

Western Lane Ambulance District



Strategic Plan

2016

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A key project component is input provided by a cross-section of the community served by WLAD. Citizen stakeholders who participated in the facilitated meeting provided an invaluable contribution, which was used by the internal strategic planning team while creating this plan; it truly is a team effort. The citizens who participated in the facilitated session are acknowledged below:

Community Focus Group

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The Ambulance District’s internal strategic planning team was assembled from a cross-section of the organization’s members, and all participants were committed to the project’s success. As part of this process, the facilitators asked team members to participate on a no-rank or position basis. Labor and management participated fully and without silent disbelief. As a facilitation strategy, the executive director and elected officials reserved comment on issues until other members of the organization spoke so as not to influence discussion or perspective. ESCI would like to thank and acknowledge Brian Burright and his agency for their commitment to the process and the leadership they modeled.

Internal Planning Team

- Matt House
- Cynthia Russell
- Dick Childs
- David Haberman
- George Lydick
- Darrek Mullins
- Julie Brown
- Charles York
- Zach Werner
- David Rossi
- Danielle Hanson
- Brian Burright
- Ron Pearson
- Mike Webb
- Anne Stonelake



Western Lane

Ambulance District

*Excellence In Service
To The Community*

Letter from the Executive Director

March 2016

Western Lane Ambulance District is pleased to present our 2016 Strategic Plan to our patrons and members. It represents many hours of work by our career staff, board members, and representatives from our community. Through these concerted efforts this process and subsequent written plan captures what we believe are our highest priorities.

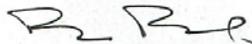
This plan is intended to serve the District for the next three to five years. In these times of economic recovery, changing health care and yet to be identified future challenges, it is important for us to be as prepared as possible to meet the needs of our citizens in both short and long term situations.

I would like to acknowledge and thank everyone involved for their efforts, not the least of which came from our internal Strategic Planning Team and External Stake Holders who spent many challenging hours on this process. These groups took on the task of identifying the goals and objectives written into this plan. I would like to thank the Board of Directors for their drive for improvement and the desired sustainability of our operations long into the future. I also want to extend my sincere thanks and appreciation to Emergency Services Consulting International, who has been extremely helpful with its professional expertise and guidance throughout this process and without their help and guidance this document would not have been possible.

This plan represents many months of preparation and work, but it is not the end of the process. The next step is implementing of the plan, including its incorporation into our individual and group performance measurement and appraisal systems. Timelines and responsibility for each of the stated objectives have been identified. This document will be used as a living guide to lead us into the next several years. The administrative staff, supervisors and Board of Directors are committed to monitoring and providing regular progress reports on the status of each plan element.

The 2016 Strategic Plan will serve as a valuable tool in determining the overall performance and success of the District. It will become an organizational management activity that will set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals. It will establish agreements around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment. All of us must be proactive and disciplined in regularly reviewing and updating our Strategic Plan, through quarterly reviews and annual updates. My thanks to all of you for making this commitment to being actively involved in this ongoing process and being prepared to the very best of our ability to meet the emergency service needs of our citizens.

Sincerely,



Brian Burrigh, Executive Director
Western Lane Ambulance District

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Western Lane

Ambulance District

*Excellence In Service
To The Community*

Letter from the President of the Board of Directors

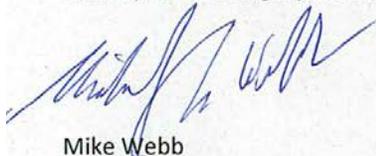
March, 2016

Western Lane Ambulance District 2016 Strategic Plan is now complete. This has been a significant and collaborative effort occurring over several months. We note that members of the Board of Directors, District Staff, and the Community Focus Groups joined together and did an outstanding job in committing to this important project and seeing it to its final form.

In creating this document, we have drawn on the rich and diverse intellectual resources from both inside and outside the organization to learn from our past, and appraise our current situation to develop a plan to move Western Lane Ambulance District toward a future in which we will grow in resiliency, service and accomplishment. In that light, the Board of Directors of Western Lane Ambulance District has officially adopted the Strategic Plan as the District's long-term policy for direction and focus.

The Strategic Plan is a living document intended to be used as the foundation for decision making at all organizational levels: policy, administrative, management and service delivery. It will be subjected to a regular review, and its details will be revised as needed to ensure that we achieve the ultimate purpose, to define where we are going as an institution, and how we propose to get there. Open communication of the plan will help to assure organizational accountability. Continuous evaluation of outcomes will determine the effectiveness of effort and direction.

Thank you for being a part of our strategic planning during these challenging but exciting times.



Mike Webb
Board President
Western Lane Ambulance District

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Planning Methodology

“A goal without a plan is just a wish.”

-- Antoine de Saint-Exupery, author (1900-1944)

As the quote above suggests, having goals in and of themselves does not accomplish anything. A plan -- complete with goals, timelines, assignments, and incremental steps which can be measured -- creates a roadmap for an organization to follow. Change starts with a plan. In order for any organization, public or private, to reach its full potential, it must have a plan. An organization that knows where it is going, knows the environment in which it must operate, and identifies how to get there has the best chance to meet the needs of its community and achieve its vision. This planning process has served to refresh the organization's continuing commitment to professionalism and set the path toward future success.

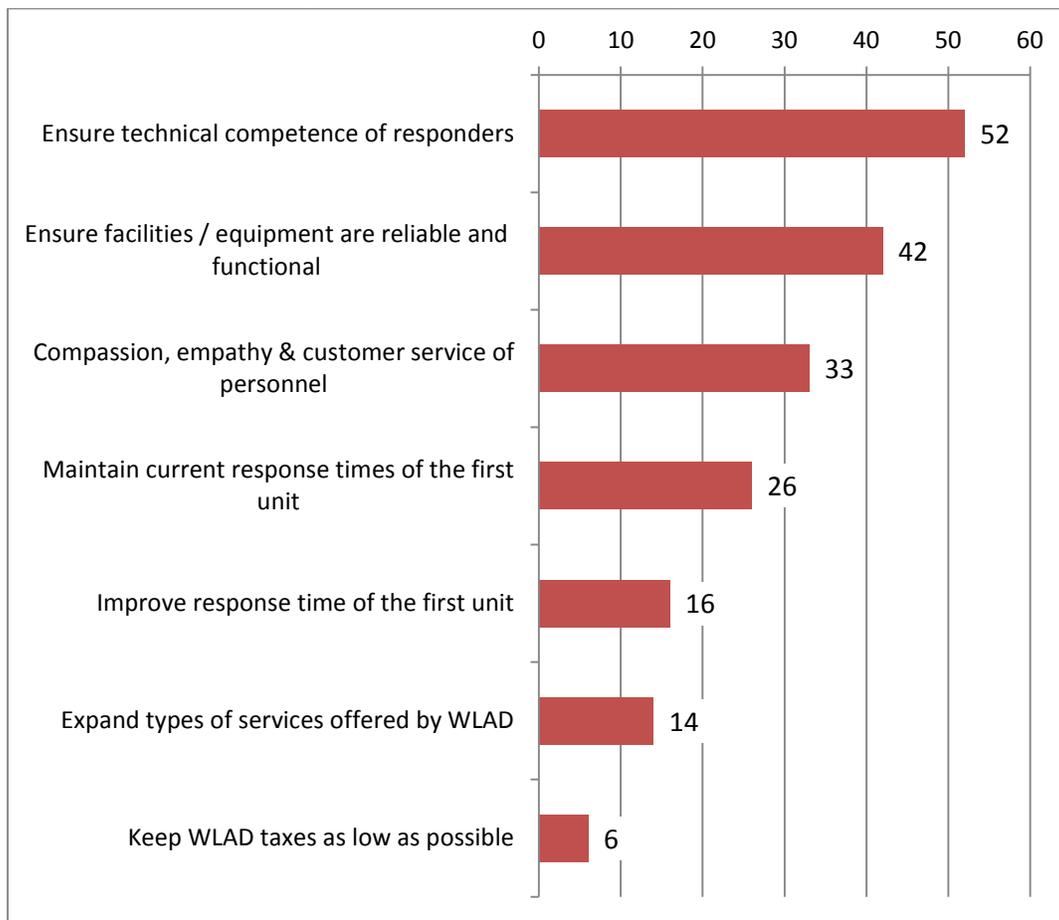


The approach taken in this planning process includes an in-depth environmental scan from the perspectives of the internal line staff, the elected

officials, and administration. The criteria are referred to as a SWOC Analysis (strengths, weaknesses, opportunities, and challenges). The feedback from all of these areas is summarized later in this report.

The following graphs illustrate the planning priorities the respondents believe the ambulance district should focus on in priority order.

Figure 1: Citizens Forum Planning Priorities

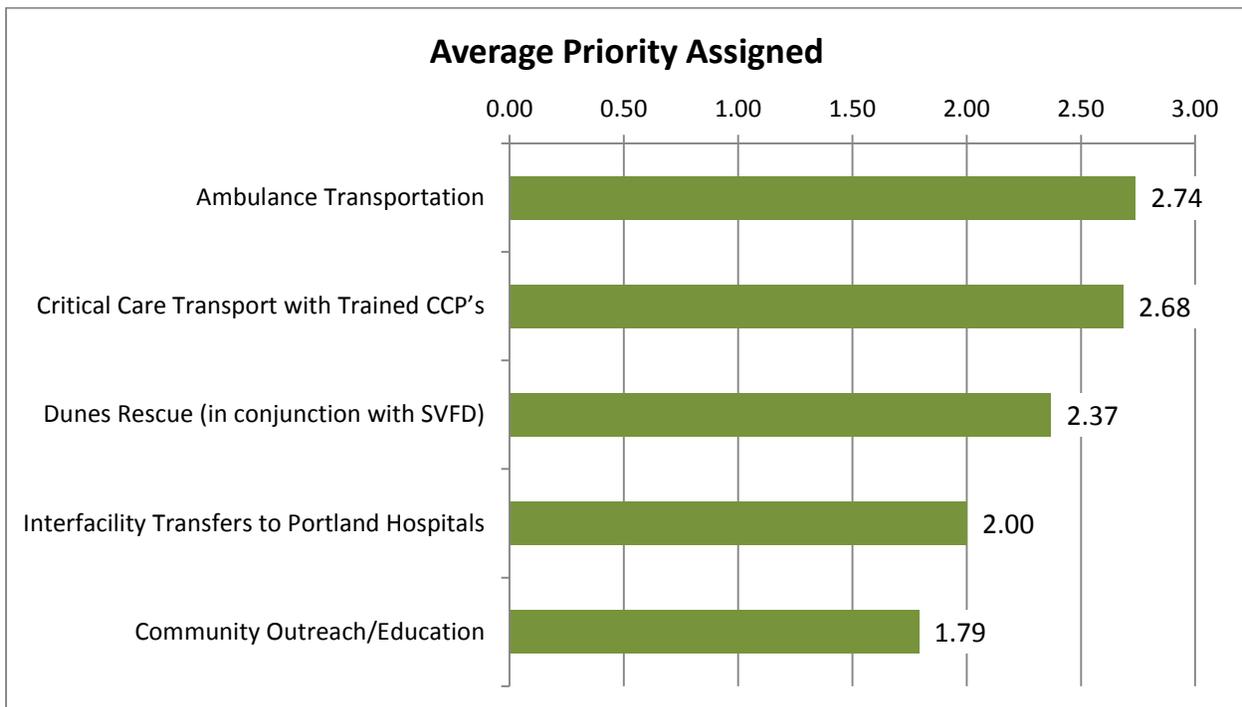


The planning priorities were presented as a forced ranking of costs, response times, training, and customer service, among other dimensions. The respondents assigned a value to each of the dimensions. The scale allows the respondents to assign the highest value to the most important dimension (a seven), a value of one to the lowest priority dimension, with no value given to dimensions a respondent did not feel was an appropriate priority. Respondents were also given the opportunity to add a dimension where he/she felt one was missing. None of the respondents added a dimension to the planning priorities.

The citizen forum participants prefer a high state of readiness to respond to emergencies (technical competence as well as reliable equipment and facilities), a high degree of customer service and compassion, and appear to be satisfied with the existing response times provided by the district. The remaining dimensions were given a relatively lower value. During discussion, there was no strongly held belief that response times needed to be improved or new services offered, nor was there a belief that keeping the cost low was an over-riding concern. This should not be viewed as endorsement of increased costs, but simply that maintenance of existing services and response times are valued higher than keeping the costs low.

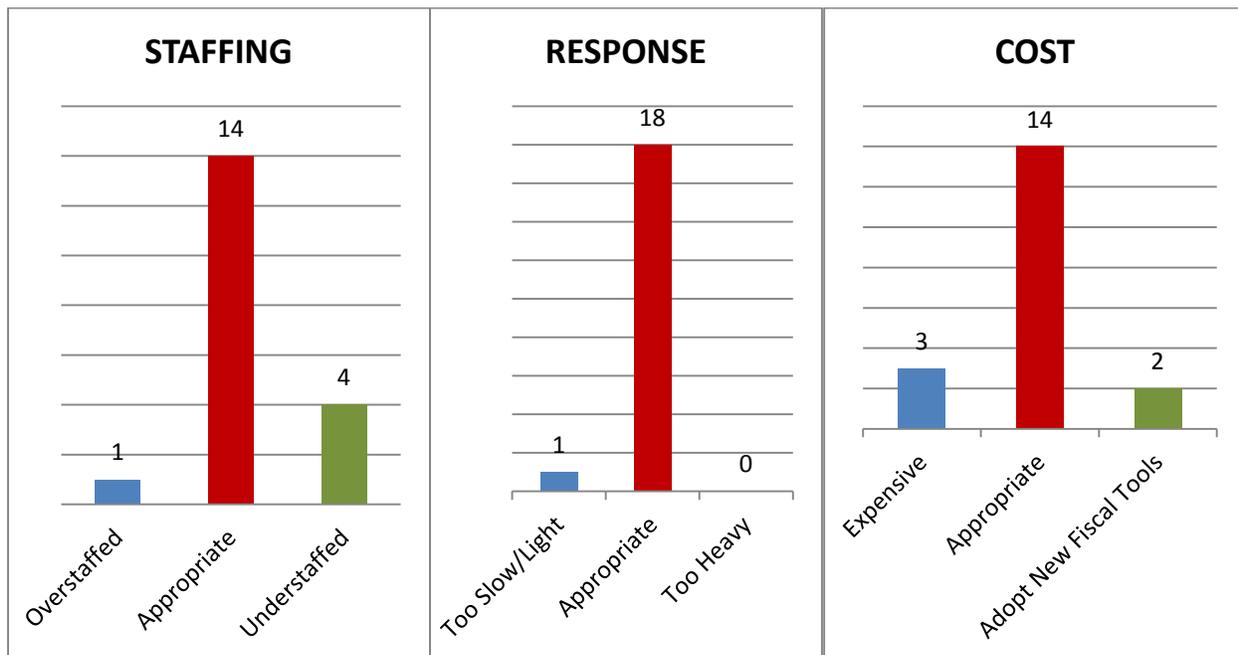
The citizens represented were then asked to identify the most important functions and services the district provides based on the list of services currently provided and rank those services. In this case, the respondents placed a value of 1, 2, or 3 alongside the services. A three (3) reflects a critical priority, a two (2) an important priority, and a one (1) a low priority. The following chart describes the service priorities. The participants were also asked to cross out any service it felt was not appropriate to provide or add a service where they believed a gap existed. None of the respondents crossed out a service or added a service.

Figure 2: Citizens Forum Service Priorities



It is clear that the citizens prioritize emergency response services above all other services. This is not to say they do not value the other services, and some went as far as to recommend merging with Siuslaw Valley Fire & Rescue. Finally, the forum participants were asked to rate and compare the cost of service, response performance, and staffing. The following charts describe the views of the forum attendees.

Figure 3: Staffing, Response & Cost Survey



Just over 5 percent of the attendees (1) believed the staffing is too high. Just over 21 percent of the attendees (4) believed the staffing was too low. The remaining, almost 74 percent (14) believe the staffing is appropriate.

The attendees were asked their opinion about response (too slow or too few resources, an appropriate response time and size of response, or too many resources being sent). The vast majority of the forum participants, almost 95 percent (18), stated that WLAD dispatches an appropriate amount of resources with an appropriate response time. The remaining 5 percent (1) felt the response was too slow or too few resources dispatched.

The final chart depicts attendee opinion about cost (too expensive, appropriate cost, or needing to adopt new, expanded fiscal tools). The majority of the forum participants (over 73 percent) believed the cost was appropriate to the service WLAD provides. Over 15 percent (3) felt the cost was too expensive, while over 10 percent (2) felt that new fiscal tools should be adopted.

These three simple survey charts illustrate that WLAD is appropriately staffed, provides an appropriate response time, and has an appropriate cost for the service. However, it is important to recognize that these dimensions are not necessarily representative of a community-wide perspective, nor that these survey results would be an accurate predictor of similar results of a broader survey. It is a reflection of the opinions of those in attendance, armed with some background information about WLAD’s service delivery system and the challenges and limitations it faces. This result reinforces ESCI’s assertion that community outreach provides the opportunity to educate the community about WLAD’s service delivery system and its limitations to the broader community.

A summary of the written comments from the attendees of the citizen forum is provided in the appendix to this report.

Mission, Vision, and Guiding Principles

Mission

The organization's mission statement should clearly define the primary purpose of the organizations' existence. It focuses ambulance district members on what is truly important to the organization and community. The mission statement should be understood by all members and posted prominently throughout the organization's facilities. Each member should commit the mission to memory. The internal planning team, through a consensus process and based on feedback from the citizen forum, reviewed and revised the district's mission statement.

WLAD Mission Statement

To provide quick, efficient, professional medical services, transport, and community education with the highest standards of excellence and compassion.



Vision

In addition to knowing their mission, all successful organizations need to define where they expect to be in the future. The district's vision provides members with a future view that can be shared, a clear sense of direction, a mobilization of energy, and gives a sense of being engaged in something important. Vision statements provide a direction of how things can be and a sense of organizational purpose.

WLAD Vision Statement

To provide superior and compassionate services to each and every community member through a forward thinking, highly trained team of professionals.



Guiding Principles (Values)

Guiding principles (values) define what the organization considers to be appropriate and inappropriate behaviors. An organization's fundamental guiding principles define the organization's culture and belief system, thus providing a foundation in an environment that is always changing. The strategic planning team declared the following as the core values for the district.

With the completion of its mission, vision, and core values, the WLAD has established the organization's foundation for strategic planning. ESCI strongly recommends that every member empower themselves with these elements; they are the basis for accomplishing the organization's strategic initiatives, goals, objectives, and day-to-day tasks.

WLAD Core Values

- ***Safety & Family come first***
- ***Teamwork***
- ***Honest and open communication***
- ***Craftsmanship***
- ***Accountability***
- ***Respecting others' ideas***



Environmental Scan

In order to properly formulate strategic initiatives, the internal planning team had to evaluate the external and internal organizational environment. The internal planning team combined feedback from the citizen forum, the internal brainstorming results, and their collective knowledge of the organization and the community to assess the environment in which the district operates. Analyzing the organization's strengths, weaknesses, opportunities, and challenges (SWOC) is the first step in identifying actionable strategies for the future.

Strengths

The identification of organizational strengths is the first step in the environment scan. An organization's strengths identify its capability of providing the services requested by its customers. The organization needs to make certain that its strengths are consistent with the issues it faces. Programs that do not match organizational strengths or primary functions should be reviewed to evaluate the rate of return on precious staff time. The internal planning team identified and prioritized the following district strengths:

- Excellent patient care
- Technically progressive agency
- Critical care services
- Training
- Customer service above and beyond
- Good quality people/experienced/family feel



Weaknesses

Organizational weaknesses, or lack of performance, are also an important environmental scan element. In order to move forward, the organization must honestly identify the issues that have created barriers to success in the past. Weak areas needing improvement are not the same as challenges, which will be identified later, but rather those day-to-day issues and concerns that may slow or inhibit progress. Internal organizational issues, as identified by the planning team, are typically issues that are at the heart of an organization's problems. The internal planning team identified and prioritized the following district weaknesses:

To map out a course of action and follow it to an end requires some of the same courage that a soldier needs.

– Ralph Waldo Emerson

- Tax base is too small/local option levy
- Not enough part time & full time staff
- Old facility/lack of storage
- Planning for future capital needs
- Staffing level stretched to meet demand

Opportunities

An organization's opportunities and challenges are generally derived from the external environment.

You can't expect to meet the challenges of today with yesterday's tools and expect to be in business tomorrow.

- Unknown Source

Opportunities are focused on existing services and on expanding and developing new possibilities inside and beyond the traditional service area. Many opportunities exist for the

district:

- Permanent director
- Community paramedic
- Current location offers room for expansion/new facility
- Partner with SVFD volunteers/others to grow labor force
- Develop succession plan
- Permanent funding source/seek grants

Challenges

There are conditions in the external environment that are not under the organization's control. The identification of these conditions allows the organization to develop plans to mitigate or respond when a challenge becomes an obstacle. By recognizing these challenges, an organization can greatly reduce the potential for loss. The internal planning team identified the following challenges:

If you don't like change you're going to like irrelevance even less.

-- US Army General Eric Shinseki

- Loss of operating levy
- Continued reduction in reimbursements
- Inability to hire qualified manager
- Private ambulance companies
- Moving off hospital campus



Definition of Terms

There are four main components to a strategic plan: Initiatives, Goals, Objectives and Critical Tasks. For purposes of this strategic plan, they are defined as follows:

Initiative – The largest overarching element of a strategic plan, an initiative is a broad enterprise where the district may have multiple areas of focus.

Goal – A smaller component of and subordinate to an initiative, a goal is focused on one particular area but is still general in nature. If all of the goals under an initiative have been accomplished, the initiative will be considered achieved.

Objective – A smaller component of and subordinate to a goal, an objective is usually defined as specific, measurable, action-oriented, realistic, and time-sensitive. If all objectives under a goal are accomplished, the goal will have been accomplished.

Critical task – The smallest component of a strategic plan, critical tasks are the immediate (within 90 days) action steps needed to meet an objective or a goal. Not all goals or objectives have critical tasks.

Performance Indicators – A list of circumstances which should be evident if an objective has been accomplished.

Outcome – The desired consequence of an objective once accomplished.

Strategic initiatives, goals, objectives, performance indicators, and outcomes become an important part of the organization's efforts. By following these components carefully, the organization will be guided into the future and should benefit from reduced obstacles and distractions. Each of the initiatives, goals, and objectives were identified in a two-day planning workshop facilitated by ESCI with the internal planning team.

The following series of tables list and define each initiative with its subordinate goals and each goal with its subordinate objectives. Timelines are also listed with each objective as follows: Critical tasks (to be completed in 90 days), Short-term (more than 90 days but less than one year), Mid-term (greater than one year but less than three years), and Long-term (greater than three years but not longer than five years). These timelines are listed after the objectives. The initiative manager is responsible for tracking that initiative's progress. Each objective also has a person responsible for coordinating the effort to implement that objective.

Strategic Plan

Initiative 1 – Administration/Finances

Western Lane Ambulance District has been operating without a permanent executive director for almost a year. As such, many temporary administrative decisions have been made, but the continuity and direction provided by permanent leadership suffers. Members recognize that a permanent CEO may change some of those decisions, so are naturally tentative in committing to a temporary course of action.

As a primarily taxpayer-supported service, WLAD depends on revenue from a variety of sources, such as fees for transport services, Medicare reimbursement, subscription fees, a permanent levy, and a local option levy. The district must balance increasing expenses with uncertain revenue streams. As revenues are influenced by changes in reimbursement rates, such as potential changes in Medicare reimbursements, either expenses must be reduced or alternative funding must be identified. This initiative addresses administrative issues, as well as the balancing of revenues and expenses to maintain a sustainable operation.

Initiative Managers: Executive Director

Goal: 1A Ensure financial stability and sustainability of the organization and plan for future needs and growth

Objectives	1. <i>Conduct a financial needs analysis, listing current revenue sources and expenditures.</i>	
	Responsible: Julie Brown	Timeline: Critical
	Outcome: A clear financial picture of current and anticipated expenditures compared to existing revenues, identifying any gap which may exist.	
	2. <i>Evaluate each revenue source and expenditure to determine if they must be adjusted and set at levels appropriate to the cost of delivering service.</i>	
	Responsible: Julie Brown	Timeline: Critical
	Outcome: A clear understanding of the true cost of programs and the revenues those programs bring in, indicating to what degree a given program pays for itself.	
	3. <i>Identify potential new revenue sources.</i>	
	Responsible: Executive Director	Timeline: Short-term
	Outcome: A list of revenue streams available to the district is compiled. This list may be referred to when determining how to address any revenue gaps identified in Objective 1.	
	4. <i>The Board of Directors review, approve or modify, and provide direction to the Executive Director regarding identified revenue streams.</i>	
Responsible: Board of Directors	Timeline: Short-term	
Outcome: The board of directors has given the executive director specific direction regarding aligning expenses with revenues, provided for future growth, and adjusted programs with low return on investment.		

Goal: 1B Consider renewal of levy	
Objective	1. <i>Contrast the financial needs and service capabilities with and without a renewed levy.</i>
	Responsible: Julie Brown
	Timeline: Short-term
	Outcome: A clear case of cost versus consequence (in terms of service delivery impacts) is made.
	2. <i>Evaluate the community's willingness to support renewal of levy</i>
	Responsible: Executive Director & Board of Directors
	Timeline: Short-term
	Outcome: The likely result of a levy election is clearly identified based on anecdotal evidence and feedback from the community.
3. <i>If evidence indicates the community is willing to support it, present the levy to voters for renewal.</i>	
Outcome: A levy election is on the ballot for voters to consider.	
Responsible: Executive Director/Board of Directors	
Timeline: Short-term	
Goal: 1C Evaluate the feasibility of a shared services approach to managing the district	
Objectives	1. <i>Determine areas to be evaluated in a shared services feasibility study.</i>
	Responsible: Executive Director
	Timeline: Critical
	Outcome: The scope of a shared services feasibility study is articulated (i.e., combined management, shared support functions, a "190" agreement, merger, all of the above).
	2. <i>Collaborate and discuss the concept with potential partners.</i>
	Responsible: Executive Director
	Timeline: Critical
	Outcome: Potential partners have been identified and willing partners have been engaged.
	3. <i>Report findings to the Board of Directors for direction.</i>
Responsible: Executive Director	
Timeline: Critical	
Outcome: The board of directors direct the executive director regarding next steps in a potential shared services feasibility study (e.g., discontinue efforts, refine partner list and/or limit scope, begin the process to commission a study).	

	4. <i>If approved, issue a request for proposals (RFP) to conduct a shared services feasibility study.</i>	
	Responsible: Executive Director	Timeline: Mid-term
	Outcome: A request for proposals (RFP) for a qualified firm to conduct a shared services feasibility study has been commissioned.	
	5. <i>Consider and if appropriate, implement the shared services feasibility study recommendation(s).</i>	
	Responsible: Board of Directors	Timeline: Mid-term
	Outcome: The study recommendations have been evaluated by the potential partner agencies and areas of mutual benefit and agreement have been implemented.	
Goal: 1D Develop and maintain comprehensive facilities, apparatus, equipment and funding plan		
Objectives	1. <i>Identify and prioritize apparatus and equipment requirements.</i>	
	Responsible: Ron Pearson	Timeline: Mid-term, ongoing
	Outcome: Current and future apparatus and equipment needs have been identified and prioritized for purposes of future expense planning.	
	2. <i>Evaluate the existing facility to meet the current needs.</i>	
	Responsible: Ron Pearson	Timeline: Mid-term, ongoing
	Outcome: The current facility has been evaluated against current needs.	
	3. <i>Evaluate the existing facility to meet the future needs.</i>	
	Responsible: Board of Directors	Timeline: Mid-term, ongoing
	Outcome: Future facility needs are identified to help identify if/when the existing facility will no longer meet the needs of the district.	
	4. <i>Develop an apparatus and equipment maintenance/replacement plan for the Board of Directors to consider for approval.</i>	
	Responsible: Ron Pearson	Timeline: Mid-term
	Outcome: An apparatus and equipment inventory list has been compiled, a maintenance interval assigned, and a useful life expectancy assigned to each vehicle/major equipment item. Replacement funds are set aside in anticipation of the end of each vehicle/major equipment item useful life, ensuring funds are available for programmatic replacement.	

Goal: 1E Address current and future resource needs	
Objectives	1. <i>Hire an Executive Director.</i>
	Responsible: Board of Directors Timeline: Short-term
	Outcome: A permanent executive director has been hired. Note: If Goal 1C results in a decision to combine administratively, this position may be reconfigured as agreed to by the participating partners.
	2. <i>Assess the current resource needs as they relate to growth in response demand.</i>
	Responsible: Executive Director Timeline: Short-term
	Outcome: The necessary resources (personnel, equipment) have been evaluated against the response demand for those resources (i.e., total call volume, unit hour utilization, concurrent calls for service), and gaps clearly identified.
	3. <i>Forecast future financial needs to meet resource demands.</i>
	Responsible: Julie Brown/Executive Director Timeline: Critical, ongoing
	Outcome: To the extent that gaps have been identified Objective 2 above, the cost to fill those gaps has been clearly defined.
	4. <i>Establish a succession plan for the executive director position.</i>
	Responsible: Matt House Timeline: Mid-term, ongoing
	Outcome: A clearly understood and supported plan exists which allows internal candidates an opportunity to adequately prepare for ascension into the executive director position should the position become vacant in the future.
	5. <i>Determine possible funding sources to support the executive director succession plan.</i>
	Responsible: Executive Director Timeline: Mid-term
	Outcome: The extent to which the district has committed to financially support the succession plan is detailed. This may include temporary appointment of a subordinate to fill vacation or other absences of the regular executive director, payment of coursework which supports preparation for an executive director position, etc.
	6. <i>Present the executive director succession plan to the Board of Directors to review, approve or modify.</i>
	Responsible: Executive Director Timeline: Mid-term
	Outcome: A succession plan for the executive director position has been developed, presented and approved by the board of directors.

7. <i>Evaluate need for additional administrative support.</i>	
Responsible: Executive Director	Timeline: Short-term
Outcome: An assessment of workload and skillsets have been conducted and results articulated.	

Initiative 2 – Service & Community Outreach

The services provided by Western Lane Ambulance District are critical to the vitality and livability of the communities served, yet little is known of the district by their constituents. As a largely retirement area, the district serves an aging population, which drives the demand for service disproportionately as compared to similar sized communities in Oregon. There is often a disconnect between the need for the services of the district and the impact of growing demands on the district’s ability to sustain services. The district must continually evaluate the services it provides and communicate or educate its constituency. The district must engage the community to inform patrons of the services they are provided and the needs the district has to sustain that level of service.

Initiative Managers: Executive Director

Goal: 2A Develop a systematic approach to disseminating information to the public

Objectives	1. <i>Develop a process to distribute general information regarding the district to the public.</i>	
	Responsible: Rob Chance, Albert Kreitz & Danielle Hanson	Timeline: Mid-term
	Outcome: A program(s) to provide information about the district to the public has been developed.	
	2. <i>Establish campaign strategies for a levy to be presented in 2017.</i>	
	Responsible: Board of Directors	Timeline: Short-term
	Outcome: The board of directors has developed and articulated specific strategies to be used to inform the electorate of the district’s needs far enough in advance of the 2017 election that voters can consider the facts in their deliberation.	
	3. <i>Develop a plan to maximize the utilization of social media within the district.</i>	
	Responsible: Rob Chance	Timeline: Mid-term
Outcome: Appropriate social media platforms have been identified and strategies for their use and maintenance have been developed.		

	4. <i>Develop specific programs and curricula with other agencies to enhance involvement and awareness in the schools.</i>	
	Responsible: Rob Chance & Danielle Hanson	Timeline: Mid-term
	Outcome: Age appropriate curricula and programs have been developed and presented to schools, increasing student awareness of EMS and WLAD as a potential vocational choice.	
Goal: 2B Provide community outreach education		
Objectives	1. <i>Identify community medical emergency prevention needs.</i>	
	Responsible: Danielle Hanson	Timeline: Mid-term
	Outcome: Through data analysis, WLAD has identified the common types of call types it receives for service within its service area, and thereby what prevention education topics must be developed.	
	2. <i>Develop community outreach programs based on data received and deliver programs to groups throughout the community.</i>	
	Responsible: Danielle Hanson	Timeline: Mid-term
	Outcome: Prevention education and access education outreach programs have been developed to deliver to high risk groups throughout the district.	
Goal: 2C Working with community health care partners, establish an integrated health care system		
Objectives	1. <i>Partner with allied health care agencies to provide education and design programs which enhance health care services</i>	
	Responsible: Charles York	Timeline: Mid-term, ongoing
	Outcome: A consortium of health care agencies has been formed, developing programs and curricula for each member agency to use to improve services to the community.	
	2. <i>Identify potential sources of funding to maintain these programs.</i>	
	Responsible: Charlie York	Timeline: Mid-term, ongoing
	Outcome: Funding sources for the consortium referred to in Objective 1 above have been identified.	
	3. <i>Conduct a cost analysis to implement these efforts.</i>	
	Responsible: Julie Brown	Timeline: Mid-term, ongoing
	Outcome: The cost to develop and maintain the programs and curricula listed in Objective 1 above have been identified.	

Objectives	4. <i>Identify the role of community partners through district outreach programs.</i>	
	Responsible: Charlie York/Executive Director	Timeline: Mid-term
	Outcome: Community partners have been identified and solicited to join the consortium.	
	5. <i>Develop a program to educate the public about the benefits of a community paramedic program.</i>	
	Responsible: Charlie York & Executive Director	Timeline: Long-term
	Outcome: A community paramedic program has been designed and its benefits to the community shared with internal and external stakeholders.	

Initiative 3 – Staffing/Craftsmanship		
<p>Western Lane Ambulance District is an organization made up of full-time and part-time personnel serving a large geographic area. Obtaining and retaining well trained, appropriately certified personnel is a challenge. Use of part-time employees has been a personnel source to recruit from, but adequate staffing has been difficult to achieve and maintain. The skills of those hired must be at the pinnacle of their profession since their responses are often remote. Development of cutting edge training programs is a must.</p>		
<i>Initiative Managers: Executive Director</i>		
Goal: 3A Address the staffing needs on the front lines of service delivery		
Objectives	1. <i>Create a committee to perform a line staffing needs assessment for full and part-time personnel.</i>	
	Responsible: Matt House	Timeline: Short-term, ongoing
	Outcome: A committee has been formed, a chairperson selected, and the staffing needs quantified based on objective data.	
	2. <i>Present the committee’s recommendations to the Board of Directors.</i>	
	Responsible: Matt House	Timeline: Short-term, ongoing
	Outcome: The committee’s assessment results and recommendations have been presented to the board of directors for their consideration and action.	
	3. <i>Board of Directors review, discuss, and implement or modify the recommendations.</i>	
	Responsible: Board of Directors	Timeline: Short-term, ongoing
Outcome: The board of directors takes appropriate action on the results and recommendations presented by the committee.		

	4. <i>Establish an ongoing process for hiring replacements to fill vacancies.</i>	
	Responsible: Executive Director/Supervisors	Timeline: Short-term
	Outcome: Proposed practices and procedures are developed to maintain an effective hiring roster to fill vacancies occurring in line positions.	

Goal: 3B Develop a succession plan for the supervisor position and any future mid-level manager positions

Objectives	1. <i>Create a system for training and evaluating potential acting in charge (AIC) candidates.</i>	
	Responsible: Matt House	Timeline: Mid-term
	Outcome: Criteria for an AIC has been established and communicated throughout the district. Candidates meeting the criteria and expressing interest in AIC positions have received the training to fill that role on a temporary basis.	
	2. <i>Create a formal process for hiring supervisors.</i>	
	Responsible: Executive Director/Supervisors	Timeline: Mid-term
	Outcome: Criteria for a supervisor has been established and communicated throughout the district. When vacancies are anticipated, interested and qualified candidates have been tested and a hiring/promotional list established.	
	3. <i>Provide training for supervisors to function at a higher level position.</i>	
	Responsible: Executive Director/Board of Directors	Timeline: Short-term
	Outcome: Criteria for positions above supervisor have been established. Training to satisfy that criteria has been provided to supervisors.	
	4. <i>Create a field training officer program.</i>	
	Responsible: Darrek Mullins	Timeline: Mid-term
	Outcome: A field training officer curriculum has been developed and implemented when new members join the agency.	
	5. <i>Create clear, up-to-date position specifications (job descriptions) for each job classification.</i>	
	Responsible: Julie Brown/Executive Director/Supervisors	Timeline: Mid-term
Outcome: All positions within the district have been identified and position specifications for each have been created and published.		

Goal: 3C Improve mutual aid relationships and resources	
Objectives	1. <i>Re-establish relations with mutual aid partners and maintain those relationships.</i>
	Responsible: Matt House
	Timeline: Long-term
	Outcome: All mutual aid partners have been identified. The district has engaged each of those agencies to establish a meaningful relationship in advance of the need to rely upon the mutual aid.
	2. <i>Conduct mutual aid training exercises annually.</i>
	Responsible: Darrek Mullins
Timeline: Long-term, ongoing	
Outcome: A training exercise has been designed, developed and implemented annually, with all mutual aid partners actively participating.	
Goal: 3D Provide appropriate training to all personnel to enhance their skills in the field and in the office	
Objectives	1. <i>Create a training committee to evaluate new methods and diverse experiences of all members.</i>
	Responsible: Darrek Mullins
	Timeline: Short-term
	Outcome: A training committee has been created and actively seeks new information, new methodologies, and new techniques, sharing that new information with all members of the district.
	2. <i>Create a discussion forum to share experiences.</i>
	Responsible: Darrek Mullins
	Timeline: Short-term
	Outcome: A user-friendly forum has been created which facilitates open discussion between and among members about what has worked well and what has not worked.
	3. <i>Establish quality assurance/quality improvement (QA/QI) programs and participate in research opportunities.</i>
Responsible: Matt Danigelis/Darrek Mullins	
Timeline: Mid-term	
Outcome: A QA/QI program has been developed and all members are actively engaged, sharing lessons learned, new research, and new methods.	

Implementation Methodology

“The three major keys to successful strategic planning and implementation are commitment, credibility, and communication.”¹ These three critical elements are best addressed by appropriate prioritization and completion of objectives, consistently seeking and utilizing input from WLAD members and communicating plan status on a consistent basis, and measuring compliance for the established timelines.

Prioritization of Objectives

In conjunction with developing operational plans, assigned committees/individuals are charged with prioritizing each of their objectives. Each assigned committee/individual will determine the priority and timing for each objective. Upon approval of the Executive Director, objectives that can be accomplished over the course of the current fiscal year within the limits of existing program maintenance budgets will receive highest priority.

WLAD Member Input and Communication

Once the operational plans for each objective are developed, the groups tasked will forward ideas, suggestions, and comments to the Executive Director for review and approval.

2016 Implementation Timeline

The WLAD Strategic Planning Team is committed to a regular schedule of status updates and accountability monitoring. The Team has set an implementation schedule for 2016 to ensure regular communication and commitment to the strategic plan:

- March 2016 – Executive Director provides summary of strategic plan initiatives and goals to membership, partner agencies, and interested community stakeholders. Official development of operational plans begins.
- Quarterly Meeting – Strategic Planning Team meeting to track progress of operational plan development and objectives prioritization.
- Annual budget development plan review – Strategic plan is reviewed and prioritized in accordance with budget development and annual planning priorities.

In addition to the quarterly planning meetings, the Strategic Planning Team will meet on an annual basis to assess progress, celebrate accomplishments, and ensure the ongoing viability and validity of the WLAD Strategic Plan.

To help maintain communication about the organization’s progress in meeting its goals to the membership, WLAD leadership has committed to publishing regular status reports and minutes resulting from the Team’s quarterly and annual meetings.

¹ Ahoy, Chris, Associate Vice President of Facilities Planning & Management, Iowa State University, September 1998.

Appendix A – Citizen Forum Feedback

Written comments were encouraged of the citizen forum participants. The areas of feedback solicited were in three general areas: citizen expectations of their ambulance service, citizen concerns about their ambulance service, and the strengths citizens believe their ambulance service possessed. Each similar comment was categorized broadly, with the number of similar responses in parentheses. These three categories are listed below:

Citizen Expectations

- (10) Well trained employees
- (8) Appropriate response time
- (7) Top of the line equipment
- (6) Professional Service
- (5) Compassion
- (3) Fair and reasonable budgeting and cost containment
- Excellent administration
- Interoperability (able to work with and for other agencies)
- Treatment with respect
- Transparency/Confidentiality is maintained
- Reduce cost to consumers/bill back more to insurance & users to reduce taxpayer costs
- Billing seems to account for 30 percent of the budget
- Facilitate a culture of openness
- Care is coordinated well with local healthcare
- Keep up with staffing needs due to growth

Citizen Concerns

- (6) Community growth drives up need for more staff
- (3) Should be combined with fire department to reduce overhead
- (2) General Public should better understand all aspects of WLAD
- (2) Funding for a new headquarters
- (2) Ability to attract and retain qualified staff
- Operational levy expiring in 2017
- Promotional opportunities
- Greater understanding of DNR nuances
- More interagency collaboration
- Overextending agency into other service areas
- Sustainability (carryover and reserves are declining)

Citizen Identified Strengths

- (9) The service is exceptional
- (6) Well trained
- (3) Customer service/Respect
- (2) Coordination with other agencies

Appendix B - Timeline

Objectives	Assigned Responsibility	Critical 3/2016 to 6/2016	Short Term 6/2016 to 3/2017	Mid Term 3/2017 to 3/2019	Long Term 3/2019 to 3/2021
1A1: Conduct a financial needs analysis, listing current revenue expenditures.	Julie Brown				
1A2: Evaluate each revenue source and expenditure to determine what must be adjusted and set at levels appropriate to the cost of delivered service.	Julie Brown				
1C1: Determine areas to be evaluated in a shared services study	Executive Director				
1C2: Collaborate and discuss the concept with potential partners	Executive Director				
1C3: Report findings to the Board of Directors for direction	Executive Director				
1E3: Forecast future financial needs to meet resource demands.	Julie Brown/ Executive Director				
1A3: Identify potential new revenue sources.	Executive Director				
1A4: The Board of Directors review, approve or modify, and provide direction to the Executive Director.	Board of Directors				
1B1: Contrast the financial needs and service capabilities with and without a renewed levy	Julie Brown				
1B2: Evaluate the community's willingness to support renewal of levy.	Executive Director & Board of Directors				
1B3: Present the levy to voters for renewal.	Executive Director & Board of Directors				
1E1: Hire an Executive Director.	Board of Directors				
1E2: Assess the current resource needs as they relate to growth in response demand.	Executive Director				
1E7: Evaluate need for additional administrative support.	Executive Director				
2A2: Establish campaign strategies for a levy to be presented in 2017.	Board of Directors				
3A1: Create a committee to perform a line staffing needs assessment for full and part-time personnel.	Matt House				
3A2: Present the committee's recommendations to the Board of Directors.	Matt House				
3A3: Board of Directors review, discuss, and implement or modify the recommendations.	Board of Directors				
3A4: Establish an ongoing process for hiring replacements to fill vacancies.	Executive Director & Supervisors				
3B3: Provide training for supervisors to function at a higher level position.	Executive Director & Board of Directors				
3D1: Create a training committee to evaluate new methods and diverse experiences of all members.	Darrek Mullins				
3D2: Create a discussion forum to share experiences.	Darrek Mullins				
1C4: If approved, issue a request for proposals (RFP) to conduct a shared services study.	Executive Director				
1C5: Consider and if appropriate, implement the shared services study recommendation(s).	Board of Directors				
1D1: Identify and prioritize apparatus & equipment requirements.	Ron Pearson				
1D2: Evaluate the existing facility to meet the current needs.	Ron Pearson				
1D3: Evaluate the existing facility to meet the future needs.	Board of Directors				
1D4: Develop an apparatus and equipment maintenance/replacement plan for the Board of Directors' approval.	Ron Pearson				
1E4: Establish a succession plan for the executive director position.	Matt House				
1E5: Determine possible funding sources to support the executive director succession plan.	Executive Director				
1E6: Present the executive director succession plan to the Board of Directors for approval.	Executive Director				
2A1: Develop a process to distribute general information regarding the district to the public.	Rob Chance & Danielle Hanson				
2A3: Develop a plan to maximize the utilization of social media within the district.	Rob Chance				

Objectives	Assigned Responsibility	Critical 3/2016 to 6/2016	Short Term 6/2016 to 3/2017	Mid Term 3/2017 to 3/2019	Long Term 3/2019 to 3/2021
2A4: Develop specific programs and curricula with other agencies to enhance involvement and awareness in the schools.	Al Krietz & Danielle Hanson				
2B1: Identify community medical emergency prevention needs.	Danielle Hanson				
2B2: Develop community outreach programs based on data received and deliver programs to groups throughout the community.	Danielle Hanson				
2C1: Partner with allied health care agencies to provide education and design programs which enhance health care services.	Charlie York				
2C2: Identify potential sources of funding to maintain these programs.	Charlie York				
2C3: Conduct a cost analysis to implement these efforts.	Julie Brown				
2C4: Identify the role of community partners through district outreach programs.	Charlie York & Executive Director				
3B1: Create a system for training and evaluating potential acting in charge (AIC) candidates.	Matt House				
3B2: Create a formal process for hiring supervisors.	Executive Director & Supervisors				
3B4: Create a field training officer program.	Darrek Mullins				
3B5: Create clear, up-to-date position specifications (job descriptions) for each job classification.	Julie Brown, Executive Director, & Supervisors				
3D3: Establish quality assurance/quality improvement (QA/QI) programs and participate in research opportunities	Matt Danigelis & Derrek Mullins				
2C5: Develop a program to educate the public about the benefits of a community paramedic program.	Danielle Hanson				
3C1: Re-establish relations with mutual aid partners and maintain those relationships.	Matt House				
3C2: Conduct mutual aid training exercises annually.	Darrek Mullins				

Appendix C – Status & Accountability

Western Lane Ambulance District

Status & Accountability Worksheet

Implementation Timeline Status: On Target – Delayed or Deferred – Not Currently On Target

Initiatives/Goals/Objectives		
Initiative #1: Administration/Finances		Manager: Executive Director
Goal 1A: Ensure financial stability and sustainability of the organization and plan for future needs and growth	Responsible	Timeline
Obj. 1: Conduct a financial needs analysis, listing current revenue sources and expenditures.	Julie Brown	Critical
Obj. 2: Evaluate each revenue source and expenditure to determine if they must be adjusted and set at levels appropriate to the cost of delivering service.	Julie Brown	Critical
Obj. 3: Identify potential new revenue sources.	Executive Director	Short-term
Obj. 4: The Board of Directors review, approve or modify, and provide direction to the Executive Director.	Board of Directors	Short-term
Goal 1B: Consider renewal of levy	Responsible	Timeline
Obj. 1: Contrast the financial needs and service capabilities with and without a renewed levy.	Julie Brown	Short-term
Obj.2: Evaluate the community’s willingness to support renewal of levy.	Executive Director & Board of Directors	Short-term
Obj. 3: Present the levy to voters for renewal.	Executive Director & Board of Directors	Short-term
Goal 1C: Evaluate the feasibility of a shared services approach to managing the district	Responsible	Timeline
Obj. 1: Determine areas to be evaluated in a shared services feasibility study.	Executive Director	Critical
Obj. 2: Collaborate and discuss the concept with potential partners.	Executive Director	Critical
Obj. 3: Report findings to the Board of Directors for direction.	Executive Director	Critical
Obj. 4: If approved, issue a request for proposals (RFP) to conduct a shared services feasibility study.	Executive Director	Mid-term
Obj. 5: Consider and if appropriate, implement the shared services study recommendation(s).	Board of Directors	Mid-term
Goal 1D: Develop and maintain a comprehensive facility, apparatus, equipment and funding plan	Responsible	Timeline
Obj. 1: Identify and prioritize apparatus and equipment requirements.	Ron Pearson	Mid-term, ongoing
Obj.2: Evaluate the existing facility to meet the current needs.	Ron Pearson	Mid-term, ongoing
Obj. 3: Evaluate the existing facility to meet the future needs.	Board of Directors	Mid-term, ongoing
Obj. 4: Develop an apparatus and equipment maintenance/replacement plan for the Board of Directors’ approval.	Ron Pearson	Mid-term
Goal 1E: Address current and future resource needs	Responsible	Timeline
Obj. 1: Hire an Executive Director.	Board of Directors	Short-term
Obj. 2: Assess the current resource needs as they relate to growth in response demand.	Executive Director	Short-term
Obj. 3: Forecast future financial needs to meet resource demands.	Julie Brown/ Executive Director	Critical, ongoing
Obj. 4: Establish a succession plan for the executive director position.	Matt House	Mid-term, ongoing
Obj. 5: Determine possible funding sources to support the executive director succession plan.	Executive Director	Mid-term
Obj. 6: Present the executive director succession plan to the Board of Directors for approval.	Executive Director	Mid-term
Obj. 7: Evaluate need for additional administrative support.	Executive Director	Short-term
Initiative #2: Service & Community Outreach		Manager: Executive Director
Goal 2A: Develop a systematic approach to disseminating information to the public	Responsible	Timeline
Obj. 1: Develop a process to distribute general information regarding the district to the public.	Rob Chance & Danielle Hanson	Mid-term
Obj. 2: Establish campaign strategies for a levy to be presented in 2017.	Board of Directors	Short-term
Obj. 3: Develop a plan to maximize the utilization of social media within the district.	Rob Chance	Mid-term
Obj. 4: Develop specific programs and curricula with other agencies to enhance involvement and awareness in the schools.	Al Krietz & Danielle Hanson	Mid-term
Goal 2B: Provide community outreach education	Responsible	Timeline
Obj. 1: Identify community medical emergency prevention needs.	Danielle Hanson	Mid-term
Obj. 2: Develop community outreach programs based on data received and deliver programs to groups throughout the community.	Danielle Hanson	Mid-term

Goal 2C: Working with community health care partners, establish an integrated health care system	Responsible	Timeline
Obj. 1: Partner with allied health care agencies to provide education and design programs which enhance health care services.	Charlie York	Mid-term, ongoing
Obj. 2: Identify potential sources of funding to maintain these programs.	Charlie York	Mid-term, ongoing
Obj. 3: Conduct a cost analysis to implement these efforts.	Julie Brown	Mid-term, ongoing
Obj. 4: Identify the role of community partners through district outreach programs.	Charlie York & Executive Director	Mid-term
Obj. 5: Develop a program to educate the public about the benefits of a community paramedic program.	Danielle Hanson	Long term
Initiative #3: Staffing/Craftsmanship	Manager: Executive Director	
Goal 3A: Address the staffing needs on the front lines of service delivery	Responsible	Timeline
Obj. 1: Create a committee to perform a line staffing needs assessment for full and part-time personnel.	Matt House	Short-term, ongoing
Obj. 2: Present the committee's recommendations to the Board of Directors.	Matt House	Short-term, ongoing
Obj. 3: Board of Directors review, discuss, and implement or modify the recommendations.	Board of Directors	Short-term, ongoing
Obj. 4: Establish an ongoing process for hiring replacements to fill vacancies.	Executive Director & Supervisors	Short-term
Goal 3B: Develop a succession plan for the supervisor position and any future mid-level manager positions	Responsible	Timeline
Obj. 1: Create a system for training and evaluating potential acting in charge (AIC) candidates.	Matt House	Mid-term
Obj. 2: Create a formal process for hiring supervisors.	Executive Director & Supervisors	Mid-term
Obj. 3: Provide training for supervisors to function at a higher level position.	Executive Director & Board of Directors	Short-term
Obj. 4: Create a field training officer program.	Darrek Mullins	Mid-term
Obj. 5: Create clear, up-to-date position specifications (job descriptions) for each job classification.	Julie Brown, Executive Director, & Supervisors	Mid-term
Goal 3C: Improve Mutual Aid Relationships and Resources	Responsible	Timeline
Obj. 1: Re-establish relations with mutual aid partners and maintain those relationships.	Matt House	Long-term
Obj. 2: Conduct mutual aid training exercises annually.	Darrek Mullins	Long-term, ongoing
Goal 3D: Provide appropriate training to all personnel to enhance their skills in the field and in the office	Responsible	Timeline
Obj. 1: Create a training committee to evaluate new methods and diverse experiences of all members.	Darrek Mullins	Short-term
Obj. 2: Create a discussion forum to share experiences.	Darrek Mullins	Short-term
Obj. 3: Establish quality assurance/quality improvement (QA/QI) programs and participate in research opportunities.	Matt Danigelis & Derrek Mullins	Mid-term



Appendix D – Task Worksheet

Initiative:	Person(s) Responsible:	Desired Outcome(s):
Goal:		
Objective:		Timeline:

#	Task	Assigned/Delegated	Start Date	Completion Date	Cost Estimate	Comments
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						