



Portland Fire & Rescue

2010 – 2015 Strategic Plan

Task Force Work Session: Day 1

May 3, 2010

8:30am – 5:00pm

8:30am – 9:15am

1. Opening Remarks (Chief Klum)
2. Overview of Task Force Work Sessions (i.e, review agenda for all 5 days) Jack
3. Getting to Know Each Other (Introductions)
4. Activities to Complete Today
5. Outline Why We Do Strategic Planning
6. Mission, Vision, Principles “Check In”
7. Overview of PF&R’s Three-Tiered Approach to Strategic Planning
8. Outline Status of PF&R’s Current FY2005-2010 Strategic Plan
9. Review the Strategic Planning Structure
10. Review Steering Committee Role
11. Review Task Force Role
12. Review Strategic Planning Timeline

9:15am – 10:15am

13. Present Findings From:
 - Stakeholder Interviews
 - Environmental Scan
 - External & Internal Focus Groups
 - External & Internal Surveys
 - SWOC Analysis

10:15am – 10:30am

BREAK

10:30am – 12:00 noon

14. Overview of the Balance Scorecard Approach (the four perspectives) (*Large Group*)
 - After overview, divide into 4 groups based on the four perspectives. Task Force members will be asked to select a perspective based on overview presentation. Instruct TF members to take break, report to table of perspective they are interested in.

15. Outline How Things Fit Together and Review Key Definitions (*Small Groups—initial formation*)

- Themes, Issues, Goals, Performance Measures, Objectives, Strategies (Jack to redo chart)
- Review Definitions – refer to Glossary of Terms

16. Present and Discuss Strategic Issues that the Steering Committee Developed from the Research Findings (make any modification as necessary) (*Small Groups*)

12:00pm – 12:30pm

Lunch Break

12:30pm – 1:30pm

17. Continue to Present and Discuss Strategic Issues that the Steering Committee Developed from the Research Findings (make any modification as necessary) (*Small Groups*)

18. Small Groups – Final Formation

- a. Allow Task Force members to change the perspective they selected based on the Issues discussion.
- b. Make sure small groups are balanced
 - Ask each group how many members have strategic planning experience, how many are newbies (raising of hands)
 - Similar size
 - Similar number of Steering Committee members.
 - Data Analysts: Steve – IPB, Hang – IPB, Huy – Customer
- c. Each small group needs to assign following responsibilities to members: (explain role for each assignment)
 - Facilitator
 - Note Taker
 - Timer
 - Reporter

1:30pm - 4:30pm

19. Provide an Overview of a Strategic Theme

20. Task Force Members Develop Conceptual Theme Statements. Each Group Will Review the Issues for Their Perspective, Develop Conceptual Theme Statements and Report Out to the Large Group. (*Small Groups*)

- a. Each group will report its themes to the entire group using the tools it is given: laptop computer, flash drive, and reporting template.
- b. Provide instructions on template use
- c. Provide instructions on flash drive use (naming of files, folders, etc)

4:30pm – 5:00 pm

21. Outline Activities for Day 2



Portland Fire & Rescue

2010 – 2015 Strategic Plan

Task Force Work Session: Day 2

May 4, 2010

8:30am – 5:00pm

8:30am – 9:00 am

1. Recap of Day 1
2. Outline Activities for Day 2
3. Complete Development of Themes (if necessary)

9:00 am – 10:00am

Training on Goals

4. Training on the Development of Strategic Goals

- a. Discussion with Task Force regarding their knowledge of a strategic goal
- b. Provide definition of a smart goal
- c. Provide examples of both good and bad goals
- d. Conduct practice exercise on writing goals
 - Use a real strategic issue (same issue will be used in all training exercises) developed by the Steering Committee
 - All groups will work to develop a goal from the same strategic issue; this will introduce them to a common approach, format to use in goal development, and report outs.
 - Each group will report out on the goal they developed and their work will be reviewed and assessed by the full Task Force.
 - Explain template
 - Each group will have following responsibilities assigned (can be different from previous day: Facilitator, Note Taker, Timer, Reporter

10:00am – 10:15am

BREAK

10:15am – 1:00pm (includes 30 minute Lunch)

Development of Goals (In Groups)

5. Goals for all Issues are Developed by the Small Groups for the Four Perspectives

1:00pm – 4:45pm

- 6. Each Group Will Report Its Goals to the Entire Group Using the Tools it is Given: laptop computer, flash drive, and reporting template.**
- 7. All Task Force Members Will Comment and Validate the Goals for Each Group**
- 8. All Goals are Developed and Given to Support Staff to Finalize**

4:45pm – 5:00pm

- 9. Outline Activities for Day 3**



Portland Fire & Rescue

2010 – 2015 Strategic Plan

Task Force Work Session: Day 3

May 5, 2010

8:30am – 5:00pm

8:30am – 9:00 am

1. Recap of Day 2
2. Outline Activities for Day 3
3. Complete Development of Goals (if necessary)

9:00 am – 10:00am

Training on Objectives

4. Training on the Development of Strategic Objectives

- a. Discussion with Task Force regarding their knowledge of a strategic objective
- b. Provide definition of a smart objective
- c. Provide examples of both good and bad objectives
- d. Conduct practice exercise on writing objectives
 - Use a real strategic issue (same issue will be used in all training exercises) developed by the Steering Committee
 - All groups will work to develop an objective from the same strategic issue; this will introduce them to a common approach, format to use in goal development, and report outs.
 - Each group will report out on the objectives they developed and their work will be reviewed and assessed by the full Task Force.
 - Explain template
 - Each group will have following responsibilities assigned (can be different from previous day: Facilitator, Note Taker, Timer, Reporter

10:00am – 10:15am

BREAK

10:15am – 1:00pm (includes 30 minute Lunch)

Development of Objectives (In Groups)

5. Objectives for all Issues are Developed by the Small Groups for the Four Perspectives

1:00pm – 4:45pm

- 6. Each Group Will Report Its Objectives to the Entire Group Using the Tools it is Given: laptop computer, flash drive, and reporting template.**
- 7. All Task Force Members Will Comment and Validate the Objectives for Each Group**
- 8. All Objectives are Developed and Given to Support Staff to Finalize**

4:45pm – 5:00pm

- 9. Outline Activities for Day 4**



Portland Fire & Rescue

2010 – 2015 Strategic Plan

Task Force Work Session: Day 4

May 6, 2010

8:30am – 5:00pm

8:30am – 9:00 am

1. Recap of Day 3
2. Outline Activities for Day 4
3. Complete Development of Objectives (if necessary)

9:00 am – 10:00am

Training on Performance Measures

4. Training on the Development of Strategic Performance Measures

- a. Discussion with Task Force regarding their knowledge of a strategic performance measure
- b. Provide definition of a smart performance measure
- c. Provide examples of both good and bad performance measures
- d. Conduct practice exercise on writing performance measures
 - Use a real strategic issue (same issue will be used in all training exercises) developed by the Steering Committee
 - All groups will work to develop a performance measure from the same strategic issue; this will introduce them to a common approach, format to use in goal development, and report outs.
 - Each group will report out on the performance measures they developed and their work will be reviewed and assessed by the full Task Force.
 - Explain template
 - Each group will have following responsibilities assigned (can be different from previous day: Facilitator, Note Taker, Timer, Reporter

10:00am – 10:15am

BREAK

10:15am – 1:00pm (includes 30 minute Lunch)

Development of Performance Measures (In Groups)

5. Performance Measures for All Issues are Developed by the Small Groups for the Four Perspectives

1:00pm – 4:45pm

- 6. Each Group Will Report Its Performance Measures to the Entire Group Using the Tools it is Given: laptop computer, flash drive, and reporting template.**
- 7. All Task Force Members will Comment and Validate the Performance Measures for Each Group**
- 8. All Performance Measures are Developed and Given to Support Staff to Finalize**

4:45pm – 5:00pm

- 9. Outline Activities for Day 5**



Portland Fire & Rescue

2010 – 2015 Strategic Plan

Task Force Work Session: Day 5

May 7, 2010

8:30am – 5:00pm

8:30am – 9:00 am

1. Recap of Day 4
2. Outline Activities for Day 5
3. Complete Development of Performance Measures (if necessary)

9:00 am – 10:00am

Training on Strategies

4. Training on the Development of Strategic Strategies

- a. Discussion with Task Force regarding their knowledge of a strategic strategy
- b. Provide definition of a smart strategy
- c. Provide examples of both good and bad strategies
- d. Conduct practice exercise on writing strategies
 - Use a real strategic issue (same issue will be used in all training exercises) developed by the Steering Committee
 - All groups will work to develop a strategy from the same strategic issue; this will introduce them to a common approach, format to use in goal development, and report outs.
 - Each group will report out on the strategies they developed and their work will be reviewed and assessed by the full Task Force.
 - Explain template
 - Each group will have following responsibilities assigned (can be different from previous day: Facilitator, Note Taker, Timer, Reporter

10:00am – 10:15am

BREAK

10:15am – 1:00pm (includes 30 minute Lunch)

Development of Strategies (In Groups)

5. Strategies for All Issues are Developed by the Small Groups for the Four Perspectives

1:00pm – 4:45pm

- 6. Each Group Will Report Its Strategies to the Entire Group Using the Tools it is Given: laptop computer, flash drive, and reporting template.**
- 7. All Task Force Members Will Comment and Validate the Strategies for Each Group**
- 8. All Strategies are Developed and Given to Support Staff to Finalize**

4:45pm – 5:00pm

- 9. Review Accomplishments of All 5 Days**