

**Southern Ozaukee
Fire & Emergency Medical Services
Department**



2025-2030 Strategic Plan

September 10, 2025

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Executive Summary

The Charge

The Southern Ozaukee Fire & Emergency Medical Service Department (SOFD) was formed on January 1, 2023, to serve the City of Mequon and the Village of Thiensville. An Intergovernmental Agreement provides the framework for the SOFD. A Board of Directors is charged with the governance of the SOFD. Having successfully integrated operations and approved its mission, vision and values, the SOFD engaged in a process to develop a five-year strategic plan. The strategic plan will serve as the organization's guide for the future. Oversight will be the responsibility of the Board of Directors, and execution of the plan will be managed by SOFD's Command Staff.

The Approach

Developing a plan with a multi-tier focus is important. The challenges and opportunities of the Fire & EMS environment suggest the need for five (5) strategic priorities. These priorities were developed through a facilitated, two-day retreat attended by the Board of Directors, representatives from the municipalities served and community leaders. Stakeholder input was critical to the process.

Strategic Priorities

- Exceptional People
- Effective & Efficient Operations
- Community Engagement
- Modern Facilities & Equipment
- Sound Financial Planning

Assessment

A framework will be put in place for assessing progress that emphasizes the measurement of objectives, combining quantitative metrics and qualitative indicators.

Background

The Southern Ozaukee Fire and Emergency Medical Services Department (SOFD) was formed on January 1, 2023, to serve the communities of Mequon and Thiensville. An Intergovernmental Agreement (IGA) provides the framework for the SOFD. Through this merger, the departments have consolidated their equipment and personnel into a single, unified organization. A summary of background information can be found in Appendix A.

The Board of Directors is charged with the governance of the SOFD. In 2023 the Board engaged in a process to define the mission, vision and values of the organization. The process included obtaining input from the SOFD membership and key stakeholders in the community. The Department's Annual Plan for 2025 calls for development of a five-year strategic plan. The strategic plan provides a framework for the integration of strategy, operations and finance, as well as guide the future of this growing Department.

Mission, Vision & Values

Our Mission

The Southern Ozaukee Fire & Emergency Medical Services Department exists to ensure the safety of our communities through fire suppression, response to medical emergencies, professional training and public education. We serve our communities to protect people, property and the environment. We provide our citizens with reassurance, aid and comfort when they are vulnerable.

Our Vision

The Southern Ozaukee Fire & Emergency Services Department will continuously strive to be a trusted community service that is recognized for meeting the needs of our citizens, while being good stewards of our resources. We will be known as a modern department with a professionally trained team that attains best practice standards and ensures a high level of readiness. We will innovate and continuously have an eye to the future.

We will accomplish our vision of a strong combination department by investing in our people, with a workforce of committed career and volunteer team members. We will forge strong partnerships to ensure the safety of the communities we serve.

Our Values

Our culture reflects our shared values, and we have pride in all that we do.

Integrity: We live in accordance with our values, demonstrating sound ethical principles and being honest with ourselves and others.

Trust: We believe that reliability and the strength of our relationships is core to our being. Trust fosters respect, provides safety and earns loyalty.

Empathy: We seek to understand the thoughts, feelings and perspectives of others from their point of view. We show compassion for those who feel vulnerable and suffer a loss.

Grit: We exhibit courage, resolve and selfless devotion to duty.

Excellence: We are professional and exceptional in our skills, continuously striving to improve.

Stewardship: We are responsible in our use of financial and human resources.

Plan Development

The Board of Directors developed a list of individuals to participate in a two-day planning retreat to be held in May of 2025. Those invited included the Board of Directors, SOFD members, as well as municipal and community leaders representing those we serve. Thirty-six (36) individuals were able to commit to the two-day planning event (see Appendix B). In addition to nine interviews that were previously conducted as part of the work to develop our mission, vision and values, five additional individuals were interviewed, including members of the Mequon Common Council, an area Fire Chief and a senior living specialist. To ensure a strong voice in the planning process, two facilitated sessions were held for members of the SOFD. Forty-six (46) members of the Department participated.

Strategic Planning Objectives:

- We will develop a shared understanding of our current state, as well as community and industry changes which will affect service delivery
- We will validate our mission and vision for the future
- We will develop a five-year strategic plan which addresses the key priorities of the SOFD
- We will ensure that our strategic plan aligns with the strategic priorities of the municipalities we serve

Prior to the retreat, participants received a packet of materials which included background materials related to the formation of the SOFD, as well as a profile of the Department's current state. The agenda for the May 1-2, 2025, strategic planning retreat can be found in Appendix C.

Day 1

The stage was set through a learning session that included: An Overview of the History and Formation of SOFD; Trends, Priorities & Challenges of Our Communities; and Current & Future Capabilities of SOFD. At this session, participants reflected on the desired future state of the SOFD and created models for achieving our vision.

Using a collaborative planning model, the following major strategic priorities were identified:

- Retain, train and recruit exceptional people

- Ensure effective and efficient operations by improving our systems and processes
- Enhance our community engagement through strong partnerships, increased visibility and community awareness
- Facilities, equipment and apparatus will be maintained and replaced to ensure a modern department
- Engage in sound financial planning

Day 2

Five table groups were assigned to further develop each of the major strategic priorities. Table groups identified the key objectives to support these priorities, defined outcome measures and determined timeframes.

The strategic plan was then drafted, integrating all input from approximately 100 stakeholders.

Plan Implementation

The approved 2025-2030 SOFD Strategic Plan will be implemented and monitored by the SOFD Board of Directors, the Fire Chief and the Department's Command Staff. Ongoing communications will also occur with both the City of Mequon Common Council and the Village of Thiensville Board of Trustees.

Strategic Priorities

Strategic Initiative #1: People

Objective 1: Create an employee-driven, individualized development plan tailored to both interest and needs

Tactic	Outcome	Accountability	Timeframe
a) Plan professional development process	Individual plans that are documented, implemented, and periodically evaluated	Deputy Chief	2026

Objective 2: Develop a unified culture

Tactic	Outcome	Accountability	Timeframe
a) Conduct internal department assessment of current culture	Data and shared results	Fire Chief	2026
b) Create a culture committee representative of all department members	Recommendations for improvement	Fire Chief	2026
c) Communicate and implement recommendations	Inform staff via clear and concise communications	Fire Chief	2026
d) Re-evaluate/re-engage employees	Data, next steps	Fire Chief	Ongoing

Objective 3: Ensure sufficient personnel to respond to emergencies

Tactic	Outcome	Accountability	Timeframe
a) Review current staffing levels and need for future staffing	Recommendations for current & future staffing	Fire Chief	2026
b) Cost-Benefit Analysis	Complete comprehensive cost-benefit analysis of available options	Fire Chief	2026
c) Determine funding sources; incorporate into annual budget	Funding sources identified	Fire Chief	2026

d) Recruit and hire additional personnel	Hire and on-board staff	Fire Chief	2026
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Objective 4: Establish distinctive skills training tailored to groups that ensures a coordinated team response

Tactic	Outcome	Accountability	Timeframe
a) Determine needs of the SOFD and interested individuals	Identify growth opportunities	Deputy Chief	2026
b) Identify training resources	Specify internal and external resources	Deputy Chief	2027
c) Implement Training	Trained instructors, adequate equipment, trained personnel	Deputy Chief	Ongoing

Objective 5: Establish leadership & soft skills training

Tactic	Outcome	Accountability	Timeframe
a) Determine needs of the SOFD	Identify growth opportunities	Fire Chief	2026
b) Identify training resources on leadership development	Specify resources	Fire Chief	2026
c) Implement leadership training	Group classes and a trained staff	Fire Chief	Ongoing

Objective 6: Partner with educational institutions and formalize agreements that improve hiring pipeline and retention strategies for the Department

Tactic	Outcome	Accountability	Timeframe
a) Develop formal agreements	Agreements with colleges for dual credit, reduced tuition or reimbursement	Fire Chief	2028
b) Shared resources are identified and utilized	Create shared resources like training facilities, housing at CUW	Fire Chief	2028
c) Create community support for aspiring employees	Work with local foundations to create scholarships & programs	Fire Chief	2028

Strategic Initiative #2: Operations

Objective 1: Utilize accreditation process to self-assess strengths, weaknesses, and requirements

Tactic	Outcome	Accountability	Timeframe
a) Utilize Center for Public Safety Excellence Self-Assessment Guide to review accreditation process	SOFD is fully accredited with zero deficiencies	Deputy Chief	2030
b) Identify deficiencies that can be corrected in 12 months or less	Plan established within current budget to correct deficiencies identified in accreditation report	Deputy Chief	2031
c) Identify deficiencies that can be corrected within 12-24 months	Plan established with future budget allocations necessary to correct deficiencies identified in accreditation report	Deputy Chief	2032

Objective 2: Advance technology integration and processes to optimize response times

Tactic	Outcome	Accountability	Timeframe
a) Reduce response times by utilizing CAD and incorporating concepts into future development plans and infrastructure	Additional duty of Technology Integration established, and program established to use AI, CAD and other technological advances to reduce response times	Deputy Chief	2027
b) Develop technology training for current and future equipment and processes	SOFD personnel can operate and maintain all technological equipment and data entry	Deputy Chief	2027

c) Create a data repository that tracks response times, current and future population trends, and other data that helps SOFD meet current and future needs and response times	Capture data, trends and conduct analysis of SOFD's current state, and project where SOFD needs to be in five years	Deputy Chief	2027
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Objective 3: Establish protocols for succession planning

Tactic	Outcome	Accountability	Timeframe
a) Develop staffing plan that includes organizational chart and job position descriptions	Collectively detail the structure, roles, and staffing levels	Fire Chief	2026
b) Establish training and leadership development plan for succession and promotion	Each member has a career progression plan in place and is trained to assume the next higher level of position, responsibility	Fire Chief	2026
c) Create detailed job descriptions for each position so members can assume the activities of a supervisor/manager	Permit subordinates the ability to assume leadership positions in case of unforeseen leadership vacancies	Fire Chief	2026

Objective 4: Leverage regional enabling agreements (e.g., MOU, IGA) to align education & training needs with curricula offered by MATC, etc.

Tactic	Outcome	Accountability	Timeframe
a) Produce list of required classes which are to be provided at MATC	County-wide agreement with MATC to facilitate and guarantee classes semi-annually to meet Fire & EMS needs	Fire Chief	2027
b) Develop county-wide list of personnel requiring classes at MATC for Fire & EMS employment or continuing education	A county-wide list developed to showcase the need to MATC for classes to be added to schedule each semester	Fire Chief	2027

Strategic Initiative #3: Community

Objective 1: Enhance the community's ability to increase personal safety and reduce risk

Tactic	Outcome	Accountability	Timeframe
a) Connect with community in non-emergency settings to reduce emergency calls	Provide preventive, follow-up care, and non-emergency services	EMS Chief	2026
b) Implement a multi-faceted community outreach program (e.g., paramedicine program)	Create databases to track outreach efforts (e.g., schools, parades, local functions, social media)	CRR Chief	2027
c) Make state of current facilities visible in the community	Host adult ride-alongs, citizen Fire/EMS academy, birthday parties	CRR Chief	2027

Objective 2: Promote prevention and safety by conducting thorough inspections of businesses to ensure compliance and minimize risk

Tactic	Outcome	Accountability	Timeframe
a) Make this a positive activity	Highlight successful inspections, create business ambassadors	CRR Chief	2027
b) Manage the inspection process	Share data w/ City and Village permit systems	CRR Chief	2027
c) Create proactive ways to manage inspections	Create best practice tip sheet for the community	CRR Chief	2026

Objective 3: Collaborate with senior living facilities, and train their staff to review practices

Tactic	Outcome	Accountability	Timeframe
a) Review current senior living facility practices	Review care facility call volume data	Deputy Chief	2027
b) Assess data and develop appropriate plan	Review of data from care facilities use of 911	Deputy Chief	2028
c) Develop and implement education plan	Address highest calls, fall prevention, 911 calling	Deputy Chief	2029
d) Re-assess data and modify plans as needed	Determine impact(s) on 911 service	Deputy Chief	2030

Strategic Initiative #4: Facilities

Objective 1: Develop and prioritize partnerships for facility use and development

Tactic	Outcome	Accountability	Timeframe
a) Ensure future station locations are scalable to long-term needs (e.g., community growth, future consolidation?)	Station location(s) meet current and future needs based on long-term plans	Fire Chief	2026
b) Examine opportunities for equipment sharing, joint purchasing, etc.	Coordinate with other agencies to share and maintain excess equipment	Fire Chief	2026
c) Determine training needs, props to be incorporated into any new facilities (e.g., firearms range)	New facility has adequate land and building space for training facilities and/or training props	Fire Chief	2026
d) Complete benchmarking analysis of size & cost of other area public facility construction projects	Inventory of area police & fire facility projects from 2010 - present	Fire Chief	2026
e) Determine other community needs to be or that can be accommodated within new facilities (e.g., Interfaith Caregivers)	Examine opportunities for partnerships, service-sharing with other agencies, not-for-profits, etc.	Fire Chief, Deputy Chief, Battalion Chiefs	2026

Objective 2: Conduct analysis of future station(s) needs & requirements

Tactic	Outcome	Accountability	Timeframe
a) Space needs analysis	Contract firm to conduct analysis of space needs for SOFD	Fire Chief	Complete

b) Determine combined Police/Fire building or stand-alone facilities	Analyze feasibility of a combined public safety center based on available space, needs, cost, response times, etc.	City of Mequon, Village of Thiensville, SOFD Board, etc.	2026
c) Station location analysis	Complete analysis of response times to determine general geographic areas suitable for future station locations	Fire Chief	2026
d) Update inventory of potential sites	Evaluate and determine appropriate sites for further (cost-benefit) analysis	Fire Chief	2026
e) Cost-benefit analysis	Complete comprehensive cost-benefit analysis of available options	Fire Chief	2026
f) Land acquisition	Negotiate, finance and acquire any identified real estate needed for future station construction	City Administrator	2026

Objective 3: Construct/renovate facilities

Tactic	Outcome	Accountability	Timeframe
a) Engage architectural, engineering, other firms as needed	Professional firms engaged to prepare detailed design documents for approval, bidding	Fire Chief	2026
b) Designate internal project team	Project team consisting of representatives from Mequon and Thiensville established	Fire Chief	2026

c) Approve design	Design(s) approved by City, Village, SOFD Board	Fire Chief	2026
d) Finalize project financing	Prepare for and secure debt-issued financing based on approved cost-sharing formula between City, Village & SOFD	Fire Chief	2026
e) Bid project(s)	Project(s) competitively bid for award	Fire Chief	2027
f) Award contracts	Construction contract(s) awarded to low responsible bidder(s)	Fire Chief	2027
g) Manage project & construct facility(s)	Construction management firm & project team oversee facility construction, completion	Fire Chief	2027

Objective 4: Plan regional training center for Fire, EMS & other potential agencies/partners

Tactic	Outcome	Accountability	Timeframe
a) Determine interest & key stakeholders	Solicit interest from area agencies (e.g., police, fire, public works, utilities, etc.) and confirm participants	Fire Chief	2029
b) Site selection/facility	Evaluate and determine appropriate sites for further analysis; complete comprehensive cost-benefit analysis of available options; negotiate, finance and acquire identified real estate needed for future facility	Fire Chief	2029

c) Determine funding sources	Establish financing formulas for facility construction and ongoing operations among project participants; identify available grant funding opportunities to offset initial or ongoing costs	Fire Chief	2029
d) Establish governing structure	Develop intergovernmental agreement, by-laws, operating budget and other documents to specify how facility will be operated	Fire Chief	2030
e) Design-bid-construct	Professional firms engaged to prepare detailed design documents for approval, bidding; competitively bid for award; construction management firm & project team oversee facility construction, completion	Fire Chief	2030
f) Operationalize & market facility availability	Fully outfit newly constructed/remodeled facility for operational use & training; develop materials and market availability of facility to other agencies in region	Fire Chief	2031

Strategic Initiative #5: Financial Planning

Objective 1: Advocate for legislative review of funding

Tactic	Outcome	Accountability	Timeframe
a) Meet with other County departments to determine position/funding needs/goals	Identify unified goals/narratives	Fire Chief	2026
b) Draft and disseminate formal deliverable (position letter, funding analysis)	Communicate funding needs effectively to appropriate officials	Deputy Chief	2027
c) Seek support from external organizations (e.g., League of Wisconsin Municipalities, other organizations to assist)	Build regional or statewide support	Fire Chief	2028-2029

Objective 2: Create financial partnerships

Tactic	Outcome	Accountability	Timeframe
a) Identify goals and explore partnership opportunities internally and externally	Create list of viable financial partnership options; identify internal opportunities; coordinate discussions with other departments for ideas or larger opportunities	Fire Chief, Deputy Chief	2027
b) Identify potential partners and initiate contact	Begin partnership discussions	Fire Chief	2028
c) Negotiate terms with selected partners	Finalize partnership agreement(s)	Fire Chief	2030

Objective 3: Conduct personnel compensation study

Tactic	Outcome	Accountability	Timeframe
a) Review current compensation study and determine if an internal or external update is needed	Define scope and process	Fire Chief	Complete

b) Identify reasonable party to conduct the review (internal staff or external via RFP)	Assign lead for project	Fire Chief	2025
c) Complete study	Final document	Fire Chief	2025
d) Implement recommendations	Implement compensation recommendations into future budget cycles	Fire Chief	2025

Objective 4: Negotiate future intergovernmental agreement

Tactic	Outcome	Accountability	Timeframe
a) Ascertain desire of communities to continue	SOFD/Board/Council directive to negotiate renewal	City & Village Administrators	2026
b) Establish capital funding plan for apparatus, equipment and facilities	Multi-year (5-10) capital budget	City & Village Administrators	2026-2031
c) Explore financing options (bonding, levy, service fees, impact fees, fundraising, municipal funding formulas)	Develop sustainable funding sources/formulas	City & Village Administrators	Ongoing

Objective 5: Resource sharing with neighboring departments

Tactic	Outcome	Accountability	Timeframe
a) Meet with other departments in County to determine and understand shared needs and opportunities	Identify key contacts, list of resources and potential efficiencies	Deputy Chief	2027
b) Negotiate formal resource-sharing agreements with other departments and/or County	Final agreement	Fire Chief	2028

APPENDIX A

Background Information of the Southern Ozaukee Fire Department

The background information provided will offer an overview of the Southern Ozaukee Fire & Emergency Medical Services Department (SOFD), including a brief history of the organization. It will also cover the Department's facilities, staffing structure, personnel, call volume, and budget.

History

On January 1, 2023, the City of Mequon and the Village of Thiensville Fire Departments officially merged to form the Southern Ozaukee Fire & Emergency Medical Services Department (SOFD). Both fire departments boast a long history of dedicated service to their communities, with a combined total of nearly 250 years of experience. Through this merger, the departments have consolidated their equipment and personnel into a single, unified organization. The new department operates with a mix of career staff and Paid-on-Call (POC) members, ensuring a swift response to emergency medical calls, fire incidents, vehicle accidents, and other situations requiring urgent assistance. Included are the original Intergovernmental Agreement between the two communities, along with two subsequent amendments.

Facilities

The Southern Ozaukee Fire & Emergency Medical Services Department is responsible for responding to fire and EMS calls within a 49-square-mile area. The Department primarily operates from two fire stations: Station 1, located at 11300 N. Buntrock Avenue in Mequon, and Station 2, located at 11800 N. Port Washington Road in Mequon. Additionally, Station 3, situated at 250 Elm Street in Thiensville, is specifically designated for water-related incidents on the Milwaukee River and Lake Michigan. While personnel are assigned to Stations 1 and 2, Station 3 is staffed on an as-needed basis for water rescue operations and does not have permanent personnel assigned.

Station 1 (11300 N. Buntrock Avenue)

1. Administrative Offices
2. Equipment
 - Two fire engines
 - Ladder truck
 - Tender truck
 - Two ambulances
 - Brush fire truck
 - Special operations truck
 - First responder car (Med 9)
 - Battalion Chief vehicle
3. Five bunk rooms
4. Kitchen and living quarters

Station 2 (11800 N. Port Washington Road)

1. Equipment
 - One fire engine
 - Ladder truck

- Tender truck
 - Two ambulances
2. Five bunk rooms
 3. Kitchen and living quarters

Station 3 (250 Elm Street in Thiensville)

1. Equipment
 - Rigid hull boat
 - Inflatable boat
 - Utility truck

Staffing

Administrative work is done by the Fire Chief, Deputy Chief, three Battalion Chiefs, and an Administrative Assistant. The Fire Chief and Deputy Chief are responsible for overseeing all departmental operations, personnel, and resources. They manage emergency response strategies, ensure firefighter safety, coordinate training programs, develop policies, and collaborate with local officials on budgeting and resource allocation. Additionally, due to the staffing model at SOFD, many day-to-day operations, including inspections and responses to EMS and fire calls, are critical and essential. The Administrative Assistant, working part-time, handles all accounts receivable and payable, personnel onboarding, employee enrollment in various programs, processing inspection fees, payroll, and addressing inquiries related to ambulance billing. The Administrative Assistant, alongside a Battalion Chief, is also responsible for making journal entries in the accounting software.

Staffing for EMS calls are scheduled for 24-hour coverage. The current goal for staffing is seven staff members on the schedule per day, as follows:

Station 1 (11300 N. Buntrock Avenue)

- Battalion Chief
- 2 EMTs staffing an ambulance
- 1 EMT staffing first responder vehicle

Station 2 (11800 N. Port Washington Road)

- 2 EMTs staffing an ambulance
- 1 EMT staffing first responder vehicle

Of the seven positions assigned daily, two must be staffed by paramedics, with the remaining positions filled by firefighter EMTs or EMTs. In 2023 and 2024, the Department was able to fill nearly all of the required coverage hours, with a shortfall of approximately 1% or about 1,000 hours out of the 60,000 hours needed.

The training requirements for EMS personnel vary significantly depending on their certification level. Currently, EMT-Basic certification requires 144 hours of training, while EMT-Advanced certification demands an additional 180 hours of training, along with clinical experience. Paramedic certification requires over 1,000 hours of training and clinical time.

Personnel

SOFD is a combination department with both full-time and paid-on-call (POC) positions.

1. Full-time
 - Fire Chief
 - Deputy Chief
 - Battalion Chiefs (3)
 - Administrative Assistant (26 hours/week)
 - Paramedic/Firefighters (9)

2. Paid-On-Call
 - The remaining scheduled EMS positions are staffed with POC members

Paid-on-Call (POC) members receive \$3.00 per hour on weekdays and \$7.00 per hour on weekends for being "on call" for EMS services. When responding to an EMS call, they are compensated at an hourly rate ranging from \$28 to \$36, depending on experience. In addition to the POC structure, the Department also utilizes a Paid-On-Premises (POP) program to fill vacant paramedic shifts. Under this program, at least one paramedic is assigned to each side of the City. POP members are paid \$34 per hour and do not receive additional compensation for responding to calls. Firefighters are not scheduled for on-call shifts. They respond to fire calls as needed and are compensated with an hourly rate. All firefighters are required to complete a minimum of 60 hours of Fire 1 certification training.

Call Volume

When combined, the Mequon and Thiensville Fire Departments (now SOFD) have seen double digit increases in call volume over the last 10 years. Calls for service in 2024 were 3,948 calls. See the Department's 2024 Annual Report for more details.

Budget

The SOFD budget for 2025 is \$3,721,465, with 49% of the budget derived from revenue and the remaining 51% funded through tax levies from the two communities. The majority of revenue is generated through ambulance transport. Contributions from each community are established by the intergovernmental agreement, with Mequon contributing 84.43% and Thiensville contributing 15.57%.

Additionally, the SOFD maintains a separate capital fund for future needs. Mequon currently contributes \$110,000 annually, while Thiensville contributes \$20,285. As of January 1, 2025, the capital account fund balance stands at \$930,000.

APPENDIX B

Strategic Planning Participants

Chris Anderson
Brenda Arnett
Gregg Bach
David Bialk
Melissa Bleidorn
Nick Boehlke
Amy Boll
Jeremiah Bradley
Doug Chimenti
Mackenzie Haase
Mike Homme
William Jones
Matthew Joynt
Curt Kleppin
Christy Knowles
Andy LaFond
Colleen Landisch-Hansen
Rick Lemke
Kristen Lundeen
Dale Mayr
Van Mobley
Chas Neman
Andrew Nerbun
Carl Peluso
Mark Riley
John Rosing
Brian Sajdak
Kathleen Schneider
Justin Schoenemann
Lindsay Scholz
Jason Staszko
Lynn Streeter
Steven Taylor
Kim Tollefson
Jeff Vahsholtz
John Wirth

Appendix C

Southern Ozaukee Fire & Emergency Services Department (SOFD) Strategic Planning Agenda May 1-2, 2025

Objectives

- We will develop a shared understanding of our current state, as well as community and industry changes which will affect service delivery
- We will validate our mission and vision for the future
- We will develop a five-year strategic plan which addresses the key priorities of the SOFD
- We will ensure that our strategic plan aligns with the strategic priorities of the municipalities we serve

Day 1

Welcome, Opening Reflection and Overview

Mequon Mayor *Andrew Nerbun* & Thiensville President *John Rosing*

Trends, Challenges and Priorities of our Community

Mequon Administrator *Will Jones* & Thiensville Administrator *Colleen Landisch-Hansen*

SOFD Current Capabilities and Future Trends

Chief *David Bialk*, Battalion Chief *Amy Boll*, Battalion Chief *Rick Lemke*

Assignment 1: Synthesize Our Learning, Our Opportunities

Assignment 2: Designing Our Future State

Day One Closing Remarks

Reception

Day 2

Hot Breakfast Buffet

Opening Discussion

Assignment 3: Identification of Strategic Priorities and Initiatives

Assignment 4: Defining Success: what, how and when

Retreat Conclusion & Thank You

Andrew Nerbun