



**SAFE-D 25**  
Annual Conference

# Strategic Planning

## The Essentials

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**Round Rock, TX**  
**Feb 6-8, 2025**

# Cautionary Disclaimer

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**The information presented today is for informational and educational purposes only.**

It is not intended to represent or replace policy or opinion.

It is not intended as legal or financial advice.

You are strongly advised to seek competent legal counsel, financial guidance, and jurisdictional authorization before taking any official action based on this information.

# The role of ESDs

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## Provide emergency services

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### Collect taxes

- Property taxes
- Sales tax

### Contract with others

- Emergency Services
- Communication Services
- Risk Reduction
- Admin Support
- Real property
- Facilities
- Apparatus
- Equipment

### Own and provide

- Real property
- Facilities
- Apparatus
- Equipment

### Provide services

- Emergency Services
- Communication Services
- Risk Reduction Services
- Admin Support

Source: Article III, Section 48-e, Texas Constitution

# As a Commissioner and a Chief ...

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**You need to create a  
“compelling story”**

# You need a compelling story

- Image  
What people see
- Mission  
What you do
- Vision  
What you aspire to be
- Values & Expectations  
What you stand for  
What you count on

# As an ESD Commissioner or Chief ...

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**You need to create a  
“compelling plan”**

# Strategic Plans . . .

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- Take too long
- Cost too much
- Are a waste of time
- Are too complicated
- Are obsolete before they're finished
- Don't tell me anything I don't already know



# The essentials -- 5 basic topics

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- **Desired Level of Service**
- **Critical Issues**
- **Gap Analysis**
- **Capital Plan**
- **Financial Outlook**



# The essentials -- 4 basic questions

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## Observe

- Purpose
- Mission
- Vision
- Values

## Orient

- C-SWOT
- Needs
- Gaps
- Expectations

## Decide

- Priorities
- Initiatives
- Goals
- Objectives

## Act

- Capable
- Available
- Supportable
- Maintainable

# The essentials -- 3 basic steps

- **Define the environment**

- **Create the Plan**

- **Measure Results**





# Define the Environment

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# Collect Essential Information

- Department Profile
- Community Profile
- Capital Assets
- Financial Information

Strategic Plan Essentials: Information Request MSM (Michael S. Montgomery LLC  
public safety consultants)

**TABLE 1A. Fire Department Profile – Organization**

Dept. Name	Information Component	Documentation?	
		Yes	No
	There is written documentation from a unit of government that authorizes the existence of the Agency and defines its jurisdictional boundaries. <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>		
	Copy of documents for Agency existence and jurisdiction <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>		
	Copy of boundary ordinances, court order, MOU/MOA exhibit, or portions of Metes and Bounds book <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>		
	Copy of map with jurisdictional boundaries <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>		
Name of Governing Body: _____ Head of body title: _____			
Type of Governing Body <input type="checkbox"/> Federal <input type="checkbox"/> State <input type="checkbox"/> County/Parish <input type="checkbox"/> Municipal <input type="checkbox"/> Special District <input type="checkbox"/> Industrial <input type="checkbox"/> Private, for profit <input type="checkbox"/> Private, not-for profit <input type="checkbox"/> Other: _____			
Established by <input type="checkbox"/> Statute <input type="checkbox"/> Charter / Articles of Incorporation <input type="checkbox"/> Court Order / Ordinance <input type="checkbox"/> Other (specify): _____ Date: _____			
The agency has written documentation from a unit of government designating the authority of the Agency Director or Head of Department. <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>			
The agency has a statement of purpose that defines the department's mission, vision, and values. <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>			
The agency has a statement of purpose that defines the department's desired level of service <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>			
The agency has a current organizational chart depicting the organizational components. <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>			
The Agency has a written directive which requires that personnel hold applicable certification before performing emergency response duties. <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>			
<b>CRITICAL ISSUE #1</b>		<b>CRITICAL ISSUE #3</b>	
<b>CRITICAL ISSUE #2</b>		<b>CRITICAL ISSUE #4</b>	

Adapted from multiple "best practices" programs, ©MSM-LLC, 2025 page 1

# Define the Desired Service Level

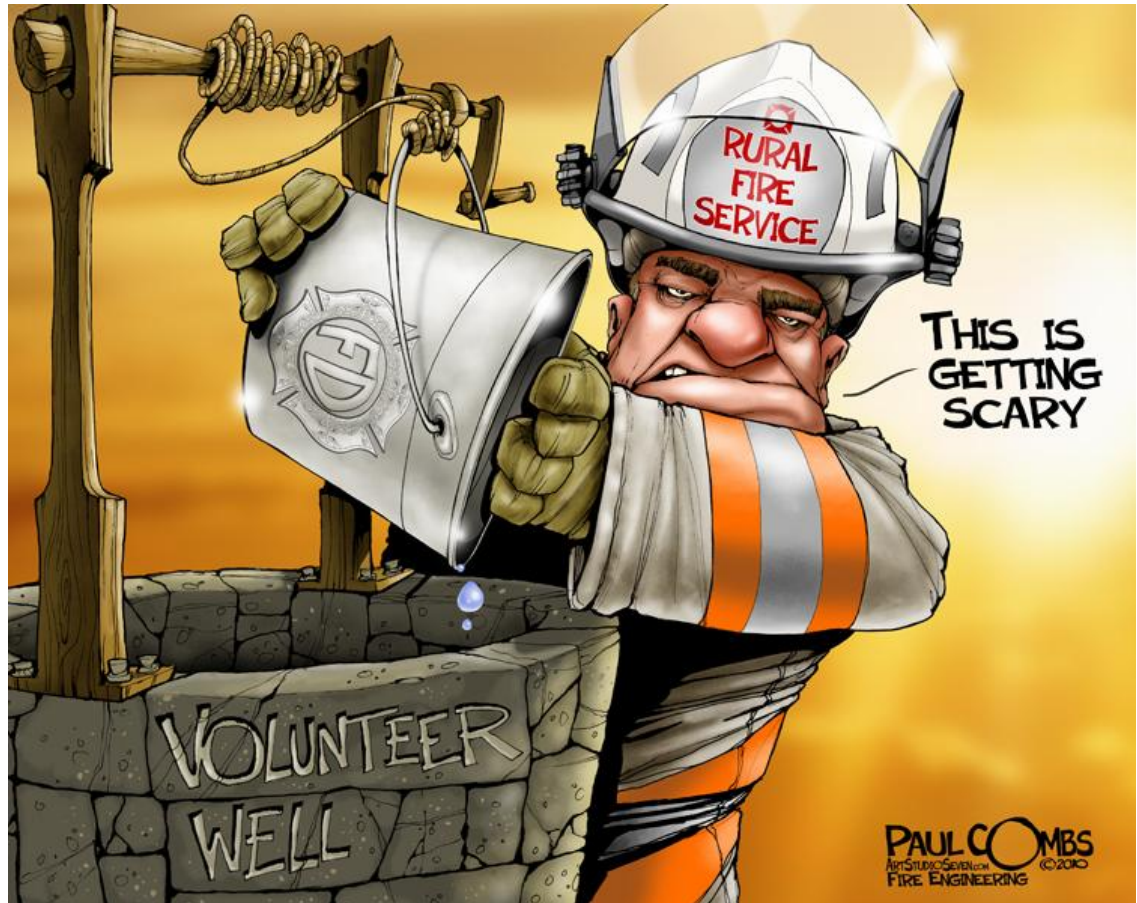
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- **Department and Community**
  - Mission, Vision, Values, and Expectations
  - Needs, Expectations, and Concerns
- **Response**
  - First Arriving Unit
  - Effective Response Force
  - Incident Stabilization
- **Staffing**
  - Desired staffing
  - Desired deployment
- **Desired outcomes**



# Identify Critical Issues

- Coverage
- Staffing
- Funding
- Growth
- Admin



Artwork from the Fire, Smoke, and Guts Portfolio ©by Paul Combs, <http://artstudioseven.com/>

# C-SWOT Gap Analysis

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- **C**ritical Issues
- **S**trengths
- **W**eaknesses
- **O**pportunities
- **T**hreats





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# Create the Plan

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# Getting Started

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- **Choose a Team Leader**
- **Identify and Engage Stakeholders**
- **Recruit a Collaborative Planning Team**
- **Define the Desired Outcome**
- **Pick a Timeframe**
- **Go to Work**

# Think in terms of Perspectives



**OPERATIONAL PHILOSOPHY**



**COMMUNITY**



**PEOPLE**



**FINANCES**



**PROCESSES**



**CAPACITY**

Source: adapted from “*Balanced Scorecard for Government and Nonprofit Agencies*”, Paul Niven, © 2003

# Build a Strong Foundation



Source: adapted from “Balanced Scorecard for Government and Nonprofit Agencies”, Paul Niven, © 2003

# Add a Department Profile

- Department history and organization
- Mission, vision, values, and expectations
- Service area size and population protected
- Services, people, stations, and apparatus
- Response Statistics
- Funding



# Add a Community Profile

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- **Geographic overview**
- **Demographics**
- **At-risk Populations**
- **Hazards and vulnerabilities**
- **Response experience**
- **Community needs, expectations, and concerns**

# Turn Perspectives into Initiatives



- Improve Community Outcomes
- Take Care of our People
- Attain Financial Stability and Transparency
- Excel at Internal Processes
- Build and Sustain Capacity

# Write SMART Objectives

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- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-sensitive



# Writing Smart Objectives



It takes **9 minutes** after tones drop  
to leave the station





# Writing Smart Objectives

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## Specific

- Reduce turn-out time.

## Measurable

- Reduce turn-out time **to 15 seconds or less.**

## Achievable

- Reduce turn-out time to **2 minutes** or less.

## Relevant

- Reduce turn-out time to 2 minutes or less **in order to reduce total response time and ultimately reduce fire loss.**

## Time-sensitive

- **Before June 1, 2025,** reduce turn-out time to 2 minutes or less in order to reduce total response time and ultimately reduce fire loss.

# Example of a Strategic Initiative

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## INITIATIVE 1—IMPROVE RESPONSE TIME

Staffing is one of the biggest challenges facing the District and it has a direct impact on response time and capability. Increased staffing demands in urban areas are drawing current and potential volunteers out of the rural setting and away from the District. Thus, recruitment of paid staff, both full-time and part-time, must be considered to ensure a competent and timely response to emergencies, and will be a challenge for the foreseeable future.

GOAL 1A HIRE FIRE CHIEF

CRITICAL TASK

OBJECTIVE: COMPLETE THE SELECTION PROCESS FOR A FULL-TIME PAID FIRE CHIEF

GOAL 1B HIRE INITIAL DUTY CREW, 3-PERSON

MID-TERM

OBJECTIVE: PROVIDE A 1<sup>ST</sup>-UNIT RESPONSE TIME OF 20 MINUTES OR LESS, 90% OF THE TIME, EXCEPT IN REMOTE AREAS OF THE DISTRICT

GOAL 1C HIRE SECOND DUTY CREW, 3-PERSON

LONG-TERM

OBJECTIVE: PROVIDE A 1<sup>ST</sup>-UNIT RESPONSE TIME OF 10 MINUTES OR LESS, 90% OF THE TIME, EXCEPT IN REMOTE AREAS OF THE DISTRICT

# Timelines and Action Plans

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- Critical Task within next 90 days
- Short-term within this budget year
- Mid-range within two budget cycles
- Long-range within five years or longer
- Ongoing current and continuing

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**Every goal / objective needs a sponsor**

# Add a Capital Plan



# Capital Plan

	FY 25	FY 26	FY 27	FY 28	FY 29
<b>Facilities</b>					
Station 1 remodel/addition	923,000				
Station 2 remodel		472,000			
Station 3 remodel				206,000	
Station 4 land/construction, new			450,000		600,000
<b>Total Facilities</b>	<b>923,000</b>	<b>472,000</b>	<b>450,000</b>	<b>206,000</b>	<b>600,000</b>
<b>Vehicles</b>					
Engine 1 replacement		750,000			
Brush truck 1 replacement		300,000			
Command 1 replacement		130,000			
Brush truck 2 replacement				320,000	
Engine 2 replacement				850,000	
Engine 3 replacement					875,000
<b>Total Vehicles</b>	<b>0</b>	<b>1,180,000</b>	<b>0</b>	<b>1,170,000</b>	<b>875,000</b>
<b>Other equipment</b>					
Turnout gear	24,000	26,000	30,000	36,000	40,000
E-rescue tools		45,000	45,000		60,000
Radios		10,199	21,095		22,108
Hose		10,000	22,000	8,090	150,000
<b>Total Other Equipment</b>	<b>24,000</b>	<b>91,199</b>	<b>118,095</b>	<b>44,090</b>	<b>272,108</b>
<b>Total CAPEX</b>	<b>947,000</b>	<b>1,743,199</b>	<b>568,095</b>	<b>1,420,090</b>	<b>1,747,108</b>



# Add the Financial Outlook

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# Financial Outlook

Description	Projected					% increase 2025-29
	2025	2026	2027	2028	2029	
Property Tax Revenues	4,252,244	4,618,589	5,180,292	5,499,729	6,155,460	44.8%
Other Receipts	110,680	118,076	280,492	1,021,469	1,442,792	1203.6%
Total Recurring Revenues	<b>4,362,924</b>	<b>4,736,665</b>	<b>5,460,784</b>	<b>6,521,198</b>	<b>7,598,252</b>	<b>74.2%</b>
Recurring Expenses	3,047,252	3,396,519	4,360,158	4,723,737	5,312,112	74.3%
Total Non-Recurring Costs	947,311	1,743,199	568,095	1,422,090	1,747,108	84.4%
Total Expenditures	<b>3,994,563</b>	<b>5,139,718</b>	<b>4,928,253</b>	<b>6,145,827</b>	<b>7,059,220</b>	<b>76.7%</b>
Net Cash Flow (Deficit)	368,361	(403,053)	532,531	377,371	539,032	146.3%
Beginning Balance, Reserve	3,416,872	3,785,233	3,382,180	3,914,711	4,292,082	125.6%
Ending Balance, Reserve	<b>3,785,233</b>	<b>3,382,180</b>	<b>3,914,711</b>	<b>4,292,082</b>	<b>4,831,114</b>	<b>127.6%</b>
Reserve, % of ops expense	95%	66%	79%	70%	68%	(27)%



Vision	We will make a difference in our community by providing the best possible public service.			
Mission	We will provide effective community risk reduction programs that prevent, mitigate, respond to, and recover from fires, explosions, and other emergencies in the communities we serve.			
Expectation	We expect to meet or exceed regulatory requirements and customer expectations. Every One. Everywhere. Every Time.			
Strategic Priorities	<i>Public safety</i>	<i>Economic development</i>	<i>Quality of life</i>	<i>Government transparency</i>
Strategic Results	Create and sustain a fire-resistant community through risk reduction programs and prompt correction of fire and life safety hazards.	Support abundant opportunities for financial stability and economic growth while balancing the needs of public safety and welfare.	Create a safe, thriving community so families can achieve social, mental, physical, and cultural well-being.	Create and sustain ethical and transparent work processes that engage the public and provide the best possible public service.
Strategic Objectives		Initiatives	Measures	Targets
<b>The Community</b> 		• Community response resiliency, Phase II	25% complete this year	• Disaster response preparedness
		• School districts reach Gold Standard status	10% this year	• Safe Schools inspection program
		• Hazard ID to correction effectiveness	40% w/i 60 days this year	• Hazard correction processes
		• Community Risk Analysis, Phase II	25% complete this year	• Vision 20/25 Community Risk Reduction program
<b>Financial Stewardship</b> 		• External property/evidence audit results	100% critical items, > 95% for all other items this year	• Property management processes
		• Inventory tracking audit results	97% correct this year	• Inventory control programs
		• Strategic projects on time and on budget	90% this year	• Vehicle management plans
		• Controllable, below-the-line expenses	↓ 3% this year	• Continuous fiscal monitoring
<b>Programs and Internal Processes</b> 		• Process management analysis	50% by division this year	• Business intelligence solutions
		• Use of social media and online services	↑ followers 20% this year	• Social media/Online information
		• Service request management initiative, Phase I	100% complete this year	• Service resource software
		• Customer satisfaction rate	90% this year	• Satisfaction surveys
<b>Organizational Capacity</b> 		• Employee recruiting and retention initiatives	100% complete this year	• Professional Development
		• Incident management technology, Phase I	100% complete this year	• College Intern/Job Fair program
		• Desk Reference, Phase I	100% complete this year	• Incident mgmt tools project
		• Annualized sick time rate	< 4% this year	• Desk Reference project
Core Values		Integrity	Commitment	Excellence





# Vision 2030 Strategic Plan

## Moving Forward ... Setting the Standard for Excellence

<b>Mission</b>	To protect and serve our community by minimizing the loss of life or property from fire, medical, or other emergencies.	<b>Our Strategic Priorities</b>		
<b>Vision</b>	We will make a difference in our community by providing the best possible public services.	<b>Technical Competence</b>		
<b>Values</b>	To provide the highest degree of customer service through our words, acts, and deeds. <b>Honor • Integrity • Courage • Duty • Sacrifice</b>	<b>Organizational Excellence</b>	<b>Member Engagement</b>	<b>Financial Integrity</b>
<b>Expectations</b>	To meet / exceed the needs and expectations of our community and our response partners. <b>Every Day • Every Way • Everyone</b>	Provide a professional, safe work environment that encourages ethical successful leadership at all levels.	Provide meaningful, positive, and lasting opportunities for all members, career and volunteer.	Provide strong financial expectations, structure, and processes which increase transparency and accountability.

## Our Strategic Objectives and Desired Outcomes

# 2022-23

<b>Our community</b>	Provide competent, timely response	Provide 24/7 staffing at all stations	Reduce Community Risk	Improve community interaction
<b>Our people</b>	Recruit and retain the best available	Build expectations of excellence	Provide competitive pay	Provide professional development
<b>Our work processes</b>	Emphasize safety	Ensure regulatory compliance	Build leadership at all levels	Empower our members
<b>Financial stewardship</b>	Optimize Resource Alignment	Optimize procurement processes	Control and monitor inventory	Improve financial transparency
<b>Sustainable future</b>	Adopt balanced budgets	Create strategic and succession plans	Create a positive work culture	Sustain emergency reserve balance

ESD 1 Mission: To safely deliver the highest quality of emergency services through operational excellence, competence, and care with integrity, compassion, and dedication.

To create a sustainable **STAFFING PLAN** that provides competent, effective, and timely delivery of fire protection and emergency medical services within our community and the surrounding mutual aid area.

To create a sustainable **CAPITAL IMPROVEMENT PLAN** that provides safe and reliable facilities, apparatus, and equipment that are up-to-date, well-maintained, and meet the needs of our members and our community.

To create a sustainable **FINANCIAL PLAN** that meets district needs and community expectations, with solid financial stewardship and cost controls, sound accounting practices, and transparency.



1A. Increase crew size to 3 per shift



1B. Implement a competitive pay scale and comprehensive benefit package



1C. Establish and adopt a plan to allow for professional development



1D. Maintain an acceptable work/life balance



1E. Improve internal communications



1F. Develop and implement a succession plan



2A. Identify future operational / support needs for facilities, apparatus, other vehicle, PPE, tools and equipment



2B. Evaluate technology to determine effectiveness; and update to new technologies as appropriate



2C. Adopt a 10-year capital plan as part of the 2024-28 strategic plan



2D. Review, revise and develop policies for capital projects



2E. Develop capital project tracking system(s)



3A. Identify/quantify revenues and expenditures required to meet current and future needs



3B. Adopt a 5-year operations plan as part of the 2024-28 strategic plan



3C. Create and adopt a 10-year financial forecast that links annual budgets with long-range plans and needs



3D. Post financial information about tax rates, budgets, and audit results to ESD 1 website



# Measure the Results

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# Evaluating your strategic plan

- Set clear metrics
- Gather your data
- Compare reality to goals
- Listen to feedback
- Update your plan

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## When to evaluate

- Implementation
- Major milestones
- End of the strategic period



Source: Miro: "How to Measure Your Strategic Plan" Miro © 2025

Source: ESO: "2024 Fire Service Index, EMS Service Index" ESO © 2024



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