision to the organization's stakeholders in a style so convincingly that it becomes their personal vision. Exceptional leaders not only have the ability to see the preferred future, but they also have the enthusiasm and credibility to convince others in the desirability of the vision.

With its emphasis on creating the future, the strategic planning course is best matched with those who seek opportunities for significant advancement for themselves and the organization. The course will benefit those who are encouraged by the challenge of significant change toward an ideal outcome. The strategic planning course is especially beneficial for those who have responsibility for the professional development of others and for those who are preparing to become the future leaders of the organization.

A need for strategic planning

Organizations are expected to change their services to better serve their customers. With time, conditions change. Some hazards and threats subside while new ones surface. To better serve the customer, organizations develop and implement new programs to counter these new threats. The process of developing and implementing new programs is expensive and time consuming. In addition to the costs, it is often critical that the very best program is selected to have the greatest impact. In today's competitive environment solutions that "come close" to resolving problems are no longer acceptable. The incremental approach wastes resources, misses opportunities and fails to have the most desirable outcome. To assist in identifying the true problem and subsequently selecting the best solution, personnel need a better process. That process is Strategic Planning.

How is the problem being addressed?

Many organizations provide their personnel with little information to guide them in strategic planning and project management. In many cases, current programs are designed by testing, evaluating outcomes and testing again. The impact of such programs tends to have incremental benefits as opposed to a more comprehensive, sustaining outcome. Due to the urgency of perceived hazards, programs are quickly developed to appease complainants. Without the training and commitment to strategic planning, the proposed programs often function in a piecemeal manner. The intended results never seem to have the most desirable outcome.

Creating the Future

This course has two main parts, strategic planning and project management. The strategic planning section is designed to challenge today's supervisors. The value of strategic planning is found in its process. This process requires students to systematically consider which scenario will result in the preferable outcome. The student is guided through a series of discussions, dialogues and exercises to seek appropriate solutions to their problem and to implement actions that enable them to reach their goal. Historically students have been conditioned to identify a solution without analyzing the problem and its causes. They then commit to a solution that may not address the actual problem. The shortfall encountered in this traditional approach is the missed opportunity to consider what outcome was most desirable. Strategic thinking requires an individual to act deliberately, to create a desired future in contrast to predicting what will happen and positioning oneself for that anticipated event. One approach actually creates the future and the other forecasts the future. Due to the business culture, policies, guidelines and regulations many supervisors have become more comfortable with predicting the future as opposed to creating their future. The Applied Strategic Planning model offers individuals a process to create that ideal future.

The Applied Strategic Planning Model

Strategic planning concepts are illustrated with the Applied Strategic Planning Model. Elements in the model include a values audit, review of mandates, environmental monitoring, creating the vision, resource analysis, gap analysis and contingency planning. Emphasis is placed on the value of vision in creating the future.

A Special Style of Leadership

Although the course is not intended to be a course on leadership, various leadership qualities are examined. Students are encouraged to compare and contrast the skills needed to be successful in strategic planning and project management. Strategic planning requires a definable set of leadership qualities. Innovation, creative thought, encouraging questions, avoiding judgments, protecting team members, maintaining the team focus are all elements instilled in the strategic planning leader. The course design incorporates numerous activities designed to increase self-awareness. Active learning techniques are employed throughout the course to obtain a high level of new knowledge retention.

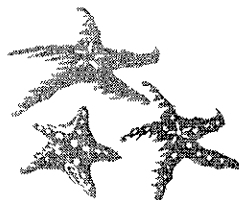
Video - Case Studies

The very successful video series, "The Last Place on Earth" is the story of two teams of explorers (English and Norwegian) racing to be the first to reach the South Pole. One tape is shown each day at the beginning of class. To relate the story to the course objectives, students are required to identify the planning issues, how the project was managed, the impact of the two leadership styles and how these issues affected the final outcome of the mission. The video series has been very effective in conveying the importance of planning, team management and the continual need to focus on outcomes.

A second video is used to convey important concepts in managing projects. The video "Fat Man, Little Boy" is the story of the Manhattan Project. The video is not viewed in its entirety but selected scenes are viewed to initiate discussion. This video provides an excellent example of successful project management. The course videos make clear the need for maintaining focus, protecting the contributions of team-members, and the recognition that in critical endeavors, failure is not an option. The course terminal objectives are met as students recognize how much better our services would be if they utilized the same skills, commitment and teamwork as presented in the Manhattan Project.

Project Management

The second half of the course examines project management. Project management is identified as the activity employed to accomplish the strategic plan. At this point in the course the student has knowledge of the concepts and reasoning behind the strategic planning process. The challenge is to identify all the tasks that will make the strategic plan become reality. Many supervisors are familiar with many of the methods of project management. During this part of the course students gain the ability to identify major and supporting tasks associated with a project that has real-life application. They practice and develop skills associated with group dynamics. The students work in groups to achieve the course goals through the design and implementation of a schedule, assigning responsibilities to team members, developing contingency tables, and a responsibility matrix to bring successful closure to a project.



The following questions were submitted to Fire Chief Rocco Forte of the Minneapolis Fire Department concerning his experience with the NFA Executive Planning course.

What did you personally gain from your attendance in the EP Class?

I had a working knowledge of business planning before attending the course, but the modules helped clarify some components that are included in a good business plan. I found the work we did with project management and GANT charts to be especially helpful to me.

What did your organization gain from your attendance in the EP Class?

Our organization has sent 14 managers to this course over the past 18 months. This has allowed us to refine our business planning process to the point that we have become the model department within the city when it comes to planning. Our business plan has been circulated throughout the city and every other department is now involved in the planning process. This process has become the driving force behind the annual budget at the department level as well as citywide.

How have the efforts at Applied Strategic Planning paid off for your organization?

In 2003, the Minneapolis Fire Department faced the most critical budget challenges since the Great Depression. We were forced to lay off 44 firefighters, or about 10 percent of the workforce. Since we had completed the Strategic Business Plan just prior to this budgetary layoff, we were able to use the initiatives and contingency plans to rehire 32 of these firefighters after only 5 months. The plan gave us the tools to pursue new revenue sources almost immediately. Because the City Council could see that we had a viable plan ahead of time, we were allowed to keep all of the new revenue produced by the key initiatives contained in our Strategic Plan.

How have the efforts at Project Management paid off for your organization?

This is one area where we were weak, but the skill and techniques learned during this course allowed us to develop a project management plan and assign specific responsibility to individuals for their part of the overall planning effort. This process gave us a better end product and we were able to achieve our goals much faster with everyone working off of the same project management matrix. Project management is another area where the whole city has benefited from the knowledge we brought back from this course.

What value do you place on the ability to send several members to one class to attend as a team?

We have taken advantage of this ability to send three teams of four or five managers to the course at one time. This allows them to learn the skills as a group and interact with each other regarding specific challenges faced by the Minneapolis Fire Department. This ability to send more than one person at a time has also allowed us to train our entire management team and get everybody on the same page much more rapidly than would have been possible if we were limited to one attendee per course offering. I would highly recommend this policy be continued for other departments for this course.

What would you say to your fire service colleagues that might be sitting on the fence about whether to attend or not?

This course has made a world of difference for our department. We have been able to develop a strategic plan for the next five years that supports our budget requests as well as gives us a tool to demonstrate the impact of both future budget reductions and future budget increases on our ability to provide a quality fire department for the citizens of Minneapolis. By this I mean that elected officials can see clearly the impact of spending decisions on the level of service we can provide. Fire Chiefs as well as City Managers should seriously consider sending a group of four or five managers to this course and then implement this planning process. I am sure that the time and effort involved will reap many times the investment in benefits for any department who takes this planning process seriously.

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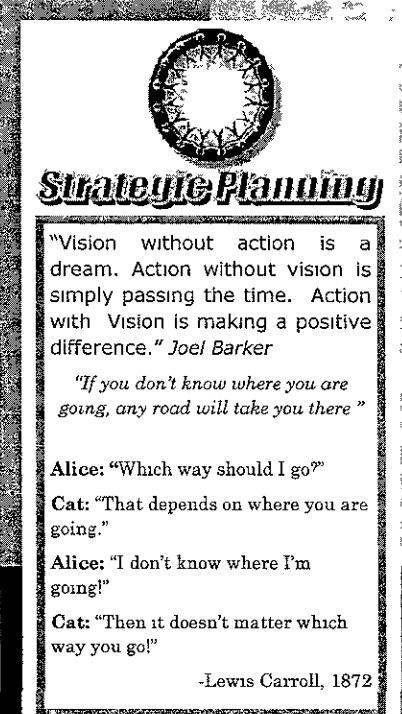
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"If you don't know where you are going, any road will take you there."

Alice: "Which way should I go?"
Cat: "That depends on where you are going."
Alice: "I don't know where I'm going!"
Cat: "Then it doesn't matter which way you go!"

-Lewis Carroll, 1872

For further information:
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Strategic Planning/Project Management

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