

# **FIRE DISTRICT 3**

*Jackson County, Oregon*



## **BUDGET DOCUMENT**

**2017/2018  
FISCAL YEAR**

# 2017/2018 Fiscal Year Budget Document

# Fire District 3



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White City, OR 97503  
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# Introduction and Profile

# Fire District 3



2017/18 Fiscal Year Budget

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# Introduction of Members

## **BOARD OF DIRECTORS**

As of July 2017

Harvey Tonn, President  
Cindy Hauser, Vice President  
John Dimick, Secretary/Treasurer  
Steve Shafer, Director  
Vacant

### Term Expires

*June 30, 2019*  
*June 30, 2021*  
*June 30, 2019*  
*June 30, 2021*  
*June 30, 2019*

## **BUDGET COMMITTEE**

As of July 2017

*Members consist of the Board of Directors and five (5) citizen members*

Alison Chan  
Ken Cummings  
Joe Strahl  
Rob Hernandez  
Steve Weber

### Term Expires

*December 31, 2017*  
*December 31, 2017*  
*December 31, 2018*  
*December 31, 2019*  
*December 31, 2019*

## **DISTRICT EXECUTIVE STAFF**

Robert Horton, Fire Chief  
Stacy Maxwell, Chief Finance Officer  
Mike Hussey, Deputy Chief Operations  
John Patterson, Deputy Chief Fire Marshal  
Dave Blakely, Division Chief Training and Safety  
Margie Calvert, Executive Assistant

*Serving Since 2017*  
*Serving Since 1999*  
*Serving Since 1998*  
*Serving Since 2011*  
*Serving Since 2011*  
*Serving Since 2011*

# Distinguished Budget Award



GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished  
Budget Presentation  
Award*

PRESENTED TO

**Jackson County Fire District No. 3**

**Oregon**

For the Fiscal Year Beginning

**July 1, 2016**

A handwritten signature in black ink, appearing to read 'Jeffrey R. Egan'.

Executive Director

The Government Finance Officers Association of the United States and Canada (GFOA) presented an award to Jackson County Fire District 3, White City, Oregon for its annual budget for the fiscal year beginning July 1, 2016. In order to receive this award, a governmental unit must publish a budget document that meets program criteria as a policy document, as an operations guide, as a financial plan and as a communications medium. The award is valid for a period of one year only. We believe our current budget continues to conform to program requirements, and therefore are submitting it to GFOA to determine its eligibility for another award.

# Mission, Vision, Value Statements

## Mission Statement

The mission statement is a general description of why the District exists. A good mission statement is clear, concise, and easily remembered by all. The mission statement is reviewed periodically to ensure it remains an accurate reflection of the District's key role within the community.



***"The mission of Jackson County Fire District 3 is to protect life and property through public education, prevention activities, and emergency response services."***

## Vision Statement

While the mission statement describes why the District exists, the vision statement describes how the District wishes to be viewed within the community. A good vision statement will serve as a guide for continuous self-improvement.



***"The vision of Jackson County Fire District 3 is to reduce and eliminate risk from fire, rescue, and medical events in the communities we serve."***

## Values

Values are the ideals and principles that guide thinking and action. Values are the basis for decision-making. Values influence the choice of goals and objectives. The actions and decisions of District members confirm or challenge the organizational values. The District teaches these values to every member early in their association with the District. The actions of every member must reinforce these values. The District expects these values to be visible in each individual's daily activities and interactions with other members and the public. The following are the value statements that the District has adopted and holds all employees accountable to:



### **Honesty and Integrity**

*Don't be afraid of the truth. Do the right thing, even if it hurts.*

### **Professionalism**

*Take pride in your work, display confidence, be accountable, and respect each other.*

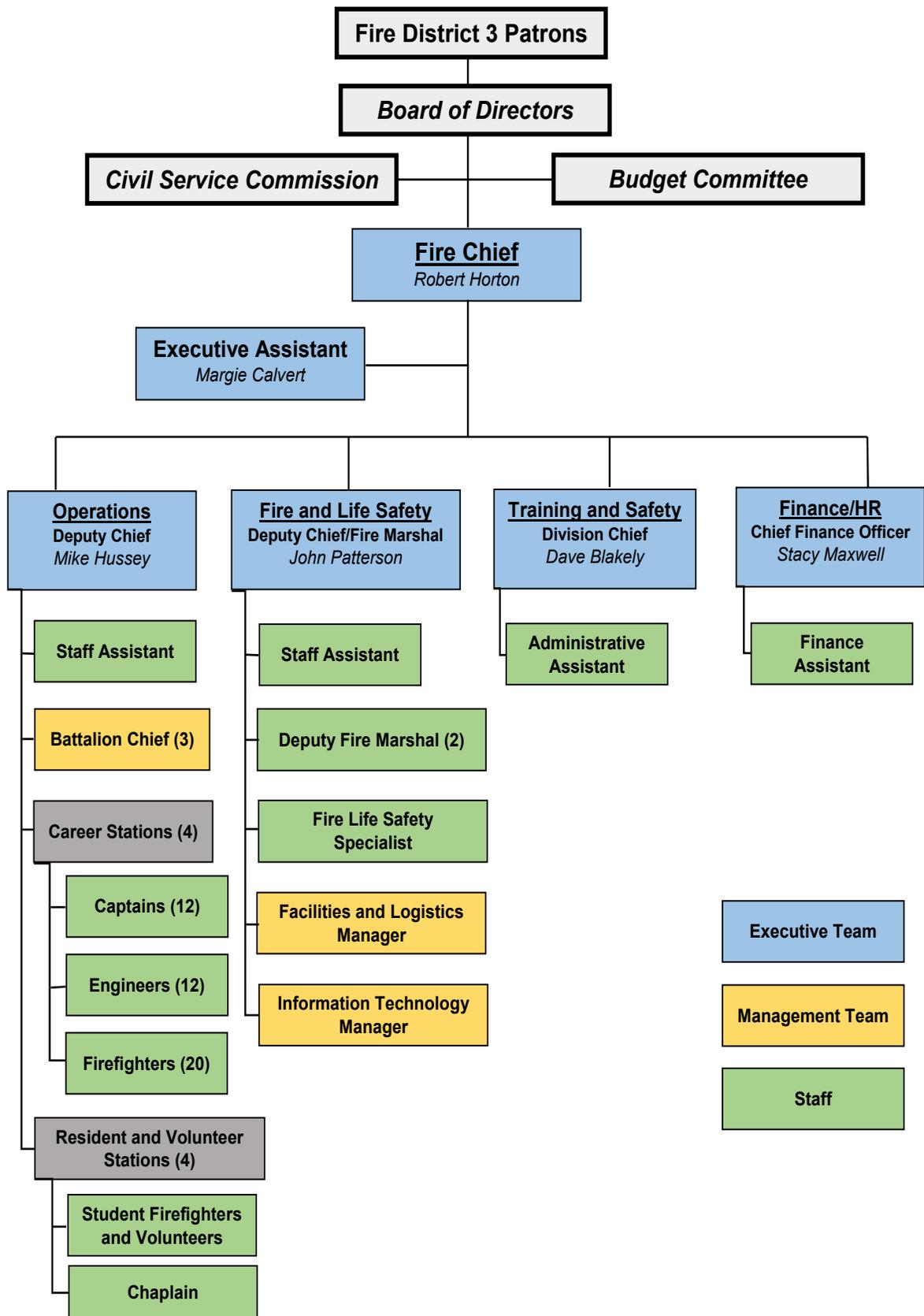
### **Safety**

*Make personal, team, and the public's safety a priority.*

### **Teamwork**

*Be receptive to the sharing of differing ideas. Play your position; help each other but don't walk on each other.*

# Organization Chart



# Personnel Summary

## Budgeted Staffing Level by Department

All positions are authorized and fully funded out of the General Fund.

	2014/15	2015/16	2016/17	2017/18
	Actual	Actual	Adopted	Adopted
<b>Administration</b>				
Fire Chief	1	1	1	1
Chief Finance Officer	1	1	1	1
Finance Assistant	1	1	1	1
Executive Assistant	0	1	1	1
Administrative Assistant	1	0	0	0
Public Information Officer (part-time)	0.15	0	0	0
<b>Total</b>	<b>4.15</b>	<b>4</b>	<b>4</b>	<b>4</b>
<b>Operations</b>				
Deputy Chief of Operations	1	1	1	1
Rural Communities Chief	1	1	0.5	0
Battalion Chief – 56 Hour Shift	3	3	3	3
Battalion Chief – 40 Hour Staff	0	0	1	0
Fire Captain	12	12	12	12
Fire Engineer	12	12	12	12
Firefighter	18	20	20	20
Staff Assistant	1	1	1	1
Program Assistant (part-time)	0	0	0	0
<b>Total</b>	<b>48</b>	<b>50</b>	<b>50.5</b>	<b>49</b>
<b>Fire and Life Safety</b>				
Deputy Chief/Fire Marshal	1	1	1	1
Deputy Fire Marshal	2	2	2	2
Fire and Life Safety Specialist	0.5	1	1	1
Staff Assistant	1	1	1	1
<b>Total</b>	<b>4.5</b>	<b>5</b>	<b>5</b>	<b>5</b>
<b>Training</b>				
Division Chief of Training and Safety	1	1	1	1
Administrative Assistant	1	1	1	1
<b>Total</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>
<b>Support Services</b>				
Facilities/Logistics Manager	1	1	1	1
<b>Total</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>Technology</b>				
Information Technology Administrator	1	1	1	1
<b>Total</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>Total for All Departments</b>	<b>60.65</b>	<b>63.00</b>	<b>63.50</b>	<b>62.00</b>

# Personnel Summary

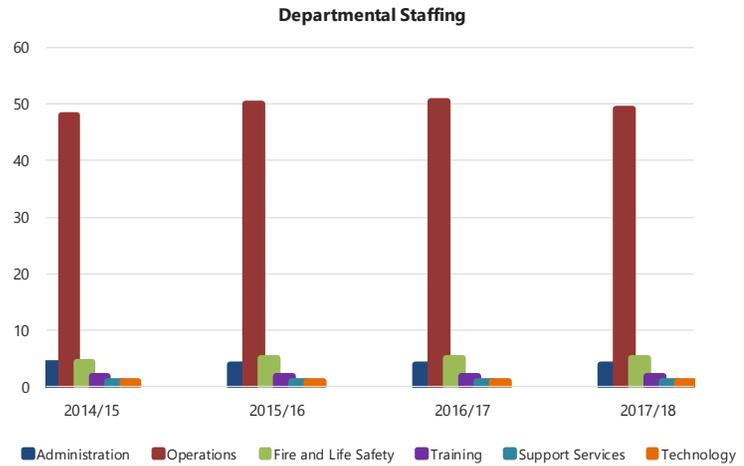
## SUMMARY OF PERSONNEL CHANGES

Staffing changes that occurred during the 2016/17 fiscal year was the retirement of the Rural Communities Chief and the Fire Chief, both effective December 31, 2016.

The District had a six month advance notice of the Rural Communities Chief retirement and decided during the last budget process not to fill this position in the same manner. Instead the District identified that a program coordinator for emergency medical services (EMS) was needed. This position would provide continued education to paramedics, develop policies and programs, participate in countywide health groups and committees, and oversee medical supplies and pharmaceuticals. After an unsuccessful recruitment process the District made the decision not to continue seeking other candidates and instead focused on filling this need through a 40-hour special assignment program utilizing a shift paramedic. During this time further analysis was performed on the District's emergency medical needs, in which other opportunities and options were explored. The District decided to delay the hiring of this position for the immediate future.

The Fire Chief's retirement resulted in a nationwide recruitment which began in December of 2016. An assessment and interview process was held on March 6 and 7, 2017. Robert B. Horton of Las Vegas Fire and Rescue was offered the position and started his career with the District on June 19, 2017.

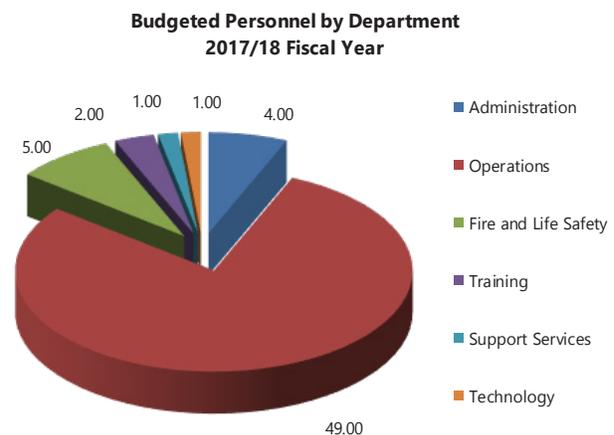
The District administered a Civil Service Firefighter entrance examination process in January of 2017 which resulted in a certified register valid for 12 months. Also, the District administered a promotional exam for the Captain position in March of 2017, which resulted in a Civil Service promotional register of six internal candidates valid for 30 months.



### 2017/18 Fiscal Year

The District is not recommending any additional position changes in this fiscal year.

The District has some large scale construction projects ahead and has new executive leadership at the helm, so to provide flexibility in anticipation of some potential staffing needs, the District had approved through the Budget Committee process two (2) part-time program assistants. No salary and benefit dollars however were allocated towards these positions, only a \$1,000 placeholder. Should the need come to fruition, the District will transfer the appropriate funds from Contingency to the salary and benefit accounts.



The District is planning to administer a Civil Service Engineer promotional exam in the spring of 2018 in order to maintain a current register. The Firefighter register will expire January of 2018, in which the District may administer another entrance exam or request an extension from the Civil Service Commission. The District will continue looking towards the future, evaluating our response capabilities and support services, while assessing ways to maximize employee efficiency with patron's tax dollars.

# History of the District

## 1951

A non-profit corporation, "Central Point Rural Fire Protection District, Inc." is formed to collect donations for creating a rural fire protection district.

## 1952

The County Court held a successful election and formed the Central Point Rural Fire Protection District (CPRFPD).

## 1953

Mr. Richard Krupp is hired as the first salaried Fire Chief.

The first fire station is built on Highway 99 in Central Point with donated funds.

As industry grows considerably, commercial and industrial businesses in the White City area donate materials and land to build a second fire station on Agate Road.



## 1955

The Board of Directors appoints former Volunteer Firefighter and Assistant Chief Mr. L. C. "Liz" Lisenbee as the new Fire Chief. The District experiences considerable residential, commercial and industrial growth, creating complex protection and service delivery issues.

## 1970

Mr. William H. Anson is hired to replace Chief Lisenbee. Chief Anson had extensive experience in southern California with departments that had experienced rapid growth and expansion and had worked with both paid and volunteer personnel.

The District was considerably under-equipped in apparatus and equipment to combat the increasing fire problems that existed. The Board of Directors recognized these deficiencies and undertook the task of bringing the District up to standard. The outcome was reduced fire insurance premiums and increased levels of fire protection.



## 1974

The Land of Many Oaks Rural Fire Protection District (LOMO RFPD), a one square mile fire district located in Sams Valley was annexed into the District.



The Board of Directors makes a determination to provide emergency medical services. A fundraising drive, led by Mr. Michael Burrill, General Manager of Eugene F. Burrill Lumber Co., was successful in raising approximately \$15,000 for the acquisition of a multi-purpose vehicle for emergency medical calls and for incident command situations.

# History of the District

## 1975

CPRFPD officially becomes Jackson County Fire District No. 3 (JCFD3) to better describe the areas being protected. It is the third fire district formed within Jackson County protecting approximately 140 square miles.



## 1977



Funding from a Federal grant allows the District to construct a new White City station and Administrative Offices in White City across the street from the original station on Agate Road. The classroom is dedicated in the honor of Wes Claflin, a former Volunteer Fire Captain and school teacher.

## 1978



The Board of Directors send personnel to the University of Oregon Health Sciences Center in Portland to be trained as Firefighter/EMT 4 (Paramedics). JCFD3 was the first fire department in southern Oregon to provide Paramedic services.

## 1979



The third fire station (Dodge Bridge) is built by District personnel on land donated by Jim and Lois Wilson. This station, located at the intersection of Highway 234 and Rogue River Drive, is staffed by volunteers.

## 1983



The Central Point station is demolished and a new station is built at the same location. This station continues to service the southern and western regions of the District.

## 1985



The Sams Valley station is constructed to replace the existing Land of Many Oaks station and is staffed by volunteer personnel living on site in residential mobile homes.

# History of the District

## 1986



A new maintenance facility is added to the White City station in 1986. The facility is officially named in honor of Mr. Rupert R. Wilson, former Chief Mechanic, who had recently retired from the District after an extensive length of service as a volunteer, Board Director, part-time employee, and full-time employee.

## 1989

Property is purchased on Access Road near the City of Gold Hill for a future fire station. The location is selected because of its strategic location for response to the Sams Valley area, Interstate 5, Blackwell Road, and Old Stage Road towards Central Point and Jacksonville.

## 1991

Fire Chief Anson retired in December of 1991 after 20 years of service with the District and over 35 years in the fire service. Assistant Chief/Fire Marshal Randall Iverson was hired as the new Fire Chief. He came to the District in 1980 with previous fire service experience in Oregon and California.



## 1994

The City of Gold Hill contracts with JCFD3 for fire protection. One year later the territory of the City is annexed to the District by a passing vote.

## 1995



The fifth District fire station is built near Agate Lake following the successful annexation of that area.

## 1996

The District enters into a five year contract with the City of Central Point to provide fire and EMS services for City residents.

Ballot Measure 50 is passed by Oregon voters, changing the way property taxes are computed. The District gets a permanent tax rate of \$3.1194 per \$1,000 of assessed value.

# History of the District

## 1999



The City of Eagle Point contracts with the District for fire and EMS response for city residents. The City's volunteer fire department merges with the District's volunteer firefighter association.

The sixth District fire station is constructed in Gold Hill on the Access Road land that the District purchased in 1989.

## 2001

The residents within the cities of Central Point and Eagle Point both pass a measure to annex into the Fire District for permanent fire and EMS protection. Funding now comes from property taxes and service contracts with the two cities terminate.

## 2002



The District purchases land on Loto Street in the City of Eagle Point and builds the seventh fire station.

The Veterans Administration Domiciliary in White City elects to close its fire department and transfers responsibility to JCFD3.

## 2003



The Central Point station is remodeled and expanded.

The District increased staffing by hiring 12 firefighters to meet increased service demands within the two cities.

The White City Urban Renewal Agency funds and constructs a training center complex for the District on adjacent property. This project includes a large training area, five story tower, confined space rescue prop, and a warehouse.

## 2004

The District purchases land on Table Rock Road between the White City and Central Point stations.

The volunteer program is enhanced and a Volunteer Program Coordinator is hired to support and promote the volunteers.

## 2005

Fire Chief Randall P. Iverson retires after 25 years with the District.

## 2006

Barry Hutchings is hired in May as the new Fire Chief.

# History of the District

## 2007



Chief Hutchings resigns in March and David K. Hard is hired in November as Fire Chief.

The District secures funding and starts the construction of a new administrative office building on land donated by the White City Urban Renewal Agency adjacent to the White City station.

## 2008



The District completes construction of the new Administrative Office Building. Opening ceremonies are held on September 30, 2008.

## 2009

The remodel of the White City fire station gets underway. White City Urban Renewal Agency expires and the frozen assessed valuation from 1996-2008 comes back onto the District's tax rolls.

## 2010

Fire Chief David K. Hard leaves the District and former Fire Chief Randall P. Iverson is appointed as the Interim Fire Chief.

The Southern Oregon Regional Communications Center is consolidated with Rogue Valley Consolidated Communications to form Emergency Communications of Southern Oregon (ECSO). Fire District 3 secures a position on the seven member Chief Executive Board. The center is the Public Safety Answering Point (PSAP) for all of Jackson County and dispatches all fire and law enforcement in the County.

Daniel V. Petersen is hired as the Fire Chief on October 11, 2010. The Strategic Plan is revised and focused on seven goals for the next 12 months. A new community based vision is adopted by the Board of Directors: "To reduce or eliminate risk from fire, rescue, and medical events in the communities we serve".

## 2011

The District purchases two initial attack tenders to haul 2,000 gallons of water to the fire and be able to effectively make an initial attack on a structure fire. This design also provides greater capacity during urban interface fires.



The District modifies the operational deployment method by responding with four engine companies, each lead by a Captain. This reinforces a crew response to emergency incidents and improves the ability of the firefighters to solve problems in the community.

Members of the community and the organization are invited to participate in the strategic planning process resulting in a new two year plan for 2012-2014. The Fire Chief begins making quarterly presentations to all cities inside the District on the progress of the plan.

Student Firefighter positions are added to nine of the career companies (three each day), providing four person engine companies. The District pays for the student firefighter's fire science education and book costs.

# History of the District

## **2012**

The District converts the Volunteer Coordinator position to a Rural Communities Chief to oversee the response in the rural areas and to assist the community members in the reduction of risk.

The District celebrates 60 years of service with a ceremony on September 19, 2012. Past members from each decade shared their memories and highlighted significant District achievements. The first Fire Chief, Richard Krupp, is a speaker and describes his involvement in purchasing the first fire engine.



The District hires three additional firefighters, ensuring that four three-person career engines and a Battalion Chief are on duty each day. This is supplemented by four volunteer stations in the rural community.

The District contracts out vehicle maintenance to the City of Medford and expands the agreement with Rogue Community College. RCC now houses their fire engine and equipment at the White City Training Facility and the majority of the hands on college training is occurring at this site.

The District experiences a 2.6 percent reduction in taxable assessed valuation on property due to the local economic recession. The District is able to sustain all services, the result of an increase in carryover and contingency established over the last few years in anticipation of this downturn.

## **2013**

The District improves its Insurance Services Office (ISO) rating from PPC 4 to a PPC 3, saving the community thousands in fire insurance premiums. A live fire burn building using shipping containers is placed in service at the training facility.

The first two of six manufactured homes are placed at volunteer stations as part of an improved resident firefighter program. Student firefighters are placed at the Gold Hill station on a trial basis to improve response in that station area.

The District engages in formal discussions with the City of Medford for cooperative services and enters into an intergovernmental agreement with Jackson County Fire District 4 to provide fire chief services and chief officer response to the District. The Rural Communities Chief is assigned this responsibility.

The District see a rebound in the economy with a 2.7 percent increase in assessed value.

## **2014**

The District purchases and places in service two new structural fire engines from Pierce Manufacturing. These new PUC style engines have a shorter wheel base and 30 percent more compartment storage space.

The District concludes the cooperative services study with the City of Medford. The District decides to remain a separate agency but improve cooperative service by responding the closest engine available, regardless of jurisdictional boundary. Additional training and fire rescue protocols will be developed to improve the performance.

The District initiates a strategic planning process that includes a District wide survey of community opinion. Over 475 responses are received and presented to a group of community members for analysis. A new strategic plan is adopted for 2015-2017.

# History of the District

## **2015**



The District opened its eighth fire station and moved the second staffed engine company from the Central Point station to a temporary facility on Table Rock Road.

The District establishes its first Firewise community and receives access in cooperation with Oregon Department of Forestry for over \$300,000 in grant funds to help prevent the spread of fire into the urban interface.

The District began dispatching engines through the use of Automatic Vehicle Locator (AVL) technology as part of the Computer Aided Dispatch (CAD) program. This change allows the closest District or Medford Fire-Rescue unit to be dispatched automatically.

The District receives a \$250,000 grant to construct a fire simulation house at the White City Training Facility. This project generates support from the State Legislature, Oregon State Fire Marshal, and the Department of Public Safety Standards and Training (DPSST).

## **2016**

The District began the planning stages of a classroom facility on the White City campus in collaboration with Rogue Community College to house the fire science program.

The District received a \$150,000 grant from Jackson County Title 3 Funds to promote Firewise Communities within the District.

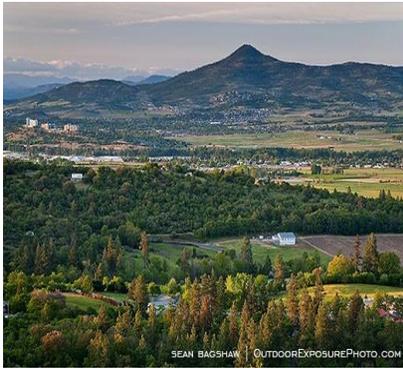
Fire Chief Dan Petersen retires from the District in December and an aggressive search for a new Fire Chief begins.

## **2017**

The District hired Robert B. Horton from Las Vegas Fire and Rescue to serve as the new Fire Chief commencing June 19, 2017.

# Fast Facts

The District is located in the northern part of Jackson County, Oregon in the beautiful Rogue River Valley. Jackson County borders California to the south and is nestled between the majestic Cascade and Siskiyou Mountain ranges. It is conveniently located along Interstate 5 between Portland and San Francisco and is considered a very desirable area to live for quality of life, pleasant seasons, and abundant recreation opportunities.



Population Served	54,010
Square Miles Served	167

City of Central Point	17,995	3.6 square miles
City of Eagle Point	8,902	2.6 square miles
City of Gold Hill	1,266	0.5 square miles
Unincorporated	25,847	159.9 square miles

The Rogue Valley is home of the legendary Rogue River where you'll find jet boating, rafting, and fishing, mountains for snow skiing, biking and hiking, and green valleys that produce award-winning wines. It's also home to North America's deepest lake and Oregon's only National Park, Crater Lake, which graces the back of Oregon's state quarter. A two hour drive to the west will take you to the Pacific Ocean coastline.



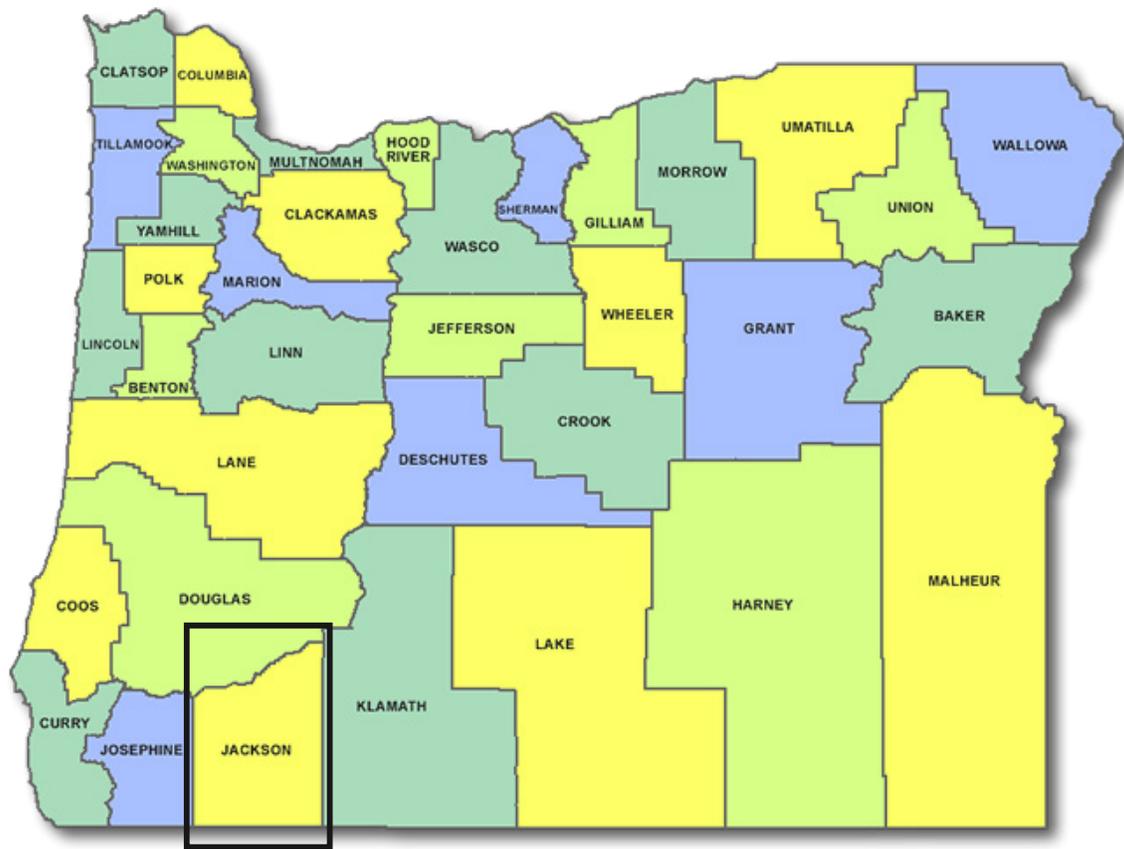
The Rogue Valley is home to a pair of well-known attractions - the Britt Music Festival and Ashland's Oregon Shakespeare Festival - and to dozens of museums, art galleries, theaters, wineries, and golf courses. History buffs will recognize the region as the site of Oregon's 19<sup>th</sup> Century gold rush, an era preserved within the boundaries of Jacksonville, a National Historic Landmark town. The Pear Blossom Festival held in April each year celebrates the famous pear harvest.

In addition to the scenery and activities, Jackson County offers a progressive economic base, moderate climate, Southern Oregon University, an international airport, and cultural attractions that all add to the incomparable quality of life.



# Geographical Location - State Map

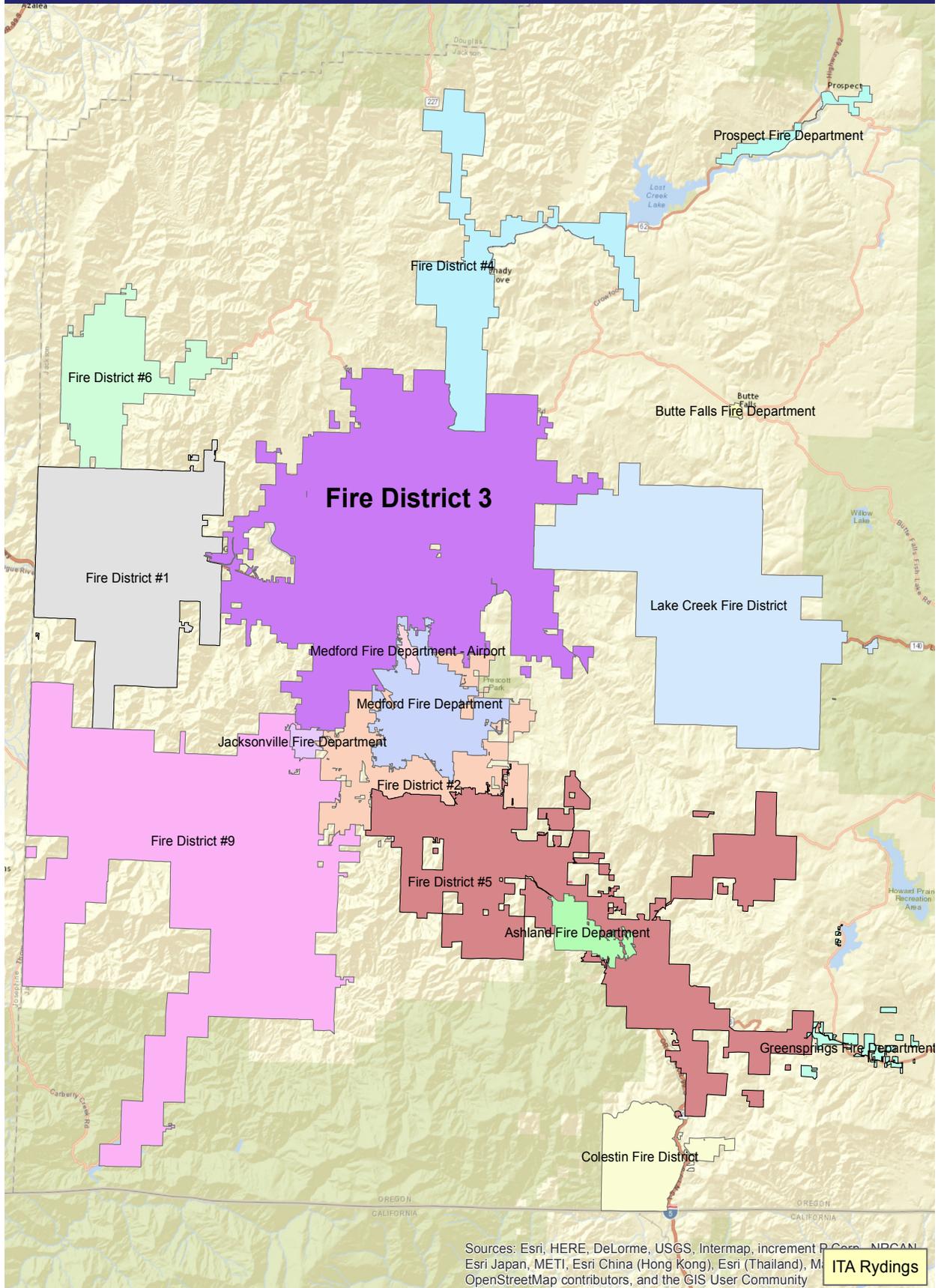
## State of Oregon



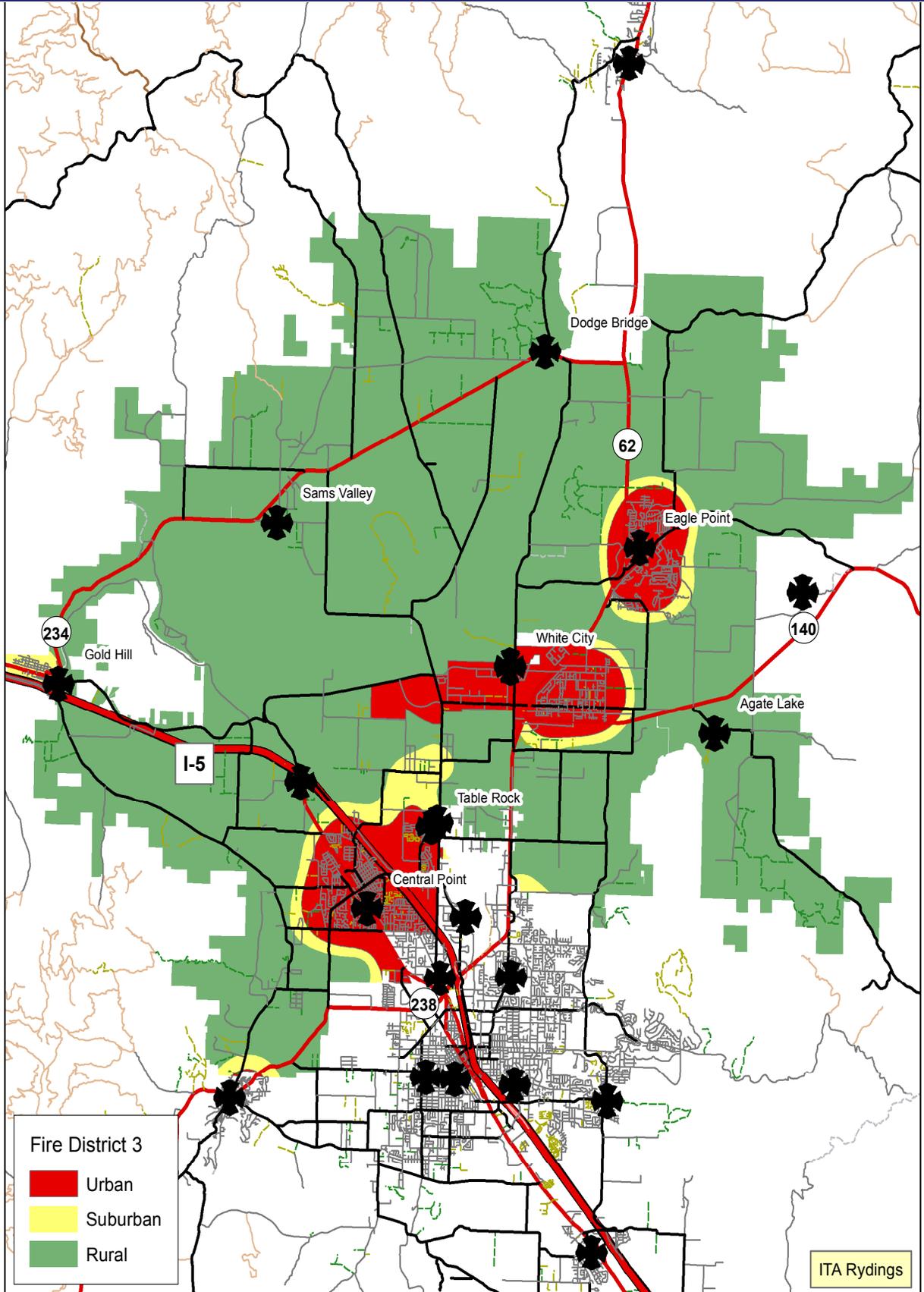
### Jackson County Demographics

Calendar Year	Jackson County Population (a)	Total Personal Income (thousands of dollars)	Per Capita Personal Income	Unemployment Rate
2006	195,719	\$ 6,619,201	\$ 33,743	5.6%
2007	198,978	6,859,383	34,443	6.1%
2008	201,538	7,095,393	35,272	10.2%
2009	202,807	6,690,586	33,072	13.5%
2010	203,421	6,819,499	33,524	11.6%
2011	204,761	7,075,288	34,554	10.7%
2012	206,336	7,380,315	35,768	10.8%
2013	207,998	7,525,300	36,180	9.7%
2014	210,151	8,121,087	38,644	8.5%
2015	212,567	8,650,946	40,698	6.5%

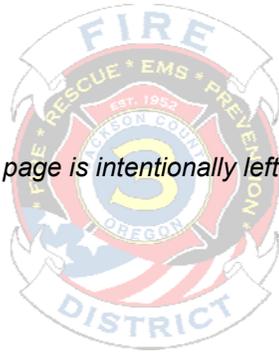
# Geographical Location - County Map



# Geographical Location - Station Locations



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# Budget Message, Process, and Policies

## Fire District 3



2017/18 Fiscal Year Budget

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# Fire District 3

8383 Agate Road  
White City OR 97503-1075  
(541) 826-7100 (office)  
(541) 826-4566 (fax)  
www.jcfd3.com

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April 20, 2017

Budget Committee Members and Citizens  
Jackson County Fire District 3  
White City, Oregon

Budget Committee Members and Citizens:

I am pleased to present to you the 2017/2018 fiscal year **proposed budget** for Jackson County Fire District 3. Staff has prepared this budget for your review and approval consistent with the District's vision, mission, and strategic priorities. In addition, it is prepared in compliance with generally accepted accounting principles (GAAP) and Oregon Local Budget Law. This budget is intended to serve as a financial plan, policy document, communications device, and operations guide. *This budget message contains figures based on what we are proposing to the Budget Committee at our April 20, 2017 meeting. Figures may change slightly from what is proposed and reflective in this message at the subsequent Budget Committee meetings, therefore the approved and adopted figures may differ. The budget message is not modified throughout the process to update these changes.*

This budget supports the initiatives identified in our 2014-2017 Strategic Plan. By the end of 2017 the District will have completed a community based strategic planning session with an outcome of a new three year strategic plan that will continue to keep the organization focused and drive future budget processes.

The vision for the District is to reduce and eliminate risk from fire, rescue, and medical events in the communities we serve. The mission of the District is to protect life and property through public education, prevention activities, and emergency response services. The current Strategic Plan identifies five strategic priorities that are designed to focus the efforts of the organization on achieving the vision. Each of the goals have desired outcomes to further define how to measure our progress.

## Strategic Priorities:

1. Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.
2. Ensure sustainability of service delivery (people, facilities, fleet, and finance).
3. Promote, develop, and support craftsmanship, innovation, and excellence throughout the organization.
4. Promote community involvement with the District and satisfaction of the patrons.
5. Develop and strengthen collaborative strategic partnerships.

Each department develops action plans to help achieve the desired outcomes and meet the adopted priorities. These priorities are in focus year round by all managers and serve as performance measurements. Additional action items are generated during the life of the plan. Each year staff reviews the priorities and desired outcomes to ensure the plan is relevant and attainable. A semi-annual and year-end performance report is presented to the Board of Directors and each of the city councils within the District. The reports are also published on the District website to allow full transparency of the progress made towards accomplishing the goals. The Strategic Plan is a dynamic working document that ensures the members of the District and those in the community where our focus is, what our expectations are, what winning looks like, and where the finish line is.

# Budget Message

During this past fiscal year the District had several accomplishments while also experiencing some unanticipated change. Some of the key accomplishments achieved during this past year that we are most proud of are:

- Performed a thorough analysis of the District's succession plan and the motivators that drive personnel to promote within the organization. Through collaborative dialogue, and by engaging various stakeholder groups, the District was able to identify some unique and innovative ways to encourage personnel throughout the organization to prepare for promotional opportunities when they avail.
- The District, in collaboration with other regional fire service agencies, introduced and launched the PulsePoint smartphone app in Jackson County. The mobile app immediately alerts CPR trained bystanders when a cardiac arrest event occurs in a public place near them, with the goal to improve a person's chance of survival. PulsePoint has been integrated into the 911 dispatch system.
- The District was fortunate to be awarded a \$150,000 grant over a two year period from Jackson County Title 3 Funds that promote establishing Firewise Communities. The District has been working the Long Mountain area of Eagle Point in the first phase of the grant, assisting homeowners with hazardous fuels reduction and mitigation and establishing adequate defensible space around their residences.
- The District established the Rogue Valley Fire Rescue Standing Orders, which are comprised of various protocols that address communications, tactical actions, special responses, and a host of other fire ground related operations. These protocols define critical areas of our response and most importantly, provide consistency to personnel as well as among participating partner agencies.

The significant change that occurred during this past year was Fire Chief Dan Petersen's unexpected retirement. 2017 started with the launch of a nationwide recruitment. As this budget is being developed and presented to Committee, the District is closer to having our new Fire Chief join our organization. In addition, the District continues to remain focused on projects and programs that develop our people and continues to provide the most effective emergency response and prevention services to our citizens. We are also committed to maintaining clear fiscal policies that will ensure a sustainable service delivery.

## Economic Factors and Assumptions

The District has identified several key environmental assumptions that may have, or will have, impact on this budget development and our ability to provide service. Some of the factors have had longstanding impact, in which the District is still recovering from. Others are ones we are watching closely and planning for those potential consequences in the future.

- Property assessed valuations are projected to increase modestly. We have forecasted a 3.65 percent assessed valuation growth for the 2017/18 fiscal year. Since the economic recession, we do not forecast that growth will be experienced as it was between 2002 and 2008, when it averaged 7.42 percent.
- The economy continues to show improvement and gain strength. New construction has rebounded and job growth is at pre-recession lows, posting jobs growth of 3.2 percent over the past year, surpassing the statewide job growth rate. The unemployment rate for Jackson County in February 2017 was 4.7 percent, compared to 6.4 percent for the same month a year ago.
- Call volume for the District was only up 1.08 percent in 2016. This is a slower growth than experienced in years past. One contributor is due to not having a significant and volatile fire season in 2016. Central Point still remains our busiest station, experiencing an 18 percent increase in responses over the prior year. The Central Point area is where the dominate growth in our District is occurring and service demands will not decrease.
- The establishment of the Central Point urban renewal district in 2012 will continue to cause a loss in revenue for the District over the next 20 years, however the program will provide a significant increase in assessed valuation once the projects have been completed.

# Budget Message

- Emergent medical calls continue to be the dominate type of incident the District responds to (42 percent for 2016). The type of medical calls continue to change based on the socioeconomic environment, changing demographics, and changes in the national medical care system. Calls often categorized as emergent upon dispatch are often determined non-emergent once medics arrive on scene. The District realizes that community education is important and that an analysis and discussion regarding trends is warranted at various stakeholder groups to address the growing movement. Further discussions regarding how best we deploy will be vital to ensure system sustainability.
- Taxpayers will continue to expect the District operate within its means. The community expects transparency, improvement of our key services, and a focus of our efforts on changing lives for the better.

## Long Range Financial Planning

The District remains committed to long range financial planning as a tool to meet strategic requirements, maintain expenditures at levels that do not exceed general operating revenues, and to determine the impact of various “what if” scenarios related to meeting the increasing demands for service. With this financial planning commitment the District will continue to be financially solid and remain focused on mission critical needs.

## Property Tax Analysis and Potential Impacts

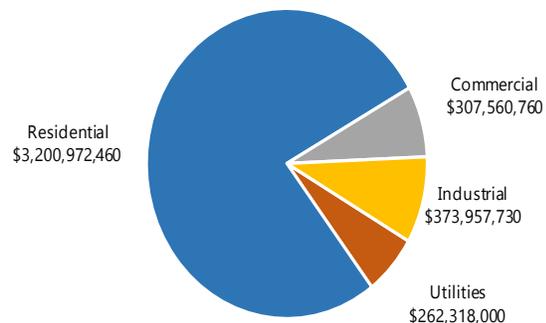
The District experienced total assessed valuation (AV) growth of 3.63 percent for the 2016/17 fiscal year. The following chart represents the breakdown of property tax by residential, commercial, industrial, and utilities.

The District’s financial forecast for the 2017/18 fiscal year and beyond includes continued modest increases in the growth rate of assessed value. Residential values have increased over the last three years. Almost all residential property that experienced a drop in real market value below the maximum assessed value that had occurred during the height of the recession, have now experienced an increase in real market value that is exceeding their maximum assessed value. Assessed value in this sector increased by 4.5 percent in fiscal year 2015/16 and 5.0 percent in fiscal year 2016/17. New construction is robustly occurring throughout the District, which will continue to support residential value growth.

Commercial values, however, are fluctuating more than residential, reflecting a decrease of 15.7 percent over the 2015/16 fiscal year, which experienced a 1.9 percent growth. Commercial values over one million are assessed by the Department of Revenue. Industrial values have also been up and down over the last five years. Assessed valuation from this sector decreased 1.1 percent compared to an 8.5 percent increase reflected in the 2015/16 fiscal year. Assessed values for utilities saw a substantial increase in value of 104 percent.

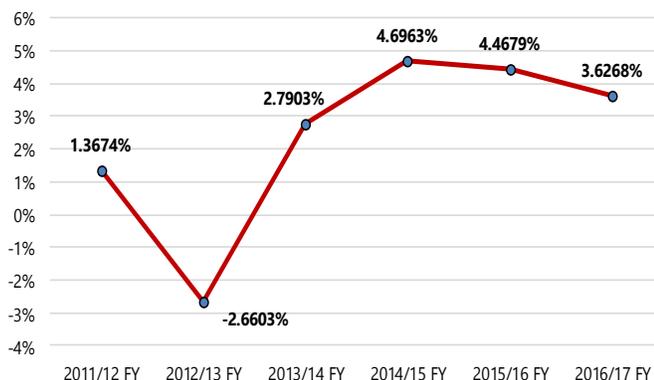
### 2016/17 Property Tax Breakdown

Total Assessed Value: \$4,144,808,950



### Total Assessed Value

Percent change from previous year

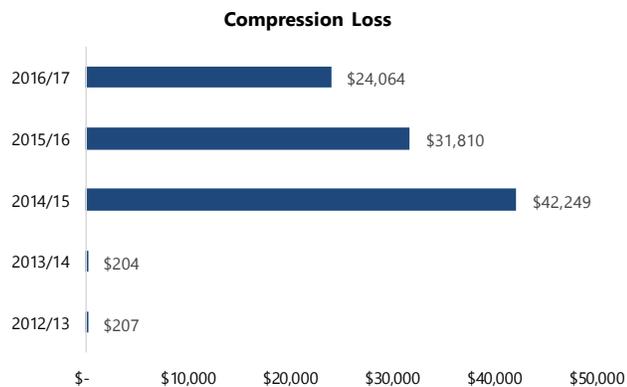


# Budget Message

**URBAN RENEWAL:** The City of Central Point's Urban Renewal, which encompasses a portion of the District, will be in their fifth year since inception. Under Oregon statute the total assessed value of the urban renewal is frozen and all future assessed valuation growth in the plan area is transferred to the urban renewal district until all identified projects are sufficiently funded. The District lost \$38,287 in tax revenue in fiscal year 2016/17 and \$101,400 since inception. This loss will continue to have an impact on the District, however the plan promises to provide substantial improvements in assessed valuation that would have otherwise not been possible.

**COMPRESSION:** The impact of taxing limits established with Measure 5 in 1990 began affecting the District in fiscal year 2014/15 when real market values on properties began falling below the assessed value. Oregon statute restricts general government to tax rates of no more than \$10 per \$1,000 of real market value and education districts to tax rates of no more than \$5 per \$1,000. The impact facing the District continues to be found in the 602 tax code area located within Central Point and caused by repressed real market values (RMV) coupled with the recent formation of other Districts, such as the Library District, the 4H Extension Service District, and Urban Renewal. The following chart depicts the District's compression loss:

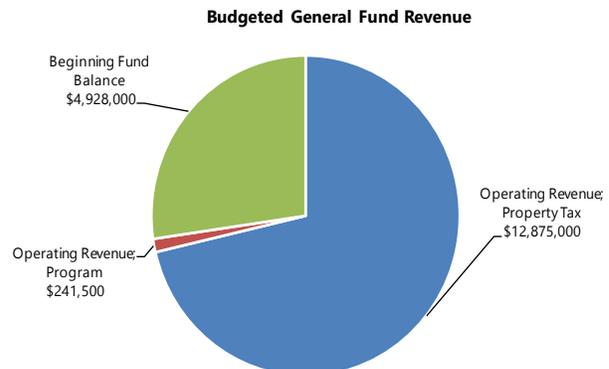
The current combined tax rates in this code is \$10.4304. As RMV increases the compression will decrease. Urban renewal takes a portion of all taxation in the urban renewal plan area to create their agency. The compression loss from the education side is added to the general government side, therefore increasing the potential for compression loss among the general government group.



**ENTERPRISE ZONES:** Enterprise zones provide an exemption of ad valorem taxes for certain new investments by business firms operating inside a designated enterprise zone. This exemption can last from three to five years. There are two business properties within the District that have recently been approved and will soon be receiving the exemption. Currently there are four business firms within the District receiving the exemption. The total loss in revenue amounted to approximately \$39,000 in 2015/16 and \$40,500 in 2016/17.

## General Fund Revenue

The District is forecasting assessed valuation of all taxable properties within the District to increase by 3.65 percent in 2017/18. This is a conservative estimate based on current trends from the County Assessor. The proposed budget reflects property tax revenue calculated at our permanent tax rate of \$3.1194 per \$1,000 of assessed value with a 93.5 percent collectible rate. This proposed budget reflects property tax revenue to be \$12,500,000, an increase over the prior year's budget by \$425,000. The District is experiencing a slightly higher collection rate for current year property taxes and a reduction in prior year property tax collection. Property tax is predominately derived from residential property and most tax payments are from bank escrow accounts. Prior year taxes is budgeted the same as last year, reflected at \$375,000. All property taxes combined account for 98 percent of the District's operating revenue.



Operating revenue consists of property tax, interest income, fees for service, contracts with other agencies, and proceeds from operational designated grants. Total operating revenue for the 2017/18 fiscal year is budgeted at \$13,116,500. Overall proposed General Fund revenue is \$18,044,500 a 2.51 percent increase from the 2016/17 fiscal year budget.

# Budget Message

## Significant Items Identified in the 2017/18 Fiscal Year

### Personnel Services

This proposed budget on April 20, 2017 reflects an increase in Personnel Services of 2.15 percent or \$212,200 from what was budgeted in the prior year. The District's collective bargaining agreement with Rogue Valley Professional Firefighters (RVPFF) Local 1817 expires June 30, 2017. Positions that are represented include Firefighters, Engineers, Captains, Deputy Fire Marshals, and the Fire and Life Safety Specialist. The District has experienced a collaborative and successful bargaining process. Personnel services throughout this budget include a 1.5 percent cost of living adjustment for both represented and non-represented employees.

STAFFING CHANGES: The 2016/17 fiscal year budget had identified a new 40-hour Staff Battalion Chief position. A recruitment and hiring process commenced in the summer of 2016, but the District was unsuccessful in finding the right candidate to best fill the position. The District made the decision not to continue recruitment; instead we re-grouped and re-evaluated our needs that led us to create this position, specifically the emphasis on emergency medical or EMS. A special assignment was created and a line paramedic transitioned over to fulfill this opportunity for a four month duration. During this time period further analysis was conducted. We have decided to delay the hiring of the 40-hour Staff Battalion Chief further. This proposed budget only reflects a placeholder for this position and therefore does not represent a full year salary and benefits as the prior year did, thus a budget reduction of \$159,600. No other changes to staffing are being recommended at proposal.

PERS: The District's employer contribution rate into the Public Employees Retirement System (PERS) will increase effective July 1, 2017. Employer rates are set by the PERS Board every two years and are based on a system-wide actuarial valuation that accounts for all costs, liabilities, rates of interest, and other factors to ensure System sustainability. A valuation report is only an estimate of the System's financial condition as of a single date. The valuation period that establishes rates effective July 1, 2017 is from 2013-2015 (the December 31, 2015 valuation).

The rate for all members in the tier one and tier two groups (those employees that have established membership prior to 2003) is increasing to 19.91 percent of payroll, up from 14.17 percent. Rates for firefighters in the tier three (OPSRP) group (those employees that have established membership after August 29, 2003) is increasing to 13.11 percent of payroll up from 9.37 percent and the rates for general service members in the OPSRP group is increasing to 8.34 percent of payroll up from 5.26 percent. The total budgeted PERS cost is \$1,116,500, an increase of \$315,700.

It is expected in future biennia that rates will continue to increase to the maximum of the PERS rate collar for at least the next two biennia of rate cycles. This is dominantly due to stock market losses from the recession that started in 2008 and litigation that occurred after 2013 legislative reforms on the PERS program in order to reduce retirement cost of living increases and out-of-state tax remedies. Albeit these reforms were overturned by the Oregon Supreme Court, employer contribution rates established in 2015 that were based on the December 31, 2013 actuarial valuation, were calculated on these reforms not being overturned. Currently the 2017 legislative session has more PERS reform on the docket. It is uncertain at this time what reform concepts will come to fruition and what exactly the impact will be on employer rates in the future.

This increase has impact on the budget, but the District has been proactive in maintaining other costs to ensure the overall Personnel Services budget remains below our target of no more than 80 percent of operating revenue. We will continue to monitor PERS issues and brace for change due to benefit cuts and/or increasing employer costs.

HEALTH INSURANCE: The total overall increase in health and dental insurance effective July 1, 2017 is 3.4 percent over actual composite rates paid in 2016/17, or a cost impact of \$40,500. In the prior year the District estimated health insurance to increase higher than what came to fruition. The decision was made not reduce the budgetary line-item accounts. Therefore the budgetary impact on this year's budget is a reduction of 7.52 percent. All employees have a cost share towards their health insurance premiums of four percent.

Total Personnel Services is proposed at \$10,079,800 which is 76.85 percent of operating revenue.

# Budget Message

## Materials and Services

This proposed budget reflects a reduction in Materials and Services of 2.66 percent or \$62,600 from the prior fiscal year. The District has focused efforts in all departments on the Strategic Plan to ensure fiscally sound spending practices at a sustainable level. Total Materials and Services are proposed at \$2,289,400 which is 17.45 percent of operating revenue.

## Debt Service

This proposed budget represents the fourth year of a 2013 financing agreement with Wells Fargo, N.A. and provides for a total principal and interest payment of \$261,900. The total term of the issuance is eight years with final payment scheduled for July 1, 2021.

## Contingency

The Board of Directors has a policy that Operating Contingency will be six percent of property tax revenue. The District has been budgeting nine percent for the past several fiscal years in order to provide additional security when property tax revenues declined. Staff is proposing to maintain contingency levels at nine percent or \$1,158,800 to continue to ensure sustainability of our operation.

## Ending Fund Balance

The Board of Directors has a policy that the Unappropriated Ending Fund Balance (UEFB) will be 24 percent of budgeted property tax revenue. Staff is proposing to maintain this policy and has allocated \$3,090,000 in UEFB.

## Capital Projects Fund

Staff is proposing to transfer \$1,139,600 to the Capital Projects Fund. This is substantially more than the annual target of \$300,000 but will provide the fund with solid funding and reserves for future projects. With this contribution and after all budgeted expenditures, the fund is projected to have an ending balance of \$2,682,400, down \$728,100 from the current year.

Capital budget requests in the Capital Projects Fund increased \$2,301,200, to a total of \$2,910,000 reflecting several large projects in accordance with our Capital Replacement Plan. Significant projects include:

- Two structural type 1 engines are budgeted with a total project cost of \$1,260,000.
- Fire science classroom facility in collaboration with Rogue Community College (RCC) for a total project cost of \$1,500,000. Over the past year the District has partnered with RCC in designing a classroom that will be used for the college's fire science program in addition to the District using it for internal and external training events, academy graduations, and ceremonies. Through a bond measure, RCC has allocated \$500,000 towards this project; the District is also proposing a matching contribution of \$500,000. Preliminary cost estimates prepared for RFP (request for proposal) has the design around \$1,500,000. RCC and the District are seeking other revenue sources for the additional \$500,000 needed. If we are unsuccessful in attaining the additional funding, then the project will be scaled back accordingly.

This proposed budget has identified the full \$1,500,000 in expenditures estimated for this project. Capital Fund revenue has budgeted \$1,000,000 in the form of donations, with \$500,000 of that dedicated by RCC.

- First phase of new fire station construction. The District identified during our last strategic planning process that an additional fire station was needed to augment services within the Central Point and White City communities. Two years ago, we staffed the Table Rock property as a temporary location in order to determine if this site was indeed the best location to build permanently. Over the past two years we have been evaluating response data, times, and our deployment from that location, as well as other identified locations within the Central Point fire management zone. We are getting closer to making a final recommendation to the Board on whether the Table Rock property is the most viable, or another location identified through our analysis. This budget has \$100,000 allocated under land and improvements to provide flexibility should land acquisition, site development, or infrastructure costs become necessary. Most likely monies from contingency, or other sources, might need to be utilized to offset any cost differences; however at this time due to uncertainties we are taking a conservative approach with expenditure appropriations.

The total Capital Projects Fund budget is proposed at \$5,737,900.

# Budget Message

CAPTIAL PROJECTS FUND CONSIDERATION: The District has applied for a \$1.46 million grant under the Oregon Seismic Rehabilitation Program to retrofit six of our fire stations to comply with current seismic standards. Notification of award should be made around the end of April, 2017. If the District is successful in attaining this grant, then adjustments will be made to the budget at the next Budget meeting, for the Committee’s consideration of approval. This budget document will reflect the grant revenue and appropriations after budget adoption.

## Budget Summary

The 2017/18 fiscal year budget is organized into the following Departments; Administration, Operations, Fire and Life Safety, Training, Support Services, Volunteers, and Technology. In addition to these Departments, separate tabs identify the Non-Departmental section, General Fund Revenue, and the Capital Projects Fund.

The intent of this budget document is to provide readers with an understanding of where the District is headed in the upcoming fiscal year. We strive to make this document an easy connection between the goals and objectives, departmental activities, and allocation of actual expenditures. The District provides descriptive information, financial summaries, significant changes, accomplishments, and objectives for each department.

The District has prepared this budget for all funds subject to the budget requirements of state law, including the legal requirement for a balanced budget, meaning that total beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, contingency, and ending fund balance. Total budget appropriations or requirements for all funds the District is proposing totals \$23,782,400, which is \$2,102,700 higher than the prior year adopted budget or 9.7 percent.

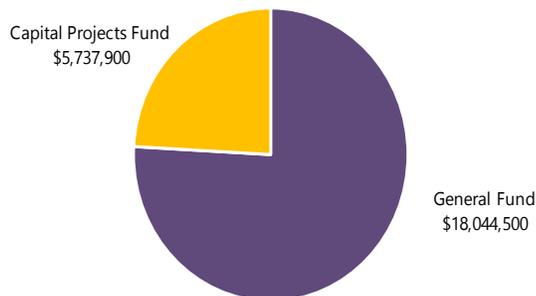
The District considers operating expenses to consist of personnel services, materials and services, and debt service. This budget is proposed with total operating expenses at \$12,631,100 which is up \$265,500 from the current year.

Staff has prepared this budget in a manner that provides a long term sustainable service delivery plan for our patrons. This budget meets our operational needs so that the District may continue to effectively provide emergency response and fire and life safety services to our citizens, while remaining receptive to our patrons and the current economic climate.

Budgetary Summary - All Funds

Appropriations	2016/17 FY Adopted Budget	2017/18 FY Proposed Budget	Increase/ (Decrease)
Personnel Services	\$ 9,867,600	\$ 10,079,800	\$ 212,200
Materials and Services	2,352,000	2,289,400	(62,600)
Capital Outlay	608,800	2,910,000	2,301,200
Debt Service	262,000	261,900	(100)
Operating Transfers Out	986,900	1,139,600	152,700
Operating Contingency	1,203,900	1,329,300	125,400
Ending Fund Balance	6,398,500	5,772,400	(626,100)
<b>Total Appropriations</b>	<b>\$ 21,679,700</b>	<b>\$ 23,782,400</b>	<b>\$ 2,102,700</b>

Total Budget by Fund



Respectfully submitted,

**Jackson County Fire District 3**

*Stacy Maxwell*

Stacy Maxwell  
Interim CEO/Chief Finance Officer

# Budget Process

The budget process for all municipalities in the State of Oregon falls under the direction of Oregon Revised Statutes, Chapter 294.305 to 294.565, which does two important things:

1. Establishes standard procedures for preparing, presenting, and administering the budget; and
2. Requires citizen involvement in the preparation of the budget and public disclosure of the budget before its formal adoption.

**The Budget as a Financial Plan.** A budget is a financial plan for one or two fiscal years. The budget authorizes the local government to spend money and limits how much money can be spent. The budget also justifies the levy of property taxes. Preparing a budget allows a local government to plan and goal set by assessing its needs in relationship to money available. The budget is required by State Statute to balance. The District's **balanced budget policy** is that a budget is considered balanced when the funds' total resources of beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, and ending fund balance.

**Budget Preparation.** In July, the Jackson County Fire District 3 Board of Directors appoints the Fire Chief as the Budget Officer. In December, preparation of the budget document begins with the planning of the new fiscal year budget calendar. If budget committee members are needed due to resignations or expired terms then new members are recruited. During this same time period, anticipated sources of revenue are projected and budget worksheets are distributed at the executive chief level for their expenditure requests. Once the Finance Officer receives the expenditure requests, the figures are entered into the budget document format and reviewed with the Budget Officer. Each department is reviewed thoroughly at all levels with revisions made as necessary.

**The Budget in Relationship to Strategic Planning.** The District supports strategic planning and the incorporation of the strategic plan in the budget document. The District has adopted a three year Strategic Plan that identifies the overarching strategic goals and the strategies to address those goals. Desired outcomes are also identified. These provide a measureable tool for directing the plans and programs that have been established. The strategies are linked to the appropriate Department and Chief Officer who is responsible for developing a set of objectives to meet those strategies. These objectives can be ever evolving and are task oriented in nature.

The District conducts a strategic planning review with the Board of Directors and Budget Committee members to evaluate the plan and seek input on any modifications that may need to be made. Every three years the District holds a strategic planning workshop involving community leaders and citizens to discuss the direction, expectations, concerns, and priorities. The financial position of the District is also reviewed and capital improvements, apparatus replacement, and hiring of personnel are prioritized. The financial position of the District is updated based on actual year revenue, collections, and values and then presented to the Board during the strategic planning reviews and the more intensive workshops.

**Budget Process.** In April the Budget Committee (five appointed citizen members and the five elected Board of Directors), meets publicly to review the budget document as proposed by the Budget Officer. Public meetings are conducted to obtain citizen comment, and notices are posted on the District's website and in the local newspaper. The Budget Committee reviews the proposed budget and either revises the proposed requests or approves them as presented by motion and majority vote.

Once the Budget Committee approves the budget, the District publishes it in the newspaper of general circulation in summary form. The budget document is also made available during regular business hours at the District Business Office for public inspection. Prior to June 30th, an advertised public hearing is held before the Board of Directors to consider the budget as approved. The Board of Directors adopts the approved budget in the form of a resolution, which also appropriates, imposes, and categorizes taxes. After the adoption the County Assessor is notified of the local government's property tax levy.

# Budget Process

**Budget Amendments.** There are two methods by which Oregon State Budget Law allows a local government’s adopted budget to be modified due to unforeseen circumstances. First, the Board of Directors may authorize the transfer of appropriations within a fund during the fiscal year by resolution in accordance with ORS 294.450. Second, the Board of Directors may authorize supplemental appropriations during the year by adopting a supplemental budget in accordance with ORS 294.480. If the amount of the new appropriation is less than ten percent of that fund’s expenditures, the supplemental budget can be approved at a regularly scheduled Board of Directors’ meeting. If the supplemental budget includes changes greater than ten percent in any fund, then a public hearing must be held with the Budget Committee and a summary of the supplemental budget advertised.

## BUDGET CALENDAR

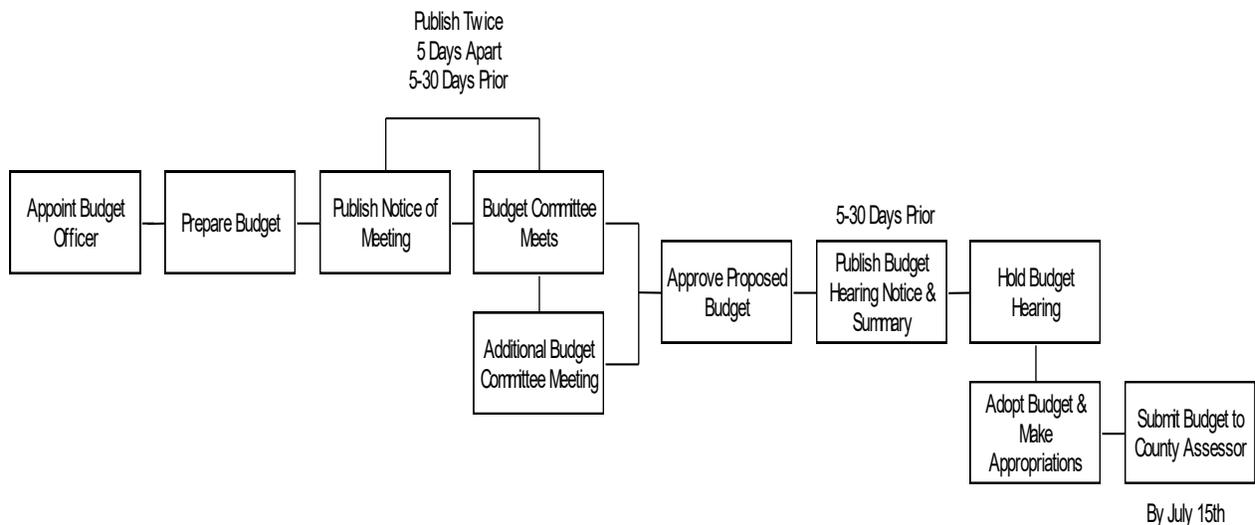
The District publishes a budget calendar that reflects both internal and external timeframes.

<p><b><u>January</u></b></p>	<p><b><u>Preliminary Budget Development</u></b></p> <ul style="list-style-type: none"> <li>• Budget worksheets distributed</li> <li>• Support assignee’s start preparing their respective budget requests</li> <li>• Meetings are scheduled with support assignee’s to review requests</li> <li>• Chief Officers start preparing their respective preliminary budgets including review of performance measures and departmental objectives</li> </ul>
<p><b><u>February</u></b></p> <p><b>02/20/17</b></p> <p><b>2/20/17</b></p>	<p><b><u>Budget Development</u></b></p> <ul style="list-style-type: none"> <li>• Chief Officers develop their internal timelines with due dates for <b>budget request worksheets</b> to be submitted by</li> <li>• Meetings are held between support assignee’s and Chief Officers</li> <li>• Direction is communicated to support assignee regarding approval/modification/denial</li> </ul> <p>Finance develops the overarching components of budget document Preliminary revenue estimates are projected; financial forecast updated</p> <p><b>First draft of budget detail sheets completed by Chief Officers</b></p> <p><b>Review departmental budgets – Chief Officers/Executive Team</b></p>
<p><b><u>March</u></b></p> <p>02/23/17 – 03/10/17</p> <p><b>03/10/17</b></p> <p>3/11/17 – 3/20/17</p> <p><b>03/22/17</b></p> <p><b>03/27/17</b></p> <p><b>03/29/17</b></p>	<p>Chief Officers work on amendments to their first draft of respective budget</p> <ul style="list-style-type: none"> <li>• Review measurements, objectives, and narratives</li> <li>• <b>Budget revisions are due back to Finance</b></li> </ul> <p>Finance reviews and implements budget amendments. Continue with follow up meetings with Chief Officers if necessary</p> <p><b>First draft of departmental narrative sections and performance measures due back to Finance</b></p> <p><b><u>Executive Team Meeting</u></b></p> <ul style="list-style-type: none"> <li>• Chief Officers review and finalize draft budget document and departmental budget sections</li> <li>• Set initial direction on budget presentations for May 4th meeting</li> </ul> <p><b>Final departmental sections due back to Finance no later than March 29th, including performance measurements</b></p>

# Budget Process

<p><b>April</b> 04/03/17</p> <p>04/04/17 – 04/19/17</p> <p>04/11/17 04/11/17 – 05/04/17</p> <p><b><u>Thursday 04/20/17</u></b></p>	<p>Budget message completed</p> <p>PowerPoint template emailed out to Chief Officers for development of departmental presentations at committee meeting on May 4th</p> <p>Budget document final touches and assembly</p> <ul style="list-style-type: none"> <li>• Publish notice of budget committee meetings in Mail Tribune</li> <li>• Post notice of budget meetings on District’s website</li> </ul> <p><b><u>Budget Committee Meeting</u></b></p> <ul style="list-style-type: none"> <li>• <b>Budget document delivered and budget message presented by CEO</b></li> </ul>
<p><b>May</b> 5/03/17</p> <p><b><u>Thursday 05/04/17</u></b></p>	<p><b><u>Budget Presentation Preparation Meeting</u></b></p> <ul style="list-style-type: none"> <li>• Dress rehearsal for departmental budget presentations held on May 4th</li> </ul> <p><b><u>Budget Committee Meeting</u></b></p> <ul style="list-style-type: none"> <li>• Chief Officers present their respective departmental budget requests and programs to Committee. Budget deliberation occurs and public comment is heard and considered. Budget Committee decides if they want to approve the proposed budget or schedule more meetings for further deliberation.</li> </ul>
<p><b>June</b> 06/06/17</p> <p><b><u>Thursday 06/15/17</u></b></p>	<p>Publish budget hearing notice and budget summary</p> <p><b><u>Public Hearing and Adoption of 2017/18 Fiscal Year Budget</u></b></p>
<p><b>July</b> No later than 07/15/17</p>	<p>Submit Local Budget (LB) Form 50 to Jackson County Assessor with two copies of District Resolution adopting the 2017/18 Fiscal Year Budget</p>

## BUDGET PROCESS TIMELINE



# Budget and Financial Policies

Jackson County Fire District 3 functions under Oregon Revised Statutes, Chapter 478, as a separate municipal corporation and provides many services to the citizens of the northern area of Jackson County, Oregon. Services include EMS (basic and advanced life support), fire suppression, fire prevention, public education, and various types of specialized rescues such as river, confined space, and high angle.

The **2017/18 fiscal year budget** has been prepared after analyzing, evaluating, and justifying requests from all departments and represents the requested financial support for the operation of the functions of Jackson County Fire District 3.

The Board of Directors' resolution adopting the balanced budget and authorizing appropriations for each fund sets the level by which disbursements cannot legally exceed appropriations. The budget will be presented departmentally and legal appropriation control will be identified and adopted by major categories or object classification. There is flexibility in the use of various line items within a major category, so long as the total category appropriation control is maintained.

The District manages its finances according to generally accepted accounting principles (GAAP). During the year, expenditures and revenues are closely monitored to ensure compliance with the adopted budget and state law. Monthly budget comparisons are distributed to management and the Board of Directors. Annually, an audit is performed and filed with the State of Oregon by an independent certified public accountant.

The District strives to prepare its annual budget in a manner that provides readers an understanding of all of the facets of the District's operations. The budget is designed to be a policy document, operations guide, financial plan, and a communications guide.

## **Fund Accounting**

Fund accounting is designed to demonstrate legal compliance and to aid financial management by segregating transactions related to certain functions. Jackson County Fire District 3 uses funds to report its financial position and the results of its operations. A fund is a separate accounting entity with a self-balancing set of accounts that comprises its assets, liabilities, reserves, fund equity, revenues, and expenditures.

Funds are classified into three categories: governmental, proprietary, and fiduciary. Governmental funds are used to account for tax-supported activities. Proprietary funds are used to account for a government's business-type activities supported by fees or charges. Fiduciary funds are used to account for resources held by the government as a trustee or agent for others and cannot be used to support the government's own programs.

Jackson County Fire District 3 has appropriated and adopted two funds, all of which are considered "governmental" and include the **General Fund** and the **Capital Projects Fund**.

The **General Fund's** primary purpose is to account for revenues and expenditures needed to run the daily operations of the District. It includes categories like personal services, materials and services, operating contingency, inter-fund operating transfers, and debt service. Within the fund the District has allocated seven departments that each depict their own unique set of accounts under the personal services and materials and services classifications. The General Fund is also considered a major fund in which revenues and expenditures are at least ten percent of the corresponding totals for all governmental funds and at least five percent of the aggregate amount for all governmental funds for the same item. The primary revenue source that sustains the General Fund is derived from property taxes.

Departments	Governmental Funds	
	General Fund (Major)	Capital Projects Fund (Considered Major for Financial Statement Presentation)
Administration	 100%	
Operations	 100%	
Fire and Life Safety	 100%	
Training	 100%	
Support Services	 100%	
Volunteer	 100%	
Technology	 100%	

# Budget and Financial Policies

The **Capital Projects Fund** accounts for all of the District's capital outlay expenditures. Capital outlays are items that are considered fixed assets or tangible goods that are expected to last more than one year and cost over \$5,000. Although it could be considered a non-major fund because expenditures do not constitute more than ten percent of the expenditures of the total appropriated budget, the District has elected to report it as a major fund because we believe the fund is important to financial statement readers. The primary revenue source to the Capital Fund are transfers from the General Fund. At times loan proceeds or special purpose grant revenue may be received. Expenditures are made directly out of the Capital Projects Fund and are limited to major departmental equipment items, capital improvements, and apparatus replacement.

## **Basis of Accounting and Budgeting**

The accounting and financial reporting treatment applied to a fund is determined by its measurement focus. Measurement focus is commonly used to describe the types of transactions that are reported in a fund's operating statement. All government funds are accounted for using a current financial resources measurement focus. Only current assets and liabilities generally are included on the balance sheet. Operating statements present increases (revenue) and decreases (expenditures) in net current assets. Basis of accounting recognizes the timing of transactions and events.

This budget is prepared using the modified accrual basis of accounting and budgeting for all governmental fund types in accordance with generally accepted accounting principles. The basis of accounting and basis of budgeting are the same under the District's practices and policy. Under the modified accrual basis, expenditures are recorded when the goods or services are actually received, rather than when the invoices are paid. The exception to this general rule is interest on general long-term debt, which is recognized when due. Revenues are recorded in the accounting period in which they become measurable and available. An example of significant revenues that are considered measurable and available at June 30th is property tax revenue (paid by District patrons in June, but received in July by the County Treasurer). The District utilizes a 31-day availability or look-back period for purposes of revenue recognition.

## **Revenue**

Property taxes account for 71 percent of the District's total General Fund revenue, which includes beginning fund balance. Not considering beginning fund balance, current and prior year property taxes combined account for 98 percent. Past estimates have been based on multi-year historical trends with consideration given to the economic climate of our District, population, and assessed valuation increases. The District anticipates values to continue to slowly increase and remain at levels around the constitutionally allowed growth of three percent. The District is projecting values to increase 3.65 percent for the 2017/18 fiscal year. Although budgets are developed each year during April and May and adopted in June, the actual certification of property tax to be received by the County Treasurer for all taxing entities is not finalized until late October, well into the new fiscal year. Therefore, the District estimates growth conservatively and thus develops budgets accordingly. The rebound in the economy and the five year growth trend of three to four percent the District estimates, is a positive reinforcement into the future. Historical assessed valuation growth trends are presented on page 57 and 58.

This budget maintains effective operations within the existing financial capabilities of the District and tax revenues generated at our permanent tax rate of \$3.1194 per \$1,000 of assessed value. The projected assessed valuation of the District for the 2017/18 fiscal year is \$4,295,984,883.

## **Ending Fund Balances**

As a policy, Jackson County Fire District 3 will provide for an ending fund balance in the General Fund (budgeted as unappropriated ending fund balance) of 24 percent of budgeted property tax revenue. This budget represents \$3,090,000 for the 2017/18 fiscal year and is an increase of \$102,000 from the prior year budget. It is the philosophy of Staff, and supported by the Board of Directors, to have sufficient resources on hand at the beginning of each fiscal year to fund the District's operating expenses for four months until property taxes are received from the County Treasurer, thus eliminating the need for short-term borrowing. This tax collection turnover generally occurs the second week of November. This policy statement and financial objective is above GFOA's recommended practice of unreserved fund balance of no less than 5 to 15 percent of regular general fund operating revenues.

# Budget and Financial Policies

## **Operating Contingency**

As a policy, Jackson County Fire District 3 will provide for an operating contingency in the General Fund of no less than six percent of budgeted property tax revenue. Occasionally expenditures will become necessary which cannot be foreseen and planned for in the budget process because of the occurrence of some unusual or extraordinary event. Operating contingency gives the District the security to transfer funds to line item accounts within a major category should the need arise. Expenditures which are known to be necessary and can be reasonably ascertained and anticipated, but which are too small in amount to list separately, are not to be funded by operating contingencies, but rather absorbed within the major category. Operating contingency should not be used to cover up improper or poor estimating practices in the preparation of the budget.

This budget has operating contingency at nine percent or \$1,159,000 which is above the six percent minimum threshold. The District has taken the approach in recent fiscal years that during slower economic growth it is prudent to maintain the threshold above six percent in order help ensure fiscal soundness. The District has established the contingency level at nine percent of operating revenue until assessed valuation growth is significantly above the four percent range. Oregon Local Budget Law has no statutory limit of the amount which may be appropriated for operating contingency. Unexpended contingency is included in the beginning fund balance for the ensuing fiscal year and utilized for operational cash flow.

In addition to general operating contingency, the District is committed to allocating funds to provide for the District's liability for compensated absences, specifically vacation payouts upon retirement or separation from service. The District does not pay out sick leave benefits. At fiscal year end June 30, 2016 the District's Comprehensive Annual Financial Report identifies a compensated absences liability of \$861,642. Although this amount will never become due all at one time, the District desires to be proactive and recognize that retirements will occur in future years. This budget identifies \$25,000 for contingency allocated for future vacation payouts, or 2.91 percent of the liability. If the District has advance notification of intended retirements in the ensuing fiscal year then the District will budget for the compensated leave payout from the department where the employee is budgeted.

Total contingency budgeted is \$1,184,000.

## **Debt Administration**

Rural Fire Protection Districts formed under ORS Chapter 478 are limited to the total amount of indebtedness they may incur, which includes both general obligation bonds and other financing liabilities. At no time may the aggregate amount of debt liabilities exceed one and one-fourth percent (0.0125) of the District's real market value, which for 2016 was \$5,497,121,929 up from \$5,007,885,669 in 2015. Jackson County Fire District 3's current legal debt limit is approximately \$68,714,024.

Debt financing for long-term capital projects is evaluated based on several factors; cost of project, ability to sustain the debt repayment, growth and property tax projections, cashflow demands, and funds available in reserve that have been set aside in the Capital Projects Fund for future capital expenditures. The Board has supported in the past that long-term debt issuance as a viable tool in achieving some of the District's strategic goals in regards to capital expansion. The current direction has been to reserve funds and pay cash for future capital projects as identified in the Capital Replacement Schedule. The District has not supported local option levies as a tool for funding capital acquisition or expansion.

In November of 2013, the District refinanced and consolidated two prior debt issuances; a 2005 single investor Bank Financing Agreement with maturity date of February 2020 and an outstanding principal amount of \$408,000; and a 2007 single investor Bank Financing Agreement with a maturity date of July 2022 and an outstanding principal amount of \$1,402,011. The interest rates on the old issuances were 4.57 and 4.65 percent respectively. The 2005 issuance was to purchase property for a future fire station and to acquire self-contained breathing apparatus. The 2007 issuance was for the construction of the new administrative office building at the White City station campus.

# Budget and Financial Policies

The District entered into a Full Faith and Credit Refinancing Agreement with Wells Fargo Bank, NA on November 4, 2013 for an eight year term at 2.38 percent in the amount of \$1,908,510. The amount financed includes cost of issuance, prepayment penalty on the 2007 issuance, and accrued interest charges. The refinance will save the District \$100,123 over the life of the loan. The 2017/18 fiscal year budget identifies \$236,500 in principal payments and \$25,400 in interest payments.

## Debt Service Schedule

2013 Refunding Issuance Dated 11-04-13 at 2.38% - 8 Year Term  
Full Faith and Credit Bank Financing Agreement with Wells Fargo Bank, N.A.

	Debt Issued	Principal	Interest	Total	Annual Debt Service
FY 14-15	07/01/14	\$ 231,654.99	\$ 30,155.52	\$ 261,810.51	
	01/01/15	\$ 111,339.68	\$ 20,398.01	\$ 131,737.69	\$ 393,548.20
FY 15-16	07/01/15	\$ 111,339.68	\$ 18,740.50	\$ 130,080.18	
	01/01/16	\$ 113,997.97	\$ 17,689.24	\$ 131,687.21	\$ 261,767.39
FY 16-17	07/01/16	\$ 113,997.97	\$ 16,147.93	\$ 130,145.90	
	01/01/17	\$ 116,809.93	\$ 14,915.80	\$ 131,725.73	\$ 261,871.63
FY 17-18	07/01/17	\$ 116,809.93	\$ 13,274.84	\$ 130,084.77	
	01/01/18	\$ 119,645.59	\$ 12,073.94	\$ 131,719.53	\$ 261,804.30
FY 18-19	07/01/18	\$ 119,645.59	\$ 10,445.39	\$ 130,090.98	
	01/01/19	\$ 122,550.08	\$ 9,163.10	\$ 131,713.18	\$ 261,804.16
FY 19-20	07/01/19	\$ 122,550.08	\$ 7,547.25	\$ 130,097.33	
	01/01/20	\$ 125,512.36	\$ 6,181.59	\$ 131,693.95	\$ 261,791.28
FY 20-21	07/01/20	\$ 125,512.36	\$ 4,604.21	\$ 130,116.57	
	01/01/21	\$ 128,571.99	\$ 3,128.01	\$ 131,700.00	\$ 261,816.57
FY 21-22	07/01/21	\$ 128,571.99	\$ 1,538.51	\$ 130,110.50	
					\$ 130,110.50
<b>Total Principal Paid:</b>		<b>\$ 1,908,510.19</b>			
<b>Total Interest Paid:</b>			<b>\$ 186,003.84</b>		
<b>Total Debt Service:</b>					<b>\$ 2,094,514.03</b>

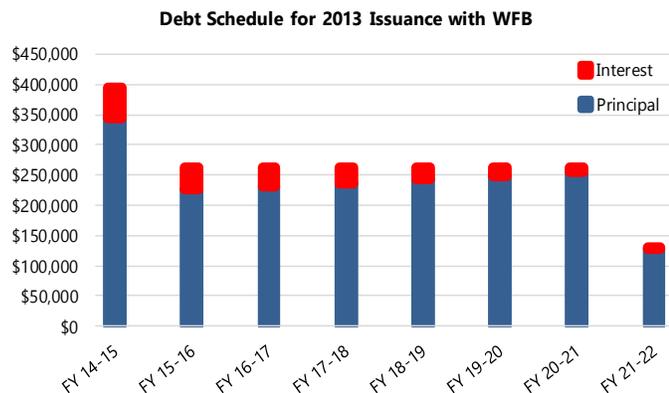
At fiscal year end June 30, 2018 outstanding debt principal will be \$872,914.

The District is committed to provide for an ending fund balance in which short-term borrowing to meet financial commitments from July through October during minimal property tax distributions, will not be required. The County Treasurer starts collecting current year property taxes in November, who in turn disperses the funds to all taxing entities assessing taxes.

## Cash Management and Investing

The County Treasurer acts as the fiscal agent for the District in collection of real property taxes. The District recognizes tax receipts after notification by the County Treasurer. Property tax revenue is deposited by the Treasurer and invested in the Oregon State Treasury in a pooled account called the Local Government Investment Pool (LGIP), which is exempt from statutes requiring insurance. The investments are regulated by the Oregon Short-Term Fund Board and approved by the Oregon Investment Council. Funds held in the LGIP are stated at fair market value.

The District transfers funds as needed to the District's checking account via electronic transfers, which access is password protected and secure. ORS 295 governs the collateralization of Oregon public funds. Bank depositories are required to pledge collateral against any public funds deposits in excess of the federal deposit insurance amounts. Public officials



# Budget and Financial Policies

are required to verify that deposit accounts in excess of deposit insurance limits are only maintained at financial institutions included on the list of qualified depositories approved by the Oregon State Treasurer. The District also participates in ACH and check fraud protection, utilizing Positive Pay and ACH Fraud Alert with its financial institution.

## **Capital Expenditures**

The District's capital policies encompass the entire area of capital purchasing. Capital expenditures are fixed assets that are expected to last more than one year and cost more than \$5,000. Typically fixed assets are replacement items as well as new capital items to provide District personnel with the tools they need to operate in the most efficient and productive manner. In addition major renovations to existing buildings or construction of new facilities are budgeted and tracked under their respective accounts in this fund.

Items budgeted in the Capital Projects Fund are in compliance with the Capital Replacement Schedule and reviewed annually by management. The Capital Replacement Schedule is an evolving multi-year plan that forecasts capital needs and related budget requirements for future fiscal years. Identified purchases and projects are incorporated into the 10-year Financial Forecast as a means to verify if the targeted transfer from the General Fund can sustain the desired projects. The District is committed to transferring \$300,000 from the General Fund per fiscal year to support the Capital Fund. If shortfalls are identified, management would need to re-evaluate the projects or explore other options to support funding. Within the fund, the District has set aside reserves for these future projects. The District also establishes a contingency based on ten percent of the budgeted expenditures.

All assets are depreciated utilizing the straight-line method and based on useful lives the District has established, with a minimum life of one year. The following are the useful lives for depreciation the District has established for its fixed assets:

Land	Inexhaustible
Buildings	30 Years
Fire Apparatus	10 Years
Staff Vehicles	07 Years
Equipment	03-15 Years based on detailed schedule

Capital expenditures are classified as either routine or non-routine. Routine expenditures are typically replacement items, between the \$5,000 and \$150,000 dollar range, and usually have no significant impact on the operating budget.

Individual assets that cost less than the capitalization threshold, but that operate as part of a network system, will be capitalized in the aggregate using the group method if the estimated average useful life of the individual assets is greater than one year. A network is determined to be where individual components may be below the capitalization threshold but are interdependent and the overriding value to the District is on the entire network and not the individual assets. Examples of such would be bulk purchase of new office furniture, self-contained breathing apparatus, fire hose components, automatic external defibrillators, etc.

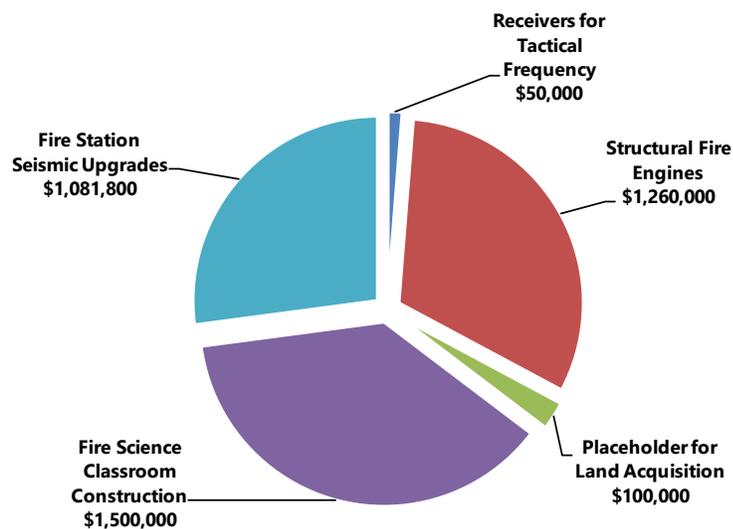
# Budget and Financial Policies

Non-routine capital expenditures are capital improvements, building construction, land acquisition and apparatus replacement of a larger magnitude. Such expenditures are often made with loan proceeds or grant revenue.

The District will budget a \$100 placeholder in an account where no capital expenditures are planned as a means to provide flexibility should a situation arise in which a capital expenditure becomes necessary mid-year. In that situation, a resolution transferring funds from contingency would be presented to the Board of Directors for approval. Oregon budget law does not allow expenditures to be made from line-item accounts with no dollar amount budgeted.

The 2017/18 fiscal year budget identifies \$3,991,800 in total capital expenditures.

**Capital Expenditures for 2017/18 Fiscal Year**  
**\$3,991,800**



# Budget and Financial Policies

## SUMMARY OF POLICIES

1. The District will adopt and maintain a balanced budget in which total resources of beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, and ending fund balance. The District will use one-time revenues to fund one-time expenditures in order to prevent potential shortfalls.
2. The District will avoid adopting budgetary procedures that result in balancing current operational costs at the expense of future years' operations.
3. The District will maintain a budgetary control system to ensure compliance with the adopted budget, State of Oregon Budget Law, and generally accepted accounting principles. Management and the Board of Directors will receive monthly "budget to actual" financial statements comparing actual revenues and expenditures to budgeted amounts on all funds and programs.
4. The District will continue to budget revenues based on historical trends, economic and demographic conditions, inflation, and projections that are realistic.
5. The District will pursue revenue diversification by actively pursuing Local, State, and Federal grants and/or partnerships with other agencies and jurisdictions to improve funding opportunities and promote cost effectiveness.
6. The District will continue to budget Unappropriated Ending Fund Balance at 24 percent of budgeted property tax revenue in order to ensure operational expenditures are obligated between the dry cash flow periods of July through November, thus eliminating the need for short-term borrowing.
7. The District will continue to budget Operating Contingency of no less than six percent of budgeted property tax revenue for unforeseen circumstances. Operating Contingency expenditures will only be made by a transfer to the appropriate line item account(s) through Board Resolution.
8. The District will continue to budget for debt service payments until all debt is obligated and will remain within legal debt limit requirements.
9. The District will maintain a Capital Replacement Schedule and identify both short and long term capital expenditures. This District will provide sufficient funding to the Capital Projects Fund via transfers from the General Fund in order to meet budgeted capital expenditures, so long as revenue allows and basic operating expenditures are sustained.
10. The District will continue long term financial planning by reviewing and updating the 10-year Financial Forecast and the Capital Replacement Schedule, adjusting for economic, social, demographic, operational, and/or legislative changes that may affect financial stability.
11. The District will invest available funds in the Local Government Investment Pool (LGIP).
12. The District will review and update the Funds and Financial Policies annually. The Board will adopt the policy by resolution at the July meeting.



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# Strategic Plan

# Fire District 3



2017/18 Fiscal Year Budget

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# Strategic Plan

The Strategic Plan for Jackson County Fire District 3 was adopted by the Board of Directors on February 19, 2015 and is designed to guide the District for the next three years. This plan is vision driven and focused on the work that we see as necessary to advance that vision. The plan is based on a community survey and community and organizational planning sessions held during the fall of 2014 that identified the strengths and weaknesses of the District and the opportunities and challenges that face us.

The plan describes our vision, mission, values and guiding principles, and the action items that are designed to make improvements in our service delivery. Each priority identifies the desired outcomes we hope to achieve by a target date.

Priorities, goals and strategies, and those desired outcomes are adopted by the Board of Directors and considered valid for the life of the plan; objectives are dynamic and provide a living action plan for the Management Team to identify, track, and report on the progress toward the adopted strategies.

A mission statement defines the fundamental purpose of an organization, succinctly describing why it exists and what it does to achieve its vision. It defines the customer, critical processes and desired level of performance.

## **Our Mission – What is our purpose?**

***“The mission of Jackson County Fire District 3 is to protect life and property through public education, prevention activities, and emergency response services.”***

A vision statement communicates both the purpose and values of an organization. It provides direction to employees on how they are expected to behave and inspires them to give their best. Further, it shapes customers’ understanding of why they should work with the organization.

## **Our Vision – What do we really want?**

***“To reduce and eliminate risk from fire, rescue, and medical events in the communities we serve.”***

### **Organizational Vision Statements**

Prevention activities that are reducing risks from fire, rescue and medical events

Members who are engaged with the community, sharing a sense of destiny with District patrons

Exceptional people with quality equipment who are arriving on the emergency scene at the right time

Leadership from the Board of Directors and the Management Team that is clear and concise

Members who are enthusiastic, motivated, and empowered

An organization that is fiscally stable and prepared for the future

# Strategic Plan

Values are beliefs that are shared among the members of an organization. Values drive the culture and priorities and provide a framework in which decisions are made.

## Values and Guiding Principles

- **Honesty and Integrity**  
Don't be afraid of the truth. Do the right thing, even if it hurts.
- **Professionalism**  
Take pride in your work, display confidence, be accountable, and respect each other.
- **Safety**  
Make personal, team, and the public's safety a priority.
- **Teamwork**  
Be receptive to the sharing of differing ideas. Play your position; help each other but don't walk on each other.
- **Health**  
Maintain physical and mental well-being.

## Strategic Priorities

The following five strategic priorities provide the ongoing direction for the District. These priorities are designed to define the level of service the District desires to deliver for the community.

1. Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.
2. Ensure sustainability of service delivery (people, facilities, fleet, and finance).
3. Promote, develop, and support craftsmanship, innovation, and excellence throughout the organization.
4. Promote community involvement with the District and satisfaction of the patrons.
5. Develop and strengthen collaborative strategic partnerships.

### **Process and Involvement**

The strategic planning process was guided by the Executive Team with a focus on community and agency involvement. A community survey was conducted in the fall of 2014, a community meeting was held on November 20 and 21, 2014 and seven internal meetings were held with District members throughout December 2014.

The interpretation of the Strengths, Weaknesses, Opportunities and Threats (SWOT), the evolution of the plan, and the development of the action items were completed by a team of District members. These dedicated members have established an effective set of Specific, Measurable, Attainable, Realistic and Timely (SMART) action items that will close the gap between desired and actual performance. These action items are organized by department and will drive the budget process.

# Strategic Plan

## **PRIORITY 1: *Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.***

### **DESIRABLE OUTCOMES:**

- Community risk assessment, prevention standards, deployment standards, and response standards are routinely reviewed and revised.
- Rate of survivability for EMS calls with measurable outcomes are at or above best practices.
- 100 percent of viable victims are rescued.
- Emergency response and prevention targets are met or exceeded.
- Civilian deaths and injuries from fires are below the State average.
- Firefighter deaths or "debilitating" injuries are at zero.
- Firefighter injuries at emergency incidents are less than the State average.
- Incidence and severity of fires are below the State average.

## **PRIORITY 2: *Ensure sustainability of service delivery (people, facilities, fleet, and finance).***

### **DESIRABLE OUTCOMES:**

- Pool of personnel ready for promotion for all positions.
- Forecast collectible revenue with the following accuracy:
  - Within 1.5 percent accuracy for the ensuing fiscal year
  - Within 5 percent accuracy for fiscal years three to five in the future
- Maintain a general fund contingency of no less than six percent of operating revenues.
- Maintain a general fund unappropriated ending fund balance of 24 percent of budgeted personnel services and materials and services.
- Fund the capital replacement plan at a minimum of \$300,000 each year to provide a fund that maintains District facilities and equipment.
- Delays of emergency responses due to communications, facility, or fleet malfunctions are at zero.
- Uninterrupted services of ambulance transport and emergency dispatch.

## **PRIORITY 3: *Promote, develop, and support craftsmanship, innovation, and excellence throughout the organization.***

### **DESIRABLE OUTCOMES:**

- Government Finance Officers Association recognition is maintained.
- Office of State Fire Marshal exempt status is maintained.
- Effective data analysis and GIS efforts to evaluate our performance are in place and routinely used for decision making.
- Department of Public Safety Standards and Training accreditation agreement is maintained.
- After Action Reviews are completed and reflect improvement in emergency scene performance.

# Strategic Plan

- Performance manual effectively maintained and utilized, reflecting the way we really do it.
- Development plan is utilized to assist personnel in maximizing their current role and preparing them for their next role.
- Innovative efforts that advance our vision are identified, developed, and institutionalized.
- Health and wellness program shows an improvement in firefighter fitness: reduced injuries, reduced sick leave, and reduced light duty.

## ***PRIORITY 4: Promote community involvement with the District and satisfaction of the patrons.***

### **DESIRABLE OUTCOMES:**

- Quarterly performance reports presented to the Board of Directors and major stakeholders.
- Increased use of volunteers to meet our rural community response and prevention targets.
- District members are involved in local organizations (Rotary, Chamber, etc.).
- District patrons are included in hiring, promotional, and strategic planning processes.
- Users of our service (incident response and fire inspections) are asked to complete a survey to determine the quality of our service delivery.
- District patrons are periodically asked to complete a survey to determine their viewpoint of the District and their expectations.

## ***PRIORITY 5: Develop and strengthen collaborative strategic partnerships.***

### **DESIRABLE OUTCOMES:**

- Partner agencies are identified and enhanced that reduce redundancy and maximize effectiveness.

## **Action Items for 2015-2017**

The following action items are designed to close the gaps between desired and actual performance and to take advantage of opportunities identified by the District in its quest to achieve its mission.

A steering committee comprised of the Board President, the Management Team, acting Battalion Chiefs, and representatives of volunteers, students, and the RVPFF Local 1817 identified the action items for the Strategic Plan.

The action items will be reviewed each year for relevance and attainability. Relevance refers to the focus on the strategic priorities and the issues identified in the SWOT. Attainability refers to the availability of resources (time and/or money) to achieve the strategy identified for the action item.

During the annual review, existing action items can be marked completed or eliminated and new action items can be added.

# Strategic Plan

## 1. ADMINISTRATION

### *Action Items Completed*

- 1.1. Reaffirm or discontinue the use of Urban Renewal funds by December 2015.
- 1.2. Develop and implement public information options for the District to effectively communicate with our patrons. Prepare a plan of action by December 2015.
- 1.3. Evaluate the benefit of providing fire chief services to Jackson County Fire District 4. Prepare a report for the Board of Directors by the December 2015 Board meeting.
- 1.4. Initiate discussion and prepare a proposal for the Board of Directors by the February 2016 Board meeting related to the potential renaming/re-branding of the Fire District to enhance recognition.
- 1.5. Review options available to the District to bill for services and prepare a report for the Board of Directors by the May 2016 Board meeting.
- 1.6. Review the transport agreement with Mercy Flights to determine the value to the District and our community prior to June 2016.
- 1.7. Continue development of the performance management system that embraces consistent feedback and reinforces personal and professional development. Administer training and provide full implementation by July 2016.
- 1.8. Identify grant opportunities that dovetail with the strategic plan by October 2016.
- 1.10. Review the firefighter hiring process and propose modifications to the Board of Directors and Civil Service Commission by August 2016.

### *Action Items Still in Progress*

- 1.9. Work collaboratively with Jackson County EMS responders to review our options for a physician supervisor prior to the retirement of Dr. Rostykus by December 2016.

## 2. FIRE AND LIFE SAFETY

### *Action Items Completed*

- 2.1. Identify areas to install additional hydrants in our unincorporated areas by March 2015 and budget for two installations for 2015/16 fiscal year.
- 2.2. Evaluate the use of Pulse Point in our community. Prepare a recommendation by December 2016.
- 2.4. Finalize and institutionalize the enhanced customer service kits by January 2016.



# Strategic Plan

- 2.5. Finalize implementation and training of residential care occupancy binders by July 2016.
- 2.7. Develop and implement wood processing occupancy binders by December 2016.
- 2.8. Develop two recognized Firewise Communities each fiscal year.
- 2.9. Improve strategic rural water supply infrastructure by completing two projects per fiscal year.
- 2.10. Award a home hydrant (fire suppression sprinkler) system to a District patron each fiscal year. Secure funding through donations.

## ***Action Items Still in Progress***

- 2.3. Explore options to improve authority for fire code enforcement throughout the planning and building process by December 2017.
- 2.6. Develop a community public education program by December 2017.

## **3. VOLUNTEERS AND RURAL COMMUNITIES**

### ***Action Items Completed***

- 3.1. Participate in a Task Force through Rogue Interagency Training Association (RITA) to regionalize a volunteer academy by June 2015.
- 3.2. Establish a minimum of two resident firefighters at the Sams Valley station and one at Dodge Bridge and Agate Lake stations by July 2015.
- 3.3. Enhance the volunteer recruiting and intake system by July 2015.
- 3.5. Enhance the coordination of training for volunteers that parallels the career training program in themes and topics by July 2015.
- 3.6. Establish a minimum of three resident firefighters at the Sams Valley station and two at Dodge Bridge and Agate Lake stations by June 2017.
- 3.7. Evaluate the effective deployment of student firefighters at the Gold Hill station by December 2015.
- 3.8. Enhance interaction and strengthen the relationships between career and volunteer members through combined drills and community functions by December 2015.
- 3.10. Inventory and evaluate the reliability of private bridges in the Fire District and make the information available to responding crews by December 2017.

# Strategic Plan

## ***Action Items Still in Progress***

- 3.4. Develop a marketing plan to recruit student firefighters by December 2017.
- 3.9. Develop and implement an emergency preparedness program for the rural community by December 2017.

## **4. OPERATIONS**

### ***Action Items Completed***

- 4.1. Assess the District's wildland response procedures, providing additional clarification, or protocols where needed prior to fire season 2015.
- 4.3. Develop a plan by December 2016 to correct deficiencies in radio communications within the District for implementation in the 2016/17 fiscal year.
- 4.4. Analyze the Central Point response and recommend station location by December 2015.
- 4.6. Update the Standard of Cover to assess risk, revise performance standards, and accurately portray the urban, suburban, and rural areas by December 2016.
- 4.9. Develop additional cooperation, collaboration, and consistency with Oregon Department of Forestry during the 2015 and 2016 fire seasons measured through feedback from both agencies by June 2017.
- 4.10. Evaluate and provide a recommendation on the fleet maintenance program with the City of Medford by December 16, 2015.
- 4.11. Assess existing engine specifications, establish a revised specification and secure an estimate of cost for the purchase of two engines prior to the scheduled replacement by June 2017.
- 4.16. Implement drone technology into the response capability by August 2016.

### ***Action Items Still in Progress***

- 4.2. Define and update the pre-plan program by June 2017.
- 4.5. Elevate the level of cooperation and rapport with Mercy Flights Ambulance by December 2017. Measured through feedback from our crews.
- 4.7. Establish a regional methodology for incident management and uniform performance to be delivered to crews by June 2017.
- 4.8. Improve processing and turn out times to meet the standards adopted by the District by December 2017.
- 4.12. Enhance the EMS program to ensure a highly adept level of service with methods in place to measure outcomes by December 2017.
- 4.13. Increase the District's preparedness for large-scale emergency management with an emphasis on continuity of service and coordination with the county and local cities.

# Strategic Plan

- 4.14. Capitalize on opportunities that strengthen interoperability and communications with Jacksonville and Rogue River measured through feedback from all agencies by December 2017.
- 4.15. Develop a continuity of service plan for the District in the event of a natural disaster by December 2017.

## 5. TRAINING

### ***Action Items Completed***

- 5.1. Collaborate with Medford Fire-Rescue and implement a Fire Rescue Protocol system by June 2015.
- 5.2. Develop a plan to incorporate a special assignment position into the training department to assist with instructional delivery and provide support by August 2015.
- 5.3. Develop and implement a formal Captain and Battalion Chief training program for existing and future officers by December 2016.
- 5.4. Implement training center procedures/policies that address use, maintenance, safety, and limitations by September 2016.
- 5.6. Evaluate programs for communicating with non-English speaking patrons by December 2015.
- 5.7. Evaluate and identify opportunities for a command training center by March 2017.
- 5.8. Broaden and develop the existing health and wellness program that shows the scope and benefits by October 2016.
- 5.9. Institutionalize the Near Miss Reporting system for all department members by July 2016.
- 5.10. Institutionalize 3EOnline for District's Globally Harmonized System for Hazard Communications by August 2016.
- 5.11. Complete the 2<sup>nd</sup> floor and ventilation portion of the burn facility by December 2016.



### ***Action Items Still in Progress***

- 5.5. Enhance the RCC relationship while they share our facilities by December 2017. Evaluate through feedback from both agencies.

# Strategic Plan

## 6. TECHNOLOGY

### *Action Items Completed*

- 6.1. Establish effective audio and video conferencing for the District by June 2015.
- 6.2. Develop and define the District use of social media by June 2015.
- 6.3. Provide guest access Wi-Fi for the administration building by September 2015. Evaluate its use in additional locations by December 2015.
- 6.4. Establish member only access to District information through the website by December 2015.
- 6.5. Explore the increased use of the Cloud in addition to local servers by January 2016.

## 7. SUPPORT SERVICES

### *Action Items Completed*

- 7.1. Enhance the facilities preventative maintenance program and schedule by July 2015.
- 7.2. Establish a centralized logistics and station supply system by September 2015.
- 7.3. Determine standard inventory of reserve apparatus equipment and ensure the reserves are equipped by December 2015.
- 7.4. Document, catalog, and maintain an appropriate inventory system for District supplies and equipment by July 2016.
- 7.6. Seek Oregon Seismic Rehabilitation Grant funds to retrofit District facilities that are not currently meeting seismic standards for fire stations by December 2017.

### *Action Items Still in Progress*

- 7.5. Establish standardize specifications for equipment, appliances, and consumables by July 2017.

# Financial Forecast

The District utilizes long range financial forecasting as a means to prevent budget shortfalls and keep revenue in alignment with expenditures. These projections are updated every year in November after the property tax certification is provided by the County Assessor and reviewed and adjusted as necessary during the budget development. Property taxes account for about 98 percent of the District's total operating revenue, so future projections are critical for maintaining existing services and planning for future growth. All projections are based on the District's permanent tax rate of \$3.1194 per \$1,000 of assessed valuation. Due to the economic recession that impacted the District from 2010 to 2013, growth percentages have been scaled back to the constitutionally allowed three percent plus a half to one percent growth for new construction. The District experienced growth of 3.63 percent for 2016 and will continue to take a conservative approach when developing the long-term financial forecast in order to ensure fiscal sustainability. The District's approach after the recession is to develop programs and make financial decisions based on minimum growth as allowed for under the constitution.

This forecast depicts minimal changes to District programs. No new positions are projected in future years. The Staff Battalion Chief position has been deferred until further analysis is completed, thus salary and benefits have been set aside until determination is made. In fiscal year 2019/20 another Public Employees Retirement System (PERS) rate increase will be assessed. Modest cost of living adjustments have been projected across future years. Growth projections are reflective of a 46.6 percent increase over the next ten year period. Total revenue includes beginning fund balances. The current adopted budget year reflects a balanced budget, thus zero budget excess or shortfall.

## Financial Forecast Summary

	Adopted Budget	Projected								
GENERAL FUND	FY 17-18	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27
<b>TOTAL REVENUE</b>	\$ 18,301,500	\$ 17,781,033	\$ 18,571,354	\$ 19,379,280	\$ 20,472,739	\$ 21,589,457	\$ 23,119,921	\$ 24,809,293	\$ 26,838,080	\$ 28,902,826
<b>TOTAL EXPENDITURES</b>	\$ 14,027,500	\$ 13,253,721	\$ 13,794,613	\$ 14,089,929	\$ 14,670,774	\$ 14,855,588	\$ 15,349,244	\$ 15,688,544	\$ 16,358,502	\$ 17,060,964
<b>ENDING FUND BALANCES</b>	\$ 4,274,000	\$ 4,527,312	\$ 4,776,741	\$ 5,289,350	\$ 5,801,965	\$ 6,733,868	\$ 7,770,677	\$ 9,120,749	\$ 10,479,577	\$ 11,841,862
Ending Fund Commitments										
Unappropriated Ending Fund Balance	\$ (3,090,000)	\$ (3,206,723)	\$ (3,334,032)	\$ (3,466,404)	\$ (3,604,042)	\$ (3,747,155)	\$ (3,895,960)	\$ (4,050,686)	\$ (4,211,567)	\$ (4,378,849)
Operating Contingency	\$ (1,184,000)	\$ (1,227,521)	\$ (1,275,262)	\$ (1,324,902)	\$ (1,376,516)	\$ (1,430,183)	\$ (1,485,985)	\$ (1,544,007)	\$ (1,604,338)	\$ (1,667,068)
Budget excess/(shortfall)	\$ -	\$ 93,068	\$ 167,447	\$ 498,044	\$ 821,407	\$ 1,556,530	\$ 2,388,731	\$ 3,526,056	\$ 4,663,672	\$ 5,795,944
<i>* Amount available for appropriation</i>										
	Adopted Budget	Projected								
CAPITAL PROJECTS FUND	FY 17-18	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27
<b>TOTAL REVENUE</b>	\$ 7,038,900	\$ 4,847,700	\$ 2,148,400	\$ 1,972,038	\$ 1,922,110	\$ 1,669,981	\$ 1,579,256	\$ 1,749,307	\$ (463,090)	\$ (172,381)
<b>TOTAL EXPENDITURES</b>	\$ 3,991,800	\$ 3,000,000	\$ 477,062	\$ 350,628	\$ 552,829	\$ 391,425	\$ 130,649	\$ 2,513,097	\$ 9,991	\$ 1,343,916
<b>ENDING FUND BALANCES</b>	\$ 3,047,100	\$ 1,847,700	\$ 1,671,338	\$ 1,621,410	\$ 1,369,281	\$ 1,278,556	\$ 1,448,607	\$ (763,790)	\$ (473,081)	\$ (1,516,297)
Ending Fund Commitments										
Operating Contingency	\$ (200,000)	\$ (300,000)	\$ (47,706)	\$ (35,063)	\$ (55,283)	\$ (39,143)	\$ (13,065)	\$ (251,310)	\$ (999)	\$ (134,392)
Reserve for Future Capital Expenditure	\$ (2,847,100)	\$ (1,500,000)	\$ (1,500,000)	\$ (1,500,000)	\$ (1,500,000)	\$ (1,500,000)	\$ (1,500,000)	\$ (1,500,000)	\$ (1,500,000)	\$ (1,500,000)
Budget excess/(shortfall)	\$ -	\$ 47,700	\$ 123,632	\$ 86,347	\$ (186,002)	\$ (260,587)	\$ (64,458)	\$ (2,515,100)	\$ (1,974,080)	\$ (3,150,689)
<i>* Amount available for appropriation</i>										
<b>ALL FUNDS COMBINED</b>										
<b>Net Ending Fund Balances</b>	\$ 7,321,100	\$ 6,375,012	\$ 6,448,079	\$ 6,910,760	\$ 7,171,246	\$ 8,012,424	\$ 9,219,284	\$ 8,356,959	\$ 10,006,496	\$ 10,325,565

# Financial Forecast

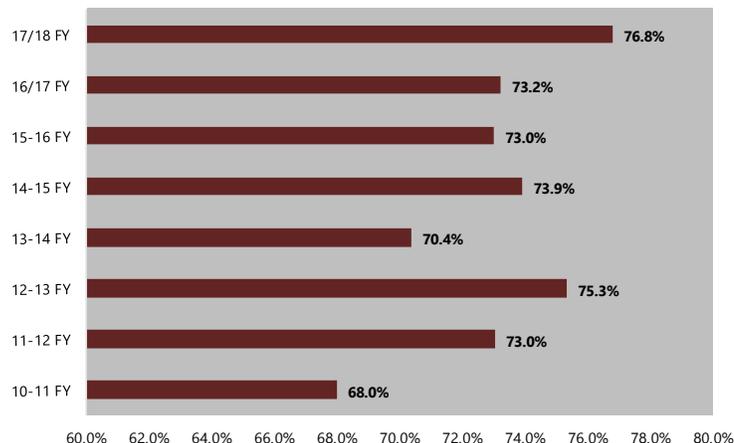
Management also reviews the growth at which operating revenues are increasing compared to basic operating expenditures. The District has a target of not allowing personnel services to exceed 80 percent of operating revenue and materials and services 20 percent. By using moderately conservative assessed valuation growth percentages of 3.5 to 4 percent per year and an average increase for personnel services and materials and services of 3.25 percent, operating revenue will soon exceed expenditures and District targets will not be met. Other factors that drive personnel services such as pension rate increases and health insurance and benefit costs could drive this gap higher. This financial forecast however enables the District to prepare for the future by monitoring and projecting impacts and making prudent decisions in the current period to thwart off deficits in the future.

The following table reflects a forecast of operating revenue, not including beginning fund balances, compared with basic operating expenditures consisting of personal services, materials and services, and debt service. The District will take the appropriate steps in the future to prevent deficits from occurring and will evaluate options for reducing costs when expenditures start exceeding revenue.

## General Fund Operating Revenues Compared to Operating Expenditures

	Adopted Budget	Projected FY 18-19	Projected FY 19-20	Projected FY 20-21	Projected FY 21-22	Projected FY 22-23	Projected FY 23-24	Projected FY 24-25	Projected FY 25-26
<b>GENERAL FUND</b>	<b>FY 17-18</b>								
<b>OPERATING REVENUE</b>									
Taxes - Current & Prior	12,875,000	13,361,346	13,891,800	14,443,352	15,016,842	15,613,145	16,233,169	16,877,858	17,548,196
All Other Income	271,500	145,687	152,242	159,187	166,547	174,347	152,884	160,758	169,134
<b>TOTAL OPERATING REVENUE</b>	<b>13,146,500</b>	<b>13,507,033</b>	<b>14,044,041</b>	<b>14,602,538</b>	<b>15,183,389</b>	<b>15,787,492</b>	<b>16,386,053</b>	<b>17,038,616</b>	<b>17,717,330</b>
<b>OPERATING EXPENDITURES</b>									
Personnel Services	10,096,900	10,349,323	10,866,789	11,138,458	11,695,381	11,987,766	12,587,154	12,901,833	13,546,925
Materials and Services	2,319,400	2,342,594	2,366,020	2,389,680	2,413,577	2,437,713	2,462,090	2,486,711	2,511,578
Debt Service	261,900	261,804	261,804	261,791	261,816	130,110	0	0	0
<b>TOTAL OPERATING EXPENDITURES</b>	<b>12,678,200</b>	<b>12,953,721</b>	<b>13,494,613</b>	<b>13,789,929</b>	<b>14,370,774</b>	<b>14,555,588</b>	<b>15,049,244</b>	<b>15,388,544</b>	<b>16,058,502</b>
<b>Operating Revenue vs Expenditures</b>	<b>468,300</b>	<b>553,312</b>	<b>549,429</b>	<b>812,609</b>	<b>812,615</b>	<b>1,231,904</b>	<b>1,336,809</b>	<b>1,650,073</b>	<b>1,658,828</b>
<b>Percent of Operating Expenditures to Operating Revenue</b>									
Personnel Services	<b>76.8%</b>	<b>76.6%</b>	<b>77.4%</b>	<b>76.3%</b>	<b>77.0%</b>	<b>75.9%</b>	<b>76.8%</b>	<b>75.7%</b>	<b>76.5%</b>
Materials and Services	<b>17.6%</b>	<b>17.3%</b>	<b>16.8%</b>	<b>16.4%</b>	<b>15.9%</b>	<b>15.4%</b>	<b>15.0%</b>	<b>14.6%</b>	<b>14.2%</b>

Percent of Actual Personnel Services to Operating Revenue



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# Financial Summary Schedules

## Fire District 3



2017/18 Fiscal Year Budget

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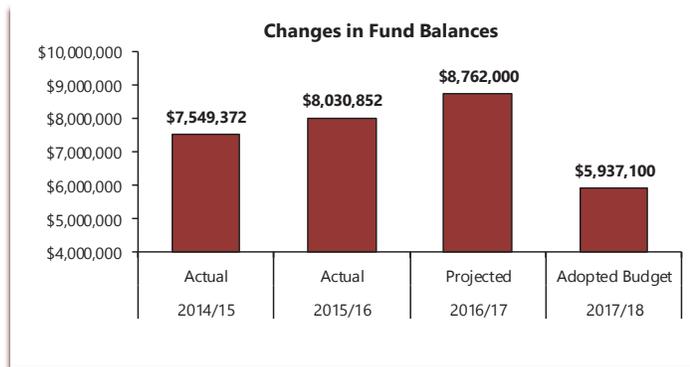
# Financial Summary Schedules

The following schedule depicts changes in fund balance for the District's two funds combined; the General Fund and the Capital Projects Fund.

	Fiscal Year			2017/18 Adopted Budget
	2014/15 Actual	2015/16 Actual	2016/17 Projected	
<b>Summary of Revenues</b>				
Property Taxes	11,614,390	12,134,058	12,530,000	12,875,000
Earnings on Investments	43,475	63,274	105,000	80,000
Grants	13,312	38,968	91,100	1,212,000
Rental Income	4,950	6,749	10,000	8,000
Donations	250,000	6,500	16,400	1,001,000
Contracts	130,656	134,544	81,300	24,900
Miscellaneous	74,703	183,477	49,300	27,000
	<b>\$12,131,486</b>	<b>\$12,567,570</b>	<b>\$12,883,100</b>	<b>\$15,227,900</b>
Other Revenue Sources:				
Proceeds from Sale of Equip	29,944	593	5,300	1,000
Loan Proceeds	0	0	0	200
Transfers to and from	1,473,800	1,036,200	986,900	1,349,300
<b>Total All Revenue Sources</b>	<b>\$13,635,230</b>	<b>\$13,604,362</b>	<b>\$13,875,300</b>	<b>\$16,578,400</b>
<b>Summary of Expenditures</b>				
Personnel Services	8,795,293	9,178,049	9,427,800	10,096,900
Materials and Services	1,768,040	1,934,972	1,991,300	2,319,400
Capital Outlay	262,201	711,894	511,700	3,991,800
Debt Service	393,548	261,767	261,900	261,900
Operating Contingency	0	0	0	1,384,000
<b>Total All Expenditures</b>	<b>\$11,219,083</b>	<b>\$12,086,683</b>	<b>\$12,192,700</b>	<b>\$18,054,000</b>
<b>Excess or Deficiency</b>	<b>2,416,147</b>	<b>1,517,680</b>	<b>1,682,600</b>	<b>(1,475,600)</b>
<b>Changes in Fund Balance</b> <i>(The cash available at the end of the fiscal year)</i>				
Beginning Fund Balance	6,607,025	7,549,372	8,066,300	8,762,000
Excess Revenues over Expenditures	2,416,147	1,517,680	1,682,600	(1,475,600)
Interfund Transfers	(1,473,800)	(1,036,200)	(986,900)	(1,349,300)
<b>Ending Fund Balance</b>	<b>\$7,549,372</b>	<b>\$8,030,852</b>	<b>\$8,762,000</b>	<b>\$5,937,100</b>
Increase or Decrease in Fund Balance		6.38%	9.10%	-32.24%

The increase in total fund balance at fiscal year end June 30, 2016 was the result of contingency funds not spent, a budgeted increase in unappropriated ending fund balance, monies across line item expenditure accounts not spent in their entirety, and an increase in capital funds set aside as reserve for future.

The projected increase in fund balance of \$731,148 at fiscal year end June 30, 2017 is the result of remaining funds across General Fund departmental accounts and Capital Fund expenditures (13.2 percent). This was primarily due to unanticipated staffing changes, a position not filled, and programs coming in under budget. In addition, the amount allocated in the General Fund unappropriated ending fund balance (UEFB) classification increased as well as Capital Fund reserves.



Proposed fund balance reflected at fiscal year end June 30, 2018 is \$5,937,100 or a decrease of over 32 percent. It should be noted however that this amount represents the minimum fund balance the District would end the fiscal year with, as operating contingency is appropriated and all line item accounts are reflected to be spent to zero. Since contingency is only spent for unforeseen circumstances and line item accounts are never completely spent in their entirety, this amount will more than likely be higher and carried forward in the ensuing fiscal year as beginning fund balance.

# Financial Summary Schedules

The following schedule represents the fund balance breakdown between the two funds. The ending fund balance amounts represented in the 2017/18 adopted budget column are depictive only and represent the minimum amount of cash the District would have on hand at year end, providing that all accounts and contingencies were spent in their entirety.

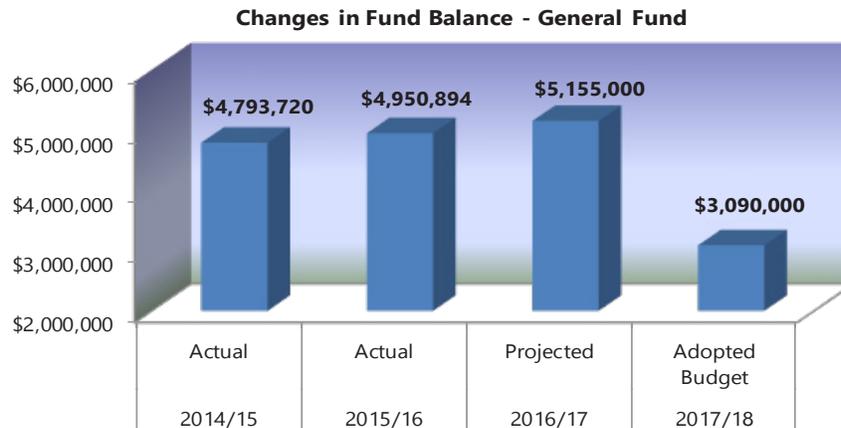
GENERAL FUND	Fiscal Year			2017/18 Adopted Budget
	2014/15 Actual	2015/16 Actual	2016/17 Projected	
<b>Revenue/Expenditures</b>				
Revenue	11,897,030	12,568,162	12,872,000	13,146,500
Expenditures	10,956,882	11,374,788	11,681,000	13,862,200
Excess or Deficiency	<b>\$940,148</b>	<b>\$1,193,374</b>	<b>\$1,191,000</b>	<b>(\$715,700)</b>
<b>Changes in Fund Balance</b>				
Beginning Fund Balance	5,327,372	4,793,720	4,950,900	5,155,000
Excess Revenues over Expenditures	940,148	1,193,374	1,191,000	(715,700)
Interfund Transfers Out	(1,473,800)	(1,036,200)	(986,900)	(1,349,300)
Ending Fund Balances	<b>\$4,793,720</b>	<b>\$4,950,894</b>	<b>\$5,155,000</b>	<b>\$3,090,000</b>
Increase or Decrease		3.28%	4.12%	-40.06%

CAPITAL PROJECTS FUND	Fiscal Year			2017/18 Adopted Budget
	2014/15 Actual	2015/16 Actual	2016/17 Projected	
<b>Revenue/Expenditures</b>				
Revenue	264,400	0	16,400	2,082,600
Expenditures	262,201	711,894	511,700	4,191,800
Excess or Deficiency	<b>\$2,199</b>	<b>(\$711,894)</b>	<b>(\$495,300)</b>	<b>(\$2,109,200)</b>
<b>Changes in Fund Balance</b>				
Beginning Fund Balance	1,279,652	2,755,651	3,115,400	3,607,000
Excess Revenues over Expenditures	2,199	(711,894)	(495,300)	(2,109,200)
Interfund Transfers In	1,473,800	1,036,200	986,900	1,349,300
Ending Fund Balances	<b>\$2,755,651</b>	<b>\$3,079,957</b>	<b>\$3,607,000</b>	<b>\$2,847,100</b>
Increase or Decrease		11.77%	17.11%	-21.07%

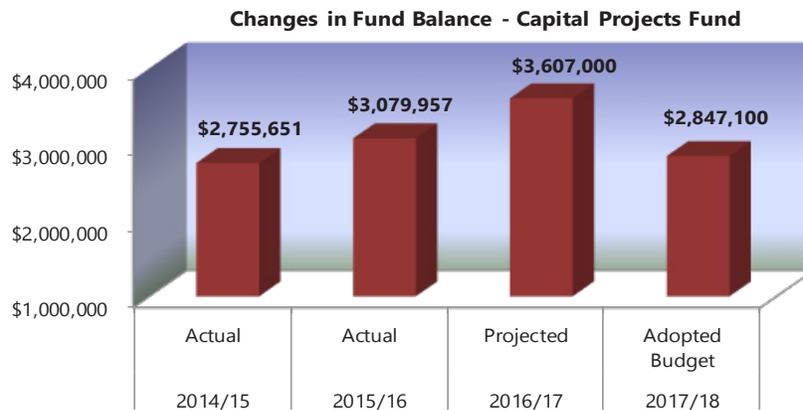
Expenditures in the General Fund consist of personnel services, materials and services, debt service, and contingency in this schedule.

# Financial Summary Schedules

The following graphs depict the District's changes in fund balance for the previous two fiscal years, the projected fund balance for the fiscal year just ended, and the minimum fund balance that would be available at year end June 30, 2018 as established by policy.



- ➔ Fund balance in the **General Fund** increased at fiscal year end June 30, 2016 by 3.28 percent, the result of some staffing changes and departmental line item accounts not spent in their entirety.
- ➔ Fund balance is projected to increase at fiscal year end June 30, 2017 by 4.12 percent, the result of additional staffing changes due to retirements, a position not filled, and program expenditures coming in under budget.
- ➔ The proposed fund balance at fiscal year end June 30, 2018 reflects only the budgeted unappropriated ending fund balance (UEFB) or \$3,090,000. The UEFB is based on 24 percent of budgeted property tax revenue. This represents the minimum amount the District would have on hand if all accounts and contingency were spent in their entirety.



- ➔ Changes in fund balance in the **Capital Projects Fund** are the result of General Fund transfers that sustain the fund and the corresponding budgeted expenditures as identified and planned for in the Capital Replacement Schedule. The District's strategic priority is to allocate all additional funds outside of General Fund policy commitments and Budget Committee approved programs to the Capital Fund for future projects.
- ➔ Fund balance increased at fiscal year end June 30, 2016 by \$324,306, the result of an increase in the transfer of funds from the General and reserving a majority of those funds for future spending instead of appropriating the entirety for expenditure.
- ➔ Fund balance is projected to increase over 17 percent at fiscal year end June 30, 2017, the result of continuing to increase the transfer from the General Fund and reserving the majority for future spending.
- ➔ The proposed fund balance at fiscal year end June 30, 2018 represents a 21 percent decrease due to planned capital construction in relation to the amount of the transfer from the General Fund.

# Financial Summary Schedules

The following schedule reflects a budgetary comparison by fund between the prior and current fiscal years.

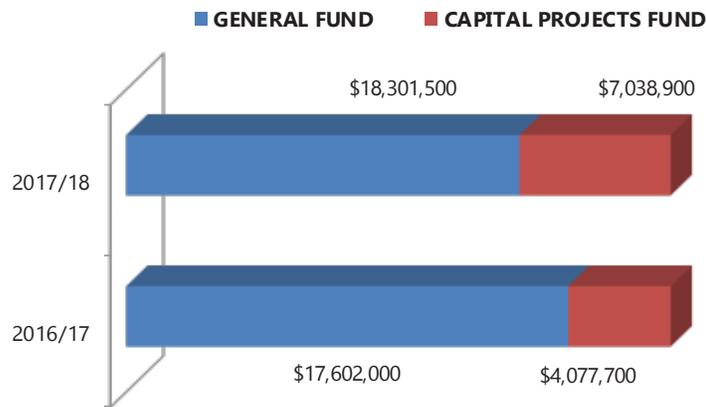
## GENERAL FUND

	Fiscal Year			
	2016/17	2017/18	Variance	Change
	Adopted Budget	Adopted Budget		
Personnel Services	9,867,600	\$10,096,900	229,300	2.32%
Materials and Services	2,352,000	\$2,319,400	(32,600)	-1.39%
Operating Contingency	1,145,500	\$1,184,000	38,500	3.36%
Debt Service	262,000	\$261,900	(100)	-0.04%
Transfer to Capital Projects Fund	986,900	\$1,349,300	362,400	36.72%
Unappropriated Ending Fund Balance	2,988,000	\$3,090,000	102,000	3.41%
	<b>\$17,602,000</b>	<b>\$18,301,500</b>	<b>\$699,500</b>	<b>3.97%</b>

## CAPITAL PROJECTS FUND

	Fiscal Year			
	2016/17	2017/18	Variance	Change
	Adopted Budget	Adopted Budget		
Department Equipment	93,700	50,000	(43,700)	-46.64%
Apparatus and Vehicles	430,000	1,260,000	830,000	193.02%
Land and Improvements	100	100,000	99,900	99900.00%
Building Construction/Improvements	85,000	2,581,800	2,496,800	2937.41%
Contingency	58,400	200,000	141,600	242.47%
Reserve for Future/Ending Fund Balance	3,410,500	2,847,100	(563,400)	-16.52%
	<b>\$4,077,700</b>	<b>\$7,038,900</b>	<b>\$2,961,200</b>	<b>72.62%</b>

<b>TOTAL BUDGET</b>	<b>\$21,679,700</b>	<b>\$25,340,400</b>	<b>\$3,660,700</b>	<b>16.89%</b>
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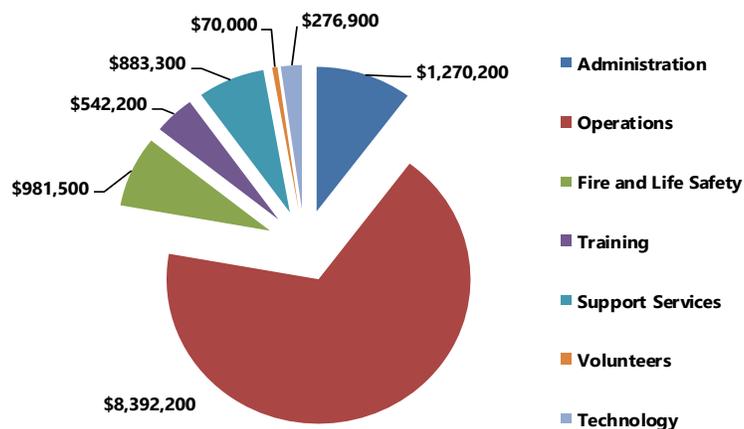


# Financial Summary Schedules

The following schedule reflects a departmental budgetary comparison between the prior and current fiscal years.

GENERAL FUND	2016/17 Adopted Budget	2017/18 Adopted Budget	Variance	Change
<b>Department 01 Administration</b>				
Personnel Services	565,300	583,200	17,900	3.17%
Materials and Services	760,000	687,000	(73,000)	-9.61%
	<b>\$1,325,300</b>	<b>\$1,270,200</b>	<b>(\$55,100)</b>	<b>-4.16%</b>
<b>Department 02 Operations</b>				
Personnel Services	7,975,800	8,131,200	155,400	1.95%
Materials and Services	257,800	261,000	3,200	1.24%
	<b>\$8,233,600</b>	<b>\$8,392,200</b>	<b>\$158,600</b>	<b>1.93%</b>
<b>Department 03 Fire and Life Safety</b>				
Personnel Services	742,600	774,000	31,400	4.23%
Materials and Services	196,200	207,500	11,300	5.76%
	<b>\$938,800</b>	<b>\$981,500</b>	<b>\$42,700</b>	<b>4.55%</b>
<b>Department 04 Training</b>				
Personnel Services	347,100	364,000	16,900	4.87%
Materials and Services	173,300	178,200	4,900	2.83%
	<b>\$520,400</b>	<b>\$542,200</b>	<b>\$21,800</b>	<b>4.19%</b>
<b>Department 05 Support Services</b>				
Personnel Services	104,000	107,000	3,000	2.88%
Materials and Services	768,200	776,300	8,100	1.05%
	<b>\$872,200</b>	<b>\$883,300</b>	<b>\$11,100</b>	<b>1.27%</b>
<b>Department 06 Volunteers</b>				
Materials and Services	74,500	70,000	(4,500)	-6.04%
	<b>\$74,500</b>	<b>\$70,000</b>	<b>(\$4,500)</b>	<b>-6.04%</b>
<b>Department 07 Technology</b>				
Personnel Services	132,800	137,500	4,700	3.54%
Materials and Services	122,000	139,400	17,400	14.26%
	<b>\$254,800</b>	<b>\$276,900</b>	<b>\$22,100</b>	<b>8.67%</b>
<b>TOTAL</b>	<b>\$12,219,600</b>	<b>\$12,416,300</b>	<b>\$196,700</b>	<b>1.61%</b>

Departmental Adopted Budget



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# General Fund Revenue

# Fire District 3



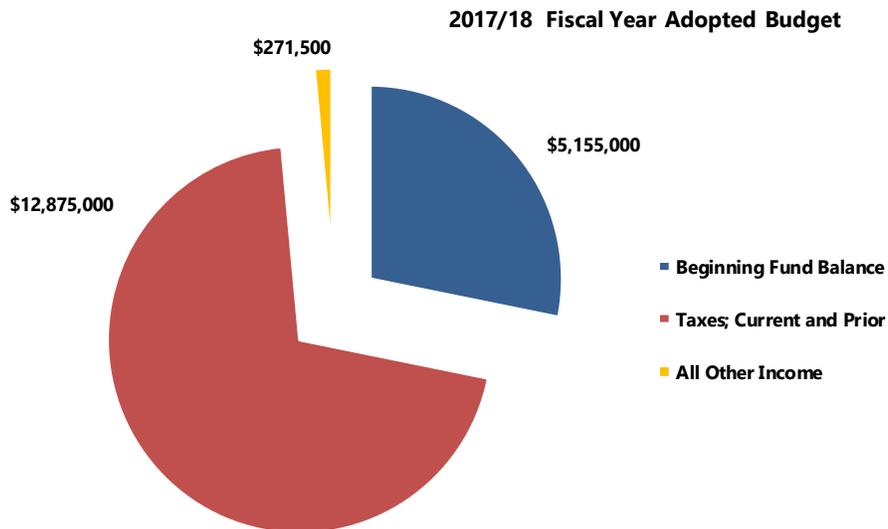
2017/18 Fiscal Year Budget

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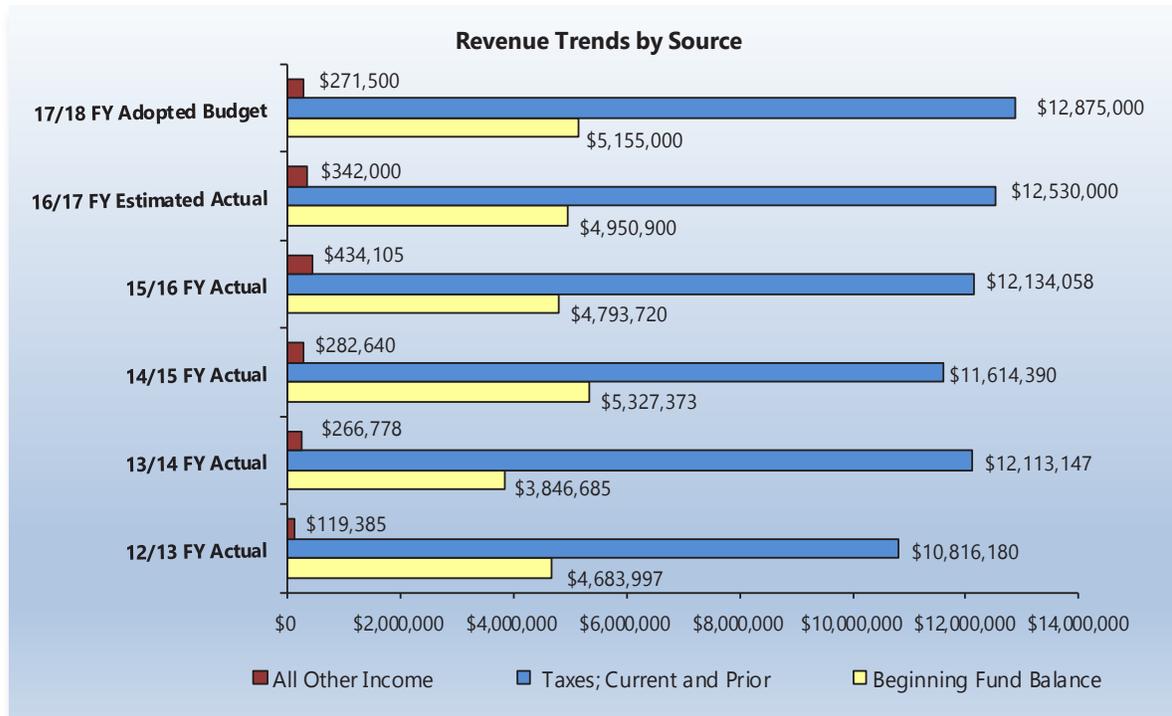
# General Fund Revenue

General Fund Description	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2014/15 FY Actual	2015/16 FY Actual	2016/17 FY Adopted Budget	2017/2018		
				Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Beginning Fund Balance	5,327,372.56	4,793,720.23	4,865,000	4,928,000	4,955,000	5,155,000
Taxes; Current	11,231,211.06	11,792,665.16	12,075,000	12,500,000	12,500,000	12,500,000
Taxes; Prior	383,178.93	341,392.91	375,000	375,000	375,000	375,000
Interest	43,475.09	63,273.83	50,000	80,000	80,000	80,000
Workers' Comp Refund & Reimb	7,681.39	22,952.16	10,000	10,000	10,000	10,000
Sale of Equipment	15,543.85	592.75	500	500	500	500
OSFM Conflagrations	1,174.62	124,194.73	5,000	1,000	1,000	1,000
EMS Contract; Mercy Flights	0.00	7,512.56	0	0	0	0
Fees for Service; Suppression/EMS	13,940.19	10,468.02	8,000	10,000	10,000	10,000
Fees for Service; Drill Ground	0.00	1,210.95	1,000	1,000	1,000	1,000
Grants; Local, State, Federal	13,311.65	38,967.97	116,100	100,000	130,000	130,000
Contract; Financial Services	22,656.00	23,304.00	24,000	24,900	24,900	24,900
Contract; Management Services	108,000.00	111,240.00	57,300	0	0	0
Rental Income	4,950.00	6,748.50	7,000	8,000	8,000	8,000
Miscellaneous	51,906.97	17,138.83	3,000	5,000	5,000	5,000
Donations	0.00	6,500.00	5,000	1,000	1,000	1,000
Loan Proceeds	0.00	0.00	100	100	100	100
<b>TOTAL GENERAL FUND REVENUE</b>	<b>\$17,224,402.31</b>	<b>\$17,361,882.60</b>	<b>\$17,602,000</b>	<b>\$18,044,500</b>	<b>\$18,101,500</b>	<b>\$18,301,500</b>

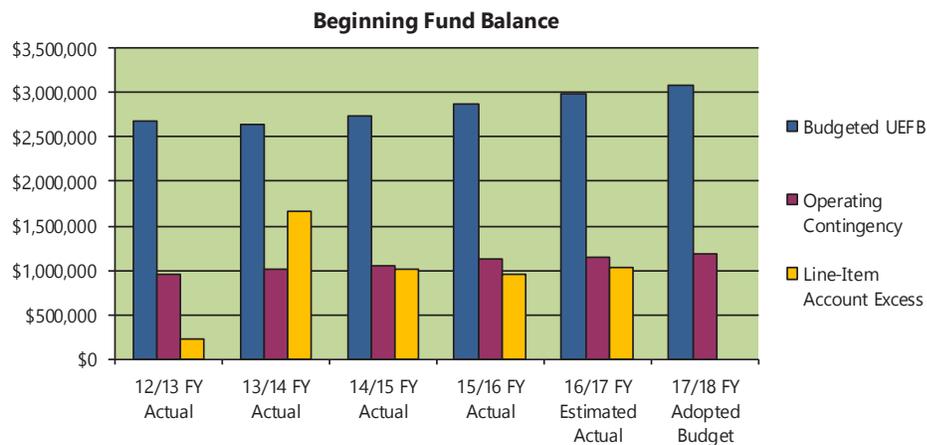


# General Fund Revenue

The District tracks all forms of revenue to ensure historical trends are preserved and to use as a tool in revenue forecasting for future budget development.



The following graph portrays the breakdown of beginning fund balance as a revenue source.

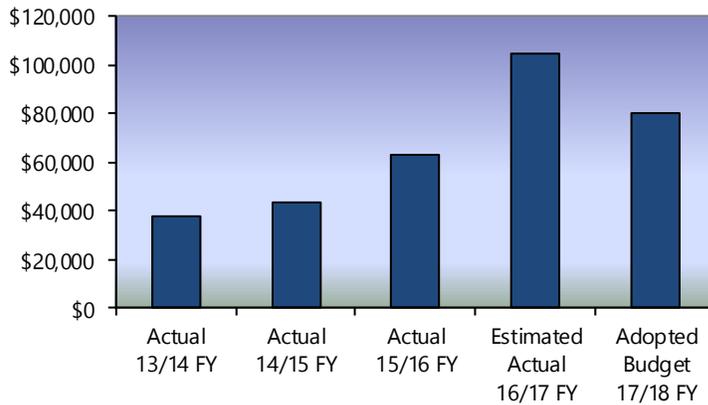


Beginning fund balance consists of the identified unappropriated ending fund balance (UEFB) from the prior fiscal year as established in the Budget and Financial Policies and as adopted by the Board of Directors, operating contingency, and dollars not expended in prior year budgeted line item accounts. The UEFB is the minimum threshold of cash on hand that the District utilizes to enter the new fiscal year.

# General Fund Revenue

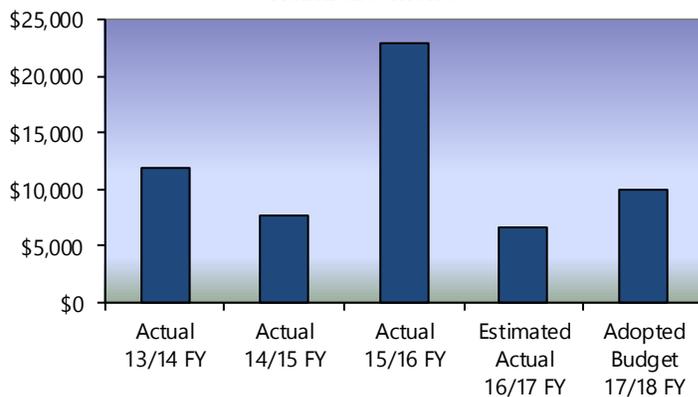
The following graphs portray an historical view of the "All Other Income" category illustrated in the "Revenue Trends by Source" chart:

**Interest Income**



**Interest income** is earned from money the District has invested in the Local Government Investment Pool (LGIP). The LGIP is an open-ended no-load diversified portfolio administered and backed by the Oregon State Treasury. The LGIP is commingled with the State's short-term funds.

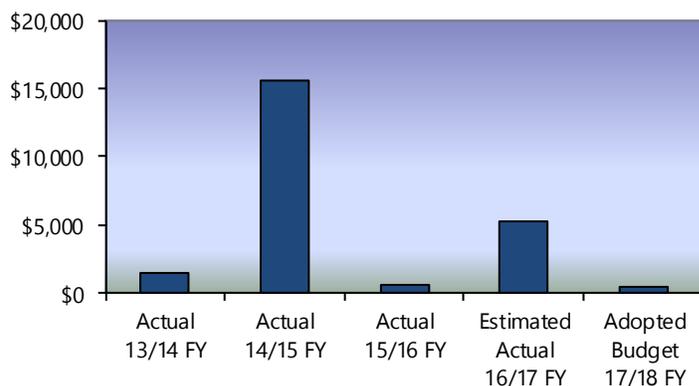
**Workers' Compensation Refund and Reimbursements**



The **workers' compensation refund** is issued by the District's insurance carrier. This refund is the difference between the estimated and actual payroll subject to premium. Annual budgeted amounts are based on conservative estimates.

This account also reflects reimbursements from the insurance carrier back to the District for time-loss payments paid to injured workers.

**Sale of Equipment**

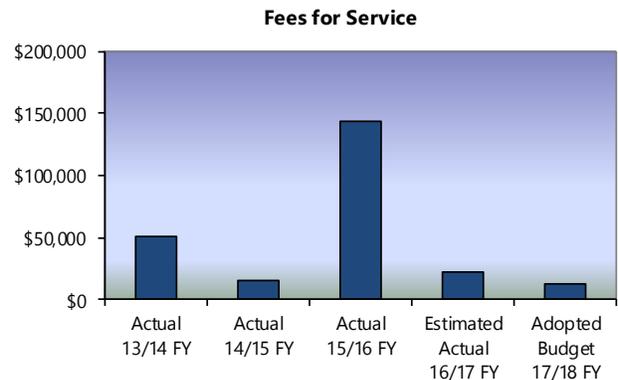


Revenue is from the **sale of equipment** sold during the fiscal year. Annual budgeted amounts are based on conservative estimates. Sale of equipment in the General Fund is for smaller items sold that are not considered fixed assets. Proceeds from the sale of capital outlay equipment are recognized in the Capital Projects Fund.

# General Fund Revenue

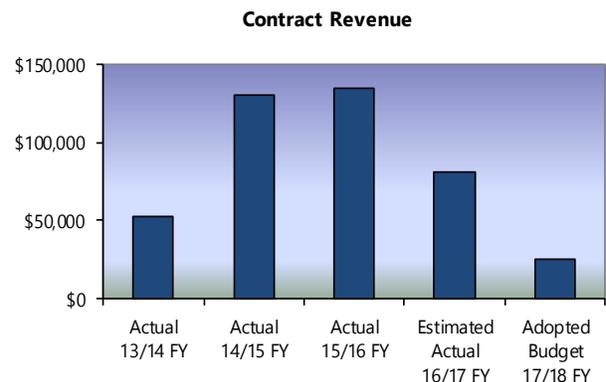
**Fees for service** include medical standby at sporting events and concerts which require emergency medical technicians to be present. It also includes income from fire suppression costs incurred while responding to unprotected property and incidents along transportation routes such as railroad.

For fiscal years ending 2014, 2015, and 2016 revenue was received from the State of Oregon as a reimbursement for District personnel serving on a State Overhead Incident Management Team assisting with fire suppression during declared conflagrations.



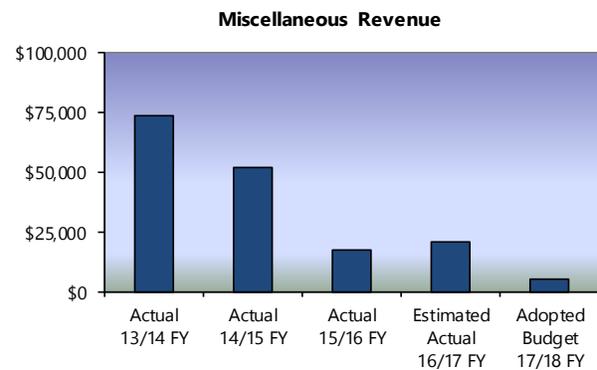
**Contract revenue** accounts for proceeds from external sources in which the District has agreements with. The District has had an intergovernmental agreement (IGA) to provide accounting and financial services with neighboring agency Fire District No. 4 since 2003.

On January 1, 2014 the District entered into a second IGA with Fire District No. 4 to provide management oversight services. This agreement ended on December 31, 2016.



**Miscellaneous revenue** category consists of rental proceeds, photocopies, alarm report copies, research fees, and any other non-anticipated income. Annual budgeted amounts are based on conservative estimates.

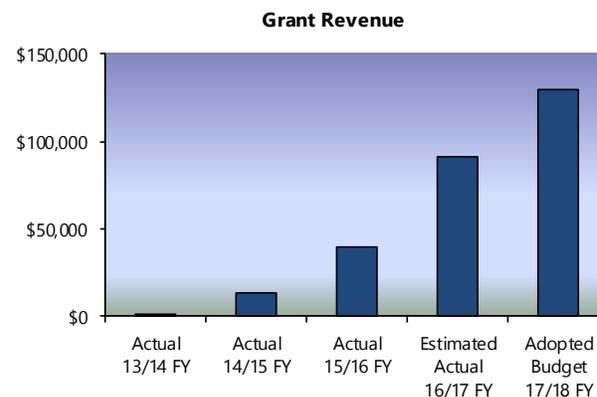
The District also receives miscellaneous revenue from its property/casualty insurance company each year in the form of longevity credits when the property loss ratio is maintained at 65 percent or below for the previous three calendar years.



**Grant revenue** comes from Local, State, and Federal sources.

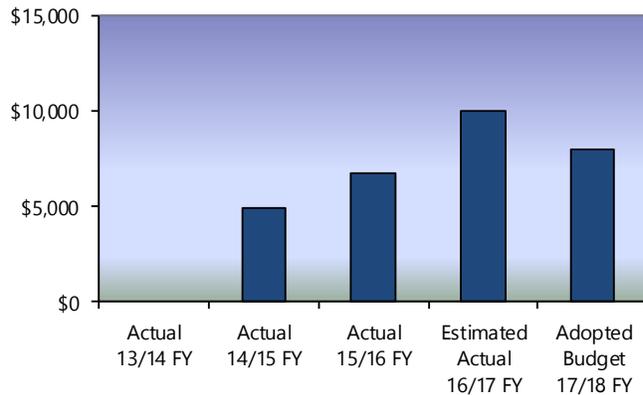
For fiscal year end 2016 the District received a grant from the State of Oregon for administering Incident Command training workshops. For fiscal year end 2017 the District received a grant from Jackson County to promote Firewise communities and perform work to reduce hazardous vegetation. This grant will continue into 2018.

Unless a grant has been awarded at time of budget development for a period that covers the ensuing fiscal year, the District will only budget a minimum dollar amount to serve as a placeholder. If a grant is received during the fiscal year, the District will appropriate it through Board resolution.



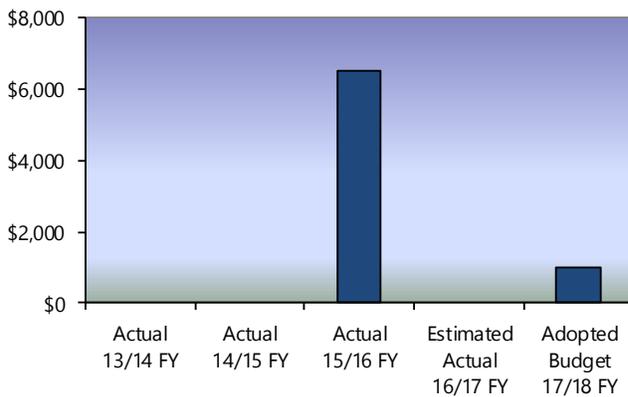
# General Fund Revenue

**Rental Income**



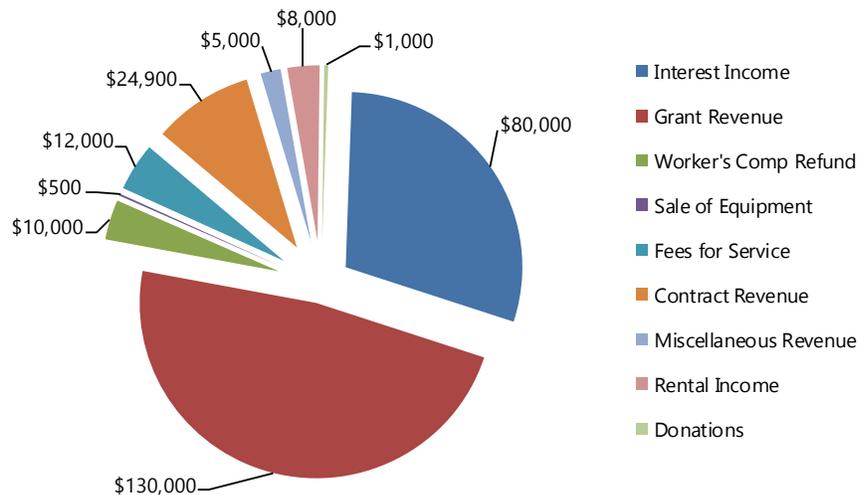
**Rental income** derives from an agreement the District has with the State Department of Public Safety Standards and Training (DPSST) to utilize a portion of the District's training grounds and offices for their regional programs. This agreement went into effect in September of 2014.

**Donations**



**Donations** was established in the 2015/16 fiscal year to accommodate monies received from community members and businesses. A \$5,000 donation was received in 2015 with designation towards the residential fire sprinkler program. A similar donation is budgeted for the 2017/18 fiscal year.

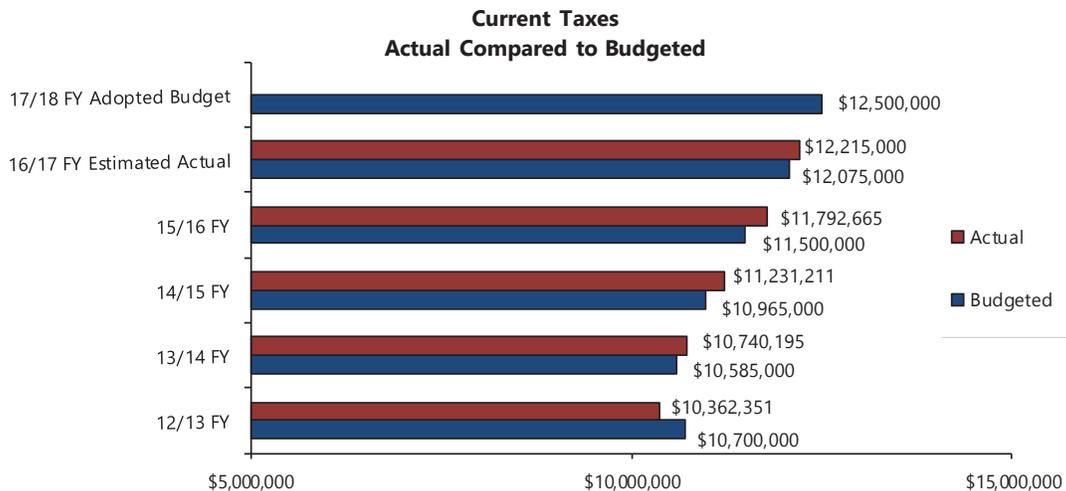
**"All Other Income" Category Proposed for the 2017/18 Fiscal Year**



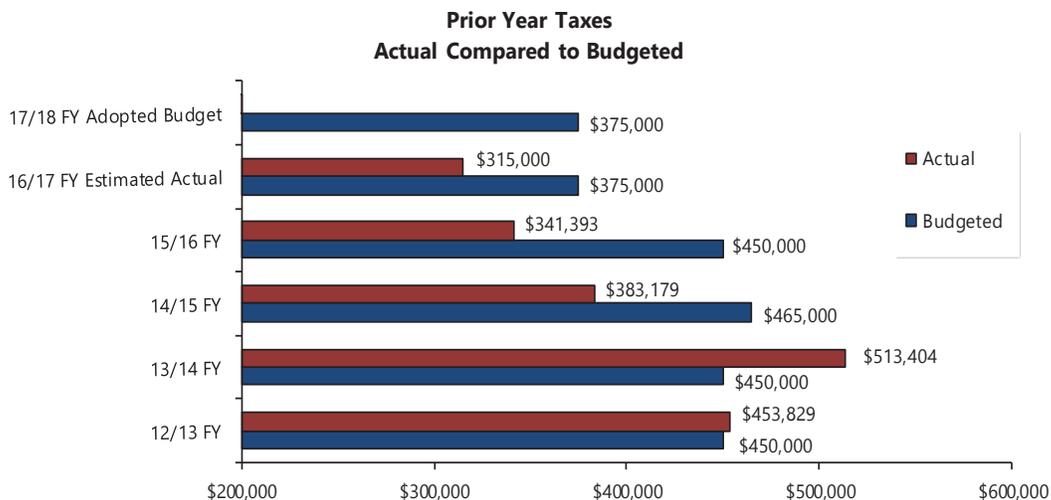
# General Fund Revenue

The following graphs portray an historical view of the current and prior year taxes category previously illustrated in the "Revenue Trends by Source" chart:

Current taxes for the 2017/18 fiscal year are budgeted based on assessed valuation growth projections of 3.65 percent across all taxing areas within the District. The projected assessed value is multiplied by the District's permanent tax rate of \$3.1194 and then divided by \$1,000 to attain the amount the tax rate will raise. Of this amount, the District is estimating a 93.5 percent collectible rate. The remaining are uncollectibles and discounts for payment in full. The collectible rate is based on the District's average over the last five years.



Prior year taxes for the 2017/18 fiscal year are budgeted at 2.9 percent of the 2016/17 Jackson County Assessor's certification of \$12,911,941.



# General Fund Revenue

The District maintains information each year on the certified assessed valuations within the communities we serve. The cities are tracked and monitored separately from the unincorporated areas of our District. Assessed valuations and the corresponding increase or decrease in the identified areas can be dramatically different. The impact can be the result of population growth in a particular city driving up new residential and commercial development, or the loss of industry or commercial infrastructure and the corresponding assessed value coming off the tax role.

## Assessed Valuation Trends:

### Unincorporated Areas Including White City

2010/11 FY	2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	
\$1,985,667,546	\$2,012,001,200	\$1,955,768,951	\$2,010,328,589	\$2,086,359,059	\$2,192,594,013	\$2,263,221,391	
<i>Percent Change</i>		1.3262%	-2.7948%	2.7897%	3.7820%	5.0919%	3.2212%

### City of Gold Hill

2010/11 FY	2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	
\$65,728,042	\$63,707,623	\$61,948,821	\$64,971,898	\$68,264,529	\$71,355,116	\$73,155,754	
<i>Percent Change</i>		-3.0739%	-2.7607%	4.8800%	5.0678%	4.5274%	2.5235%

### City of Central Point

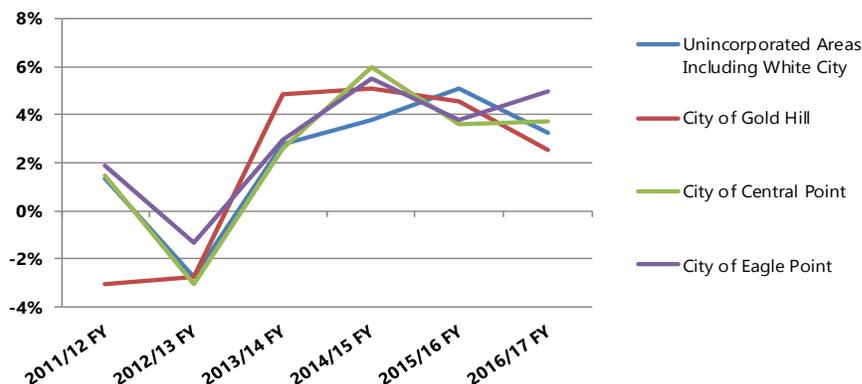
2010/11 FY	2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	
\$1,021,196,693	\$1,036,034,076	\$1,004,088,294	\$1,029,836,014	\$1,091,728,520	\$1,131,372,600	\$1,173,815,611	
<i>Percent Change</i>		1.4529%	-3.0835%	2.5643%	6.0099%	3.6313%	3.7515%

### City of Eagle Point

2010/11 FY	2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	
\$533,008,615	\$543,162,379	\$535,866,473	\$551,807,326	\$582,331,866	\$604,425,784	\$634,616,194	
<i>Percent Change</i>		1.9050%	-1.3432%	2.9748%	5.5317%	3.7940%	4.9949%

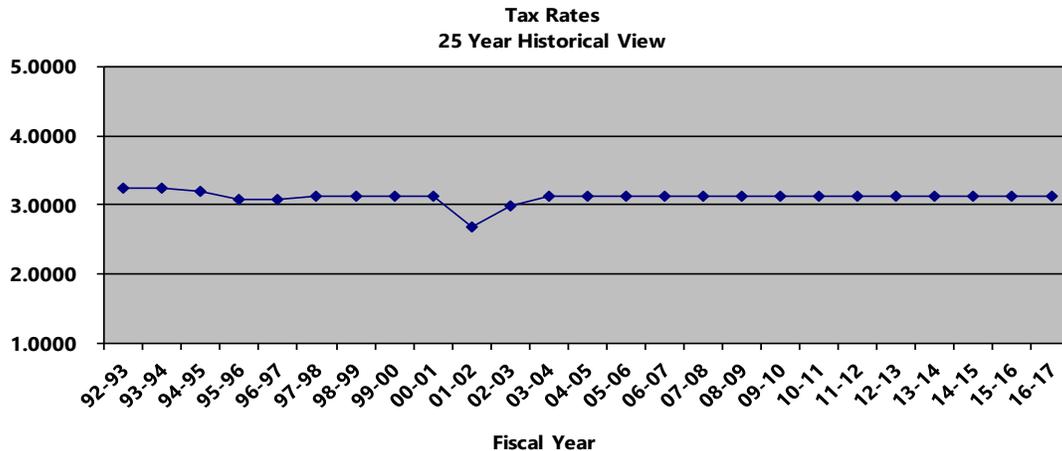
### Total Assessed Valuation for all Areas Combined

2010/11 FY	2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	
\$3,605,600,896	\$3,654,905,278	\$3,557,672,539	\$3,656,943,827	\$3,828,683,974	\$3,999,747,513	\$4,144,808,950	
<i>Percent Change</i>		1.3674%	-2.6603%	2.7903%	4.6963%	4.4679%	3.6268%

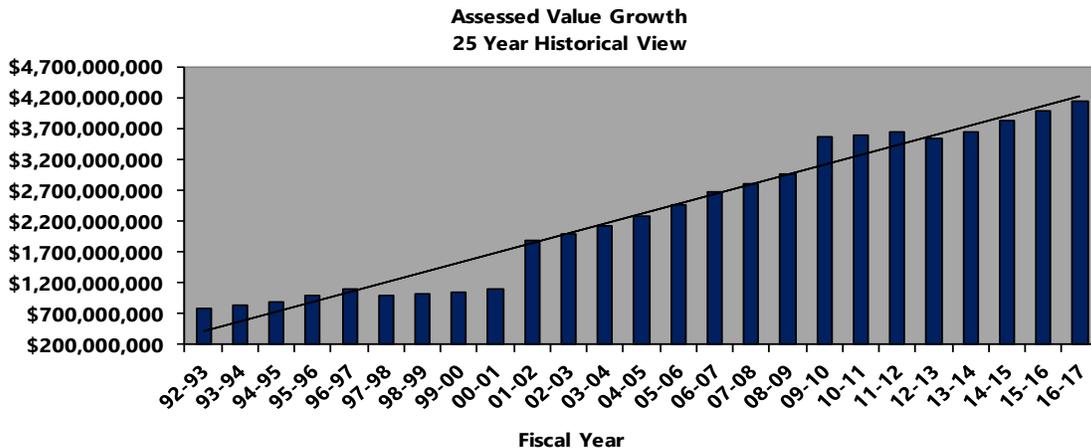


# General Fund Revenue

The District's permanent tax rate of \$3.1194 per \$1,000 of assessed value was established by the Oregon Department of Revenue through the passage of Ballot Measure 50 in May of 1997. Ballot Measure 50 also established a permanent tax rate for each taxing authority in the State, based on the entity's previous tax levy and assessed valuation at the 1995/96 value, less ten percent. The pre-existing levy based tax system was replaced by this rate based tax system.



In the 2001/02 fiscal year, the Cities of Central Point and Eagle Point annexed into the District, which resulted in a significant increase in the District's assessed valuation. Consequently, the District reduced the tax rate levied that year to \$2.69. In the 2002/03 fiscal year the rate was increased to \$2.99 and in 2003/04 the rate was levied back to the District's permanent rate of \$3.1194.



In the 2009/10 fiscal year, the White City Urban Renewal tax ended thus resulting in another increase in assessed valuation. Tax revenue generated from the frozen assessed value had been diverted to the Urban Renewal Agency since 1996.

In the 2012/13 fiscal year the District experienced a decline in assessed valuation, the result of the economic recession and property's real market housing values falling below the maximum assessed value, coupled with tax re-assessments in maintenance areas within the District by the Jackson County Assessor.

Ballot Measure 50 limits increases in assessed valuation of each property to three percent per year, with special exemptions for property that is improved, rezoned, subdivided, or ceases to qualify for exemption. However if real market value (RMV) falls below a property's maximum assessed value (MAV), the lower of the two becomes the new assessed value (AV) for which property taxes are calculated on. This continues each year until the real market value exceeds the MAV.

# General Fund Revenue

The District receives information from Jackson County Assessment annually on our top twenty taxpayers for the previous budget year. The District uses this information to depict to our Budget Committee and our patrons the industries that have significant investment in our jurisdiction. The District will engage with our business leaders and community partners in strategic planning, changes in service delivery, and fire safety.

Top Taxpayers	Type of Business	Rank	2016		2006		
			Taxable Assessed Valuation	Tax Paid to District	Rank	Taxable Assessed Valuation	Tax Paid to District
Boise Cascade Wood Products	Wood Manufacturer	1	\$ 67,268,707	\$ 209,838	2	\$ 51,737,844	\$ 161,391
Carestream Health Inc	Medical Mfg Plant	2	\$ 55,726,320	\$ 173,833	1	\$ 125,936,550	\$ 392,846
Amy's Kitchen	Organic Food Mfg	3	\$ 50,351,190	\$ 157,066			
Pacificorp	Electric Utilities	4	\$ 43,749,000	\$ 136,471	6	\$ 25,046,000	\$ 78,128
Avista Corp	Natural Gas Utilities	5	\$ 27,512,000	\$ 85,821	8	\$ 11,190,100	\$ 34,906
Linde LLC	Industrial Gases	6	\$ 21,838,970	\$ 68,124			
Plycem USA LLC	Wood Siding Plant	7	\$ 18,460,620	\$ 57,586			
Table Rock Group LLC	Real Estate Developers	8	\$ 17,040,330	\$ 53,156			
Biomass One, Ltd	Industrial Mill	9	\$ 16,217,000	\$ 50,587	5	\$ 25,547,000	\$ 79,691
CenturyLink	Telephone	10	\$ 15,639,900	\$ 48,787	7	\$ 13,730,900	\$ 42,832
Murphy Company	Wood Products Mill	11	\$ 10,914,900	\$ 34,048	17	\$ 5,073,450	\$ 15,826
Wal-Mart	Retail	12	\$ 10,743,230	\$ 33,512			
Space LLC	Property Holdings	13	\$ 9,846,870	\$ 30,716			
USF Reddaway	Trucking	14	\$ 8,393,100	\$ 26,181	10	\$ 6,992,130	\$ 21,811
Cascade Wood Products Inc	Wood Manufacturer	15	\$ 7,963,650	\$ 24,842			
Ron Deluca Trustee	Property Holdings	16	\$ 7,820,380	\$ 24,395			
Charter Communications	Cable Comm Provider	17	\$ 7,760,300	\$ 24,207			
Rogue Waste Systems LLC	Sanitary	18	\$ 7,247,350	\$ 22,607			
Twin Creeks Retirement LP	Senior Living	19	\$ 5,662,320	\$ 17,663			
Investors II, LLC	Property Holdings	20	\$ 5,386,750	\$ 16,803			
			\$ 415,542,887	\$ 1,296,244		\$ 265,253,974	\$ 827,433
Total District assessed value certified by Jackson County Treasurer			\$4,144,808,950		\$2,462,253,348		
Percent of top twenty taxpayers to total District assessed value			10.026%		10.773%		
Total property tax revenue received for year ending June 30th as stated on the governmental fund financial				\$ 12,134,058	\$ 7,574,642		
Percent of top twenty taxpayers to total District property tax revenue received				10.683%	10.924%		

# General Fund Revenue

The District tracks the real market value and assessed value of all property within our jurisdictional boundaries in order to provide historical trend information. The tax rate is per \$1,000 of assessed valuation.

Fiscal Year Ended	Real Property		Personal Property		Public Utilities		Total		Total Assessed to Total Market Value	Total Direct Tax Rate
	Market Value	Assessed Value	Market Value	Assessed Value	Market Value	Assessed Value	Market Value	Assessed Value		
2007	\$ 5,338,318,029	\$ 2,409,265,241	\$ 179,037,000	\$ 162,555,260	\$ 134,039,190	\$ 97,136,000	\$ 5,651,394,219	\$ 2,668,956,501	47.23%	3.12
2008	5,882,845,258	2,552,532,418	178,251,090	161,085,960	120,209,521	98,734,200	6,181,305,869	2,812,352,578	45.50%	3.12
2009	5,753,668,938	2,687,366,939	190,122,330	175,341,216	125,794,821	110,368,120	6,069,586,089	2,973,076,275	48.98%	3.12
2010	5,115,061,253	3,294,967,366	176,646,820	148,783,971	130,665,897	125,579,810	5,422,373,970	3,569,331,147	65.83%	3.12
2011	4,681,327,241	3,311,673,891	156,822,110	157,677,325	111,067,738	136,249,680	4,949,217,089	3,605,600,896	72.85%	3.12
2012	4,140,281,308	3,359,603,702	163,919,360	154,394,810	143,762,367	140,906,766	4,447,963,035	3,654,905,278	82.17%	3.12
2013	3,830,202,573	3,294,925,381	147,327,070	141,942,558	124,595,950	120,804,600	4,102,125,593	3,557,672,539	86.73%	3.12
2014	3,796,232,112	3,416,760,761	134,697,590	130,178,016	112,588,855	110,005,050	4,043,518,557	3,656,943,827	90.44%	3.12
2015	4,359,147,204	3,564,866,680	149,353,550	144,171,709	121,862,697	119,645,585	4,630,363,451	3,828,683,974	82.69%	3.12
2016	4,730,489,999	3,720,215,430	156,818,710	152,727,683	130,545,978	126,804,400	5,017,854,687	3,999,747,513	79.71%	3.12

# General Fund Revenue

The District trends property tax levies, delinquencies, and collections to provide a historical lookback but also to use as a tool in forecasting property tax collections in future budget years.

<u>Fiscal Year Ended June 30,</u>	<u>Taxes Levied by Assessor</u>	<u>Current Tax Collections</u>	<u>Current Tax Collections as Percent of Current Levy</u>	<u>Delinquent Tax Collections</u>	<u>Total Tax Collections</u>	<u>Total Collections as Percent of Current Levy</u>	<u>Outstanding Delinquent Taxes</u>	<u>Delinquent Taxes as Percent of Current Levy</u>
2007	\$ 8,364,597	\$ 7,671,071	91.71 %	261,581	\$ 7,932,652	94.84 %	570,998	6.83 %
2008	8,792,558	8,112,598	92.27	381,977	8,494,575	96.61	594,187	6.76
2009	9,291,810	8,545,870	91.97	343,252	8,889,122	95.67	727,166	7.83
2010	11,157,420	10,200,135	91.42	463,772	10,663,907	95.58	892,133	8.00
2011	11,254,507	10,379,903	92.23	475,519	10,855,422	96.45	977,187	8.68
2012	11,412,597	10,550,044	92.44	582,500	11,132,544	97.55	967,281	8.48
2013	11,112,431	10,386,202	93.46	429,978	10,816,180	97.33	858,401	7.72
2014	11,424,300	10,674,658	93.44	578,942	11,253,600	98.51	879,881	7.70
2015	11,909,282	11,292,333	94.82	322,057	11,614,390	97.52	861,868	7.24
2016	12,458,556	11,808,325	94.78	325,733	12,134,058	97.40	899,876	7.22

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# Fire District 3

## Administration Department



**2017/18 Fiscal Year Budget**

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# Administration Department

2017/18 Fiscal Year

## DEPARTMENT DESCRIPTION

The Administration Department includes the functions of the Fire Chief, general administrative services, personnel and human resource management, and finance. The Fire Chief serves as the Chief Executive Officer and provides direction, supervision, coordination, and general support to the District's overall operations.

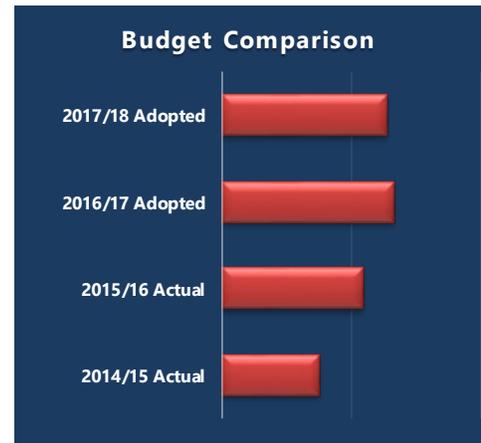
Administration supports the District in the achievement of its mission and vision by overseeing areas pertaining to strategic planning, policy development, staffing and personnel management, risk management, labor relations, and Civil Service. In addition support is provided to the District's Board of Directors, Budget Committee members, and Civil Service Commissioners. The Board of Directors are elected positions serving four year terms and are required to live within the District. The Budget Committee members are appointed by the Board and serve three year terms. Civil Service Commissioners serve four year terms and are also appointed by the Board.

Finance provides financial accounting, budgeting, and reporting services for the District along with cash management and investments, fixed asset management, contract management, and strategic financial forecasting. Finance monitors all department budget activity and more importantly, assures compliance with Oregon Local Budget Law.

The Administration Department works very closely with the other departments to provide human resource support and legal, fiscal, and labor contract compliance.

## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Personnel Services	\$562,627.84	\$541,536.21	\$565,300	\$583,200
Materials and Services	\$185,089.37	\$544,876.51	\$760,000	\$687,000
	<b>\$747,717.21</b>	<b>\$1,086,412.72</b>	<b>\$1,325,300</b>	<b>\$1,270,200</b>



## PERSONNEL SUMMARY

Position	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Fire Chief	1.00	1.00	1.00	1.00
Chief Finance Officer	1.00	1.00	1.00	1.00
Finance Assistant	1.00	1.00	1.00	1.00
Executive Assistant	1.00	1.00	1.00	1.00
Public Information Officer	0.15	0.00	0.00	0.00
<b>Total</b>	<b>4.15</b>	<b>4.00</b>	<b>4.00</b>	<b>4.00</b>

# Administration Department

2017/18 Fiscal Year

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services will increase by 3.17 percent or \$17,900 from the prior fiscal year. Factors impacting this classification include salary and benefit adjustments, specifically an increase in pension costs and a decrease in the budgeted amount for health benefits. No position changes are being recommended to this Department.

The overall Materials and Services classification will decrease 9.61 percent or \$73,000. The significant factor is a decrease in account *60270-000; Contractual Services*. The prior year recognized costs towards architectural design for the Rogue Community College fire science building/classroom project and an engineering study for the station seismic upgrades and future fire station conceptual design work. The current budget has some monies still allocated for these projects but not to the same degree. This account also includes the 911 dispatch contract which is experiencing a 3.63 percent increase.

## **PRIOR YEAR ACCOMPLISHMENTS**

<b><u>Action Item</u></b>	<b><u>Strategic Priority Number</u></b>	<b><u>Outcome</u></b>
Grant Opportunities	1	Attained a grant through Jackson County Title 3 Funds for the promotion of Firewise communities and the mitigation of hazardous vegetation in those designated areas. Attained donations from the West Family Foundation and the Darby Heart Fund to promote the HeartMap Challenge in identifying automatic external defibrillators (AED's) throughout the community.
Financial Forecasting	2	Completed long-term financial forecasting adjusting for the slight economic improvement; developed modest growth trends for future budget years as a result. Revised capital replacement plan that remains adequately funded.
Employee Performance Management Program	3	Continued to embrace the development of the employee performance management program which encourages consistent feedback and reinforces personal and professional development. The program is a self-evaluation process initiated by the employee instead of a rating system driven by the supervisor. Continued to provide professional training to all personnel. Gave lecture on subject matter at the Special District's annual conference.
GFOA Recognition	3	The District received the Distinguished Budget Award and Certificate of Excellence in Financial Reporting.
Employee Assistance Program	3	Developed an expansion and enhancement for the Employee Assistance Program (EAP) by retaining on contract a counselor who is experienced with assisting emergency responders; work is continuing to provide training and awareness of PTSD.
Hiring and Promotional Processes	3	Administered a Civil Service firefighter entry exam with a successful certified register of 29 candidates; administered a promotional captain's exam with a successful certified register of six internal candidates; administered a Fire Chief recruitment process.

# Administration Department

2017/18 Fiscal Year

## DEPARTMENT MEASUREMENTS AND TARGETS

<i>Types of Transactions (Output Measures)</i>	<i>2013/14 Actual</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Projected</i>
<i>Accounts Payable Transactions</i>	1,926	2,056	2,120	2,231	2,300
<i>Payroll Disbursements (includes ACH)</i>	1,795	1,801	1,875	1,885	2,000
<i>Purchase Orders Issued</i>	1,305	1,255	1,300	1,423	1,500
<i>Cash Receipts Processed</i>	165	167	175	180	200

<i>Effectiveness Measures</i>	<i>2013/14 Actual</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Projected</i>
<i>Award for Distinguished Budget</i>					
<i>Award for Excellence in Financial Reporting</i>					

### Service Measures and Desired Outcomes

- Manage the District's finances and provide consistent and sound financial reports.  
Measured By: Continued monthly financial reporting to the Board of Directors and District personnel; reports easily available for review; financial analysis and reporting provided in the semi and annual performance reports.
- Ensure overall expenditure growth does not exceed primary operating revenue.  
Measured By: Continued budgeting of 24 percent of operating revenue to be set aside as unappropriated ending fund balance; percent of operating expenditures to operating revenue remains below 100 percent. Personnel Services remains below maximum threshold of 80 percent of operating revenue.
- Ensure contingency levels are in compliance with financial policy.  
Measured By: Continued budgeting of no less than six percent of annual operating revenue into contingency; during budget years of lower assessed valuation growth, increase levels to nine percent.
- Continue to prepare award winning budget documents and comprehensive annual financial reports.  
Measured By: Continued receipt of GFOA Distinguished Budget Award and Excellence in Financial Reporting for the CAFR.

# Administration Department

2017/18 Fiscal Year

<i>Effectiveness Measures</i>	<i>2013/14 Actual</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Target</i>
<b>Financial Reporting</b> <i>Provide accurate financial reports on a monthly basis at Board Meetings</i>	100%	100%	100%	100%	100%
<b>Sound Audit Findings</b> <i>Number of audit findings</i>	None	None	None	None	None
<b>Investing</b> <i>Invest District surplus funds in secure holdings at all times</i>	100% in LGIP				
<b>Workers' Compensation</b> <i>Encourage safe work practices to maintain an "Experience Modifier" of below 1.0</i>	.86	.79	.86	.79	.80

## **2017/18 FISCAL YEAR DEPARTMENTAL ACTION ITEMS**

The following action items are assigned to the Administration Department and link back to one of the five organizational strategic priorities as identified within the adopted Strategic Plan. Each action item has a desired completion date identified. Detailed tasks for each action item have been developed to ultimately attain the desired outcomes and support the District in achieving its mission.

Only the overarching Strategic Priorities that encompass the identified departmental action items are reflected within the departmental sections. All the Strategic Priorities and action items are represented in their entirety under tab three of the budget document. The action item number represents the departmental number assigned to it.

The District is in the last year of our three year Strategic Plan and most of the objectives identified in that plan have been completed. Of those still in progress are as follows:

### **Strategic Priority 5 – Develop and strengthen collaborative strategic partnerships.**

<b>Action Item Number</b>	<b>Action Items Assigned to the Administration Department</b>	<b>Target Completion Date</b>
1.9	Work collaboratively with Jackson County EMS responders to review options for a physician supervisor prior to the retirement of Dr. Rostykus.  <b>Progress Report</b> – <i>The District, in collaboration with Ashland Fire and Rescue and Medford Fire-Rescue, has drafted a request for proposal for a countywide EMS supervising physician. With Mercy Flights pulling out of the existing contract, the new supervising physician contract will only oversee local fire agencies. The goal is to have a contract secured by the end of 2017.</i>	December 2017

#### **In addition to action item 1.9, the Administration will also be focusing on the following:**

- Embracing new change in leadership with the hiring of our new Fire Chief.
- Continued enhancement and development towards the Employee Assistance Program.
- Continued development with performance management program.
- Administering a community based strategic planning process with the development of a new three year plan.
- Continued analysis of workflow efficiencies, processes, and functions.

# Administration Department

2017/18 Fiscal Year

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	387,053.89	349,487.54	354,000	355,000	359,000	361,000
Overtime	1,993.41	0.00	500	500	500	500
Incentives	22,655.20	26,790.20	27,100	28,500	28,600	29,000
Retirement (PERS)	40,553.28	43,234.63	45,000	53,800	54,400	54,400
Unemployment Insurance	524.00	0.00	100	100	100	100
ER Deferred Comp Contrib	10,946.00	14,062.00	16,300	15,000	15,000	23,400
Health and Life Insurance	52,480.34	69,156.38	73,000	67,200	67,200	67,200
HRA-VEBA Contribution	14,046.44	9,218.88	15,400	15,600	15,600	15,600
FICA and Medicare PR Taxes	28,648.19	25,583.19	29,200	29,400	29,400	30,000
Workers' Comp Insurance	3,727.09	4,003.39	4,700	2,000	2,000	2,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$562,627.84</b>	<b>\$541,536.21</b>	<b>\$565,300</b>	<b>\$567,100</b>	<b>\$571,800</b>	<b>\$583,200</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	565.00	565.00	700	1,000	1,000	1,000
Uniforms	324.00	0.00	0	0	0	0
Printing	1,968.00	3,949.17	2,500	3,000	3,000	3,000
Supplies; Office	7,940.49	7,719.90	10,000	10,000	10,000	10,000
Supplies; Administrative	28,037.93	17,593.18	32,000	28,000	28,000	28,000
Supplies; Fees	9,675.88	6,868.34	11,500	9,000	9,000	9,000
Contractual/Professional Services	49,781.71	415,150.22	598,200	531,000	531,000	531,000
Property and Casualty Insurance	72,292.46	71,794.50	76,000	76,000	76,000	76,000
Mileage Reimbursements	793.91	514.64	2,000	2,000	2,000	2,000
Membership Dues	5,644.00	5,824.00	8,500	8,400	8,400	8,400
Books and Subscriptions	1,885.74	2,028.59	1,500	1,500	1,500	1,500
Advertising	2,747.89	2,532.57	6,500	6,500	6,500	6,500
Hiring Processes, CS, Backgrounds	0.00	7,285.12	7,000	7,000	7,000	7,000
Postage and Shipping	3,432.36	3,051.28	3,500	3,500	3,500	3,500
Interest on Bank Loan	0.00	0.00	100	100	100	100
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$185,089.37</b>	<b>\$544,876.51</b>	<b>\$760,000</b>	<b>\$687,000</b>	<b>\$687,000</b>	<b>\$687,000</b>
<b>TOTAL ADMINISTRATION</b>	<b>\$747,717.21</b>	<b>\$1,086,412.72</b>	<b>\$1,325,300</b>	<b>\$1,254,100</b>	<b>\$1,258,800</b>	<b>\$1,270,200</b>

# Administration Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 1

Account	Description	Account Total
58203-000	<b>Physicals and Vaccinations</b> .....	\$ 1,000
60220-000	<b>Printing</b> ..... General administrative printing by outside sources including business cards, budget document, strategic plan, and annual performance report	\$ 3,000
60222-000	<b>Supplies; Office</b> .....	\$ 10,000
60223-001	<b>Supplies; Administrative</b> ..... General administrative supplies and board expenses 10,000 Years of service awards and annual banquet 10,000 District historical preservation and display 3,000 Miscellaneous office furnishings and equipment 5,000	\$ 28,000
60223-002	<b>Supplies; Fees</b> ..... Expenses related to banking fees, employee benefits administrator fees, State of Oregon purchasing agreement, Oregon Ethics commission, ODOT land use fee, and other miscellaneous fees as required	\$ 9,000
60270-000	<b>Contractual/Professional Services</b> ..... 911 dispatch services contract 400,000 General legal counsel 35,000 Financial audit and filing expenses 10,000 Lobbyist 12,000 EMS physician supervisor contract 14,000 Employee assistance program through CenterPoint Services 27,000 Accela (financial software) annual support contract 8,000 PROJECT: New fire station engineering/architectural work for RFP 25,000	\$ 531,000
60370-000	<b>Property and Casualty Insurance</b> .....	\$ 76,000
60380-001	<b>Mileage Reimbursements</b> .....	\$ 2,000
60410-000	<b>Membership Dues</b> ..... Membership dues to organizations such as Special Districts Association, Rogue Valley Fire Chief's, Oregon Fire Chief's Association, International Association of Fire Chief's, Government Finance Officers Assn, Oregon Municipal Finance Officers, and Oregon Fire Service Museum	\$ 8,400

# Administration Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued*

General Fund 1, Department 1

<u>Account</u>	<u>Description</u>	<u>Account Total</u>
60412-000	Books and Subscriptions.....	\$ 1,500
60430-001	Advertising.....	\$ 6,500
60490-000	Hiring Processes, Civil Service, Backgrounds..... Includes entry level hiring processes and promotional exams, expenses for Civil Service meetings, and all expenses related to pre-employment background evaluations	\$ 7,000
60491-000	Postage and Shipping.....	\$ 3,500
62100-000	Interest on Bank Loan.....	\$ 100
	<b>TOTAL MATERIALS AND SERVICES</b>	<b><u>\$ 687,000</u></b>

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# Fire District 3

## Operations Department



**2017/18 Fiscal Year Budget**

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# Operations Department

2017/18 Fiscal Year

## **DEPARTMENT DESCRIPTION**

The mission of the Operations Department is to protect life and property through emergency response services. The Operations Department strives to achieve this mission through the efficient and effective delivery of four core disciplines:

1. Fire Suppression
2. Pre-Hospital Emergency Medical Service (Basic and Advanced Life Support)
3. Technical Rescue (High/Low Angle Rope, Swift Water, Extrication)
4. Hazardous Material

Attention is focused on attaining a high level of response and performance reliability and the recruitment and retention of a dedicated force of emergency response professionals. In addition the Department maintains up to date policies and procedures, coordinates with the Training Department for robust programs, develops meaningful performance standards, and encourages participation with the professional development plan.

The District operates eight fire stations. Four stations are staffed 24/7 with career personnel and four stations rely upon volunteer, student firefighters, and/or resident personnel for response. Seven of the eight fire stations are assigned a geographical area that defines its initial response area; this area is called a Fire Management Zone (FMZ). Each fire station provides the initial response to the FMZ it serves and is supported by the entire District and partner agencies during major emergencies. The Table Rock station is a temporary location and does not have an independent FMZ. Response from this location augments the Central Point and White City FMZ's.

### **White City**

Initial response to this FMZ is provided by one staffed career engine company and student firefighters from the White City station located at 8333 Agate Road in White City. The Battalion Chief is also stationed here. There were 1,803 requests for service in the White City area in 2016.



### **Central Point**

Initial response to this FMZ is provided by one staffed career engine company and student firefighters from the Central Point station located at 600 South Front Street. There were 2,736 requests for service in the Central Point area in 2016.



### **Eagle Point**

Initial response to this FMZ is provided by one staffed career engine company and student firefighters from the Eagle Point station located at 213 Loto Street. There were 1,341 requests for service in the Eagle Point area in 2016.



### **Table Rock**

Response is provided by one staffed career engine company from the Table Rock station located at 5159 Table Rock Road.



# Operations Department

2017/18 Fiscal Year

## Dodge Bridge

Initial response to this FMZ is provided by volunteers and volunteer resident personnel from the Dodge Bridge station located at 60 Rogue River Drive and career personnel from White City and/or Eagle Point stations. There were 167 requests for service in the Dodge Bridge area in 2016.



## Gold Hill

Initial response to this FMZ is provided by volunteers and volunteer resident personnel from the Gold Hill station located at 299 Access Road and career personnel from the Central Point station. There were 393 requests for service in the Gold Hill area in 2016.



## Sams Valley

Response to this FMZ is provided by volunteers and volunteer resident personnel from the Sams Valley station located at 3333 Tresham Lane, and career personnel from White City, Eagle Point and/or Central Point stations. There were 233 requests for service in the Sams Valley area in 2016.



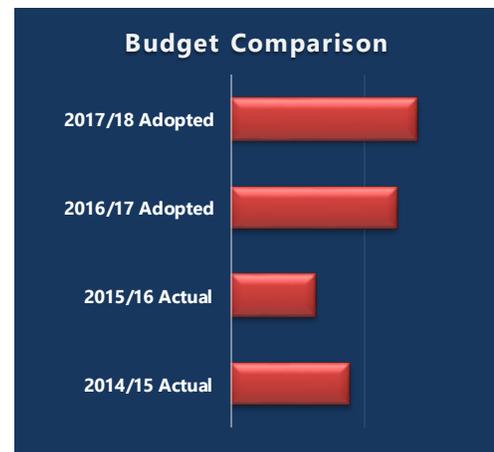
## Agate Lake

Response to this FMZ is provided by volunteers and volunteer resident personnel from the Agate Lake station located at 880 East Antelope Road and career personnel from White City and/or Eagle Point stations. There were 61 requests for service in the Agate Lake area in 2016.



## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Personnel Services	\$7,079,944.42	\$7,394,120.61	\$7,975,800	\$8,131,200
Materials and Services	\$809,208.32	\$233,245.11	\$257,800	\$261,000
	<b>\$7,889,152.74</b>	<b>\$7,627,365.72</b>	<b>\$8,233,600</b>	<b>\$8,392,200</b>



# Operations Department

2017/18 Fiscal Year

## PERSONNEL SUMMARY

Position	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Deputy Chief of Operations	1.00	1.00	1.00	1.00
Chief of Rural Communities	1.00	1.00	.50	0.00
Staff Assistant	1.00	1.00	1.00	1.00
Battalion Chief – 56 Hour	3.00	3.00	3.00	3.00
Battalion Chief – 40 Hour	0.00	0.00	1.00	0.00
Fire Captains ( <i>Represented Positions</i> )	12.00	12.00	12.00	12.00
Fire Engineers ( <i>Represented Positions</i> )	12.00	12.00	12.00	12.00
Firefighters ( <i>Represented Positions</i> )	18.00	20.00	20.00	20.00
<b>Total</b>	<b>48.00</b>	<b>50.00</b>	<b>50.50</b>	<b>49.00</b>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services will increase 1.95 percent or \$155,400 from the prior fiscal year. Factors impacting this classification include salary and benefit adjustments. In the prior year the District budgeted for a new 40-hour Battalion Chief but ended up not filling the position after an unsuccessful recruitment process. At that time, the District felt it would be best to re-evaluate the intent of the position and determine if there were other solutions available to address the areas of responsibility originally planned for it. As budget planning ensued for the 2017/18 fiscal year, and with other leadership changes having occurred over the past year, the District subsequently prepared the ensuing budget without fully funding the position. Instead the District will continue to evaluate the level of needs originally identified for it and collaborate with new leadership on innovative ideas that might address different levels of responsibility. Salary and benefits have been reduced as a result of not funding this position by \$159,600. Also contributing to the adjustments is a \$77,000 reduction that was budgeted in the prior year for a six month staffing overlap with the Chief of Rural Communities position, who retired from service. As a result of these changes, the budgeted amount for health insurance decreased, although rates increased three percent. The dominant cost increase impacting the personnel services classification is pension costs; specifically a budget increase of \$262,000 across this department.

The overall Materials and Services classification will increase 1.24 percent or \$3,200. Some of the notable projects include reconfiguring the aerial ladder tip with LED lighting, increasing safety equipment and purchasing ladder truck belts, purchasing extrication equipment, and increasing the amount for maintenance and repair of fire suppression equipment.

# Operations Department

2017/18 Fiscal Year

## **PRIOR YEAR ACCOMPLISHMENTS**

<b><u>Action Item</u></b>	<b><u>Strategic Priority Number</u></b>	<b><u>Outcome</u></b>
Future Station Location	1	Analyzed the Central Point response area and the effectiveness of the second engine company responding within the Central Point area. Recommendation to the Board prior to the end of the 2016/17 fiscal year.
Radio Infrastructure	2	Developed a plan in collaboration with ECSO and Federal Engineering to correct deficiencies in radio communications within the District.
Fleet Specifications	2	Assessed existing engine specifications and established a revised specification for the purchase of two new engines for the 2017/18 fiscal year.
Disaster Plan	2	Developed a District Disaster Plan and provided training. Recommendation to the Board for adoption prior to the end of the 2016/17 fiscal year.
Collaborative Partnerships	5	Distributed Fire Rescue Standing Orders to Jacksonville Fire. Provided initial training with crews.
Collaborative Partnerships	5	Developed additional cooperation, collaboration, and consistency with Oregon Department of Forestry during the 2016 fire season.
Standardization of Performance	3	Implemented the Fire Rescue Standing Orders in conjunction with Medford Fire-Rescue. Implemented three of five phases; phase four and five are currently in review and training.

## **DEPARTMENT MEASUREMENTS AND TARGETS**

### **EMERGENCY RESPONSE TARGETS**

Emergency response targets are used to establish District-wide response time goals which are used to measure how effectively resources are deployed towards mitigating emergent incidents in the urban, suburban, and rural areas of the District. Objective factors such as population density, target hazards, community risk assessment, staffed versus unstaffed fire stations, station response reliability, road infra-structure, travel distance, and other criteria are taken into consideration when developing emergency response targets.

# Operations Department

2017/18 Fiscal Year

## Incidents are classified using the following criteria:

**Fire:** All calls concerned with actual burning or explosions. This category includes fires in buildings and vehicles as well as brush fires, refuse fires and fires in spilled fuel.

**Code 1 Emergent Medical:** An incident where seconds will not significantly impact the outcome of the call. Crews will normally respond "Code 1" to these calls.

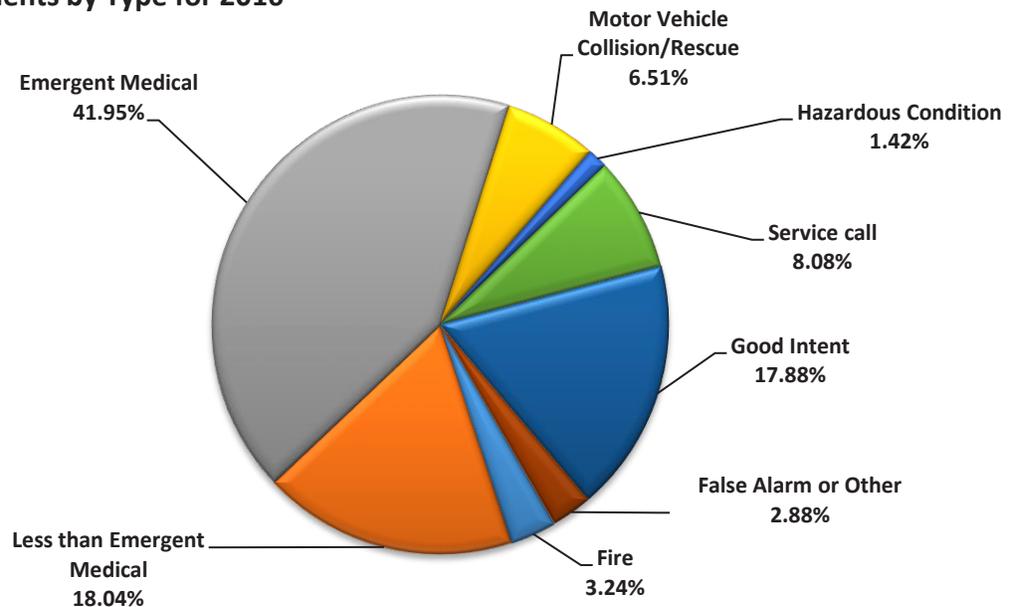
**Code 3 Emergent Medical:** This type of call is one where timeliness of the medical intervention has an impact on the positive outcome of the patient. Some examples of this type of call are chest pain, cardiac arrest, stroke, and difficulty breathing. Crews normally respond "Code 3" (lights and sirens) to these calls.

**Motor Vehicle Collision/Rescue:** Any motor vehicle collision or calls related to removing people from dangerous situations including extrication from crushed vehicles or machinery, removal from the water or ice, and searching for lost persons.

**Hazardous Condition/Hazardous Materials:** Any call involving hazardous materials or a reported hazardous condition that requires involvement of a fire crew. This type of call can range from single engine responses to a carbon monoxide alarm or multi-jurisdictional hazardous chemical releases.

**Service Call:** Any call for assistance that does not involve a medical emergency, hazardous condition or fire. An example could be a malfunctioning sprinkler system or some type of water flow where fire crews assist in water removal.

**Incidents by Type for 2016**



# Operations Department

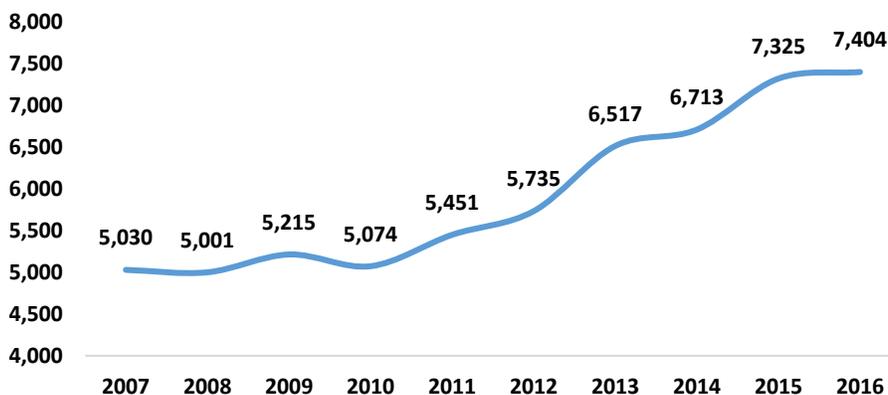
2017/18 Fiscal Year

<i>Types of Emergent Incidents (Outputs)</i>	<i>2013 Actual</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Target</i>
<i>Code 1 Emergent Medical</i>	1,295	1,1785	1,199	1,336	1,422
<i>Code 3 Emergent Medical</i>	2,685	2,950	3,297	3,106	3,305
<i>Motor Vehicle Collision</i>	370	338	413	482	513
<i>Hazardous Condition</i>	84	75	122	105	112
<i>Service Call</i>	459	496	548	598	636
<i>Fire</i>	237	225	235	240	255
<i>False Alarm / Other</i>	231	191	221	213	2,272
<i>Good Intent</i>	1,156	1,260	1,290	1,324	1,409
<b>Total</b>	<b>6,517</b>	<b>6,713</b>	<b>7,325</b>	<b>7,404</b>	<b>7,879</b>

Target based on annual growth average of 6.41%

The following graph displays the total incident responses over the last ten calendar years. These responses include all types of incidents where our citizens call 911 for help.

**Incidents over the last 10 calendar years**



Incident statistics are evaluated in the Standards of Cover and integrated into the strategic planning process. Critical decisions, such as whether or not to increase firefighter staffing or where to build future fire stations, are two examples of how the District uses trends relating to increases in incident activity to plan for future growth and development. The number of incidents have been increasing on average 6.41 percent per year over the past five years.

The following displays where emergency incidents have occurred over the past four years based on response area. Central Point, Eagle Point, and White City respond with career engine companies and the other locations with volunteer engine companies, although the career companies may respond anywhere in the District based on call activity and strategic positioning of their engines.

# Operations Department

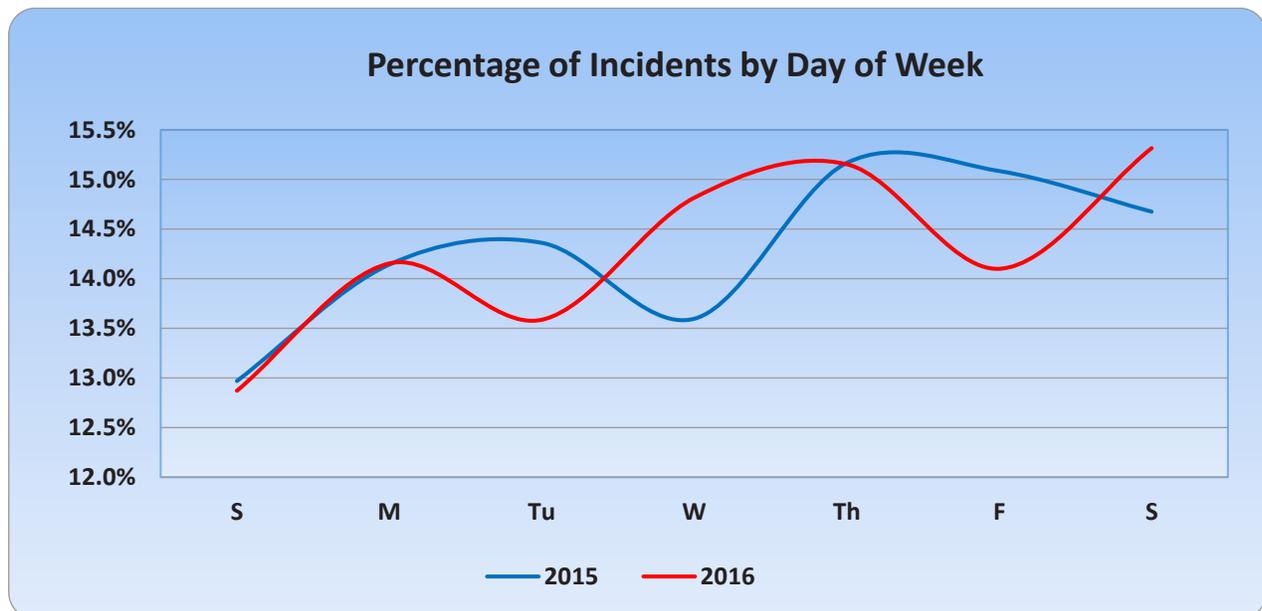
2017/18 Fiscal Year

<i>Number of Incidents by Response Area (Outputs)</i>	<i>2013 Actual</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 YTD</i>
<i>Agate Lake</i>	30	51	55	61	10
<i>Central Point</i>	2,367	2,492	2,825	2,736	726
<i>Dodge Bridge</i>	133	132	154	167	40
<i>Eagle Point</i>	1,199	1,212	1,268	1,341	363
<i>Gold Hill</i>	372	382	334	393	112
<i>Sams Valley</i>	249	224	238	233	42
<i>White City</i>	1,654	1,643	1,741	1,803	426
<i>Mutual Aid Calls</i>	513	577	710	670	179
<b>Total</b>	<b>6,517</b>	<b>6,713</b>	<b>7,325</b>	<b>7,404</b>	<b>1,898</b>

Target based on annual growth average of 6.41%

## When Responses Occur

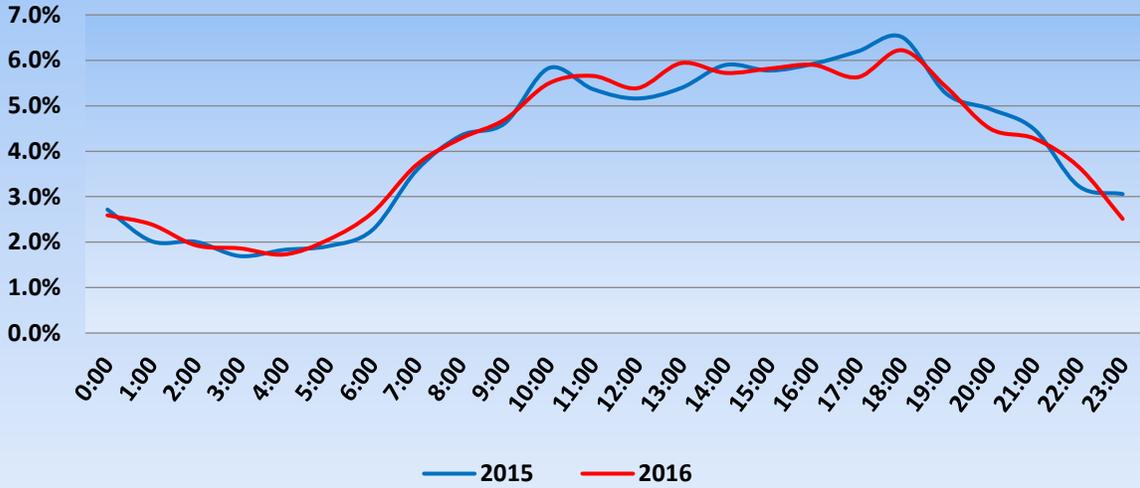
Incident responses are tracked and measured by the month, day, and the time of day. This data is expressed in percentages to allow for a comparison between the two most recent years. This information assists the District in preparing for service demands and in planning for non-emergent activities such as training, building target hazard familiarization, and maintenance.



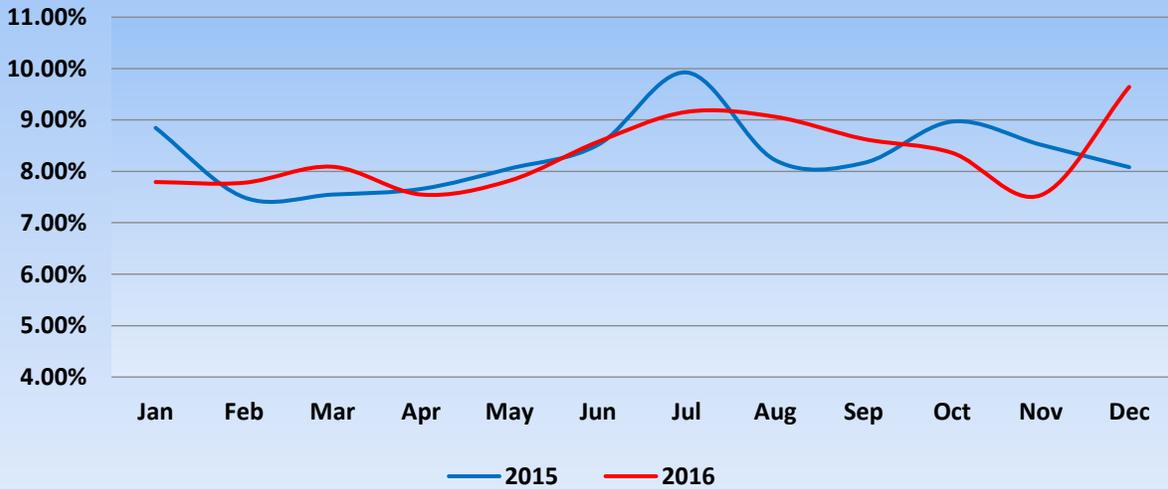
# Operations Department

2017/18 Fiscal Year

### Percentage of Incidents by Time of Day



### Percentage of Incidents by Month



# Operations Department

2017/18 Fiscal Year

## Response Times

Response times are tracked and measured for emergent calls in the urban, suburban, and rural zones that have been established within the District. Each zone has a goal or target to attain arrival on scene 80 percent of the designated time. In addition, each zone has a baseline measurement as identified. The community should expect this baseline as the minimum response time.

Response time is calculated from the moment the crew is notified to their arrival on scene. Emergent calls are those calls that require a "Code 3" response. The engine company captain makes the determination to respond "Code 3" or "Code 1" based on the information provided by the informant, which is relayed by a dispatcher. Those calls that fit the criteria for a "Code 3" response are used to evaluate the response times for the District.

<b>Urban</b> Population greater than 1,000 people per square mile and special risk occupancies	
Total Incidents: 4,736	Code 3 Incidents: 1,402
<b>GOAL:</b> 80% of Incidents within 7 minutes	<b>Actual: 84.17%</b> 
<b>BASELINE:</b> 90% of Incidents within 10 minutes	<b>Actual: 97.57%</b> 
80 <sup>th</sup> Percentile Response	<b>6:45</b>

The District is meeting the goal and the baseline standard in the urban area by responding to 80 percent of the incidents within 7 minutes and 90 percent of the incidents within 10 minutes. 2016 saw an improvement from 2015 where the goal of 80 percent was not achieved.

<b>Suburban</b> Population between 500 and 1,000 people per square mile	
Total Incidents: 416	Code 3 Incidents: 142
<b>GOAL:</b> 80% of Incidents within 11 minutes	<b>Actual: 71.83%</b> 
<b>BASELINE:</b> 90% of Incidents within 13 minutes	<b>Actual: 76.76%</b> 
80 <sup>th</sup> Percentile Response	<b>14:01</b>

Improving response times in the suburban Gold Hill area was identified as a critical action item for 2016. Although the District did improve the response times from 2015, the District did not accomplish its adopted response time goal for the suburban areas in 2016. This is largely influenced by the lack of consistent volunteer resident staffing at the Gold Hill station and the distance to that area from the Central Point station, where personnel are staffed 24/7. The District strives to maintain four resident volunteers at this station and was only able to consistently maintain one. Response times in the suburban area remains a critical action item for the District with recruitment and retention of residents for the Gold Hill station a priority task.

# Operations Department

2017/18 Fiscal Year

<b>Rural</b> Population less than 500 people per square mile	
Total Incidents: 1,584	Code 3 Incidents: 600
<b>GOAL:</b> 80% of Incidents within 13 minutes	<b>Actual: 84.00%</b> 
<b>BASELINE:</b> 75% of Incidents within 14 minutes	<b>Actual: 88.33%</b> 
80 <sup>th</sup> Percentile Response	<b>12:13</b>

The District is meeting the goal and the baseline standard in the rural area by responding to 80 percent of the incidents within 13 minutes and 75 percent of the incidents within 14 minutes. The inclusion of manufactured homes for resident volunteers has significantly improved the response times in the rural areas.

## 2017/18 FISCAL YEAR DEPARTMENTAL ACTION ITEMS

The following action items are assigned to the Operations Department and link back to one of the five organizational strategic priorities as identified within the adopted Strategic Plan. Each action item has a desired completion date identified. Detailed tasks for each action item have been developed to ultimately attain the desired outcomes and support the District in achieving its mission.

Only the overarching Strategic Priorities that encompass the identified departmental action items are reflected within the departmental sections. All the Strategic Priorities and action items are represented in their entirety under tab three of the budget document. The action item number represents the departmental number assigned to it.

The District is in the last year of our three year Strategic Plan and most of the objectives identified in that plan have been completed. Of those that are still in progress are as follows:

### **Strategic Priority 1 – Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.**

Action Item Number	Action Items Assigned to Operations Department	Target Completion Date
4.8	Improve call processing and turn-out times to meet the standards adopted by the District.	December 2017
4.12	Enhance the EMS program to ensure a highly adept level of service with methods in place to measure outcomes.	December 2017

# Operations Department

2017/18 Fiscal Year

## Strategic Priority 2 – Ensure sustainability of service delivery (people, facilities, fleet, and finance).

Action Item Number	Action Items Assigned to Operations Department	Target Completion Date
4.15	Develop a continuity of service plan for the District in the event of a natural disaster.	December 2017

## Strategic Priority 3 – Promote, develop, and support craftsmanship, innovation, and excellence throughout the organization.

Action Item Number	Action Items Assigned to Operations Department	Target Completion Date
4.2	Define and update the fire pre-plan program of commercial and industrial business within the District.	December 2017

## Strategic Priority 5 – Develop and strengthen collaborative strategic partnerships.

Action Item Number	Action Items Assigned to Operations Department	Target Completion Date
4.5	Elevate the level of cooperation, coordination, and rapport with Mercy Flights which is measured through feedback from District personnel.	December 2017
4.7	Establish a regional methodology for incident management and uniform performance to be delivered to crews.	December 2017
4.14	Capitalize on opportunities that strengthen interoperability and communications with Jacksonville and Rogue River which is measured through feedback from all agencies.	December 2017



# Operations Department

2017/18 Fiscal Year

## Expenditures by Account

General Fund	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
	Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee
<b>Personnel Services</b>						
Salaries	3,981,098.78	4,218,624.88	4,348,600	4,253,000	4,255,000	4,255,000
Overtime	592,375.15	394,889.12	525,000	549,000	574,000	574,000
Incentives	504,891.00	559,330.93	565,900	574,700	574,700	574,700
Retirement (PERS)	525,747.88	607,025.20	658,000	915,800	920,000	920,000
ER Deferred Comp Contrib	11,046.32	83,037.15	95,700	99,000	99,000	99,000
Health and Life Insurance	803,763.75	901,563.23	1,025,000	935,000	935,000	935,000
HRA-VEBA Contribution	175,591.67	114,099.09	192,000	195,000	195,000	195,000
FICA and Medicare PR Taxes	366,761.46	377,543.85	415,600	412,000	414,000	414,000
Workers' Comp Insurance	118,668.43	138,007.16	150,000	164,500	164,500	164,500
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$7,079,944.44</b>	<b>\$7,394,120.61</b>	<b>\$7,975,800</b>	<b>\$8,098,000</b>	<b>\$8,131,200</b>	<b>\$8,131,200</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	24,664.00	15,715.00	18,000	18,000	18,000	18,000
Uniforms	11,304.00	0.00	0	0	0	0
Janitorial and Laundry Services	21,245.46	0.00	0	0	0	0
Supplies; Fees	6,934.50	674.60	4,000	4,000	4,000	4,000
Supplies; Medical	31,489.08	0.00	0	0	0	0
Supplies; Operations	497.94	3,624.46	2,500	3,000	3,000	3,000
Supplies; Station	5,119.87	0.00	0	0	0	0
Supplies; Special Projects	371.77	193.99	6,000	7,000	7,000	7,000
Fire Suppression						
Personal Protective Equipment	40,114.03	51,614.69	68,500	50,300	50,300	50,300
Hose and Appliances	40,263.16	52,477.99	12,000	15,000	15,000	15,000
Apparatus Equipment and Supplies	21,854.09	12,179.95	20,000	22,000	22,000	22,000
Safety Equipment	35,068.18	18,921.72	10,500	14,000	14,000	14,000
Technical Apparatus Equipment	1,913.00	9,349.59	12,000	11,800	11,800	11,800
Technical Rescue Equipment	10,171.32	2,281.00	6,000	8,700	8,700	8,700
Rehabilitation and Consumables	3,068.47	5,885.17	6,000	6,000	6,000	6,000
Equipment for New Apparatus	5,616.15	870.00	25,000	35,000	35,000	35,000
M&R; Emergency Response Equip	29,800.08	22,515.62	34,700	40,000	40,000	40,000
Contractual/Professional Services	393,830.82	34,500.70	30,500	24,000	24,000	24,000
Membership Dues	360.00	475.00	700	700	700	700
Books and Subscriptions	1,133.77	1,965.63	1,400	1,500	1,500	1,500
Utilities; WC	24,994.52	0.00	0	0	0	0
Utilities; CP	17,975.67	0.00	0	0	0	0
Utilities; DB	4,124.31	0.00	0	0	0	0
Utilities; SV	5,267.49	0.00	0	0	0	0
Utilities; GH	9,673.55	0.00	0	0	0	0
Utilities; AL	3,969.22	0.00	0	0	0	0
Utilities; EP	14,773.91	0.00	0	0	0	0
Utilities; TR	366.30	0.00	0	0	0	0
Utilities; TC	9,610.54	0.00	0	0	0	0
Utilities; Adm Bldg	33,633.12	0.00	0	0	0	0
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$809,208.32</b>	<b>\$233,245.11</b>	<b>\$257,800</b>	<b>\$261,000</b>	<b>\$261,000</b>	<b>\$261,000</b>
<b>TOTAL OPERATIONS</b>	<b>\$7,889,152.76</b>	<b>\$7,627,365.72</b>	<b>\$8,233,600</b>	<b>\$8,359,000</b>	<b>\$8,392,200</b>	<b>\$8,392,200</b>

# Operations Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 2

Account	Description	Account Total
58203-000	<b>Physicals and Vaccinations.....</b>	\$ 18,000
<b>60223</b>	<b><u>Supplies</u></b>	
60223-002	<b>Fees.....</b> Oregon ambulance licensing fees, CLIA, DEA, FCC, Motorola license, drone registration	\$ 4,000
60223-007	<b>Operations.....</b> Purchase of operational supplies, meeting refreshments	\$ 3,000
60224-000	<b>Special Projects.....</b> Standby Events Emergency preparedness Pre-fire plans	\$ 7,000 3,000 3,000 1,000
<b>60225</b>	<b><u>Fire Suppression Expenses</u></b>	
60225-001	<b>Personal Protective Equipment.....</b> Routine purchase of structural and wildland personal protective equipment Structural turnouts (4 year rotation cycle)	\$ 50,300 10,300 40,000
60225-002	<b>Hose and Appliances.....</b> Routine purchase of structural and wildland hose Routine purchase of structural and wildland nozzles and adapters	\$ 15,000 10,000 5,000
60225-003	<b>Apparatus Equipment and Supplies.....</b> Routine purchase of small tools, chainsaws and power equipment, foam, salvage and overhaul, lettering / decals, and mounting supplies Rapid Intervention Team (RIT) supplies PROJECT: 7722 ladder tip lighting	\$ 22,000 13,000 4,000 5,000
60225-004	<b>Safety Equipment.....</b> Routine purchase of safety vests, flares, cones, warning tape, flashlights, ladders, batteries, fire extinguishers, and miscellaneous equipment Self-contained breathing apparatus (SCBA) masks and annual fit testing PROJECT: Ladder truck belts	\$ 14,000 8,200 3,500 2,300
60225-005	<b>Technical Apparatus Equipment.....</b> Routine purchase of gas monitors, calibration, and testing equipment Routine purchase of extrication equipment PROJECT: Holmatro mini cutter for BC vehicle	\$ 11,800 5,200 2,400 4,200

# Operations Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued*

General Fund 1, Department 2

Account	Description	Account Total
<b>60225-006</b>	<b>Technical Rescue Equipment.....</b> Routine replacement of rescue equipment, ropes, harnesses, and swift water equipment PROJECT: Replacement life vests	\$ 8,700  6,000 2,700
<b>60225-007</b>	<b>Rehabilitation and Consumables.....</b> Purchase of incident rehabilitation supplies	\$ 6,000
<b>60225-008</b>	<b>Equipment for New Apparatus.....</b> Initial purchases to equip (2) new structural engines budgeted with nozzles, appliances, hose and related equipment. Other miscellaneous equipment needed to equip new tactical tender	\$ 35,000
<b>60254-000</b>	<b>M&amp;R; Emergency Response Equipment.....</b> Repair of medical, fire suppression, and extrication equipment (includes defibrillators, gurneys, hose, ladders, chainsaws, small tools, positive pressure ventilation (PPV) fans, extinguishers, nozzles, and appliances) SCBA equipment maintenance Extrication equipment maintenance PPE inspection and repair	\$ 40,000  7,500 7,000 6,500 19,000
<b>60270-000</b>	<b>Contractual/Professional Services.....</b> Hose and ladder testing contract Pre-plan development contract	\$ 24,000  12,000 12,000
<b>60410-000</b>	<b>Membership Dues.....</b> International Association of Fire Chief's, Oregon Fire Chief's Association, and Rogue Valley Fire Chief's Association	\$ 700
<b>60412-000</b>	<b>Books and Subscriptions.....</b> Mail Tribune newspaper and EMS Standing Order books	\$ 1,500
<b>TOTAL MATERIALS AND SERVICES</b>		<b><u>\$ 261,000</u></b>



# Fire & Life Safety Department

# Fire District 3



**2017/18 Fiscal Year Budget**

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# Fire and Life Safety Department

2017/18 Fiscal Year

## DEPARTMENT DESCRIPTION

The Fire and Life Safety team consists of the Fire Marshal, two Deputy Fire Marshals, a Fire and Life Safety Specialist, and a Support Assistant. Periodically fire suppression personnel with an interest in fire prevention will assist on the team as a cross-training opportunity to gain new skills and experience.

The most effective risk-reduction strategies are those that employ an integrated approach that utilizes a combination of prevention interventions and emergency response. President Harry S. Truman's 1947 conference on fire prevention coined the original "Three E's" of fire prevention; education, enforcement and engineering. In 2000 the National Fire Academy added the possibility of economic incentives and emphasized emergency response because of its importance to community risk reduction. Two impacts are realized when we use a broad based approach, it prevents incidents from occurring and when prevention falls short, it reduces and mitigates the impact of the incident through emergency response and fire suppression. Each of the original E's contribute to the development of realistic, reasonable, comprehensive, and effective solutions. Coupled together this produces a cooperative effect and is more effective if used individually.

The Fire and Life Safety Department puts the "Three E's" into practice in the following manner:

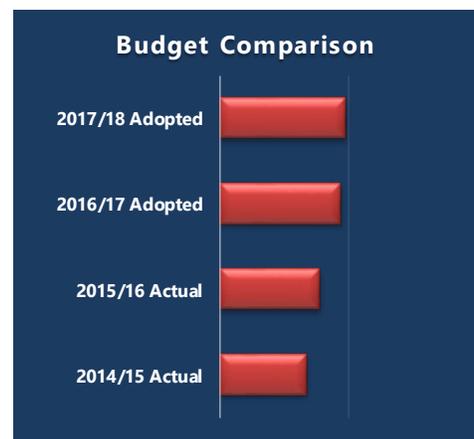
**Engineering** – We review commercial construction plans for fire code compliance, specialty fire safety systems and attend pre-application land development conferences to provide technical advice on fire service apparatus access and firefighting water supply. We strive to provide input on the design and building of structures so that they are as safe from fire as reasonably possible and conform to code requirements.

**Enforcement** – Deputy Fire Marshal's partner with inspectable occupancies and the public to help them meet the requirements imposed by State laws, fire codes and other recognized national standards. Once construction is completed, fire and life safety construction maintenance codes are enforced for the safety of citizens and firefighters. Enforcement also includes investigating all fires to determine the origin, cause and circumstances that led to ignition. We also provide on-duty investigation standby 24 hours a day, seven days a week.

**Education** – Our education programs endeavor to teach citizens of all ages how to prevent fires and what to do in the event of a fire or other emergency. Led primarily by the Fire and Life Safety Specialist, we deliver fire and life safety education to schools, businesses and industry. This education includes smoke alarm campaign programs, CPR Anytime to all seventh graders, Smokey Bear team teaching to early elementary children, civic groups and other organizations, and emergency incident public information.

## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Personnel Services	\$611,787.89	\$708,683.60	\$742,600	\$774,000
Materials and Services	\$60,815.89	\$64,807.24	\$196,200	\$207,500
	<b>\$672,603.78</b>	<b>\$773,490.84</b>	<b>\$938,800</b>	<b>\$981,500</b>



# Fire and Life Safety Department

2017/18 Fiscal Year

## PERSONNEL SUMMARY

Personnel	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Deputy Chief/Fire Marshal	1.00	1.00	1.00	1.00
Deputy Fire Marshal ( <i>Represented Positions</i> )	2.00	2.00	2.00	2.00
Fire and Life Safety Specialist ( <i>Represented Position</i> )	0.50	1.00	1.00	1.00
Staff Assistant	1.00	1.00	1.00	1.00
<b>Total</b>	<b>4.50</b>	<b>5.00</b>	<b>5.00</b>	<b>5.00</b>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services will increase 4.23 percent or \$31,400 from the prior fiscal year. Factors impacting this classification include salary and benefit adjustments, specifically an increase in pension costs. No position changes are being recommended in this Department.

The overall Materials and Services classification will increase 5.76 percent or \$11,300. The District received a Title 3 grant from Jackson County in August of 2016 to establish Firewise communities and assist homeowners with hazardous fuels reduction. This is a two year grant ending June 30, 2018. A majority of work has been completed in the 2016/17 fiscal year with the remaining project work budgeted for 2017/18. In addition to this grant, the District received a Bureau of Land Management (BLM) grant with Title 2 funds to perform hazardous fuels reduction and establish Firewise communities in another area of the District. The appropriation of these grant funds is the primary reason for the classification increase. In offset, account 60270-000; *Contractual Services* has been reduced by half to reflect changes with the frequency of the distribution of the community newsletter.

## PRIOR YEAR ACCOMPLISHMENTS

<u>Action Items</u>	<u>Strategic Priority Number</u>	<u>Outcome</u>
Fire Life Safety Inspections	1	The District's current inspectable inventory is 1,642 and is broken down as follows: 1,115 regular hazard, 300 moderate hazard, and 227 high hazard. A total of 1,202 inspections and calls for service were completed in 2016.
Fire Adaptive Communities	1	The District hosted a regional learning exchange by touring Biomass One, Long Mountain, and Firewise gardens. Grants were obtained to conduct fuels reduction; as a result two of the five Long Mountain communities became Firewise certified. A Firewise garden was created at Sams Valley Elementary and a pilot prevention program was held at Jewett Elementary in Central Point.
PulsePoint	1	Implemented the PulsePoint phone app in cooperation with other agencies in Jackson County and initiated the Jackson County HeartMap Challenge to assist in identifying AED locations.
Occupancy Binders	1	Implemented and trained wood processing agencies on the use of occupancy binders.

# Fire and Life Safety Department

2017/18 Fiscal Year

Grants	2	Obtained grants for smoke alarms, life jacket loaner stations, and hazardous fuels mitigation. Submitted grants for fire station seismic rehabilitation, State Emergency Response Commission (SERC) Local Emergency Planning Committee (LEPC) plan creation.
Public Education and Newsletter	4	An annual newsletter was published and distributed to over 22,000 District households. 174 public education activities were completed including CPR Anytime, team teaching with Smokey Bear, and special requests. The District's social media page reaches close to 10,000 residents' monthly providing prevention tips and information regarding ongoing projects in the District.
State and National Involvement	5	Maintained State level requirements to receive competency recognition and exempt jurisdiction status. DFM Northrop was involved with the State IAAI Board of Directors, FLSS Lara was active in the Fire Adapted Communities Network and Ready-Set-Go, and DC Patterson was heavily involved with legislative issues that impact the fire service and was an OFMA Board Member.

## **DEPARTMENT SERVICE MEASUREMENTS AND TARGETS**

Fire and Life Safety inspections achieve success through the direct removal of identified hazards and indirect educational and motivational effects on the people responsible for the property. Effective education and motivation tend to reduce the time required (and resistance involved) in hazard abatement. More importantly, effective education and motivation lend themselves to sharply reduce the recurrence of violations and introduce safer behaviors that will reduce fire loss and fire risk even in scenarios where no physical hazards are clearly involved. All of our efforts are focused on maximizing these educational and motivational effects.

Prevention targets identify how we measure the District's efforts related to our vision of reducing and eliminating risk in our community. Each of these targets has shown a reduction in risk in communities across the nation when performed effectively.

Annual inspection numbers for 2016 show a decrease from the previous year's totals. A number of large fire investigations pulled staff away from general inspections. The large fires include Butte Creek Mill, Mason Way, Biomass One, and Wilson Road.

### **FIRE LIFE SAFETY INSPECTIONS**

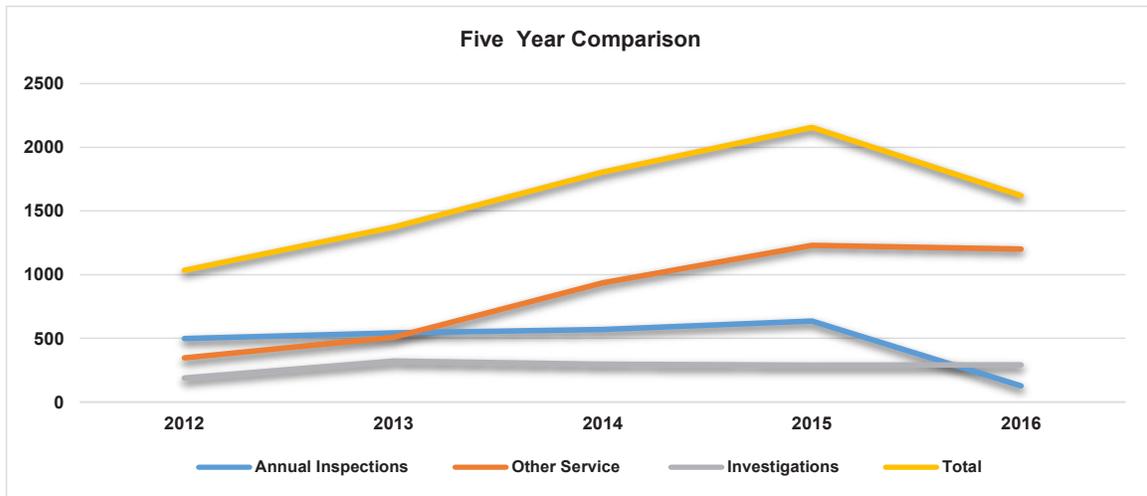
#### Statement of Measurement

- Inspect low hazard occupancies on a three year rotation.
- Inspect moderate hazard occupancies on a two year rotation.
- Inspect high hazard occupancies annually.
- Conduct re-inspections 100 percent of the time as called upon to confirm code compliance.
- Conduct inspections generated by citizen complaints or partner agency department complaints 100 percent of the time.
- Conduct home fire safety inspections when requested by citizens or partner agencies 100 percent of the time.
- Conduct wildland urban interface fuels reduction inspections when requested by citizens or partner agencies 100 percent of the time.
- Review third party inspection and testing reports for installed fire safety equipment 100 percent of the time.

# Fire and Life Safety Department

2017/18 Fiscal Year

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2013 Actual</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Target</i>
<i>Low Hazard Inspections</i>	125	143	215	40	300
<i>Moderate Hazard Inspections</i>	31	75	72	26	64
<i>High Hazard Inspections</i>	342	147	134	61	179
<i>Re-Inspections</i>	130	206	215	77	100%
<i>Consultations</i>	157	157	152	144	100%
<i>Complaints</i>	14	27	31	49	100%
<i>Construction Permits</i>	62	32	19	49	100%
<i>Home Fire Safety</i>	26	65	71	81	100%
<i>Wildland Urban Interface Fuels Reduction</i>	17	36	59	83	100%
<i>Expo and Special Events</i>	57	75	65	93	100%
<i>State Fire Marshal Referrals</i>	2	31	32	26	100%
<i>Fire Protection Systems</i>	89	216	165	127	100%
<b>Totals</b>	<b>1,052</b>	<b>1,210</b>	<b>1,230</b>	<b>856</b>	



## FIRE INVESTIGATIONS

### Statement of Measurement

- Investigate the origin, cause, and circumstance of all hostile fires that occur within the District.
- Provide Juvenile Fire Setter Intervention support services to partner agencies 100 percent of the time required.

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2013 Actual</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Target</i>
<i>Investigations Performed – FLS Staff</i>	64	52	51	52	100%
<i>Investigations Performed – Operations Staff</i>	236	225	239	241	100%
<i>Juvenile Fire Setter Intervention</i>	22	20	10	20	100%
<b>Totals</b>	<b>322</b>	<b>297</b>	<b>300</b>	<b>313</b>	

# Fire and Life Safety Department

2017/18 Fiscal Year

## PUBLIC EDUCATION AND COMMUNITY OUTREACH

### Statement of Measurement

- Make contact with 30 percent of our suburban/rural households annually with a specific public education message for our rural community.
- Produce an annual newsletter as a means to reach the community we serve.
- Provide and participate in 30 public education and community events on fire safety, injury prevention, child safety, Red Cross blood drives, and medical training.
- Participate in community focused organizations to strengthen cooperative partnerships such as Central Point Rotary, Upper Rogue Chamber of Commerce, School Board meetings, SOREDI, and others.

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2013 Actual</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Target</i>
<i>Suburban/Rural Households &amp; Newsletters</i>	15,981	22,600	22,860	22,860	25,000
<i>Public Education/Community Events</i>	70	111	166	174	150
<i>Community Outreach Events</i>	14	10	71	71	50
<i>Estimated Number of Community Contacts</i>	17,500	25,000	23,079	23,105	25,200

## DEVELOPMENT

### Statement of Measurement

- Review all new development plans within seven working days to ensure incorporation of fire safety features, firefighting water supply, and firefighter access.
- Conduct construction permit inspections 100 percent of the time when requested by City and County partners.
- Provide fire and life safety consultations 100 percent of the time when requested by citizens, community, and other governmental agencies.

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2013 Actual</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Target</i>
<i>Number of Plan Reviews</i>	41	41	36	30	100%
<i>Plan Review Turn-around Time</i>	7 Days	7 Days	5 Days	5 Days	5 Days
<i>Construction Permit Inspections</i>	62	32	19	49	100%
<i>Development Consultations</i>	157	189	152	144	100%
<b>Totals</b>	<b>260</b>	<b>262</b>	<b>207</b>	<b>223</b>	

# Fire and Life Safety Department

2017/18 Fiscal Year

## **2017/18 FISCAL YEAR DEPARTMENTAL ACTION ITEMS**

The following action items are assigned to the Fire and Life Safety Department and link back to one of the five organizational strategic priorities as identified within the adopted Strategic Plan. Each action item has a desired completion date identified. Detailed tasks for each action item have been developed to ultimately attain the desired outcomes and support the District in achieving its mission.

Only the overarching Strategic Priorities that encompass the identified departmental action items are reflected within the departmental sections. All the Strategic Priorities and action items are represented in their entirety under tab three of the budget document. The action item number represents the departmental number assigned to it.

The District is in the last year of our three year Strategic Plan and most of the objectives identified in that plan have been completed. Of those still in progress are as follows:

### **Strategic Priority 1 – Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.**

<b>Action Item Number</b>	<b>Action Items Assigned to Fire and Life Safety Department</b>	<b>Target Completion Date</b>
2.3	Explore options to improve authority for fire code enforcement throughout the planning and building process; lead a State taskforce team to accomplish this goal on a large scale.  <i><b>Progress Report</b> – Efforts continue to enhance relationship with local and state building officials. The State Taskforce team has been meeting regularly to collaborate new ideas for construction and fire code enforcement and assisting the State Fire Marshal Office in developing language for updated Oregon Administrative Rules.</i>	December 2017
2.6	Develop a community public education program.  <i><b>Progress Report</b> – A draft public education plan has been developed and will be vetted by various stakeholders to ascertain the best implementation approach.</i>	December 2017
2.8	Establish additional Firewise Communities in predetermined areas.  <i><b>Progress Report</b> – Three new Firewise communities are on target to be completed by end of year.</i>	December 2017

# Fire and Life Safety Department

2017/18 Fiscal Year

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	362,956.27	421,283.82	429,500	438,000	438,000	438,000
Overtime	11,396.15	15,228.83	15,000	18,000	18,000	18,000
Incentives	49,284.61	54,691.33	55,400	57,000	57,000	57,000
Retirement (PERS)	50,502.38	62,315.43	63,200	91,600	91,600	91,600
ER Deferred Comp Contrib	4,440.00	5,094.90	9,600	10,900	10,900	10,900
Health and Life Insurance	77,993.31	92,560.07	97,500	98,300	98,300	98,300
HRA-VEBA Contribution	15,618.55	11,519.46	19,200	19,500	19,500	19,500
FICA and Medicare PR Taxes	31,081.18	35,516.95	38,200	39,200	39,200	39,200
Workers' Comp Insurance	8,515.44	10,472.81	15,000	1,500	1,500	1,500
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$611,787.89</b>	<b>\$708,683.60</b>	<b>\$742,600</b>	<b>\$774,000</b>	<b>\$774,000</b>	<b>\$774,000</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	1,474.00	1,542.00	2,000	2,000	2,000	2,000
Uniforms	1,493.36	0.00	0	0	0	0
Printing	0.00	0.00	1,000	1,500	1,500	1,500
Supplies; Fees	140.00	210.00	1,000	1,000	1,000	1,000
Supplies; Fire Life Safety	13,249.13	20,569.91	12,500	10,000	10,000	10,000
Supplies; Public Education	0.00	0.00	5,000	5,000	5,000	5,000
Community Fire Prev and Safety	32.68	4,604.12	146,200	137,000	167,000	167,000
Contractual/Professional Services	37,565.00	31,261.37	20,000	10,000	10,000	10,000
Membership Dues	1,781.50	1,419.00	3,000	3,500	3,500	3,500
Books and Subscriptions	1,878.97	2,400.84	3,500	3,500	3,500	3,500
Advertising	3,201.25	2,800.00	2,000	4,000	4,000	4,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$60,815.89</b>	<b>\$64,807.24</b>	<b>\$196,200</b>	<b>\$177,500</b>	<b>\$207,500</b>	<b>\$207,500</b>
<b>TOTAL FIRE AND LIFE SAFETY</b>	<b>\$672,603.78</b>	<b>\$773,490.84</b>	<b>\$938,800</b>	<b>\$951,500</b>	<b>\$981,500</b>	<b>\$981,500</b>

# Fire and Life Safety Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 3

Account	Description	Account Total
58203-000	<b>Physicals and Vaccinations</b> .....	\$ 2,000
60220-000	<b>Printing</b> .....	\$ 1,500
60223-002	<b>Supplies; Fees</b> ..... Code recertification's and certification renewals	\$ 1,000
60223-004	<b>Supplies; Fire Life Safety</b> ..... Supplies including address signs and reflective numbers, customer service kits, fire investigation tools, and personal protective equipment	\$ 10,000
60223-005	<b>Supplies; Public Education Materials</b> ..... Supplies including school event handouts and public education materials such as fire hats, bracelets, stickers, and coloring books	\$ 5,000
60223-009	<b>Community Fire Prevention and Safety</b> ..... Provide for the community in fire prevention and safety including but not limited to smoke alarms, fire suppression sprinkler system giveaways, boat safety life jackets, firewise example gardens, hazardous fuels mitigation, rural water supply enhancements, community events, and general programs PROJECT: AED Partnership with Jackson County Expo (3 AED's) PROJECT: Rogue River life safety signage PROJECT: Bureau of Land Management Title 2 Grant - Hazardous fuels reduction PROJECT: Jackson County Title 3 Grant - Firewise communities and fuels reduction	\$ 167,000 30,000 4,500 2,500 25,000 105,000
60270-000	<b>Contractual/Professional Services</b> ..... District newsletter (design, printing, and mailing)	\$ 10,000
60410-000	<b>Membership Dues</b> ..... Memberships in organizations including Rogue Valley Fire Chief's Association, Rogue Valley Fire Prevention Coop, Oregon Fire Marshals Association, Oregon Fire Chief's Association, National Fire Protection Association, and International Fire Marshal's Association	\$ 3,500
60412-000	<b>Books and Subscriptions</b> ..... NFPA online access, reference materials, code updates	\$ 3,500
60430-001	<b>Advertising</b> ..... Advertising through various media outlets including Exposition Park and Chamber of Commerce	\$ 4,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b><u>\$ 207,500</u></b>



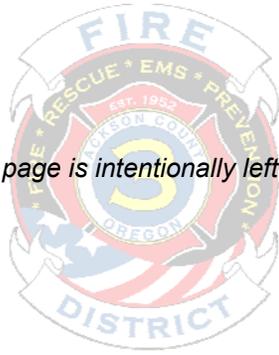
# Fire District 3

## Training Department



2017/18 Fiscal Year Budget

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# Training Department

2017/18 Fiscal Year

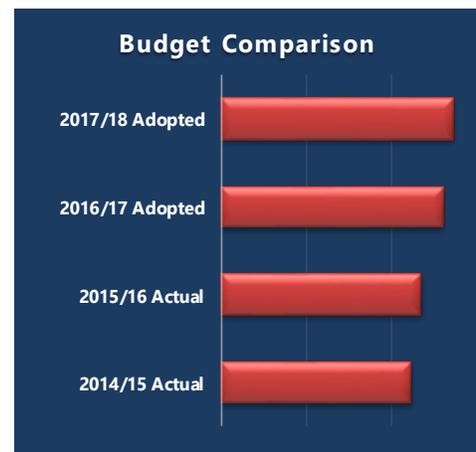
## DEPARTMENT DESCRIPTION

The Training Department is responsible for delivering a variety of training programs, developing proper safety techniques and procedures, maintaining accurate and complete training records, and fostering professional growth and development to all members of the organization. Safety and career development are key elements in the design of all training programs; therefore the District delivers an in-service training program that provides most of the necessary training for personnel to be safe, effective, and efficient. Training is a critical function of the District in that all members must constantly be prepared for a wide variety of very complex and stressful fire, medical and/or rescue situations. For these reasons all training is administered and delivered to meet or exceed standards set by Local, State, National, and/or any other governing institution.

In addition to the training and education requirements, the Training Department is also responsible for the safety program, health and wellness of personnel, budgeting, development of performance guidelines and fire rescue protocols, strategic planning, and goal setting.

## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Personnel Services	\$315,472.82	\$307,746.15	\$347,100	\$364,000
Materials and Services	\$130,462.96	\$161,203.72	\$173,300	\$178,200
	<b>\$445,935.78</b>	<b>\$468,949.87</b>	<b>\$520,400</b>	<b>\$542,200</b>



## PERSONNEL SUMMARY

Personnel	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Division Chief of Training and Safety	1.00	1.00	1.00	1.00
Administrative Assistant	1.00	1.00	1.00	1.00
<b>Total</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>

# Training Department

2017/18 Fiscal Year

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services will increase 4.87 percent or \$16,900 from the prior fiscal year. Factors impacting this classification include salary and benefit adjustments, specifically an increase in pension costs. No position changes are being recommended in this Department.

The overall Materials and Services classification will increase 2.83 percent or \$4,900. Notable projects include a smoke machine and mannequin for emergency medical training. In addition, account *60455-003; Training/ Conferences Operations* has increased slightly to accommodate four personnel to participate in specialized training in Phoenix, Arizona for the Blue Card incident management program.

## **PRIOR YEAR ACCOMPLISHMENTS**

<b><u>Action Item</u></b>	<b><u>Strategic Priority Number</u></b>	<b><u>Outcome</u></b>
Training Center Policy Implementation	2	Updated the District's fee resolution identifying the use, limitations and fees for District facilities and produced "How to" videos available on the District's YouTube page concerning procedures, tasks and use of equipment.
Health and Wellness	2	The health and wellness of District members continues to be a priority. Measuring endurance and flexibility remains the focus and driving force of our program. The health and wellness committee believes we can support the current program and evaluate the program annually.
Develop and Implement a Formal Captain and Battalion Chief Training Program	3	Coordinated and delivered Captain and Battalion Chief training; sought experts/professionals to present topical information pertinent to supervisor-level personnel; will continue to provide additional training opportunities as much as possible.
Evaluate and Identify Opportunities for a Command Training Center	3	Evaluated the necessity of a command training center as we progress toward the Blue Card training program for incident management. We identified a need for iPads to utilize for scenario-based applications with specific buildings within the District. The flexibility, practicality, and ease of use with the iPads out-weighed a fixed command training center.
Enhance RCC Relationship	5	The District continues to explore opportunities with Rogue Community College (RCC) where feasible. RCC was successful in passing a bond measure that will allow them to build a classroom facility located at the District's White City campus. This classroom's primary purpose is to host the Fire Science program, add depth to the District's classroom capabilities, and provide a local venue for other groups/agencies to use for various events.
Burn Container Facility	5	Collaborated with RCC and Medford Fire-Rescue to make significant improvements to the live fire program. Seven additional containers were purchased to add a second story burn chamber with plans to construct variable pitch roof props for ventilation training.

# Training Department

2017/18 Fiscal Year

## **DEPARTMENT MEASUREMENTS AND TARGETS**

### **TRAINING PROGRAM MANAGEMENT**

#### Statements of Measurement

- Complete the integration of the Blue Card training program at all levels within the organization.
- Complete the RCC classroom project and promote and coordinate its use for public safety agencies throughout the Rogue Valley.
- Maintain an accurate training calendar that incorporates promotional processes and activities based on the regionally adopted two year training plan; topics are identified and supported utilizing interested and motivated instructors providing quality training in a positive learning environment.
- Maintain training compliance with the following organizations:
  - OR-OSHA
    - To provide a safe and healthy work environment for all members of the District.
  - Department of Public Standards Safety and Training (DPSST)
    - Provides a voluntary standard training and certification process for all firefighters in the State of Oregon.
  - Oregon Health Authority (OHA)
    - Provides training requirements for all EMT's in the State of Oregon.
  - Department of Homeland Security (DHS)
    - Identifies minimum training requirements for Incident Command System for emergency responders to All-Hazard incidents; training requirements are tied to Federal grant funding.



### **TRAINING DEPARTMENT ACTIVITIES**

#### **Outputs**

- The Training Department facilitated a Firefighter testing process over a three day period that resulted in a certified register with 29 potential candidates to be used for future vacancies.
- The Training Department coordinated and hosted a two week NFPA Fire Officer 1 academy that brought 31 students from departments within the Rogue Valley as well as Roseburg and Klamath Falls. At the conclusion of the academy all 31 students successfully completed all requirements of the course.
- The Safety Committee reviewed 19 reported injuries and eight other incidents that included accidents without injury, exposure reports, and near miss reports. Each injury was reviewed by the committee and recommendations were made in an effort to reduce and mitigate these types of injuries in the future.
- 16 applications for certification were submitted and approved by DPSST on behalf of eight members.
- Workplace safety inspections were conducted with 100 percent compliance within OR-OSHA requirements.
- The District continues to support individual and career development by seeking outside opportunities for personnel to participate in various training and conferences locally, regionally and outside of Oregon; the District supported attendance and participation to 63 outside courses.

# Training Department

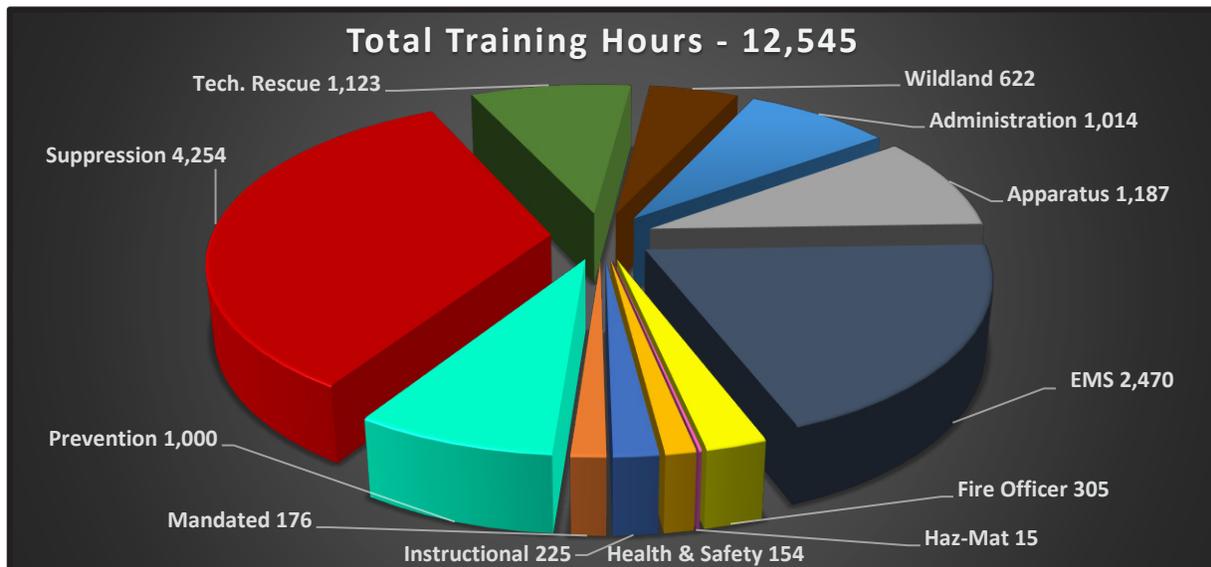
2017/18 Fiscal Year

## TRAINING DEPARTMENT STATISTICS

### Outputs

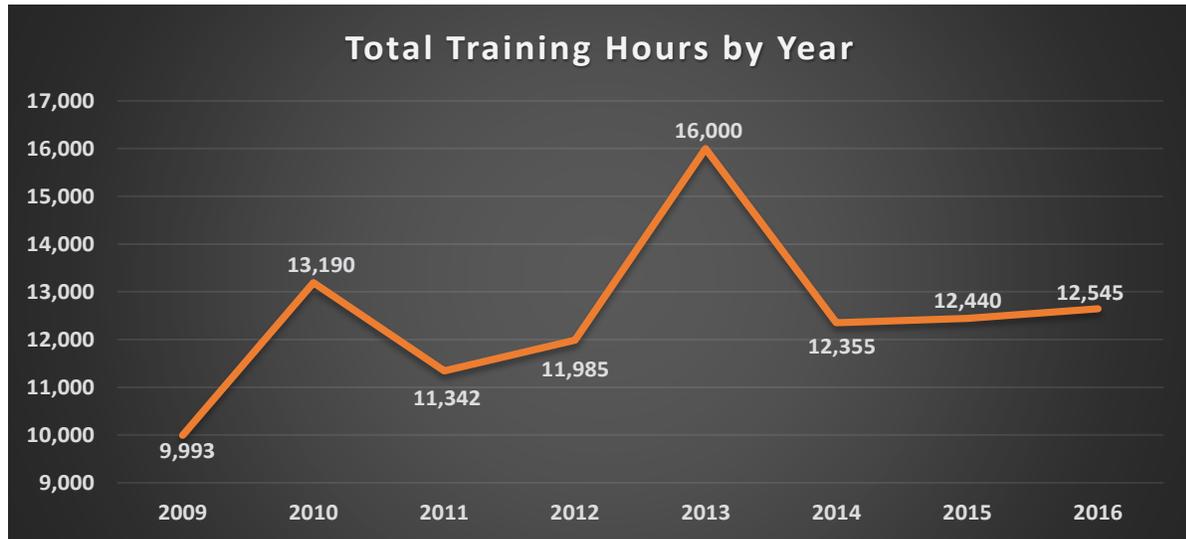
- The Training Department coordinated 3,509 courses.
- Personnel participated in 3,017 hours of classroom training.
- All personnel contributed to the 12,545 man hours of training.
- 1,102 courses were delivered by District members for a total of 1,936 hours.
- 2,407 courses were delivered by an outside instructor or conducted on-line, totaling 1,081 hours.

<i>Number of Training Hours (Outputs)</i>	<i>2013 Actual</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 YTD</i>
<i>Administration</i>	274	272	616	1,014	157
<i>Apparatus</i>	537	552	1,928	1,187	418
<i>EMS</i>	755	611	2,751	2,470	486
<i>Fire Officer</i>	281	139	678	305	704
<i>Haz-Mat</i>	2	6	47	15	8
<i>Health and Safety</i>	NA	NA	199	154	80
<i>Instructional</i>	75	11	124	225	3
<i>Mandated</i>	NA	NA	195	176	0
<i>Prevention</i>	252	225	590	1,000	74
<i>Suppression</i>	926	714	4,818	4,254	770
<i>Technical Rescue</i>	329	221	868	1,123	26
<i>Wildland</i>	220	75	670	622	0
<b>Totals</b>	<b>1,727</b>	<b>1,235</b>	<b>13,484</b>	<b>12,545</b>	<b>2,726</b>



# Training Department

2017/18 Fiscal Year



## 2017/18 FISCAL YEAR DEPARTMENTAL ACTION ITEMS

The following action item is assigned to the Training Department and links back to one of the five organizational strategic priorities as identified within the adopted Strategic Plan. Each action item has a desired completion date identified. Detailed tasks for each action item have been developed to ultimately attain the desired outcomes and support the District in achieving its mission.

Only the overarching Strategic Priorities that encompass the identified departmental action items are reflected within the departmental sections. All the Strategic Priorities and action items are represented in their entirety under tab three of the budget document. The action item number represents the departmental number assigned to it.

The District is in the last year of our three year Strategic Plan and most of the objectives identified in that plan have been completed. Of those still in progress are as follows:

### **Strategic Priority 5 – Develop and strengthen collaborative strategic partnerships.**

Action Item Number	Action Items Assigned to Training Department	Target Completion Date
5.5	Enhance the RCC relationship while they share our facilities. Evaluate through feedback from both agencies.	December 2017
<p><b>Progress Report</b> – The District has been in continual partnership with RCC and is collaborating on the future Fire Science classroom project. Upon completion a new Intergovernmental Agreement will be developed and approved by both governing bodies that encompass the full scope of RCC’s usage of the District’s training campus.</p>		

### **In addition to the Strategic Priorities, the Training Department will also be focusing on the following:**

- Continued development of the Blue Card Incident Management Training program.
- Continued training and growth of all personnel with an emphasis on leadership development.
- Enhancement of the live fire burn containers and training props with an emphasis on regional partnerships.
- Continue development of the health and wellness program supporting overall individual mental and physical well-being.

# Training Department

2017/18 Fiscal Year

General Fund Description	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	154,913.46	155,632.97	160,500	164,200	164,200	164,200
Overtime	71,835.89	60,648.56	76,000	76,000	76,000	76,000
Incentives	12,519.20	14,493.80	16,600	17,200	17,200	17,200
Retirement (PERS)	17,358.03	20,030.66	25,700	36,900	36,900	36,900
ER Deferred Comp Contrib	4,630.49	6,180.95	6,200	6,300	6,300	6,300
Health and Life Insurance	24,669.28	25,799.20	29,000	29,500	29,500	29,500
HRA-VEBA Contribution	8,402.09	5,174.31	7,700	7,800	7,800	7,800
FICA and Medicare PR Taxes	16,738.11	15,305.47	19,400	19,700	19,700	19,700
Workers' Comp Insurance	4,406.27	4,480.23	6,000	6,400	6,400	6,400
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$315,472.82</b>	<b>\$307,746.15</b>	<b>\$347,100</b>	<b>\$364,000</b>	<b>\$364,000</b>	<b>\$364,000</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	514.00	514.00	300	500	500	500
Uniforms	479.99	0.00	0	0	0	0
Supplies; Fees	0.00	1,068.75	2,000	1,000	1,000	1,000
Supplies; Training and Safety Equip	17,803.62	18,931.61	20,000	23,000	23,000	23,000
Training Props and Equipment	0.00	0.00	12,300	10,700	10,700	10,700
M&R; Training Equipment and Props	0.00	0.00	1,000	1,500	1,500	1,500
Health and Wellness	9,325.32	8,282.13	5,000	5,000	5,000	5,000
Contractual/Professional Services	20,975.00	33,688.05	15,000	15,000	15,000	15,000
Membership Dues	440.00	340.00	1,000	1,000	1,000	1,000
Books and Subscriptions	8,638.52	8,034.38	12,000	12,000	12,000	12,000
Meeting Travel Expenses	0.00	4,871.38	8,000	8,000	8,000	8,000
Training & Conferences; Admin	33,635.97	30,091.16	26,000	25,000	25,000	25,000
Training & Conferences; Board	869.24	2,032.18	2,500	2,500	2,500	2,500
Training & Conferences; Operations	18,971.80	41,126.09	51,200	55,000	55,000	55,000
Training & Conferences; Fire Life Safety	8,221.09	9,139.95	10,000	10,000	10,000	10,000
Training & Conferences; Volunteers	992.39	3,084.04	5,000	5,000	5,000	5,000
Training & Conferences; Technology	460.25	0.00	2,000	3,000	3,000	3,000
Entrance & Promotional Exams	9,135.77	0.00	0	0	0	0
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$130,462.96</b>	<b>\$161,203.72</b>	<b>\$173,300</b>	<b>\$178,200</b>	<b>\$178,200</b>	<b>\$178,200</b>
<b>TOTAL TRAINING DEPARTMENT</b>	<b>\$445,935.78</b>	<b>\$468,949.87</b>	<b>\$520,400</b>	<b>\$542,200</b>	<b>\$542,200</b>	<b>\$542,200</b>

# Training Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 4

Account	Description	Account Total
58203-000	<b>Physicals and Vaccinations</b> .....	\$ 500
60223-002	<b>Supplies; Fees</b> ..... DPSST fingerprinting costs for certification process	\$ 1,000
60223-012	<b>Supplies; Training and Safety Equipment</b> ..... Consumable training supplies for props, equipment, materials for in-service training, towing service fees for extrication vehicles, and safety equipment	\$ 23,000
60223-014	<b>Training Props and Equipment</b> ..... Miscellaneous training props and equipment 3,000 PROJECT: Rescue anne mannequin 3,500 PROJECT: Dump bin for live fire prop 1,000 PROJECT: Smoke machine 3,200	\$ 10,700
60254-000	<b>M&amp;R; Training Equipment and Props</b> ..... Maintenance and repair of training equipment and props	\$ 1,500
60265-000	<b>Health and Wellness</b> ..... Fitness supplies, miscellaneous equipment purchases, and fitness equipment maintenance and/or repair	\$ 5,000
60270-000	<b>Contractual/Professional Services</b> ..... Personal services contracts for hiring instructors to teach District staff on site	\$ 15,000
60410-000	<b>Membership Dues</b> ..... Annual dues for Oregon Fire Chief's Association and safety and health section, Oregon Fire Instructor's Association, Rogue Valley Fire Chief's Association, International Association of Fire Chief's, International Society of Fire Service Instructors, and Rogue Interagency Training Association	\$ 1,000
60412-000	<b>Books and Subscriptions</b> ..... Professional periodicals, general reference and training materials, LearnFire web based training, safety data management systems, fire rescue protocol website, fitness website, and emergency medical services continuing education materials	\$ 12,000
60449-000	<b>Meeting Travel Expenses</b> ..... Travel expenses for staff and board members to attend regional and statewide meetings and activities relating to the Oregon Fire Chief's Assn, Oregon Fire Instructor's Assn, National Fire Protection Assn, DPSST, Oregon State Fire Marshal, Governor's Fire Service Policy Council, and other meetings as necessary	\$ 8,000

# Training Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued*

General Fund 1, Department 4

Account	Description	Account Total
60455-001	<b>Training and Conferences; Administrative</b> ..... Continued education and training through Oregon Fire Chief's Assn, Special District's Assn of Oregon, Oregon Municipal Finance Officers Assn, Oregon Fire Service Office Administrators, Int'l Assn of Fire Chief's, Oregon Fire Instructor's, staffing/scheduling training, approved higher education, supervision and leadership seminars such as the Northwest Leadership Seminar, facilities and logistics inventory systems and various other innovative conferences, training, and workshops	\$ 25,000
60455-002	<b>Training and Conferences; Board</b> ..... Continued education for the Board of Directors such as the Special District's Assn of Oregon and Oregon Fire District Director's Assn conferences	\$ 2,500
60455-003	<b>Training and Conferences; Operations</b> ..... Continued education and certification for EMS, suppression, and technical rescue; additional opportunities are promoted to support professional development, safety and committee functions, Fire Department's Instructors Conference (FDIC), Firemanship conference, other relevant training, conferences and workshops PROJECT: Blue Card Incident Management training for (4) instructors	\$ 55,000  35,000 20,000
60455-004	<b>Training and Conferences; Fire and Life Safety</b> ..... Continued education through the Oregon Fire Marshal's Assn, Pacific Northwest Fire Prevention Coop, Local and State Int'l Assn of Arson Investigators, and Fire Marshal's Roundtable; additional opportunities may include fire code training, fire adapted community training, and other relevant conferences, training, and workshops	\$ 10,000
60455-006	<b>Training and Conferences; Volunteers</b> ..... Continued education and training for all volunteers and student firefighters; includes EMS skills training and attendance at the Oregon Volunteer Firefighters Conference, International Association of Chaplains, and other relevant conferences, training, and workshops	\$ 5,000
60455-007	<b>Training and Conferences; Technology</b> ..... Continued technology training such as conferences, geographic information systems, data analysis , and other relevant conferences, training, and workshops	\$ 3,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 178,200</b>



# Fire District 3

## Support Services Department



**2017/18 Fiscal Year Budget**

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# Support Services Department

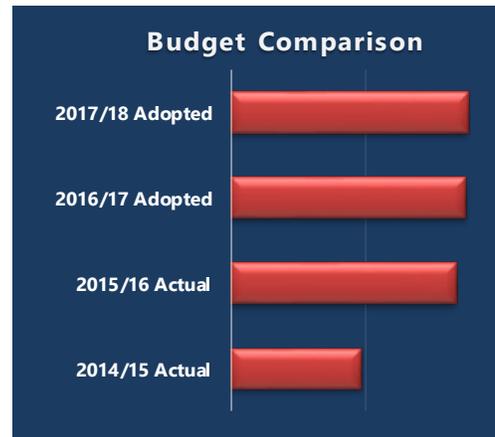
2017/18 Fiscal Year

## DEPARTMENT DESCRIPTION

The Support Services Department is responsible for the coordination and oversight of all preventative and routine maintenance activities for the District's eight stations, training facility, and administrative building. The Department also is charged with supply ordering, receiving, cataloging, and distributing. Logistical and program support is also provided across the other Departments. The primary mission is to protect the public's investment in emergency services facilities and to ensure effective and uninterrupted emergency response by maintaining and supporting the District's facilities and equipment.

## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Personnel Services	\$98,052.42	\$99,216.14	\$104,000	\$107,000
Materials and Services	\$385,741.02	\$737,429.32	\$768,200	\$776,300
	<b>\$483,793.44</b>	<b>\$836,645.46</b>	<b>\$872,200</b>	<b>\$883,300</b>



## PERSONNEL SUMMARY

Personnel	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Facilities/Logistics Manager	1.00	1.00	1.00	1.00
<b>Total</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services will increase 2.88 percent or \$3,000 from the prior fiscal year. The significant factor impacting this classification is an increase in pension costs.

The overall Materials and Services classification will increase one percent or \$8,100. Some notable projects include an increase in account *58213-000; Uniforms* to purchase a new style of uniform pant that can be worn dual purpose for both wildland suppression and station duty, and increases across various maintenance and repair accounts to accommodate special projects such as adding apparatus bay door openers and remotes at the Sams Valley station and installing a vehicular exhaust removal system at the Eagle Point station. Preventative maintenance and repairs made on all fire apparatus will continue to be subcontracted out to Medford City Shops.

# Support Services Department

2017/18 Fiscal Year

## PRIOR YEAR ACCOMPLISHMENTS

<u>Action Item</u>	<u>Strategic Priority Number</u>	<u>Outcome</u>
Oregon Seismic Rehab Grant	2	Applied for and was awarded the Oregon Seismic Rehabilitation Grant to retrofit District facilities that are not currently meeting fire station seismic standards. The grant includes retrofitting five stations with a total award/project cost of \$1,081,800.

### **Other Noteworthy Accomplishments from Support Services**

- Completed the reconfiguration of the logistics warehouse to provide enhanced organization and efficiencies.
- Enhanced the logistic inventory system for tracking medical supplies, uniforms, and janitorial supplies to reduce loss and duplication.
- Implemented a logistics delivery system for supplies to be delivered to all fire station locations on a weekly basis.

## DEPARTMENT MEASUREMENTS AND TARGETS

<i>Types of Transactions (Output Measures)</i>	<i>2013/14 Actual</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Target</i>
<b><u>Vehicles Maintained</u></b>					
<i>Fire Engines</i>	10	11	11	11	11
<i>Aerial Ladder Truck</i>	1	1	1	1	1
<i>Wildland Engines</i>	10	9	9	9	9
<i>Water Tenders</i>	3	3	3	3	3
<i>Tactical Tenders</i>	2	2	2	2	3
<i>Rescue Equipment</i>	3	2	2	2	2
<i>Support Vehicles</i>	16	15	16	17	17
<b>Total</b>	<b>45</b>	<b>43</b>	<b>43</b>	<b>46</b>	<b>46</b>

<i>Types of Transactions (Output Measures)</i>	<i>2013/14 Actual</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Target</i>
<b><u>Facilities Maintained</u></b>					
<i>Fire Stations</i>	7	7	8	8	8
<i>Training Grounds</i>	1	1	1	1	1
<i>Maintenance Shop</i>	1	1	1	1	1
<i>Administrative Building</i>	1	1	1	1	1
<i>Warehouse Facility/Grounds</i>	1	1	1	1	1
<b>Total</b>	<b>11</b>	<b>11</b>	<b>12</b>	<b>12</b>	<b>12</b>

# Support Services Department

2017/18 Fiscal Year

## **2017/18 FISCAL YEAR DEPARTMENTAL ACTION ITEMS**

The following action item is assigned to the Support Services Department and links back to one of the five organizational strategic priorities as identified within the adopted Strategic Plan. Each action item has a desired completion date identified. Detailed tasks for each action item have been developed to ultimately attain the desired outcomes and support the District in achieving its mission.

Only the overarching Strategic Priorities that encompass the identified departmental action items are reflected within the departmental sections. All the Strategic Priorities and action items are represented in their entirety under tab three of the budget document. The action item number represents the departmental number assigned to it.

The District is in the last year of our three year Strategic Plan and most of the objectives identified in that plan have been completed. Of those still in progress are as follows:

### **Strategic Priority 2 – Ensure sustainability of service delivery (people, facilities, fleet, and finance).**

<b>Action Item Number</b>	<b>Action Items Assigned to Support Services Department</b>	<b>Target Completion Date</b>
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7.5	Establish standardize specifications for equipment, appliances, and consumables.	July 2017
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***Progress Report** – The District continues work to develop a set of standardized specifications for equipment and appliances.*

### **In addition to action item 7.5, the Support Services Department will also be focusing on the following:**

- Continued support to District departments in facilitating construction of projects; see through to fruition identified projects planned for in the upcoming fiscal year.
- Continued development in timely response to maintenance and repair issues; improve turnaround time with minimal disruption to workflow productivity.
- Continued development of inventory control and loss prevention systems.
- Continued analysis and development of workflow efficiencies, processes, and functions.

# Support Services Department

2017/18 Fiscal Year

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
	Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee
<b>Personnel Services</b>						
Salaries	68,456.00	67,272.96	69,000	69,500	69,500	69,500
Incentives	843.15	1,623.15	1,700	2,500	2,500	2,500
Retirement (PERS)	2,994.30	3,771.16	3,700	6,000	6,000	6,000
ER Deferred Comp Contrib	1,680.00	3,024.00	3,000	3,100	3,100	3,100
Health and Life Insurance	13,483.21	14,343.96	15,300	15,500	15,500	15,500
HRA-VEBA Contribution	3,776.54	2,304.72	3,800	3,900	3,900	3,900
FICA and Medicare PR Taxes	5,281.64	5,249.22	5,500	5,500	5,500	5,500
Workers' Comp Insurance	1,537.58	1,626.97	2,000	1,000	1,000	1,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$98,052.42</b>	<b>\$99,216.14</b>	<b>\$104,000</b>	<b>\$107,000</b>	<b>\$107,000</b>	<b>\$107,000</b>
<b>Materials and Services</b>						
Uniforms	208.99	41,981.46	44,200	59,600	59,600	59,600
Janitorial Supplies and Laundry Services	0.00	26,137.77	25,000	30,000	30,000	30,000
Supplies/Equipment; Medical	0.00	54,841.24	50,000	50,000	50,000	50,000
Supplies; Logistics and Warehouse	4,499.32	1,733.64	4,000	4,000	4,000	4,000
Supplies; Station Consumables	0.00	5,130.29	6,000	6,000	6,000	6,000
Supplies; Furnishings and Appliances	14,689.91	42,280.93	12,500	10,000	10,000	10,000
Supplies; Facilities	2,642.35	12,493.77	4,300	5,000	5,000	5,000
Fuel and Lubricants	73,412.77	52,866.49	80,000	80,000	80,000	80,000
M&R of Vehicles and Apparatus	166,851.67	201,061.90	197,000	197,000	197,000	197,000
Bldgs & Grounds - WC Station	15,467.64	24,396.19	13,000	16,000	16,000	16,000
Bldgs & Grounds - CP Station	14,902.80	12,597.92	26,000	10,000	10,000	10,000
Bldgs & Grounds - DB Station	6,009.66	8,363.76	14,500	12,000	12,000	12,000
Bldgs & Grounds - SV Station	10,098.64	4,599.01	10,500	23,000	23,000	23,000
Bldgs & Grounds - GH Station	8,438.73	6,111.37	6,000	5,000	5,000	5,000
Bldgs & Grounds - AL Station	8,582.98	8,218.56	5,000	4,000	4,000	4,000
Bldgs & Grounds - EP Station	19,330.29	37,433.24	19,000	20,000	20,000	20,000
Bldgs & Grounds - TR Station	39.57	5,723.94	6,000	5,000	5,000	5,000
Bldgs & Grounds - TRNG Center	5,838.22	8,029.98	30,000	13,500	13,500	13,500
Bldgs & Grounds - ADMIN Bldg	14,254.90	31,481.80	15,000	22,000	22,000	22,000
Bldgs & Grounds - LOG Warehouse	9,231.38	374.48	2,500	1,500	1,500	1,500
M&R; District Equipment	5,322.43	3,733.68	7,500	7,500	7,500	7,500
M&R; Appliances and Furnishings	1378.77	2024.15	3,000	3,000	3,000	3,000
Contractual/Professional Services	4,540.00	4,290.00	7,000	7,000	7,000	7,000
Membership and Certifications	0.00	0.00	100	100	100	100
Subscriptions	0.00	0.00	100	100	100	100
Utilities; WC	0.00	26,646.23	32,000	32,000	32,000	32,000
Utilities; CP	0.00	17,445.27	22,000	22,000	22,000	22,000
Utilities; DB	0.00	5,750.38	12,000	14,000	14,000	14,000
Utilities; SV	0.00	8,677.22	12,000	14,000	14,000	14,000
Utilities; GH	0.00	9,643.58	13,000	14,000	14,000	14,000
Utilities; AL	0.00	4,575.10	10,000	10,000	10,000	10,000
Utilities; EP	0.00	16,272.32	18,000	20,000	20,000	20,000
Utilities; TR	0.00	6,961.91	12,000	10,000	10,000	10,000
Utilities; TC	0.00	10,830.12	12,000	12,000	12,000	12,000
Utilities; Adm Bldg	0.00	34,721.62	37,000	37,000	37,000	37,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$385,741.02</b>	<b>\$737,429.32</b>	<b>\$768,200</b>	<b>\$776,300</b>	<b>\$776,300</b>	<b>\$776,300</b>
<b>TOTAL SUPPORT SERVICES DEPARTMENT</b>	<b>\$483,793.44</b>	<b>\$836,645.46</b>	<b>\$872,200</b>	<b>\$883,300</b>	<b>\$883,300</b>	<b>\$883,300</b>

# Support Services Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 5

Account	Description	Account Total
<b>58213-000</b>	<b>Uniforms.....</b>	\$ 59,600
	Attire for all uniformed positions in all departments including shirts, pants, duty boots, accessories, badges, belts, sweatshirts, and alterations	30,000
	PROJECT: Workout sweatshirts	1,000
	PROJECT: Class A uniforms (2)	1,600
	PROJECT: Duty/wildland dual purpose uniform pants	27,000
<b>60221-000</b>	<b>Janitorial Supplies and Laundry Services.....</b>	\$ 30,000
	Janitorial and cleaning supplies for all District facilities; truck towel and floor mat laundry	
<b>60223-003</b>	<b>Supplies/Equipment; Medical.....</b>	\$ 50,000
	Medical equipment and supplies, oxygen cylinder rental, bio-waste disposal, and personal protective equipment	
<b>60223-006</b>	<b>Supplies; Logistics and Warehouse.....</b>	\$ 4,000
	General supplies for logistics warehouse	
<b>60223-008</b>	<b>Supplies; Consumables.....</b>	\$ 6,000
	Coffee and consumable supplies for all District facilities	
<b>60223-015</b>	<b>Supplies; Furnishings and Appliances.....</b>	\$ 10,000
	General facility furnishings and appliances	
<b>60223-016</b>	<b>Supplies; Facilities.....</b>	\$ 5,000
	Supplies for facilities including but not limited to lightbulbs, extension cords, garden supplies, mattress covers, kitchen utensils and cookware items	
<b>60230-000</b>	<b>Fuel and Lubricants.....</b>	\$ 80,000
<b>60250-000</b>	<b>M&amp;R of Vehicles and Apparatus.....</b>	\$ 197,000
<b>60251-</b>	<b><u>Buildings and Grounds</u></b>	
	Includes: generator service and testing, HVAC service and repair, pest control, landscape services and/or weed abatement, carpet and upholstery cleaning, apparatus bay door maintenance, plumbing, electrical, drains, and lot sweeping. Fiscal year specific projects will be listed as separate line items under respective stations	
<b>110- White City Station.....</b>		\$ 16,000
	General maintenance and repair	12,000
	PROJECT: Concrete repair	4,000

# Support Services Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued*

General Fund 1, Department 5

Account	Description	Account Total
<b>111- Central Point Station</b>		\$ 10,000
	General maintenance and repair	10,000
<b>112- Dodge Bridge Station</b>		\$ 12,000
	General maintenance and repair	4,000
	PROJECT: HVAC system in office/dayroom/classroom	4,500
	PROJECT: Frame in apparatus bay door	3,500
<b>113- Sam's Valley Station</b>		\$ 23,000
	General maintenance and repair	4,000
	PROJECT: HVAC system	5,500
	PROJECT: Apparatus bay door openers and remotes with photo eyes	13,500
<b>114- Gold Hill Station</b>		\$ 5,000
	General maintenance and repair	5,000
<b>115- Agate Lake Station</b>		\$ 4,000
	General maintenance and repair	4,000
<b>116- Eagle Point Station</b>		\$ 20,000
	General maintenance and repair	8,000
	PROJECT: Install exhaust removal system	12,000
<b>117- Table Rock Station</b>		\$ 5,000
	General maintenance and repair	5,000
<b>120- Training Center/Storage/Offices</b>		\$ 13,500
	General maintenance and repair	10,000
	PROJECT: Covered storage for draft pit	3,500
<b>121- Administrative Building</b>		\$ 22,000
	General maintenance and repair	10,000
	PROJECT: New kitchen countertops	2,000
	PROJECT: New flooring in kitchen and hallways	7,500
	PROJECT: Chair rail in Crater Lake conference room	2,500
<b>122- Logistics Warehouse</b>		\$ 1,500
	General maintenance and repair	1,500
<b>60254-000 M&amp;R; District Equipment</b>		\$ 7,500
	Includes but is not limited to breathing air compressors, forklift, mule, golf cart, flatbed trailer, scissor lift, blowers, sprayer, and fuel tanks	

# Support Services Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued*

General Fund 1, Department 5

Account	Description	Account Total
60255-000	<b>M&amp;R; Station Appliances and Furnishings</b> ..... Includes but is not limited to interior appliances, ice machines, dishwashers, refrigerators, and cook stoves	\$ 3,000
60270-000	<b>Contractual/Professional Services</b> ..... Includes annual fire alarm monitoring, fire sprinkler testing, and station alerting testing	\$ 7,000
60410-000	<b>Membership and Certifications</b> .....	\$ 100
60412-000	<b>Subscriptions</b> .....	\$ 100
60500-	<b>Utilities; Stations and Facilities</b> ..... Includes electricity, natural gas, propane, water, garbage, sewer, telephone, internet, and cable or satellite television services	\$ 185,000
	<b>110- White City Station</b>	32,000
	<b>111- Central Point Station</b>	22,000
	<b>112- Dodge Bridge Station</b>	14,000
	<b>113- Sams Valley Station</b>	14,000
	<b>114- Gold Hill Station</b>	14,000
	<b>115- Agate Lake Station</b>	10,000
	<b>116- Eagle Point Station</b>	20,000
	<b>117- Table Rock Station</b>	10,000
	<b>120- Training Center/Storage/Offices</b>	12,000
	<b>121- Administrative Building</b>	37,000
	<b>TOTAL MATERIALS AND SERVICES</b>	<b>\$ 776,300</b>

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# Volunteer Department

# Fire District 3



**2017/18 Fiscal Year Budget**

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# Volunteer Department

2017/18 Fiscal Year

## DEPARTMENT DESCRIPTION

The Volunteer Department supports the District's mission of protecting life and property through public education, prevention activities, and emergency response by recruiting, mentoring, and developing community-minded individuals. Of the District's eight fire stations, four are located in rural areas and served by volunteers. The Agate Lake, Dodge Bridge, Sams Valley, and Gold Hill fire stations have volunteers assigned to each. A Volunteer Team Leader oversees the volunteers at each station, providing guidance, training, and experience.

Prospective volunteers and students go through an application process followed by a background evaluation. Once accepted into the program, volunteers fall under one of three categories: student firefighter, resident volunteer, or community volunteer.

A student firefighter's first requirement is to successfully complete an eleven week fire academy at Rogue Community College where they receive specialized training and instruction. Upon academy graduation, students are then assigned to a career fire station to enhance their educational experience. Students work alongside career firefighters and respond to calls for service to gain real world experience and practical skills. In addition, they are enrolled as a full-time student in the Fire Science or Paramedic program at Rogue Community College. Students receive no compensation for their time given to the District, but they are eligible to have their tuition paid by the District while pursuing their Associates Degree. Students typically finish the program in two or three years, depending on their chosen degree program.

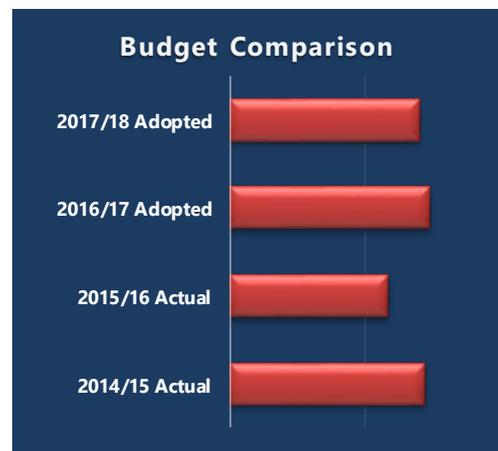
Resident volunteers live on-site at our rural stations, either in the station itself or in manufactured homes placed on the station property. The advantage gained by having resident volunteers located on-site at our rural stations is that they can provide a quicker response than community volunteers responding to a rural station from their homes or career personnel responding from urban stations. Resident volunteers are in place at all four rural stations.

Community volunteers either serve as suppression-qualified firefighters, or in support positions such as tender drivers, incident support, or as aides to fire prevention, training, or administration depending on their preference and the District's needs. Volunteers receive no compensation for their time given to the District, however the District does reimburse expenses under the guidance of the Internal Revenue Service Accountable Plan. To recognize a volunteer's commitment and sacrifice, the District provides a Length of Service Award Program (LOSAP), a 457(e) non-qualified deferred compensation plan. The District makes annual, pre-established contributions based upon the number of years a volunteer has provided service to the District. Under IRS regulations, this amount cannot exceed \$3,000 per year, per volunteer.

The volunteers and students are managed by the Deputy Chief of Operations whose salary and benefits are budgeted out of the Operations Department, thus the personnel services classification is not applicable to this department.

## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Materials and Services	\$72,334.22	\$58,677.67	\$74,500	\$70,000
	<b>\$72,334.22</b>	<b>\$58,677.67</b>	<b>\$74,500</b>	<b>\$70,000</b>



# Volunteer Department

2017/18 Fiscal Year

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services has no funds budgeted, as volunteers are not compensated for services rendered.

The overall Materials and Services classification will decrease six percent, or \$4,500. The significant factor is the result of a reduction in account *60272-000; Length of Service Contribution* based on actual volunteer eligibility for the District contribution. Account *60271-000; Student Firefighter Program* recognizes college tuition costs for up to nine District students whom have been accepted into the Student Program. Rogue Community College applies tuition credits towards this cost for their use of the District's training center and classrooms to operate their fire science instruction. The reduction is based on the number of approved students, actual college tuition costs, and the subsequent credits.

## **PRIOR YEAR ACCOMPLISHMENTS**

<b><u>Action Item</u></b>	<b><u>Strategic Priority Number</u></b>	<b><u>Outcome</u></b>
Resident Volunteer Firefighters	1	Established a minimum of three resident firefighters at the Sams Valley station, two at Dodge Bridge, and one at the Agate Lake station. A second manufactured home has been purchased for placement at the Agate Lake station; it is currently in place at the Table Rock station.
Student Firefighters at Gold Hill Station	1	Actively recruited student firefighters to the Gold Hill station. The District was able to place two knowledgeable residents at Gold Hill; four resident volunteers continue to remain the District's goal.
Enhanced Relationships	2	Coordinated training and community events to include both volunteers and career members improving interaction. Events are scheduled on the quarterly training plan to allow for standby coverage for those participating.
Volunteer Proficiencies	2	Developed and implemented the volunteer performance proficiencies. This provides the framework to focus training and emergency response performance.
Bridge Assessment	2, 3	Completed an assessment of all bridges throughout the District. Further integration is in progress to make the assessments available to the field resources.
Student Firefighter Recruitment Plan	5	Continued to streamline the recruitment and intake process, maintaining active participation in the joint student recruitment process established with Rogue Community College and other partner agencies.
Volunteer Training	5	Implemented a monthly combined volunteer and career drill instructed by career members. Additional training conducted at the Sim house with career members.

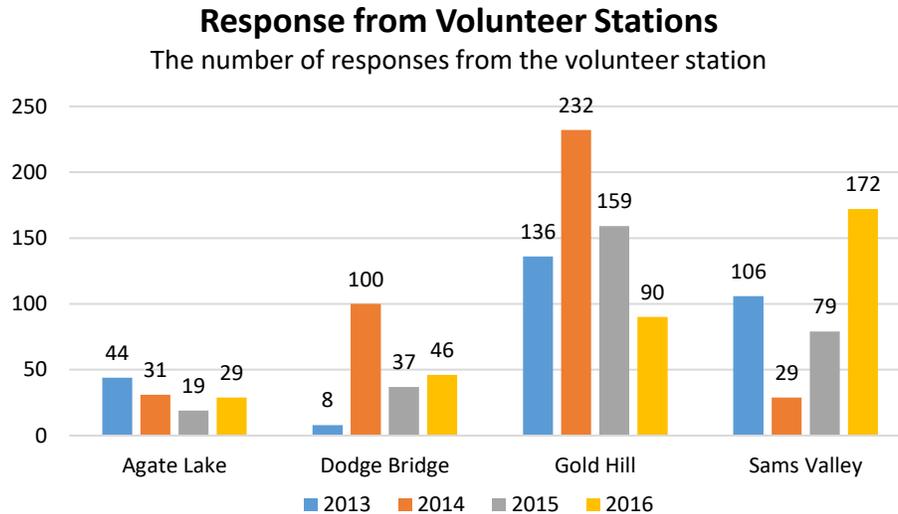
# Volunteer Department

2017/18 Fiscal Year

## DEPARTMENT MEASUREMENTS AND TARGETS

### Response from Volunteer Stations:

The District tracks volunteer response in the four identified zones; Agate Lake, Dodge Bridge, Gold Hill, and Sams Valley. The following chart identifies the number of responses by the volunteers from the volunteer stations. Every response into these response zones receive a unit from the career station, however the District's goal is to have volunteer stations provide the initial response.



**Analysis:** Utilizing resident firefighters can make a significant impact in meeting the goal of an initial response by the volunteer station. The District has made improvements through the installation of manufactured homes at the Agate Lake, Sams Valley and Dodge Bridge stations.

### Response Times in the Volunteer Station Fire Management Zones:

The primary goal of the volunteer program is to improve the response times in the volunteer station fire management zones. All of the volunteer stations are classified as "rural" and have a response time target of arriving on scene to 80 percent of the incidents within 13 minutes. District wide, the rural area received a 13 minute response time 84 percent of the time, an improvement from 80.3 percent in 2015.

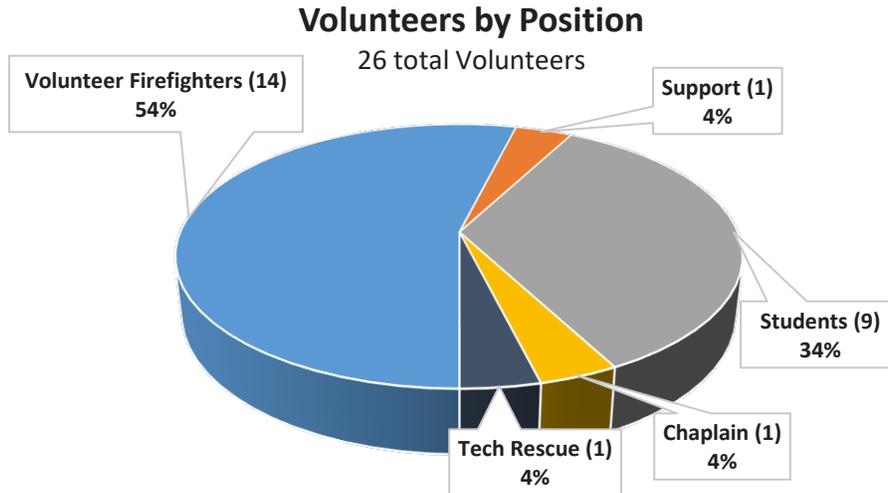
The following chart depicts the average response time and the response time for 80 percent of the emergency incidents that required a "Code 3" response for each of the volunteer stations.

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2014 Actual</i>		<i>2015 Actual</i>		<i>2016 Actual</i>		<i>2017 Target</i>
<i>Fire Management Zone / Station</i>	<b>80%</b>	Average	<b>80%</b>	Average	<b>80%</b>	Average	<b>80%</b>
<i>Agate Lake</i>	<b>14:31</b>	11:37	<b>14:13</b>	12:51	<b>17:04</b>	12:52	<b>13.00</b>
<i>Dodge Bridge</i>	<b>14:14</b>	11:16	<b>13:31</b>	10:49	<b>13:13</b>	10:32	<b>13.00</b>
<i>Gold Hill</i>	<b>15:24</b>	11:42	<b>15:28</b>	12:17	<b>15:44</b>	13:31	<b>13.00</b>
<i>Sams Valley</i>	<b>15:53</b>	12:24	<b>15:09</b>	13:34	<b>14:52</b>	11:27	<b>13.00</b>

**Analysis:** While the fire management zones have generally seen improvement, they are not meeting the goal established by the District. Additional resident firefighters and/or other creative actions will be critical to improving this critical performance measurement.

# Volunteer Department

2017/18 Fiscal Year



## 2017/18 FISCAL YEAR DEPARTMENTAL ACTION ITEMS

The following action items are assigned to the Volunteer Department and link back to one of the five organizational strategic priorities as identified within the adopted Strategic Plan. Each action item has a desired completion date identified. Detailed tasks for each action item have been developed to ultimately attain the desired outcomes and support the District in achieving its mission.

Only the overarching Strategic Priorities that encompass the identified departmental action items are reflected within the departmental sections. All the Strategic Priorities and action items are represented in their entirety under tab three of the budget document. The action item number represents the departmental number assigned to it.

The District is in the last year of our three year Strategic Plan and most of the objectives identified in that plan have been completed. Of those still in progress are as follows:

### **Strategic Priority 1 – Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.**

Action Item Number	Action Items Assigned to Volunteer Department	Target Completion Date
3.9	Develop and implement an emergency preparedness program for the rural community.	December 2017

### **Strategic Priority 2 – Ensure sustainability of service delivery (people, facilities, fleet, and finance).**

Action Item Number	Action Items Assigned to Volunteer Department	Target Completion Date
3.4	Revise the marketing plan to identify and recruit potential community volunteers.	December 2017

# Volunteer Department

2017/18 Fiscal Year

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Materials and Services</b>						
Vaccinations and Entrance Screenings	1,697.00	2,280.00	4,000	4,000	4,000	4,000
Uniforms	12,119.68	0.00	0	0	0	0
Personal Protection Equipment	2,262.39	0.00	0	0	0	0
Workers' Compensation Insurance	2,757.15	3,255.02	4,500	4,500	4,500	4,500
General Program Supplies	303.96	2,041.60	2,500	2,500	2,500	2,500
Contractual/Professional Services	1,207.00	191.00	1,000	1,000	1,000	1,000
Student Firefighter Tuition Program	27,357.35	33,062.00	40,000	40,000	40,000	40,000
Length of Service Award Program	15,700.00	8,150.00	15,000	10,000	10,000	10,000
Membership Dues	312.00	315.00	500	500	500	500
Books and Subscriptions	7,617.69	8,383.05	6,000	6,500	6,500	6,500
Scholarship Donations	1,000.00	1,000.00	1,000	1,000	1,000	1,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$72,334.22</b>	<b>\$58,677.67</b>	<b>\$74,500</b>	<b>\$70,000</b>	<b>\$70,000</b>	<b>\$70,000</b>
<b>TOTAL VOLUNTEER DEPARTMENT</b>	<b>\$72,334.22</b>	<b>\$58,677.67</b>	<b>\$74,500</b>	<b>\$70,000</b>	<b>\$70,000</b>	<b>\$70,000</b>

# Volunteer Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 6

Account	Description	Account Total
58203-000	<b>Vaccinations and Entrance Screenings</b> ..... Entry drug screening and immunizations for student firefighters and volunteers	\$ 4,000
58221-000	<b>Workers' Compensation Insurance</b> .....	\$ 4,500
60223-010	<b>General Program Supplies</b> .....	\$ 2,500
60270-000	<b>Contractual/Professional Services</b> ..... Entry background checks for student firefighters and volunteers	\$ 1,000
60271-000	<b>Student Firefighter Tuition Program</b> ..... College tuition for nine students, four quarters each per year	\$ 40,000
60272-000	<b>Length of Service Award Program (LOSAP)</b> ..... Annual District contribution for volunteer length of service	\$ 10,000
60410-000	<b>Membership Dues</b> ..... Oregon Volunteer Firefighters Assn, National Volunteer Fire Council, Federation of Chaplains	\$ 500
60412-000	<b>Books and Subscriptions</b> ..... Books for District library for use in student firefighter program	\$ 6,500
63010-000	<b>Scholarship Donations</b> ..... Student scholarship program for Crater and Eagle Point High Schools	\$ 1,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b><u>\$ 70,000</u></b>



# Fire District 3

## Technology Department



2017/18 Fiscal Year Budget



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# Technology Department

2017/18 Fiscal Year

## DEPARTMENT DESCRIPTION

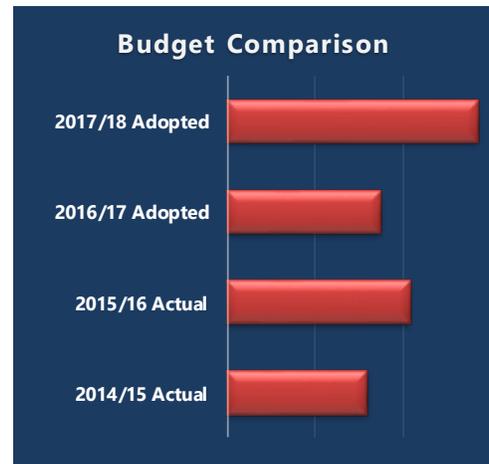
The Information Technology Department (IT) is responsible for supporting the District's computing infrastructure, including the Local Area Network, Wide Area Network, and Wireless Network. IT manages the District's computer work stations, servers and file systems, email system, network equipment, cloud storage, phone systems, internet access, audio/visual equipment, and all software and database programs. In addition, IT manages the District's communications equipment including mobile display computers, mobile and portable radios, pagers, and cellular phones.

IT maintains proper licensing and maintenance contracts for District owned software and hardware. The department partners with all divisions to evaluate technology requirements and helps determine the best solutions to meet both immediate and long-term needs.

IT manages Geographical Information Systems (GIS) and produces GIS maps for response zone analysis, workflow analysis, and deployment standards. IT also manages the District's electronic reporting system (Emergency Reporting) for all alarm responses and investigations. In addition, IT works with the 911 Dispatch Center, Emergency Communications of Southern Oregon (ECSO), for computer aided dispatch programming and support.

## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Personnel Services	\$127,408.05	\$126,745.89	\$132,800	\$137,500
Materials and Services	\$124,388.66	\$134,732.49	\$122,000	\$139,400
	<b>\$251,796.71</b>	<b>\$261,478.38</b>	<b>\$254,800</b>	<b>\$276,900</b>



## PERSONNEL SUMMARY

Position	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Information Technology Administrator	1.00	1.00	1.00	1.00
<b>Total</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>

# Technology Department

2017/18 Fiscal Year

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services will increase 3.54 percent or \$4,700 from the prior fiscal year. The significant factor impacting this classification is an increase in pension costs.

The overall Materials and Services classification will increase 14.26 percent or \$17,400. Contributing factors include increased technology costs including updated phone systems at Central Point and Eagle Point stations, additional Zoom media cameras for remote trainings and conferencing, and computer network switches. Account 60223-013; *Communication Supplies* decreased to include only routine replacement equipment, as no special projects were identified for the new fiscal year.

## PRIOR YEAR ACCOMPLISHMENTS

<u>Action Item</u>	<u>Strategic Priority Number</u>	<u>Outcome</u>
GIS Mapping	3	Continued implementation and education of GIS mapping software enhancing ability to provide detailed maps and analyze data for effective decision making regarding the District's deployment and response performance.

### **Other Noteworthy Accomplishments from Technology**

- Purchased and implemented mobile inspection devices for the Fire and Life Safety Department
- Purchased and configured the first phase of implementing Zoom video conferencing
- Maintained system network with zero percent downtime
- Provided upgrades to the Captain's cell phones
- Updated and reprogrammed all Inmotion devices for greater reliability
- Installed incident status displays in the Battalion Chief office and Central Point station
- Upgraded entire District network to Windows 10

## DEPARTMENT MEASUREMENTS AND TARGETS

<i>Types of Transactions (Output Measures)</i>	<i>2013/14 Actual</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Target</i>
<i>Computer Workstation Replacement</i>	10	10	10	10	10
<i>Mobile Display Computers and Tablets</i>	10	10	0	4	4
<i>Computer Server</i>	0	2	0	1	1
<i>Network Services Uptime Target</i>	99%	99%	99%	99%	99%

# Technology Department

2017/18 Fiscal Year

## Service Measures and Desired Outcomes

- Manage the District's technology systems and provide consistent and reliable network services.  
Measured By: A network infrastructure system that is operating efficiently with minimal to no down time, thus increasing productivity.  
➡ Successfully able to manage network systems with no down time to personnel.
- Participate as an active partner in project management, planning, and implementation to support District-wide business technology solutions.  
Measured By: Active participation in meetings and project development.  
➡ Successfully able to participate and migrate the District to Office 365, Cloud storage, server upgrades, and enhanced media delivery.
- Perform GIS mapping and data analysis to provide Executives with accurate information in tracking call volume and making managerial decisions.  
Measured By: Quarterly reports to the Executive Team; incorporate data into annual performance report; perform other specialized GIS services upon request to outside agencies if appropriate.  
➡ Successfully able to run GIS data; developed reports and maps that provide detail with respect to call volume and anticipate future demand for service.

## 2017/18 FISCAL YEAR DEPARTMENTAL ACTION ITEMS

The District is in the last year of our three year Strategic Plan and the detailed tasks for each action item identified for the Technology Department's accomplishment have been attained and the desired outcomes have been met or surpassed. The Technology Department will continue to support the District in the sustainability of service delivery to the District's members, facilities, and fleet by contributing to the following District projects:

- Complete an IT program evaluation SWOT analysis and provide recommendations.
- Update all stations to the ShoreTel telephone system.
- Provide incident status displays at the Eagle Point, White City, and Table Rock stations.
- Update the White City computer network switch gear.
- Continue to collaborate with all Department's in resolving technology issues and ensure technology is functioning consistently for workflow efficiency.

# Technology Department

2017/18 Fiscal Year

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	93,354.49	93,712.16	95,000	95,500	95,500	95,500
Incentives	3,198.00	3,248.00	5,300	5,300	5,300	5,300
Retirement (PERS)	5,250.38	5,124.60	5,200	8,200	8,200	8,200
ER Deferred Comp Contrib	2,335.19	3,264.00	3,300	4,200	4,200	4,200
Health & Life Insurance	10,961.03	11,622.48	12,100	12,300	12,300	12,300
HRA-VEBA Contribution	3,970.23	2,304.72	3,800	4,000	4,000	4,000
FICA and Medicare PR Taxes	8,032.39	7,400.46	7,600	7,500	7,500	7,500
Workers' Comp Insurance	306.34	69.47	500	500	500	500
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$127,408.05</b>	<b>\$126,745.89</b>	<b>\$132,800</b>	<b>\$137,500</b>	<b>\$137,500</b>	<b>\$137,500</b>
<b>Materials and Services</b>						
Supplies; Computers and Tech	31,179.26	33,295.68	23,000	45,500	45,500	45,500
Supplies; Communication Devices	13,287.12	20,927.52	24,100	10,000	10,000	10,000
Licenses and Subscriptions	31,990.69	39,332.85	32,300	43,900	43,900	43,900
Technical Support	0	0.00	12,100	8,000	8,000	8,000
M&R; Office and Tech Equip	6,187.71	5,372.79	7,000	7,000	7,000	7,000
M&R; Communication Devices	4,304.20	5,820.85	3,500	5,000	5,000	5,000
Contractual/Professional Services	13,457.00	10,110.65	0	0	0	0
Communication Services	23,982.68	19,872.15	20,000	20,000	20,000	20,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$124,388.66</b>	<b>\$134,732.49</b>	<b>\$122,000</b>	<b>\$139,400</b>	<b>\$139,400</b>	<b>\$139,400</b>
<b>TOTAL TECHNOLOGY DEPARTMENT</b>	<b>\$251,796.71</b>	<b>\$261,478.38</b>	<b>\$254,800</b>	<b>\$276,900</b>	<b>\$276,900</b>	<b>\$276,900</b>

# Technology Department

2017/18 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 7

Account	Description	Account Total
<b>60223-011</b>	<b>Supplies; Computers and Technology Equipment.....</b>	\$ 45,500
	Technology related equipment and supplies including computers, laptops, tablets, monitors, printers, keyboards, speakers, software, routers, cables, connectors, switches, and general supply items	20,000
	PROJECT: Alarm incident status display monitors at stations EP, WC, TR	3,000
	PROJECT: Zoom camera's for EP and Claflin classroom	2,500
	PROJECT: Shoretel phone systems at CP and EP	10,000
	PROJECT: New network switches for WC	10,000
<b>60223-013</b>	<b>Supplies; Communication Devices.....</b>	\$ 10,000
	Radio equipment, communication devices, and batteries for pagers	
<b>60240-000</b>	<b>Licenses and Subscriptions.....</b>	\$ 43,900
	SonicWall (server firewall)	500
	3E online safety data sheet management	500
	Appraver secure spam filter	700
	IBM support (backup server and Shortel server)	900
	Website hosting	900
	DNS Hosting and Active 911	600
	ArcMail service (email backup)	3,000
	Trend security (Antivirus)	1,700
	Shortel annual license and limited support (phone system)	2,900
	GIS annual license	1,000
	Photocopier lease payment (Admin color copier)	2,000
	Cloud hosted exchange service	6,500
	Zoom video conferencing	2,000
	Emergency Reporting computer aided dispatch interface	1,500
	Emergency Reporting (records management system)	7,200
	Sierra Wireless for wifi engine routers	5,000
	Personnel staffing management program	7,000
<b>60241-000</b>	<b>Technical Support.....</b>	\$ 8,000
	Core Business Solutions updates and monitoring support	4,000
	GIS support, ER support, other hardware/software support	4,000
<b>60252-000</b>	<b>M&amp;R; Office and Tech Equipment.....</b>	\$ 7,000
<b>60253-000</b>	<b>M&amp;R; Emergency Response Communication Devices.....</b>	\$ 5,000
	Reprogramming and repair of pagers, radios, tables, mobile display computers	
<b>60290-000</b>	<b>Communication Services.....</b>	\$ 20,000
	Monthly expenses for mobile phone plans, wifi cards for laptops and mobile display computer connections	
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 139,400</b>

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# Fire District 3

## Non-Departmental



**2017/18 Fiscal Year Budget**

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# Non-Departmental

2017/18 Fiscal Year

## DESCRIPTION

The non-departmental categories are the components of the budget that are not directly related to any one departmental activity. These include the categories of transfers, operating contingency, debt service, and unappropriated ending fund balance.

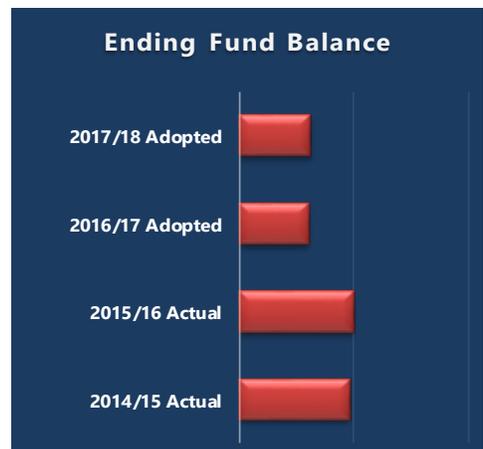
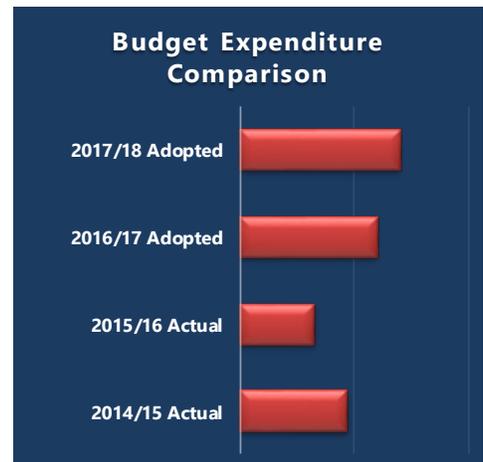
The General Fund transfers budgeted funds to the Capital Projects Fund for all capital expenditures. Operating contingency is appropriated money available for unanticipated expenditures that may arise during the budget year. Utilization of these funds requires Board of Director approval.

Unappropriated ending fund balance is budgeted at \$3,090,000. While listed as a requirement, it is actually a resource for the ensuing fiscal year and cannot be expended in the current year. This figure is computed at 24 percent of property tax revenue. It is the District's philosophy to provide funding for the ensuing year's requirements until levied taxes are received in November. When calculating the actual ending fund balance, the District includes budgeted funds not expended in line item accounts.

Debt service accounts for money the District is obligated to pay towards a Full Faith and Credit Financing Agreement issued on November 4, 2013 for \$1,908,510. This issuance was a refinance of two existing debt agreements for equipment, land, and construction of the administration building. The debt schedule represents an eight year term.

## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Transfers	\$1,473,800.00	\$1,036,200.00	\$986,900	\$1,349,300
Operating Contingency	\$0.00	\$0.00	\$1,120,500	\$1,159,000
Contingency for Liabilites	\$0.00	\$0.00	\$25,000	\$25,000
Debt Service	\$393,548.20	\$261,767.39	\$262,000	\$261,900
	<b>\$1,867,348.20</b>	<b>\$1,297,967.39</b>	<b>\$2,394,400</b>	<b>\$2,795,200</b>
<b>Ending Fund Balance</b>	<b>\$4,793,720.23</b>	<b>\$4,950,894.55</b>	<b>\$2,988,000</b>	<b>\$3,090,000</b>



# Non-Departmental

2017/18 Fiscal Year

## NEW BUDGETARY SIGNIFICANT CHANGES

- The transfer to the Capital Projects Fund has increased based on available appropriations in the General Fund and to maintain compliance with the capital policy, ensuring the fund and future commitments are supported.
- Contingency is funded at nine percent of the General Fund's budgeted property tax revenue.
- The District established a sub-account under Operating Contingency as a means to address the vacation accrual liability. Compensated absences activity for the year ending June 30, 2016 and as reflected in the Comprehensive Annual Financial Report, was \$861,642. The \$25,000 allocated represents 2.91 percent of the liability.
- Unappropriated Ending Fund Balance has increased from \$2,988,000 to \$3,090,000. This amount represents 24 percent of the General Fund's budgeted property tax revenue and is higher as a result of the District's assessed valuation increasing. This commitment to policy, in conjunction with other reserves, allows the District to remain financially responsive to operating costs during the dry cash flow period of July to November.
- Debt Service payments represent the third year under a financing agreement with Wells Fargo Bank, N.A. and is in compliant with the debt service schedule.

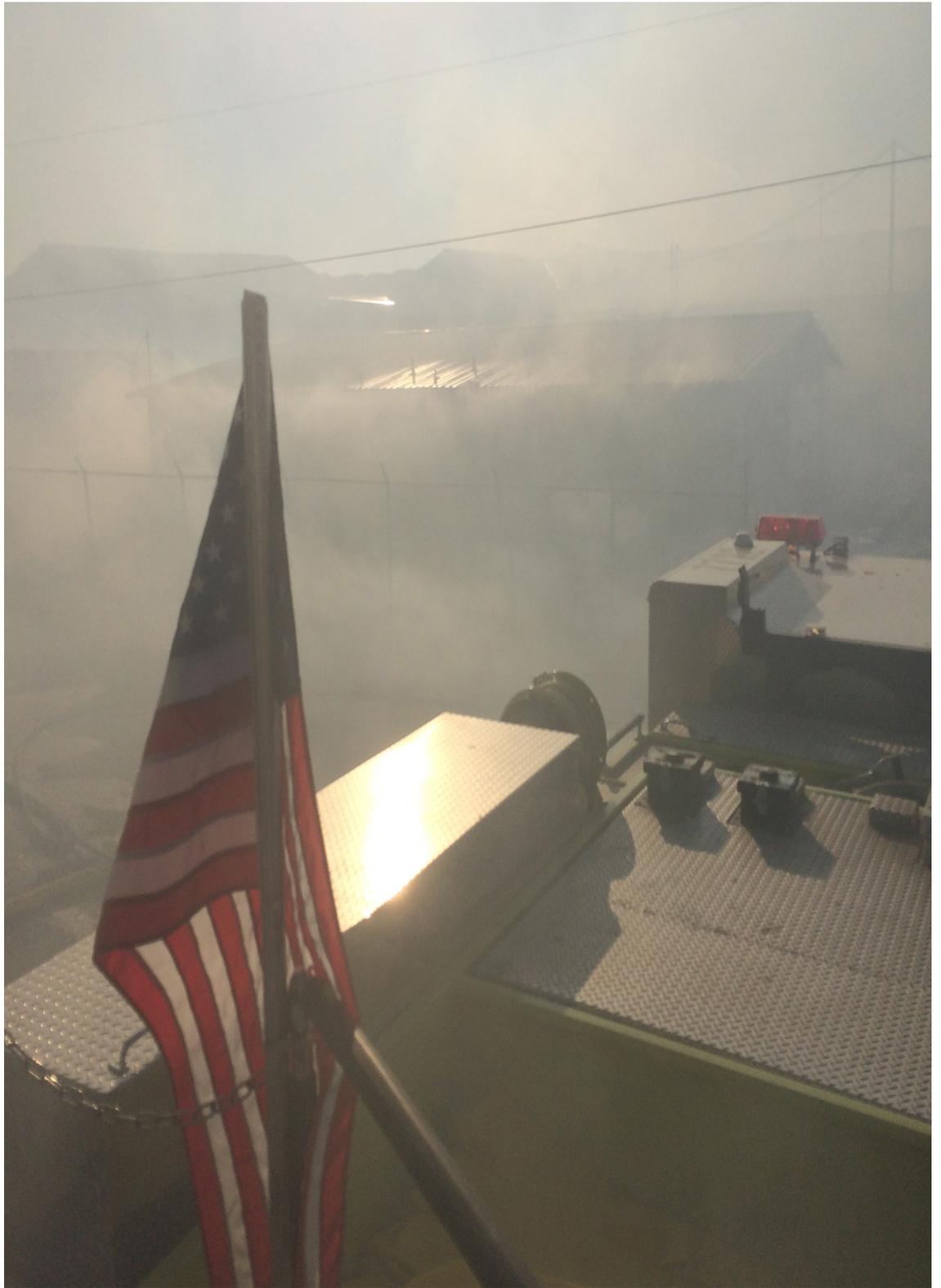
## Expenditures by Account

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<u>Transfers</u>						
Transfer to Capital Projects Fund	1,473,800.00	1,036,200.00	986,000	1,139,600	1,160,900	1,349,300
	<b>\$1,473,800.00</b>	<b>\$1,036,200.00</b>	<b>\$986,000</b>	<b>\$1,139,600</b>	<b>\$1,160,900</b>	<b>\$1,349,300</b>
<u>Operating Contingency</u>						
Operating Contingency	0.00	0.00	1,020,500	1,158,800	1,158,800	1,159,000
Contingency for Vacation Liabilities	0.00	0.00	25,000	25,000	25,000	25,000
	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,045,500</b>	<b>\$1,183,800</b>	<b>\$1,183,800</b>	<b>\$1,184,000</b>
<u>Debt Service</u>						
Debt Service Principal	342,994.67	225,337.65	231,000	236,500	236,500	236,500
Debt Service Interest	50,553.53	36,429.74	31,000	25,400	25,400	25,400
	<b>\$393,548.20</b>	<b>\$261,767.39</b>	<b>\$262,000</b>	<b>\$261,900</b>	<b>\$261,900</b>	<b>\$261,900</b>
<u>Unappropriated Ending Fund Balance</u>						
Ending Fund Balance	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$2,988,000</b>	<b>\$3,090,000</b>	<b>\$3,090,000</b>	<b>\$3,090,000</b>
<b>TOTAL NON-DEPARTMENTAL</b>	<b>\$1,867,348.20</b>	<b>\$1,297,967.39</b>	<b>\$5,281,500</b>	<b>\$5,675,300</b>	<b>\$5,696,600</b>	<b>\$5,885,200</b>



# Capital Projects Fund

# Fire District 3



**2017/18 Fiscal Year Budget**

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# Capital Projects Fund

## FUND DESCRIPTION

The Capital Projects Fund is used to account for financial resources that are restricted, committed, or assigned to expenditure for capital outlays including the acquisition of equipment, machinery, apparatus, vehicles, building construction, building improvements, and land acquisition. A capital outlay is defined as a tangible or intangible fixed asset with a value of over \$5,000 that is used in operations of the District and that has an initial useful life extending beyond one year. Primary revenue sources are transfers from the General Fund, however the fund will also receive donations, loans, or grant proceeds.

The Capital Replacement Schedule dictates the annual budgeted expenditures. This schedule is reviewed annually and revised if needed during the budget and strategic planning process. Factors that are taken into consideration in the timing of identified and scheduled replacement of equipment include; changes to deployment standards and response times, changing demographics and community needs, changes to the urban, suburban, and rural geographical areas, and changes to the nature of alarms.

An Apparatus Committee consisting of District members develops the technical requirements of each apparatus purchased. The Committee reviews specifications and makes site visits to the manufacturing plant ensuring that the unit purchased will meet the District's requirements. Once an apparatus is ordered, delivery varies depending on the apparatus type and manufacturing schedules.

Transfers from the General Fund provide funding for the budgeted requirements. The Capital Replacement Schedule identifies a committed minimum transfer amount each fiscal year in order to meet targeted expenditures. A higher transfer amount will be made in fiscal years where the General Fund supports that. Other options for funding would be loan proceeds or levies proposed to the voters. Funds not identified to be spent are appropriated in the reserve for future/ending fund balance category.

Capital expenditures considered routine in nature are those that are identified in the Capital Replacement Schedule and planned out ten years for replacement based on their expected life span and rotation schedule. Capital expenditures considered non-routine in nature are those projects not typically scheduled out on a replacement plan and are unique in concept.

## BUDGET SUMMARY

Expenditures	2014/15 Actual	2015/16 Actual	2016/17 Adopted	2017/18 Adopted
Capital Expenditures	\$262,200.60	\$711,894.48	\$608,800	\$3,991,800
Contingency	\$0.00	\$0.00	\$58,400	\$200,000
Reserve for Future/Ending Fund Balance	\$2,755,651.61	\$3,079,957.13	\$3,410,500	\$2,847,100
	<b>\$3,017,852.21</b>	<b>\$3,791,851.61</b>	<b>\$4,077,700</b>	<b>\$7,038,900</b>



# Capital Projects Fund

## NEW BUDGETARY SIGNIFICANT CHANGES

Budgeted capital expenditures planned for and considered routine in nature include two structural fire engines. These engines have been spec'd out as Pierce type one pumpers.

In addition to routine purchases the District will be entering into some construction projects over the next few fiscal years. In collaboration with Rogue Community College the District will construct a classroom type building on the White City campus to house the college's fire science program. The facility will be co-shared although the District will maintain ownership and oversee all facility scheduling, maintenance, and repairs. Of the \$1.5 million budgeted for this project only \$500,000 is from direct budget funds; Rogue Community College has allocated \$500,000 in bond funds and the remaining \$500,000 will be acquired from private and public donors.

The District will also be proceeding with construction of our eighth fire station. The primary goal in the 2017/18 fiscal year is to make a decision on station location within the Central Point and White City fire management zones and based upon the District's updated Standards of Cover, which analyzes response times, deployment, and call volume in relation to different station locations strategically located within the District's jurisdictional boundaries. This budget has \$100,000 allocated to serve as a placeholder for possible land acquisition and development. Based upon the decision regarding which location will best serve our patrons, the District may need to make budget adjustments mid-fiscal year to accommodate actual expenditures. Contingency within this fund will assist in those adjustments if necessary.

The District was successful in attaining a \$1.081 million grant from the Oregon Seismic Rehabilitation Program through the State of Oregon, which will provide funds to retrofit five fire stations and bring them up to current seismic standards.

The only other budgeted capital expenditures considered non-routine in nature for the 2017/18 fiscal year includes the purchase of tactical repeaters for improved radio frequency.

## Capital Replacement Schedule

The following expenditures are considered routine in nature because they are on a rotation replacement schedule.

Apparatus and Vehicles	Lifespan	Prior Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
		16/17 FY	17/18 FY	18/19 FY	19/20 FY	20/21 FY	21/22 FY	22/23 FY	23/24 FY	24/25 FY	25/26 FY	26/27 FY
Structural Engine	10/20/25 years		2							2		
Wildland Engine	15/20/30 years					1			1	1		
Tactical Tender	20/30 years	1					1			1		
Aerial Ladder Truck	25 years											1
Rescue/Ambulance	25 years											
Battalion Chief Command Unit	5/10/15 years					1						
Technical Rescue Truck	20 years											
Staff Vehicle	10/20 years	2			2		2					
Service Vehicle	20 years											
<b>Suppression Equipment</b>												
Breathing Apparatus	15 years				1							
Defibrillators/AED's	10 years									6		
Extrication Equipment	10 years					4			1	1		
Thermal Imagers	10 years	4										
Radio's - Portable and Mobile	15 years							80				
<b>Technology</b>												
Computer Main Server	3 years				1			1			1	
Mobile Display Computers	8 years						10					

# Capital Projects Fund

## **Apparatus Program Goals**

- Develop specifications that are practical and realistic; be resourceful and cost prudent whenever possible.
- Standardize new apparatus purchases to the maximum extent possible.
- Perform ongoing and regular preventative maintenance on apparatus to maximize the longest effective and useful life.
- Ensure adequate transfers from the General Fund are made to ensure funding of identified capital expenditures.
- Utilize the option of loan proceeds for apparatus acquisition if deemed financially necessary.
- Ensure timely information is provided to Finance within the Administration Department and to the Board of Director's for cost differences.

## **Equipment Program Goals**

- Consider safety, training functionality, and length of useful life when evaluating equipment purchases.
- Equip District firefighters with the tools and equipment necessary to maximize the margin of safety and survivability in a dangerous profession.
- Standardize equipment where possible to save training costs, increase safety, and support consistency throughout the District.
- Develop specifications that are practical and realistic; be resourceful and cost prudent whenever possible.
- Ensure adequate transfers from the General Fund are made to ensure funding of identified capital expenditures.

## **Building, Land, and Improvement Program Goals**

- Annually evaluate future capital projects based on current and projected deployment and response times.
- Construct facilities that can house career, student firefighters, and volunteer firefighters as well as male and female response personnel.
- Achieve good neighbor relationships when designing and developing new fire stations.
- Ensure capital projects are identified in the Strategic Plan under mid and long term priorities and approved at the Board of Director level.
- Provide regular preventative maintenance on facilities to ensure longest useful life.
- Consider environmental policy initiatives in facility design and repair and maintenance.
- Ensure adequate transfers from the General Fund are made to ensure funding of identified capital projects.

## **Future Projects**

Although land acquisition and site development for the new fire station will commence in the 2017/18 fiscal year, actual construction would more than likely not occur until the 2018/19 fiscal year. With two consecutive years of large capital fund expenditures, the District will scale down with projects in the fiscal years immediately following to rebuild the fund. Self-contained breathing apparatus will be due for replacement in the 2019/20 fiscal year. This project will be another large undertaking, both logistically and financially, in bringing the District up to current standards.

# Capital Projects Fund

## Capital Projects and Costs

The Capital Replacement Schedule below is further detailed to depict replacement costs ten years into the future. The prior year is also depicted as a reference to the reader. The District has based this schedule on a three percent inflationary factor per year from today's replacement cost value.

		Replacement Cost with Inflationary Factors										
		Prior Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>SCHEDULED - Apparatus and Vehicles</b>	Current Cost	16/17 FY	17/18 FY	18/19 FY	19/20 FY	20/21 FY	21/22 FY	22/23 FY	23/24 FY	24/25 FY	25/26 FY	26/27 FY
Structural Engine	\$630,000	-	1,260,000	-	-	-	-	-	-	1,724,397	-	-
Wildland Engine	\$84,000	-	-	-	-	94,543	-	-	103,309	106,409	-	-
Tactical Tender	\$350,000	350,000	-	-	-	-	405,746	-	-	443,370	-	-
Aerial Ladder Truck	\$1,000,000	-	-	-	-	-	-	-	-	-	-	1,343,916
Rescue/Ambulance	\$160,000	-	-	-	-	-	-	-	-	-	-	-
Battalion Chief Command Unit	\$140,000	-	-	-	-	154,534	-	-	-	-	-	-
Technical Rescue Truck	\$90,000	-	-	-	-	-	-	-	-	-	-	-
Staff Vehicle	\$40,000	80,000	-	-	86,151	-	90,513	-	-	-	-	-
Service Vehicle	\$75,000	-	-	-	-	-	-	-	-	-	-	-
		<b>\$ 430,000</b>	<b>\$ 1,260,000</b>	<b>-</b>	<b>\$ 86,151</b>	<b>\$ 249,077</b>	<b>\$ 496,259</b>	<b>-</b>	<b>\$ 103,309</b>	<b>\$ 2,274,175</b>	<b>-</b>	<b>\$ 1,343,916</b>
<b>SCHEDULED - Suppression</b>												
Breathing Apparatus	\$355,000	-	-	-	382,296	-	-	-	-	-	-	-
Defibrillators/AED's	\$30,000	-	-	-	-	-	-	-	-	210,899	-	-
Extrication Equipment	\$23,000	-	-	-	-	101,551	-	-	27,340	28,023	-	-
Thermal Imagers	\$7,500	30,000	-	-	-	-	-	-	-	-	-	-
Radio's - Portable and Mobile	\$4,500	-	-	-	-	-	-	382,147	-	-	-	-
		<b>\$ 30,000</b>	<b>-</b>	<b>-</b>	<b>\$ 382,296</b>	<b>\$ 101,551</b>	<b>-</b>	<b>\$ 382,147</b>	<b>\$ 27,340</b>	<b>\$ 238,922</b>	<b>-</b>	<b>-</b>
<b>SCHEDULED - Technology</b>												
Computer Main Server	\$8,000	-	-	-	8,615	-	-	9,278	-	-	9,991	-
Mobile Display Computers	\$5,000	-	-	-	-	-	56,570	-	-	-	-	-
Wi-Fi Routers for Engines	\$30,000	-	-	-	-	-	-	-	-	-	-	-
		<b>\$ -</b>	<b>-</b>	<b>-</b>	<b>\$ 8,615</b>	<b>-</b>	<b>\$ 56,570</b>	<b>\$ 9,278</b>	<b>-</b>	<b>-</b>	<b>\$ 9,991</b>	<b>-</b>
<b>Other Proposed Projects (non-routine in nature)</b>												
Treadmills/Rowers		-	-	-	-	-	-	-	-	-	-	-
Tilt Trailer		7,300	-	-	-	-	-	-	-	-	-	-
Forcible Entry Door at Trng Center		6,400	-	-	-	-	-	-	-	-	-	-
Live Fire Burn Containers		85,000	-	-	-	-	-	-	-	-	-	-
Tactical Repeaters for Radio Frequency		50,000	50,000	-	-	-	-	-	-	-	-	-
RCC Classroom			1,500,000	-	-	-	-	-	-	-	-	-
Seismic Upgrades to Fire Stations			1,081,800	-	-	-	-	-	-	-	-	-
Future Fire Station Land Acquisition / Site Development /Construction			100,000	3,000,000	-	-	-	-	-	-	-	-
		<b>\$ 148,700</b>	<b>\$ 2,731,800</b>	<b>\$ 3,000,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Project Costs</b>		<b>\$ 608,700</b>	<b>\$ 3,991,800</b>	<b>\$ 3,000,000</b>	<b>\$ 477,063</b>	<b>\$ 350,627</b>	<b>\$ 552,829</b>	<b>\$ 391,425</b>	<b>\$ 130,649</b>	<b>\$ 2,513,097</b>	<b>\$ 9,991</b>	<b>\$ 1,343,916</b>

# Capital Projects Fund

2017/18 Fiscal Year

## Fund Balances

The estimated costs of the identified capital projects are then extrapolated to a fund balance schedule to provide management with a depiction of fund deficits and overall fund sustainability. Year one of the schedule is the proposed budget presented to the Budget Committee and represents the actual transfer the General Fund is able to support. Years two through ten depict the minimum transfer amount of \$300,000. In years where the ending fund balance represents a deficit the District uses this information to prepare for the future by providing adequate transfers or attainment of other revenue sources to prevent an actual fund deficit from occurring.

	Prior Year 16/17 FY	Year 1 17/18 FY	Year 2 18/19 FY	Year 3 19/20 FY	Year 4 20/21 FY	Year 5 21/22 FY	Year 6 22/23 FY	Year 7 23/24 FY	Year 8 24/25 FY	Year 9 25/26 FY	Year 10 26/27 FY
<b>Beginning Fund Balance</b>	\$ 3,115,400	\$ 3,607,000	\$ 3,047,100	\$ 1,847,700	\$ 1,671,337	\$ 1,621,410	\$ 1,369,281	\$ 1,278,556	\$ 1,448,607	\$ (763,790)	\$ (473,081)
Transfers in from General Fund *	986,900	1,349,300	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Other Revenue **	16,400	2,082,600	1,500,600	700	700	700	700	700	700	700	700
Expenditures ***	511,700	3,991,800	3,000,000	477,063	350,627	552,829	391,425	130,649	2,513,097	9,991	1,343,916
<b>Ending Fund Balance</b>	<b>\$ 3,607,000</b>	<b>\$ 3,047,100</b>	<b>\$ 1,847,700</b>	<b>\$ 1,671,337</b>	<b>\$ 1,621,410</b>	<b>\$ 1,369,281</b>	<b>\$ 1,278,556</b>	<b>\$ 1,448,607</b>	<b>\$ (763,790)</b>	<b>\$ (473,081)</b>	<b>\$ (1,516,297)</b>

*Transfers in are based on the minimum amount as established by policy \**

*Other revenue consists of loans, grants, and sale of capital equipment \*\**

*Ending fund balance includes contingency \*\*\**

## Capital Construction Historical

The District has undertaken several unique projects over the years. These projects have been funded in the following ways.

### Projects funded with debt backed by the full faith and credit of the District:

- Eagle Point Station Construction – *Constructed 2003*
- Table Rock Road Land Acquisition – *Purchased 2005*
- Administrative Office Building – *Constructed 2009/2010*

### Projects funded with District funds:

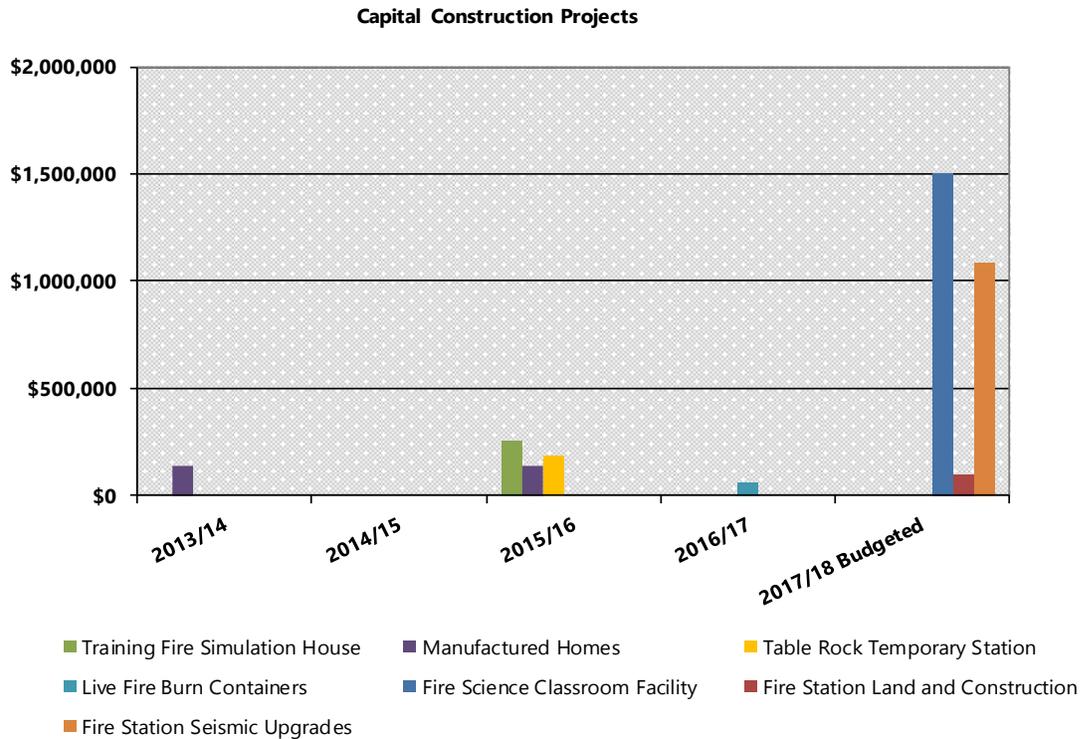
- Eagle Point Land Acquisition – *Purchased 2002*
- Central Point Station Remodel – *Constructed 2004*
- Training Center Complex and Parking Lot – *Constructed 2003*
- White City Fire Station Remodel – *Constructed 2009/2010*
- Central Point Fire Station Kitchen Remodel – *Constructed 2014*
- Eagle Point Exercise Room – *Constructed 2015*
- Manufactured Residences – *Placed in 2013; Two additional homes placed in 2016*
- Table Rock Temporary Station and Residence Quarters – *Constructed 2015*

### Projects funded by donations:

- Training Center Tower, Warehouse, and Training Grounds – *Constructed 2003*
- Simulation Training House – *Constructed 2016*

# Capital Projects Fund

The following chart reflects the capital construction projects the District has accomplished over the past five years and what is proposed in the new budget year:



## RELATIONSHIP OF CAPITAL EXPENDITURE BUDGET TO ANNUAL OPERATING BUDGET

When analyzing the District’s capital replacement an evaluation is also made on how the expenditures will impact annual operations, specifically the General Fund. The effect on the General Fund is an important factor because the majority of resources in the Capital Fund derive from transfers from the General Fund. If the General Fund is not able to sustain transfers due to a shortfall in projected property tax revenue, then transfers may become more difficult to accomplish and other funding sources may need to be pursued.

Budgeted capital expenditures for the 2017/18 fiscal year are identified below and are anticipated to have the following impact on the General Fund operating budget.

<b>Project</b>	<b>Budgeted Cost</b>	<b>Description and Operating Budget Impact</b>
<b><u>Department Equipment</u></b>		
Receivers for Tactical Frequency	\$50,000	<p>The receivers are to develop repeater sites in order to enhance radio coverage and communications in the rural communities.</p> <p>The impact on the operating budget would result in a monthly service fee for internet access on the engines at an estimated cost of \$5,300 per year.</p> <p>This project is a rollover from the prior fiscal year.</p>

# Capital Projects Fund

Project	Budgeted Cost	Description and Operating Budget Impact
<b><u>Apparatus</u></b>		
Structural Fire Engines	\$350,000	<p>The structural fire engines will replace older reserve units that have met their service life. They will eventually be decommissioned and surplus out. The new engines will be placed at the White City and Central Point stations. The reserve units at those stations will then move to those volunteer stations whose units were surplus.</p> <p>The impact on the operating budget is anticipated to be minimal as the newer units will be more fuel efficient and have less maintenance costs associated with them.</p>
<b><u>Building and Construction</u></b>		
Fire Science Classroom	\$1,500,000	<p>The classroom facility is designed to be a 5,600 square foot wood or steel framed building to accommodate up to 130 persons with a large partitioned classroom, lockers, three offices, and restroom facilities. The Rogue Community College (RCC) fire science program will operate out of this facility; the District will use it for multi-level training events and ceremonies.</p> <p>This facility will have impact on the operating budget as the District will be responsible for all preventative maintenance, utility costs, and security and oversight. At this time it is unknown how much that impact will be; the District will be determining that within the 2017/18 fiscal year and budget accordingly for these costs in the 2018/19 fiscal year. RCC will be compensating the District however for a certain portion of these overhead costs, which will help to offset the impact on the General Fund. That compensation amount will also be determined in the new fiscal year.</p>
Fire Station Seismic Upgrades	\$1,081,800	<p>The seismic upgrades will bring the Agate Lake, Central Point, Dodge Bridge, Eagle Point, and Sams Valley fire stations up to current seismic standards that are essential for emergency services facilities. It is not anticipated that these improvements will have a significant impact on the General Fund operating budget, as these improvements focus on shoring up the foundations, masonry walls, and rooflines.</p>
Land Acquisition for Fire Station	\$100,000	<p>This is the first phase in the new fire station construction project and is anticipated to have minimal impact on the operating budget during the first couple of years. Once the project has been completed in its entirety, impact of a new station will be significant. Those costs will be determined within the next fiscal year as more development is made.</p>

# Capital Projects Fund

## Revenues and Expenditures by Account

Description	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2014/15 FY	2015/16 FY	2016/17 FY	2017/2018		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Beginning Fund Balance	1,279,652.21	2,755,651.61	3,090,000	3,597,600	3,597,600	3,600,700
Sale of Capital Equip & Vehicles	14,400.00	0.00	500	500	500	500
Grants; Local, State, Federal	0.00	0.00	100	100	1,082,000	1,082,000
Donations	250,000.00	0.00	100	1,000,000	1,000,000	1,000,000
Transfer from General Fund	1,473,800.00	1,036,200.00	986,900	1,139,600	1,139,600	1,160,900
Loan Proceeds	0.00	0.00	100	100	100	100
	<b>\$3,017,852.21</b>	<b>\$3,791,851.61</b>	<b>\$4,077,700</b>	<b>\$5,737,900</b>	<b>\$6,819,800</b>	<b>\$6,844,200</b>
Department Equipment	136,050.15	53,141.07	93,700	50,000	50,000	50,000
Apparatus and Vehicles	96,376.94	45,588.40	430,000	1,260,000	1,260,000	1,260,000
Land and Improvements	0.00	0.00	100	100,000	100,000	100,000
Building Construction & Improvements	29,773.51	613,165.01	85,000	1,500,000	2,581,800	2,581,800
Contingency	0.00	0.00	58,400	145,500	200,000	200,000
Reserve for Future Exp & End Fund Bal	0.00	0.00	3,410,500	2,682,400	2,628,000	2,652,400
	<b>\$262,200.60</b>	<b>\$711,894.48</b>	<b>\$4,077,700</b>	<b>\$5,737,900</b>	<b>\$6,819,800</b>	<b>\$6,844,200</b>
<b>Fund Balance</b>	<b>\$2,755,651.61</b>	<b>\$3,079,957.13</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## DETAIL BY ACCOUNT

### Capital Projects Fund 5

Account	Description	Account Total
<b>70530-000</b>	<b>Department Equipment</b> ..... Receivers for tactical frequency	\$ 50,000
<b>70531-000</b>	<b>Apparatus and Vehicles</b> ..... (2) structural fire engines	\$ 1,260,000
<b>70532-000</b>	<b>Land and Improvements</b> ..... New fire station land acquisition - placeholder for potential site acquisition and development based on Standards of Cover	\$ 100,000
<b>70533-000</b>	<b>Building Construction/Improvements</b> ..... Fire science classroom construction in partnership with Rogue Community College Seismic Upgrade Grant - Fire Station Improvements Agate Lake Station Central Point Station Dodge Bridge Station Eagle Point Station Sams Valley Station	\$ 2,581,800 1,500,000 79,300 718,000 113,300 46,800 124,400 1,081,800
<b>TOTAL CAPITAL EXPENDITURES</b>		<b>\$ 3,991,800</b>

# Glossary of Terms and Acronyms

## Fire District 3



2017/18 Fiscal Year Budget

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# Glossary of Terms and Acronyms

**Account**

A term used to identify an individual asset, liability, expenditure control, revenue control, or fund balance.

**Administrative (ADM)**

Department responsible for the performance of executive duties and District management.

**Advanced Life Support (ALS)**

Emergency medical treatment requiring an advanced level of skill to administer life support procedures including intravenous drug therapy, cardiac monitoring, and defibrillation.

**Agate Lake Station (AL)**

Volunteer fire station located at 880 East Antelope Rd., Eagle Point, OR.

**Alarm**

A call received by a dispatch center, which is then relayed to the appropriate fire station for emergency response.

**Appropriation**

An act by a legislative body authorizing the expenditure of a designated amount of funds or to incur obligations for specific purposes.

**Assessed Valuation**

The total taxable value placed on real estate and other property as a basis for levying taxes.

**Assets**

Property owned by the District that has monetary value.

**Assistance to Firefighters Grant (AFG)**

Federal grant the District was awarded to purchase mobile and portable radios that meet Homeland Security guidelines for inter-agency communication.

**Battalion Chief (BC)**

One who supervises, plans, organizes, directs, and controls activities within the Operations Department. Will function as command officer at emergency scenes and may assume a variety of command positions.

**Balanced Budget**

A budget in which revenues equal expenditures for all funds presented.

**Basic Life Support (BLS)**

Emergency medical care generally limited to non-invasive procedures such as CPR, hemorrhage control, splinting, and breathing support.

**Board of Directors (BOD)**

Elected body of officials that governs the District.

**Budget**

A plan of financial operation embodying an estimate of proposed expenditures for a given period (typically a fiscal year) and the proposed means of financing them (revenue estimates) for the same fiscal year.

# Glossary of Terms and Acronyms

**Budget Document**

The instrument used by the budget-making authority to present a comprehensive financial program to the appropriating body.

**Budget Message**

A general discussion of the proposed budget as presented in writing by the budget officer to the legislative body.

**Budgetary Control**

The control or management of a governmental unit or enterprise in accordance with approved budget for the purpose of keeping expenditures within the limitation of available appropriations and available revenues.

**Capital Outlays**

Expenditures for the acquisition of capital assets.

**Captain**

One who is in charge of shift firefighters and engineers known as a company officer. Each shift has an assigned captain.

**Carbon Monoxide (CO)**

A colorless, odorless, highly poisonous gas.

**Cardiopulmonary Resuscitation (CPR)**

A procedure employed after cardiac arrest using heart massage, drugs and mouth-to mouth resuscitation to restore breathing.

**Central Point Station (CP)**

24-hour staffed career fire station located at 600 S. Front St., Central Point, OR.

**Certificates of Participation (COP)**

Financing revenue for capital equipment and construction that acts as a lease-purchase security.

**Chart of Accounts**

The classification system used by the District to organize the accounting for various funds.

**Chief Finance Officer (CFO)**

One who is responsible for the financial and human resource departments of the District.

**Chief Fire Officer Designation (CFOD)**

Internationally recognized level of career and academic achievement.

**Civil Service Commission (CSC)**

Consists of three (3) members who are appointed by the Board of Directors to adopt and interpret rules consistent with State Law for the regulation of personnel administration within the classified service.

**Clinical Laboratory Improvement Amendments (CLIA)**

Certification for medical blood testing.

**Commission of Fire Accreditation International (CFAI)**

Commission that gives fire agency accreditation based on certain standards of performance.

# Glossary of Terms and Acronyms

**Computer Aided Dispatch (CAD)**

System that enables the dispatch agency to send and receive emergency service calls to the appropriate agency.

**Current Liabilities**

Liabilities which are payable within a relatively short period of time, usually no longer than a year.

**Current Taxes**

Taxes levied and becoming due during the current fiscal period, from the time the amount of the tax levy is first established, to the date on which a penalty for nonpayment is attached.

**Debt**

An obligation or liability resulting from the borrowing of money or from the purchase of goods and services.

**Debt Limit**

The maximum amount of gross or net debt that is legally permitted.

**Department of Environmental Quality (DEQ)**

Establishes vehicle emissions standards for all vehicles and apparatus.

**Department of Public Safety Standards and Training (DPSST)**

State agency that oversees fire service training and education in Oregon.

**Depreciation**

Expiration in service life of fixed assets attributable to wear and tear through use and lapse of time, obsolescence, inadequacy, or other physical or functional cause.

**Deputy Chief/Fire Marshal (DC/FM)**

One who supervises and directs the personnel assigned to the Fire and Life Safety Department of the District.

**Deputy Chief of Operations (DC)**

One who plans, organizes, directs, and coordinates the activities and functions of the Emergency Operations Department of the District.

**Deputy Fire Marshal (DFM)**

One who conducts fire and life safety inspections, fire investigations, and plans reviews.

**Dispatch**

The agency responsible for receiving emergency and non-emergency calls and sending the appropriate entity to respond to the call.

**Division Chief of Training and Safety (DC)**

One who plans, organizes, directs and coordinates the training and safety functions of the District.

**Dodge Bridge Station (DB)**

Volunteer fire station located at 60 Rogue River Dr., Eagle Point, OR.

# Glossary of Terms and Acronyms

**Drug Enforcement Agency (DEA)**

Establishes and enforces laws relating to various narcotics and medical substances used in the treatment of disease.

**Eagle Point Station (EP)**

24-hour staffed career fire station located at 213 Loto St., Eagle Point, OR.

**Emergency Communication of Southern Oregon (ECSO)**

911 dispatch center that relays calls to the District for emergency response.

**Electro Cardio-Gram (EKG)**

Procedure used to diagnose the heart's electrical rhythm.

**Emergency Medical Service (EMS)**

A service that provides emergency medical treatment for the unexpected, sudden occurrence of a serious and urgent nature that demands immediate attention.

**Emergency Medical Technician (EMT)**

One who is trained and skilled in different levels of medical procedures. There are four (4) different levels of EMT's in the state of Oregon; EMT (Basic), EMT-I (Intermediate), AEMT (Advanced), and EMT-P (Paramedic).

**Engine**

Various apparatus used to transport and pump water; carries ladders, hoses, other equipment and supplies for fighting fires.

**Engineer**

One who maintains and drives the apparatus during emergency calls.

**Expenses**

Charges incurred, whether paid or unpaid, for operation, maintenance, and interest, and other charges, which are to benefit the current fiscal period.

**Fair Labor Standards Act (FLSA)**

Established minimum wage, overtime pay, recordkeeping requirements, and child labor standards for full-time and part-time workers.

**Federal Communications Commission (FCC)**

Agency that oversees radio communication.

**Fire and Life Safety (FLS)**

Department responsible for routine and on-going inspections, public education, and fire and life safety issues.

**Fire and Life Safety Specialist (FLSS)**

One who is responsible for increasing the public's awareness of safety initiatives, fire prevention, safety education programs, and fire adaptive community efforts.

**Fire Chief (FC)**

One who is responsible for planning, coordinating, implementing, and overseeing all of the District's programs, activities, and policies as established by the Board of Directors.

# Glossary of Terms and Acronyms

**Firefighter (FF)**

One who performs firefighting and other emergency scene duties involving the protection of life and property.

**Fire Management Zone (FMZ)**

An initial response area defined by geography.

**Fiscal Year (FY)**

The time period used for the accounting year. The District's fiscal year begins July 1<sup>st</sup> and ends on June 30<sup>th</sup>.

**Fixed Assets (FA)**

Tangible or intangible items purchased that are over \$5,000 and have a useful life of more than one (1) year.

**Full Time Equivalent (FTE)**

Staffing levels are measured in FTE's to give a consistent comparison from year to year.

**Fund**

A fiscal and accounting entity with a self-balancing set of accounts recording cash and other financial resources, together with all related liabilities, that are segregated for the purpose of carrying on specific activities.

**Fund Balance**

The difference between assets and liabilities reported in a governmental fund.

**Generally Accepted Accounting Principles (GAAP)**

The conventions, rules, and procedures that serve as the norm for the fair presentation of financial statements.

**General Fund**

A governmental fund type that serves as the chief operating fund of the District. It is used to account for all financial resources, except those required to be accounted for in another fund.

**General Long-Term Debt**

Legally payable from general revenues and backed by the full faith and credit of the District.

**Geographic Information System (GIS)**

A system designed to capture, store, manipulate, analyze, manage, and present all types of geographical data.

**Gold Hill Station (GH)**

Volunteer fire station located at 299 Access Rd., Gold Hill, OR.

**Government Finance Officers Association (GFOA)**

Organization offering support and a high level of training opportunities for government finance officers.

**Governmental Funds**

Funds used to account for tax-supported activities consisting of general fund, special revenue funds, debt service funds, capital projects funds, and permanent funds.

# Glossary of Terms and Acronyms

**Gross Bonded Debt**

The total amount of direct debt of the District represented by outstanding bonds.

**Hazardous Materials (Haz-Mat)**

Any element, compound, mixture, solution, or substance that, when spilled or released into the air, on land or water, may present a danger to the health and safety of the public or environment.

**Health Insurance Portability and Privacy Act (HIPPA)**

Enables workers to change jobs, regardless of pre-existing medical conditions, and maintain their health coverage. Also provides regulation protecting privacy of personal health information.

**Health Reimbursement Arrangement Voluntary Employees' Beneficiary Association (HRA VEBA)**

The HRA is a type of health plan that reimburses qualified health care costs and insurance premiums for the employee, employee's spouse, and qualified dependents. The VEBA is the tax exempt instrument through which the employee benefits are provided.

**Incident**

An event involving a fire, medical emergency, and/or hazardous material spill.

**Incident Commander (IC)**

One who is responsible for all aspects of emergency response during an incident, emergency, or natural disaster.

**Interface**

An area difficult to protect from fire due to an unusual amount of vegetation surrounding man-made structures.

**International Association of Arson Investigators (IAAI)**

Organization of career arson investigators. Training and education relating to fire investigation are made available to members.

**International Association of Firefighters (IAFF)**

National labor organization for firefighters. The Local 1817 is the organized labor group within the District.

**International Fire Code (IFC)**

The agency that regulates fire code standards.

**International Fire Service Training Association (IFSTA)**

Agency that provides fire training student manuals.

**Inspection and Maintenance (I&M)**

Branch of DEQ that tests the emissions of vehicles in the Rogue Valley located in Jackson County, OR.

**Jackson County (JC)**

The most southwesterly county located in Oregon.

**Jackson County Fire District No. 4 (JCFD4)**

Provides fire and emergency protection to the community of Shady Cove, OR and in which the District has a contract with to supply financial services.

# Glossary of Terms and Acronyms

**Levy**

Tax imposed/collected for the support of District activities.

**Local Government Investment Pool (LGIP)**

A pooled account where the County Treasurer deposits tax receipts.

**Local Government Personnel Institute (LGPI)**

Agency that compiles and publishes governmental salary and benefit statistics.

**Long Term Disability (LTD)**

Injury or illness resulting in time loss from work in excess of 90 days.

**Major Fund**

A governmental fund reported as a separate column in the basic fund financial statements. The general fund is always a major fund. Otherwise, major funds are funds whose revenues or expenditures are at least ten percent of the total budget. Any other government fund may be reported as a major fund, if that fund is particularly important to the financial statement. Although the District's reserve funds are considered non-major, they are treated as major funds for financial reporting purposes.

**Mobile Display Computer (MDC)**

A computer in rescue and command vehicles that display maps and alarm information to emergency calls.

**Modified Accrual Basis**

An accounting process in which expenditures, other than accrued interest on general long-term debt, are recognized in the accounting period that the liability is incurred and revenues are recognized in the accounting period they become available and measurable.

**Municipal Corporation**

A corporate body established for the purpose of providing services and regulations.

**National Fire Protection Association (NFPA)**

Non-governmental association that provides consensus codes and standards, research, training, and education relating to fire protection.

**Net Bonded Debt**

Gross bonded debt less any cash or other assets set aside for its retirement.

**Object Classification**

A grouping of expenditures on the basis of goods or services purchased.

**Operations (OPS)**

Department responsible for emergency medical treatment and fire suppression.

**Operating Statement**

A document summarizing the financial operations of the District for a specific accounting period.

**Oregon (OR)**

State located in the Pacific Northwest region of the United States.

# Glossary of Terms and Acronyms

**Oregon Occupational Safety and Health Administration (OR-OSHA)**

Agency responsible for the implementation of the rules and regulations for workers safety and health in the state of Oregon.

**Oregon Department of Forestry (ODF)**

The agency responsible for the fire protection of wilderness lands and determining when the fire season begins and ends in Oregon.

**Oregon Fire Chief's Association (OFCA)**

Organization of Fire Chief's providing information, education, and training in the fire service in Oregon.

**Oregon Fire Marshals Association (OFMA)**

Association of Fire Marshals to further fire and life safety programs in Oregon.

**Oregon Fire Service Office Administrator's (OFSOA)**

Association of fire service office workers that provides education and training in Oregon.

**Oregon Municipal Finance Officers Association (OMFOA)**

Organization that provides education and training for finance officers in Oregon.

**Oregon Revised Statute (ORS)**

Rules that govern public entities.

**Performance Measures**

Specific quantitative measures of work performed within an activity or program.

**Personal Protective Equipment (PPE)**

Equipment firefighters wear when responding to emergencies such as turnouts, boots, helmets, etc.

**Public Employees Retirement System (PERS)**

The retirement system in Oregon for all local and state government workers.

**Prior Year Tax Levies**

Taxes levied for fiscal periods preceding the current one.

**Property Taxes**

Mandatory tax charged for the purpose of financing emergency services provided to District residents for their protection and assistance.

**Rapid Intervention Team (RIT)**

A search process for the location and rescue of down firefighters.

**Resources**

The actual assets of the District, such as cash, taxes receivable, land, buildings, etc.

**Response**

Actions taken by the District during an emergency or citizen's request.

**Revenue**

The income of the District from sources for the payment of District expenses.

# Glossary of Terms and Acronyms

**Rogue Community College (RCC)**

Local college offering curriculums in fire science careers located in Jackson County, OR.

**Rogue Interagency Training Association (RITA)**

The combined Jackson and Josephine County fire agency training association.

**Rogue Valley Fire Chief's Association (RVFCA)**

An organization of Fire Chiefs from local fire districts and departments in Jackson and Josephine Counties.

**Rogue Valley Professional Firefighters Local 1817 (RVPFF)**

The labor organization at the District for all firefighter, engineer, captain, deputy fire marshal, and fire and life safety specialist positions.

**Sams Valley Station (SV)**

Volunteer fire station located at 3333 Tresham Lane, Central Point, OR.

**Self-Contained Breathing Apparatus (SCBA)**

Facemasks and pressurized air cylinders for fire suppression purposes.

**Shift**

The term used to describe the 24-hour period of time the crews are on duty.

**Special Districts Association of Oregon (SDAO)**

An agency providing a variety of programs for special districts in the state of Oregon.

**Special Revenue Fund**

A governmental fund type used to account for the proceeds of specific revenue sources that are legally restricted for expenditure of specific purposes.

**Supplemental Budget**

The process that modifies the adopted budget during a fiscal year. Typically, supplemental budgets are used to create new appropriations to spend increased resources.

**Technical Rescue Team (TRT)**

Group of District members that train for specialized rescues such as water, confined space, and high angle.

**Table Rock Station (TR)**

24-hour staffed career fire station located at 5195 Table Rock Rd., Central Point, OR.

**Tax Anticipation Note (TAN)**

A one (1) year, interest-bearing note issued by a government in anticipation of tax revenues to be received at a later date. The TAN must be repaid by the end of the fiscal year in which it was received.

**Tax Base**

In Oregon, a designated amount of property tax, that can be levied for operating expenses without annual voter approval.

**Tax Levy**

The total amount to be raised by general property taxes.

# Glossary of Terms and Acronyms

**Tax Increment Financing**

Financing secured by the anticipated incremental increase in tax revenues, resulting from the redevelopment of an area.

**Tax Rate**

The amount of tax levied for each \$1,000 of assessed property value.

**Technical Rescue**

An incident requiring specialized training or equipment utilized to provide assistance.

**Tender**

An apparatus that carries water to supply an engine in rural areas.

**Training Center (TC)**

The Districts on-site facility for the purpose of training firefighters.

**Unappropriated Ending Fund Balance (UEFB)**

A fund balance at the close of the preceding fiscal year that is not included in the current budget.

**Urban Renewal (UR)**

A process established where tax increment financing is used to remove blight from impoverished areas. Taxing entities within an urban renewal boundary have their assessed value frozen upon creation of a UR Agency. Increases in assessed value are then diverted to the Agency, not the taxing entities providing services, and used to improve infrastructure and bring in new development.

**VA Southern Oregon Rehabilitation Center**

Domiciliary and rehabilitation center that provides treatment to veterans located in White City, OR.

**White City Station (WC)**

24-hour staffed career fire station located at 8333 Agate Rd., White City, OR.

**White City Urban Renewal Agency (WCURA)**

Agency responsible for improving infrastructure and removing blight in the White City area of Jackson County.