

# Jackson County Fire District 3



## Annual Budget Fiscal Year 2021-22

# 2021/2022 Fiscal Year Annual Budget



Serving the citizens of Jackson County, Oregon in the communities of  
Agate Lake, Central Point, Dodge Bridge, Eagle Point,  
Gold Hill, Sams Valley, and White City

8383 Agate Road, White City, Oregon 97503  
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[www.jcfd3.com](http://www.jcfd3.com)

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# Distinguished Budget Award

2021/22 Fiscal Year

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GOVERNMENT FINANCE OFFICERS ASSOCIATION

## *Distinguished Budget Presentation Award*

PRESENTED TO

**Jackson County Fire District No. 3**

**Oregon**

For the Fiscal Year Beginning

**July 1, 2020**

*Christopher P. Morrill*

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, 2020. 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.

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# Fire District 3

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June 17, 2021

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 2021/2022 fiscal year **adopted 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 initiatives. 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. The priority of this budget is to be fiscally responsible with revenues we receive from our District patrons while providing exemplary services that align with our mission and vision statements.

The mission of the District is to preserve quality of life and protect property through public education, prevention activities, and emergency response services. The vision for the District is to reduce and eliminate risk from fire, rescue, and medical events in the communities we serve.

This budget supports the initiatives identified in our new 2021-2023 Strategic Plan. This past January the District completed a community driven strategic planning session involving internal and external stakeholders with an outcome of a new three-year strategic plan that will continue to keep the organization focused and drive future budget and planning processes.

The Strategic Plan identifies six strategic initiatives that are designed to focus the efforts of the organization on achieving the vision.

1. Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.
2. Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.
3. Develop, promote, and demonstrate professionalism and excellence throughout the organization.
4. Maintain a high level of trust by promoting District engagement in the communities we serve.
5. Develop and strengthen collaborative efforts and strategic partnerships.
6. Commit to excellence through innovation.

The six initiatives have a number of goals identified to achieve our desired outcomes. Objectives are established for each goal, which defines what needs to be accomplished in order to meet that goal and ultimately the initiative. The objectives are measured by a series of detailed tasks that have completion due dates identified. These serve as the departmental service tasks in the annual budget document and may drive many of the project program investments.

Each year the District executive team reviews the outcomes of the tasks, objectives, and goals and reports on those outcomes to the organization. An annual performance report is presented to the Board of Directors and each of the city councils within the District. The report is also published on the District website to allow full transparency of the progress made towards accomplishing our stated goals. The Strategic Plan is a dynamic working document that provides a roadmap to the members of our District and those in the communities we serve where our focus is, what our expectations are, and what success looks like.

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# Budget Message

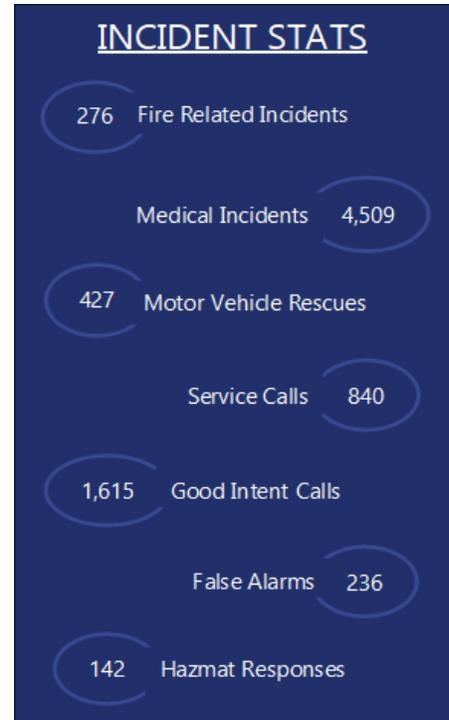
2021/22 Fiscal Year

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## 2020 Year in Review

Over the past year the District had several accomplishments, some of which we would like to highlight.

- Implemented a new platform, *Community Connect*, promoting community safety and information gathering. Citizens can create a profile and identify their household information to assist emergency responders should an event occur at their residence.
- Continued the development and the build-out of the Community Care Program by hiring two EMT's to build two complete teams of two; one paramedic and one EMT. With two trained and qualified teams, we were able to expand the program implementation to seven days-a-week.
- Continued implementation and enhancements of District data collection and analysis programs to include Imagetrend, FirstWatch, and FirstDue. This data infrastructure allows the District leadership to evaluate programs and service delivery with a high degree of analytical sophistication. Developed a semi-annual performance report that highlights District response and statistical trends occurring within our community.
- Redeveloped and modernized the District's website to provide for a more robust, user-friendly, and interactive platform with emphasis on public safety education and District program marketing. Enhanced community education and engagement through social media platforms such as Facebook, Instagram, and Twitter on a more consecutive basis.
- Navigated the Covid-19 pandemic ensuring safe practices to protect our workforce and worksites while maintaining service delivery to the community. Worked with partner agencies in navigating through the new normal and the impact on first responders. District Leadership worked diligently to seek appropriate reimbursement for Covid-19 expenses that were uncustomary but necessary to achieve a safe work environment.
- Responded within our District, and provided support for neighboring communities, to the unprecedented wildfire event of September 8, 2020 that destroyed thousands of acres of land, 2,500 homes, and resulted in three fatalities. District Leadership has been engaged in all levels of government providing testimony and influence in public policy aiming to decrease risk and increase resiliency across the landscape.



## Economic Factors and Long Range Financial Planning

The District has made several key assumptions based on information from the external environment and economic forecasts. We remain vigilant on monitoring the external environment throughout the budgetary process given the impact economic changes will have on our ability to provide service at current and future levels. In the development process, we comply with fiscal policies and we aim to preserve and protect our financial position for the future.

- Property assessed valuation is projected to increase modestly. We have forecasted a 4.8 percent assessed valuation growth for the 2021/22 fiscal year. Although the pandemic has taken its toll on our local and state economy and unemployment temporarily rose to levels mirroring the Great Recession, the economic rebound has been quick and robust. Residential and commercial construction is strong and competitive with growth in our District occurring in and around the Central Point, Eagle Point, and industrial area of White City.

# Budget Message

2021/22 Fiscal Year

- The unemployment rate for Jackson County in February 2021 was 6.2 percent compared to 3.7 percent for the same month a year ago. Projections however from state and local economists suggest that job growth will continue to increase with demand occurring in the private health care and social assistance sectors.
- Call volume for the District decreased 3.97 percent in 2020 compared to a 6.16 percent increase in 2019. The ten year average reflects an overall 4.5 percent increase for all incidents. The White City fire management zone (FMZ) is our busiest service area with approximately 24 percent of the volume of incidents occurring in that area followed by the Central Point FMZ with 23 percent. The Covid-19 pandemic is suspected to be the dominate reason for the reduction in calls for service this past year. 911 system volume was done across the entire Rogue Valley which is consistent with National 911 call volume trends since the beginning of the pandemic.
- 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.
- At 61 percent of total calls, medical requests for service continue to be the dominate type of incident to which the District responds. This category of response continues to change based on the socioeconomic environment, changing demographics, and changes within the National healthcare system. The Community Care program is focused on meeting the needs of patients who use the 911 system for low acuity conditions, or are frequent users of the 911 system, by using specially trained medical providers to provide appropriate care for the patient and assistance in navigating healthcare and social service resources that set the patient up for current and future success.
- Taxpayers will continue to expect the District to operate within its means and be responsible stewards of taxpayer money. The District remains committed to transparency, effective and efficient delivery of key services, and a focus of our efforts on preserving quality of life.

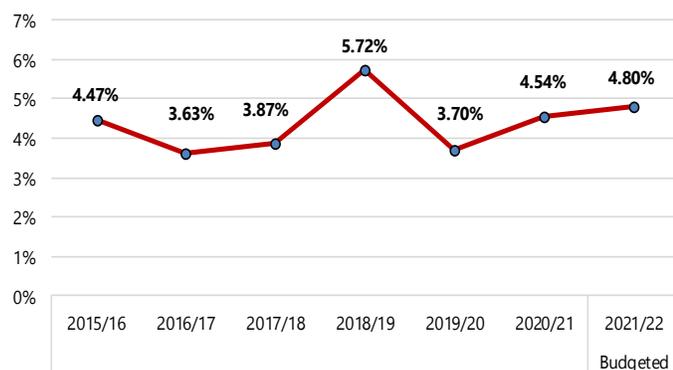
The District remains committed to long range financial planning as a tool to meet strategic requirements, maintain expenditures at levels that do not exceed general operating revenues, and to determine the impact of various "what if" scenarios related to meeting the increasing demands for service. With 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 4.5 percent for the 2020/21 fiscal year. The District's financial forecast for the 2021/22 fiscal year and beyond includes continued modest increases in the growth rate of assessed value. Based on this conservative growth assumption and new construction within the residential and commercial sectors, this budget reflects a 4.8 percent increase.

URBAN RENEWAL: The City of Central Point's Urban Renewal, which encompasses a portion of the District, will be in their eighth year. 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 \$115,925 in tax revenue in fiscal year 2020/21 and \$465,398 since inception. This loss will continue to have an impact on the District, however the plan promises to provide substantial improvements in future assessed valuation that would not otherwise have been possible.

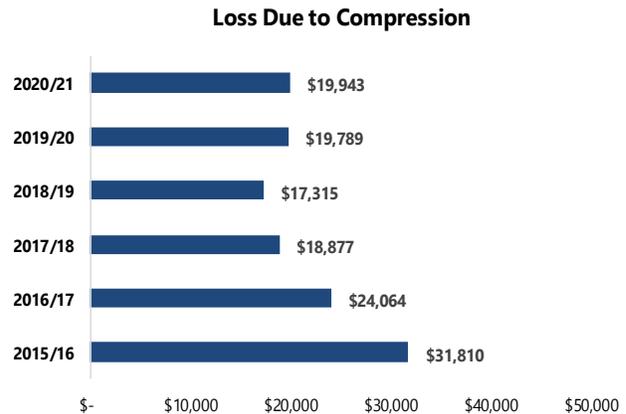
Assessed Value Growth Change



# Budget Message

2021/22 Fiscal Year

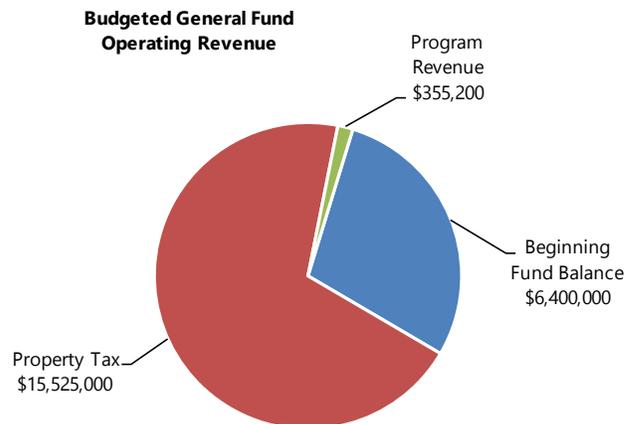
**COMPRESSION:** Oregon statute restricts general government to tax rates of no more than \$10 per \$1,000 of real market value and education districts to tax rates of no more than \$5 per \$1,000. When total taxes calculated for all taxing entities exceed these limits then the County Assessor must “compress” the rates resulting in potential loss of tax revenue. In the calculation both the assessed and real market value of each property is calculated and compared. The impact facing the District continues to be found in the 602 tax code area located within Central Point and is caused by repressed real market values (RMV) coupled with the current combined tax rates of \$10.25. If compression occurs from the education side, the loss is added to the general government side, therefore increasing the potential for additional compression loss among the general government group.



## Summary of Revenue and Expenditures / Noteworthy Budgetary Items

### General Fund Revenue

This adopted budget reflects \$15,525,000 in property tax revenue, an increase of 4.72 percent or \$700,000 from the fiscal year 2020/21 budget. Current year taxes are calculated at our permanent tax rate of \$3.1194 per \$1,000 of assessed value with a 94 percent collectible rate. Prior year taxes are budgeted at \$350,000. All property taxes combined account for 98 percent of the District’s operating revenue.



The District considers operating revenue to consist of property tax, interest income, fees for service, contracts with other agencies, and proceeds from operational designated grants. Total operating revenue for the 2021/22 fiscal year is budgeted at \$15,880,200. Overall General Fund revenue is \$22,280,200 a 5.95 percent increase over the 2020/21 fiscal year budget.

### Personnel Services

This adopted budget reflects an overall increase in Personnel Services of 3.22 percent or \$389,000 from what was budgeted in the prior year. The District will enter the second year of a three year labor agreement with Rogue Valley Professional Firefighters (RVPFF) Local 1817. Positions that are represented include Battalion Chief, Captain, Deputy Fire Marshal, Engineer, Firefighter, and Community Care paramedic and EMT. This budget within personnel services reflects a 2.04 percent cost of living adjustment for both represented and non-represented employees.

**PERSONNEL:** This budget reflects one additional firefighter position, increasing the firefighter full-time equivalency (FTE) to 21 for a budget impact of \$135,800. This additional position will help meet minimum staffing levels and help offset overtime costs due to a change in the Collective Bargaining Agreement that increases personnel eligible to be off on vacation from two to three daily. This budget also reflects the addition of a 0.5 FTE Logistics Support Technician for a budget impact of \$33,400. This position aims to align workflow for appropriate allocation of tasks across the organizational structure and to improve workload efficiency.

The District experienced several retirements this past year that resulted in internal promotions and hiring of entry level firefighters. We anticipate more retirements within this next fiscal year.

# Budget Message

2021/22 Fiscal Year

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PERS: This budget year the District will experience an employer contribution rate adjustment into the Public Employees Retirement System (PERS). 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. The valuation period that establishes rates effective July 1, 2021 through June 30, 2023 is from years 2018-2019 (the December 31, 2019 valuation).

The rate for all members in the tier one and tier two groups (those employees that have established membership prior to 2003) will decrease to 24.17 percent of payroll from 24.93 percent. Rates for firefighters in the tier three (OPSRP) group (those employees that have established membership after August 29, 2003) will increase to 18.82 percent from 17.25 percent of payroll and the rate for general service members in the OPSRP group will increase to 14.46 percent from 12.62 percent of payroll. The total budgeted PERS expense is \$1,669,800, an increase of \$74,600 from fiscal year 2020/21. Of total personnel, 37 percent are in the Tier 1 and 2 group, 46 percent are in the OPSRP firefighter group, and 17 percent are in the OPSRP general service group.

The District remains committed in maintaining costs to ensure the overall Personnel Services budget remains below our target of no more than 80 percent of operating revenue. This budget meets that target at 78.8 percent. We will continue to monitor federal, state, and local issues, including PERS, and prepare for any change that may impact operational sustainability by maintaining adequate reserves.

HEALTH INSURANCE: The District provides a medical, vision, and dental insurance plan for its full-time employees with a required employee cost share of five percent. Renewal rates effective July 1, 2021 to June 30, 2022 represents an overall increase of 4.76 percent. The total budgeted health insurance expense is \$1,500,200.

In addition, an HRA-VEBA Health Reimbursement Plan is provided in which the District contributes a fixed amount for all employees. The budgeted contribution per employee for this budget is \$351 per month for a total annualized expense of \$295,800.

Total Personnel Services is budgeted at \$12,471,000 which is a 3.22 percent increase over the current year.

## **Materials and Services**

This adopted budget reflects an increase in Materials and Services of 4.68 percent or \$119,500 from fiscal year 2020/21. The District has focused efforts across all departments from the Strategic Plan to ensure fiscally sound spending practices are at a sustainable level. Noteworthy projects budgeted include supporting community risk reduction programs, improving our personal protective equipment including scheduled replacement of structural turnouts, and continuing technology upgrades. Total Materials and Services budgeted is \$2,670,800 which is 16.82 percent of operating revenue.

## **Debt Service**

This adopted budget represents the last year of a financing agreement with Wells Fargo Bank with \$130,111 allocated for principle and interest payments and the second year of a financing agreement through full faith and credit obligations with JP Morgan Chase Bank in which \$448,642 is allocated in principal and interest payments. Total debt service budgeted is \$579,000.

## **Contingency**

The District has policy that Operating Contingency will be six percent of budgeted property tax revenue. This budget has allocated \$931,500 in contingency.

## **Ending Fund Balance**

The District has policy that Unappropriated Ending Fund Balance (UEFB) will be 26 percent of budgeted property tax revenue. Ensuring adequate levels of minimum ending fund balance ensures fiscal sustainability in order to meet operating requirements before receipt of property taxes. This budget has allocated \$4,036,500 in ending fund balance.

# Budget Message

2021/22 Fiscal Year

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## Capital Projects Fund

This fund has a budgeted transfer of \$1,591,400 coming from the General Fund. With this contribution and after all budgeted expenditures, the fund is projected to have an ending balance of \$4,626,400, an increase of \$166,200 from the prior year.

Capital expenditures are budgeted at \$1,417,000 and reflect projects in accordance with our Capital Replacement Plan. Significant projects include:

- Two tactical tenders utilizing a Freightliner chassis to replace existing fleet for a total budget of \$800,000.
- Two staff vehicles to replace existing fleet spec'd as Ford F150 pickups for a total budget of \$140,000.
- Completion of a new battalion chief command unit for a budget of \$125,000.
- The purchase of a van for logistics to provide better efficiencies for a total budget of \$35,000.
- Equipment upgrades and replacements consisting of medical equipment and a new network computer server.
- A wood chipper and pass-through funds for CAD to CAD interface technology funded under a grant through the Oregon State Fire Marshal.

## Budget Summary

The 2021/22 fiscal year budget is organized into six departments within the General Fund:

- Administration
- Operations
- Fire and Life Safety
- Training
- Strategic Services
- Technology

Each department supports the District's mission and the Strategic Plan and reflects budgeted personnel services and materials and services.

<b>Appropriations: General Fund</b>	<b>2020/21 FY Budget</b>	<b>2021/22 FY Budget</b>	<b>Increase/ (Decrease)</b>
Administration	\$1,564,600	\$1,605,000	2.58%
Operations	\$9,821,800	\$10,001,500	1.83%
Fire and Life Safety	\$684,000	\$761,500	11.33%
Training	\$570,700	\$612,800	7.38%
Strategic Services	\$1,577,800	\$1,697,000	7.55%
Technology	\$414,400	\$464,000	11.97%
Non-Departmental	\$6,395,200	\$7,138,400	11.62%
	<b>\$21,028,500</b>	<b>\$22,280,200</b>	5.95%
<b>Capital Projects Fund</b>	\$4,895,800	\$6,162,400	25.87%
<b>Total Appropriated Budget</b>	<b>\$25,924,300</b>	<b>\$28,442,600</b>	9.71%

# Budget Message

2020/21 Fiscal Year

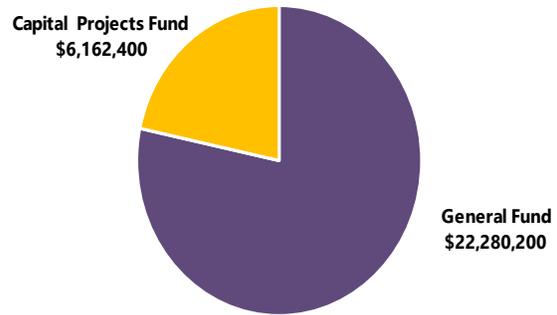
The District has prepared this budget for all funds subject to the budget requirements of state law, including the legal requirement for a balanced budget, meaning that total beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, contingency, and ending fund balance.

The District considers operating expenses to consist of personnel services, materials and services, and debt service. This adopted budget reflects total operating expenses at \$15,720,800, an increase of \$376,500 over fiscal year 2020/21 or 2.45 percent.

This budget has been prepared based on our permanent tax rate of \$3.1194 per \$1,000 of taxable assessed value. Total budget appropriations for all funds is \$28,442,600, an increase of \$2,518,300 or 9.7 percent over the current year budget.

This budget meets our operational needs so that the District may continue to effectively provide emergency response, fire and life safety, and risk reduction services to our citizens, while remaining receptive to our patrons and the current economic climate.

**Total Budget by Fund**



Respectfully submitted,

*Robert B. Horton*

Robert B. Horton  
Jackson County Fire District 3  
Fire Chief/CEO

Budget Summary - All Funds

Appropriations	2020/21 FY Budget	2021/22 FY Budget	Increase/ (Decrease)
Personnel Services	\$ 12,082,000	\$12,471,000	\$ 389,000
Materials and Services	2,551,300	\$2,670,800	119,500
Capital Outlay	417,500	1,417,000	999,500
Debt Service	711,000	\$579,000	(132,000)
Operating Transfers Out	996,200	1,591,400	595,200
Operating Contingency	851,600	1,050,500	198,900
Ending Fund Balance	8,314,700	8,662,900	348,200
<b>Total Appropriations</b>	<b>\$ 25,924,300</b>	<b>\$ 28,442,600</b>	<b>\$ 2,518,300</b>

# District Overview

2021/22 Fiscal Year

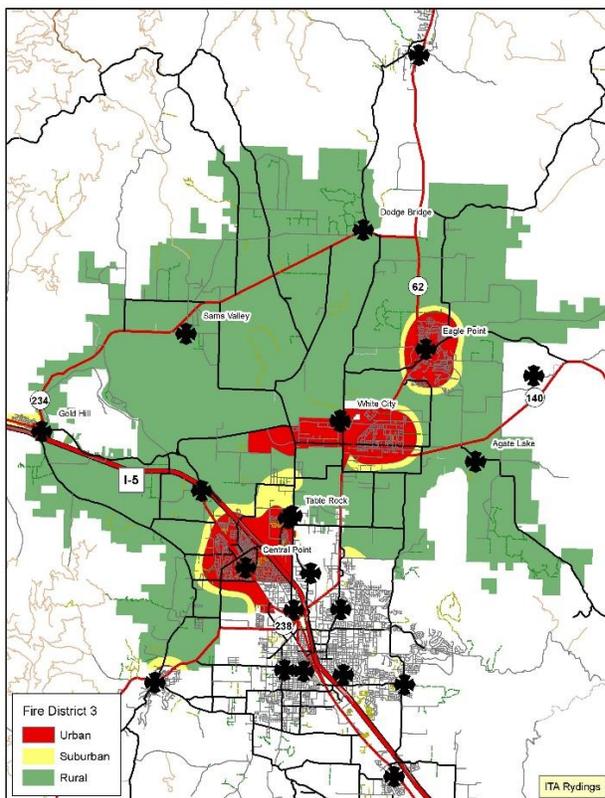
**Jackson County Fire District 3** is a special district operating under Oregon Revised Statutes (ORS) Chapter 478 as a separate municipal corporation. A Board of Directors is elected by District citizens and is comprised of a President and four Directors, who include a Vice-President and Secretary-Treasurer. The Board hires a Fire Chief/CEO to manage the day-to-day operations of the District. The governing Board appoints members of the community to serve on the Budget Committee (five appointments) and on the Civil Service Commission (three appointments).

Jackson County Fire District 3, (the District), was established in 1952 as the Central Point Rural Fire Protection District and in 1975 officially changed to its current name, Jackson County Fire District 3, which better described the growing area being protected. The "3" signifies the third rural fire protection district established under ORS 478 in Jackson County. Eight additional fire protection districts also operate in Jackson County, located in Southern Oregon.

In 1995 the City of Gold Hill annexed into the District, followed by the City of Central Point in the November 2000 election and the City of Eagle Point in the May 2001 election. Today, the District provides a full range of fire protection and emergency medical response services to its approximately 55,428 citizens across 167 square miles in the northern part of Jackson County, including fire prevention, public education, and community risk reduction efforts. The District is committed to creating safer communities through education, prevention, preparedness, and emergency response.



The District encompasses an area of densely populated suburbs, rural farmlands, retail and commercial establishments, and growing and sophisticated industrial complexes. In addition, the geography is diverse with the national acclaimed Rogue River, low brush and grasslands, heavy, dense timber, rugged mountains, and two Table Rock plateaus. To meet the demands of this diverse geographical service area, the District performs specialized rescues such as river, high angle and confined space, in addition to wildland firefighting and structural protection.



The District has 70 full-time career employees, two part-time employees budgeted and approximately 20 volunteers and student firefighters combined. The District operates eight fire stations that are strategically located across our service area in order to provide the best response times possible. Four stations are staffed with paid personnel and four with volunteer personnel.

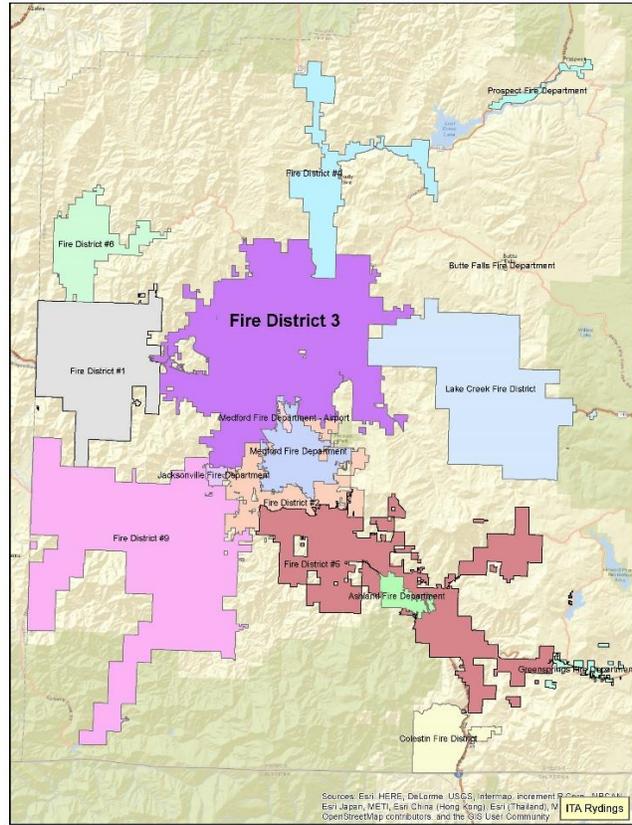
The District's administrative offices are adjacent to the White City fire station, located in an unincorporated industrial area of Jackson County known as White City. A regional training facility is also at this location, which includes a training tower, burn simulation props, water drafting pits, fire simulation training house, and a warehouse. In partnership with Rogue Community College, the District jointly owns a regional classroom located at the White City campus that provides all of the fire science degree program curriculum.

## District Overview Continued

The District maintains an insurance classification rating from the Insurance Services Office (ISO) of a 3 out of a scale of 1 – 10, with one being the most favorable. This classification results in lower premium rates for fire insurance to homeowners within the District. The significant measurement to attain this rating in the urban and suburban areas is having water sources like hydrants strategically located. Within the rural areas the key measurement is properties being located within five miles of a fire station.

To handle all types of fire and medical emergencies, the Districts staffs a team of professional firefighters and paramedics 24 hours a day, with skills and the equipment necessary to handle the wide variety of demands. All career firefighters are trained emergency medical technicians (EMT) and hold an EMT-Basic certification. Of our 60 response ready employees, 25 are certified advanced life support (ALS) Paramedics and 8 are certified as Intermediate Technicians. Under the guidance of our supervising physician, emergency medical service personnel maintain a highly certified skill level through several specialized programs and training.

The District’s adopted Standards of Cover identifies service level objectives and response time performance goals. These goals are established by District policy with consideration of desired levels of service and capability. Tracking the District’s capability to meet the targeted goals provides a method to evaluate staffing levels, apparatus, and future station location needs. Three zones are identified for measuring response; urban, suburban, and rural. The suburban zone is broken down further into a suburban 1 and 2 category that is based on distance from a 24/7 staffed fire station.

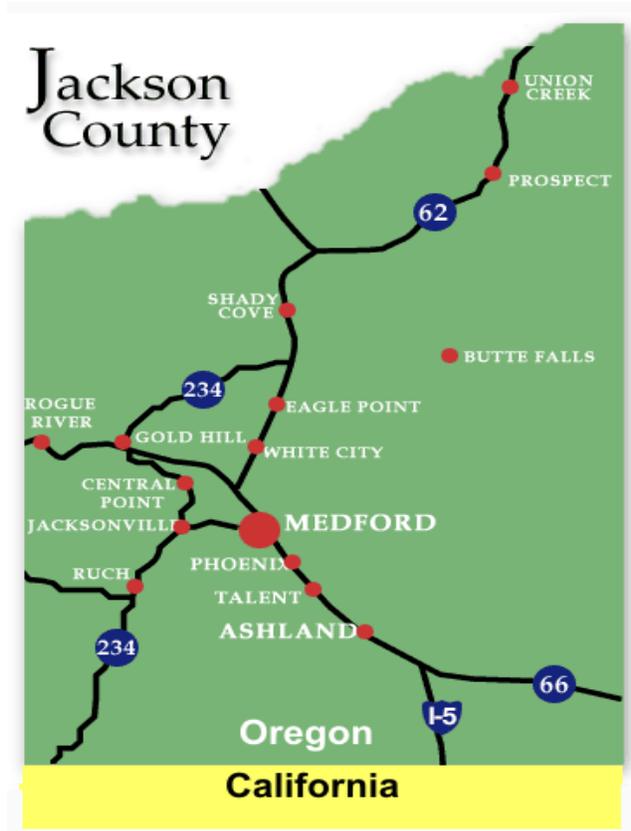


<b>Emergent Incident Response Goals</b>			
	CODE 3 Incidents in 2020	ACTUAL 80% Fractile Time	GOAL 80% Fractile Time
<i>Urban</i>	1,389	7:21	7 minutes
<i>Suburban 1</i>	98	8:17	11 minutes
<i>Suburban 2</i>	32	16:31	13 minutes
<i>Rural</i>	466	13:56	13 minutes

*Urban* Population greater than 1,000  
*Suburban 1* Population 500-1,000 and less than 6 miles from a staffed 24/7 station  
*Suburban 2* Population 500-1,000 and greater than 6 miles from a staffed 24/7 station  
*Rural* Population less than 500 people

## District Overview Continued

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 recreational opportunities.



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.

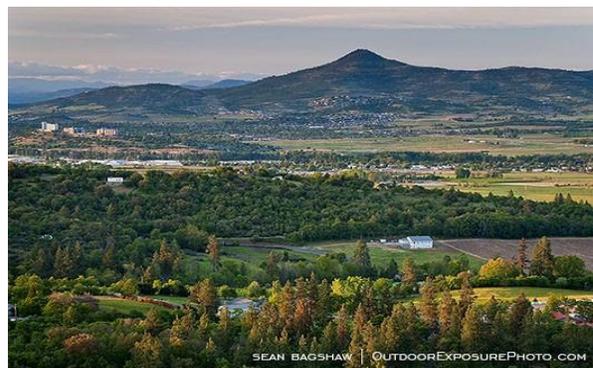
The Rogue Valley is home to a pair of well-known attractions - the Britt Music Festival and Ashland's Oregon Shakespeare Festival - and to several museums, art galleries, theaters, wineries, and golf courses. History buffs will recognize the region as the site of Oregon's 19<sup>th</sup> Century gold 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. Within the District service area is home to many prominent and internationally recognized companies such as CareStream Health Imaging, Boise Cascade Wood Products, Amy's Kitchen, Costco, Erikson Air Crane, and Highway Products.

### **Economy**

Jackson County has grown and diversified over the decades and is considered one of the very robust economies in Oregon. Strong retail trade, renowned health care, and tourism sectors have formed a regional hub attracting customers and visitors from neighboring counties and beyond. Once heavily dependent on the wood products industry, it is now supplemented by the growing wine industry and specialty agriculture products.



## District Overview Continued

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Jackson County's unemployment rate as of February 2021 was 6.2 percent compared to the State of Oregon's unemployment rate of 6.1 percent. In the Covid pandemic recession, the period of higher unemployment has been significantly shorter than during the Great Recession years of 2008 to 2013, in which unemployment was consistently over ten percent. During this past year, Jackson County's unemployment rate only remained over ten percent for four months. The sectors experiencing the most hiring and demand for workers is heavy equipment and tractor-trailer truck drivers, personal care aides, and restaurant cooks.

In looking ahead towards the future, private health care and social assistance are the industries anticipated to show the fastest growth followed by construction and professional and business services. Slower than average growth is projected in retail trade, government, and information.

### **Assessed and Real Market Value**

The District's assessed valuation increased from \$4,720,269,748 in the 2019/20 fiscal year to \$4,934,751,546 for the 2020/21 fiscal year, a 4.5 percent increase. This is up from the prior year's growth of 3.7 percent. Under state law (the result of Ballot Measure 50 passed by Oregon voters in 1997), increases in assessed valuation of existing property are generally limited to three percent a year. Accordingly, growth beyond three percent in the District's assessed valuation must come from either new development within its service areas or significant improvements made to existing property. The District anticipates continued modest growth in value over the next three to five years, as commercial construction is booming and affordable residential housing is in high demand.

Prior to BM 50, property taxes were calculated on a property's real market value using a levy based tax system. County Assessors continue to track real market values of a property along with the assessed value. A stipulation of BM 50 is if a residential property's real market value declines below the property's assessed value, then the property taxes are calculated on the lower of the two figures. The District experienced loss in value based on this requirement during the economic recession years of 2010 – 2012.

### **District Funding**

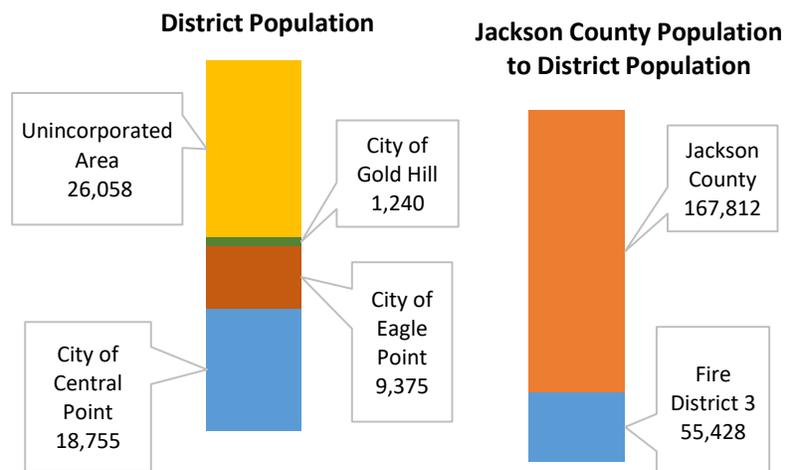
The District's funding is based upon a permanent tax rate of \$3.1194 per \$1,000 of assessed valuation, which was also established under Ballot Measure 50. The District receives 98 percent of its revenue through the form of property tax. The District has not had to rely on any general obligation bonds or local option levies for operational support. The District has been and continues to be focused on providing its citizens with the highest level of emergency response services and continues to implement operational improvements in order to accomplish its strategic goals and objectives.

### **Population**

In 2020 Jackson County's population gained 1,950 new residents for a total population of 223,240, with the District encompassing approximately 55,428 of those citizens. Of the 36 counties in Oregon, Jackson County ranks sixth in population and has experienced an annual growth of 1.5 percent from 2011 to 2020.

The District's population is expected to continue to moderately increase over the next 10 years. Staff will continue to work proactively with other governments and regional planning groups to ensure continued ability to serve this future population.

This includes working across jurisdictional boundaries to ensure closest-force response to population centers, regardless of city boundaries.

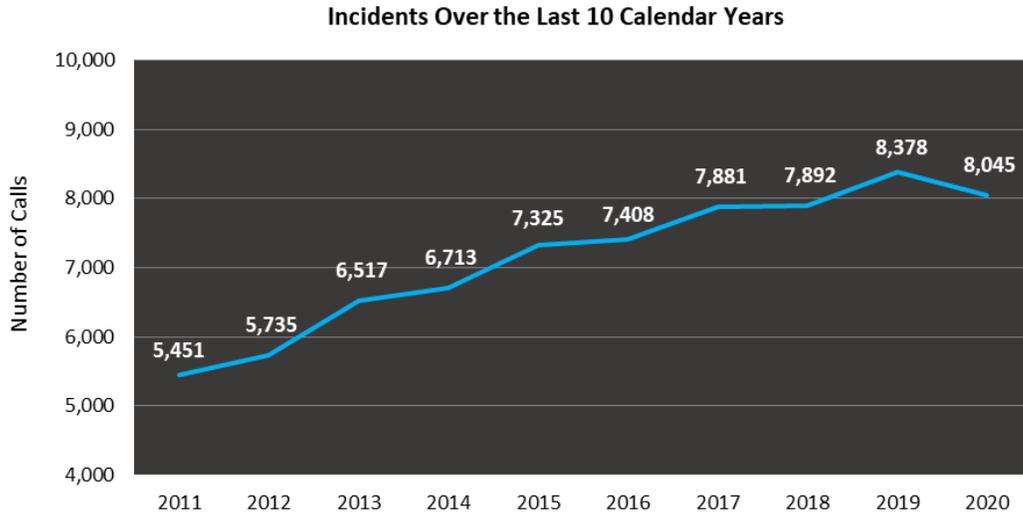


## District Overview Continued

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### Emergent Response

The District's responses to emergency incidents over the past 10 calendar years are reflected below.



Over the past ten years, the District has averaged 4.53 percent increase in incidents. The decline in incidents for 2020 is directly related to the Covid-19 pandemic, in which people were more reluctant to call the 911 system for their medical need. In 2020, 61 percent of total incidents were classified as rescue/medical followed by good intent (20%). Fire related incidents accounted for only 3.4 percent of total calls.

### Board Policies and Strategic Planning

The District operates under a comprehensive Board Policy Manual, which is adopted, reviewed, and revised as necessary by the Board of Directors. The Board Policy Manual sets the overall direction for the day-to-day operations of the District. The Manual is intended to serve, along with state law, as the primary resource for all matters relative to District policy. Policies are written to address issues of mission, scope and scale of service, and legal and fiduciary duty. It also assists individual members in the conduct of their responsibilities as elected public officials.

An Organizational Policy Manual sets the direction for more of the how-to and is structured by subject matter under each respective department. The Fire Chief is responsible for ensuring that staff of the organization administers the policies. Policies are routinely reviewed and updated as needed. Annually staff presents to the Board a Funds and Financial Policy Resolution, which provides various financial authorizations and affirms the guiding financial direction.

The Board also adopts a Strategic Plan, which serves as a roadmap of what the District plans to accomplish for the next three years. Strategic priorities are established by the Board of Directors; Staff develops the annual goals and objectives for how those priorities will be accomplished, which is what ultimately drives the annual development of the budget document.

The District appropriates a General Fund and a Capital Projects Fund. Within the General Fund the District has six departments; Administration, Operations, Fire and Life Safety, Training, Strategic Services, and Technology. Budgetary control is within the object classifications in each department and fund.

# Introduction of Members

2021/22 Fiscal Year

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## **BOARD OF DIRECTORS**

As of July 2021

Harvey Tonn, President  
Steve Shafer Vice President  
John Dimick, Secretary/Treasurer  
Bill Leavens, Director  
Tim Snaith, Director

Term Expires  
*June 30, 2023*  
*June 30, 2025*  
*June 30, 2023*  
*June 30, 2023*  
*June 30, 2025*

## **BUDGET COMMITTEE**

As of July 2021

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

John Rachor  
Rob Hernandez  
Steven Weber  
Ken Cummings  
Vacant

Term Expires  
*December 31, 2021*  
*December 31, 2022*  
*December 31, 2022*  
*December 31, 2023*  
*December 31, 2023*

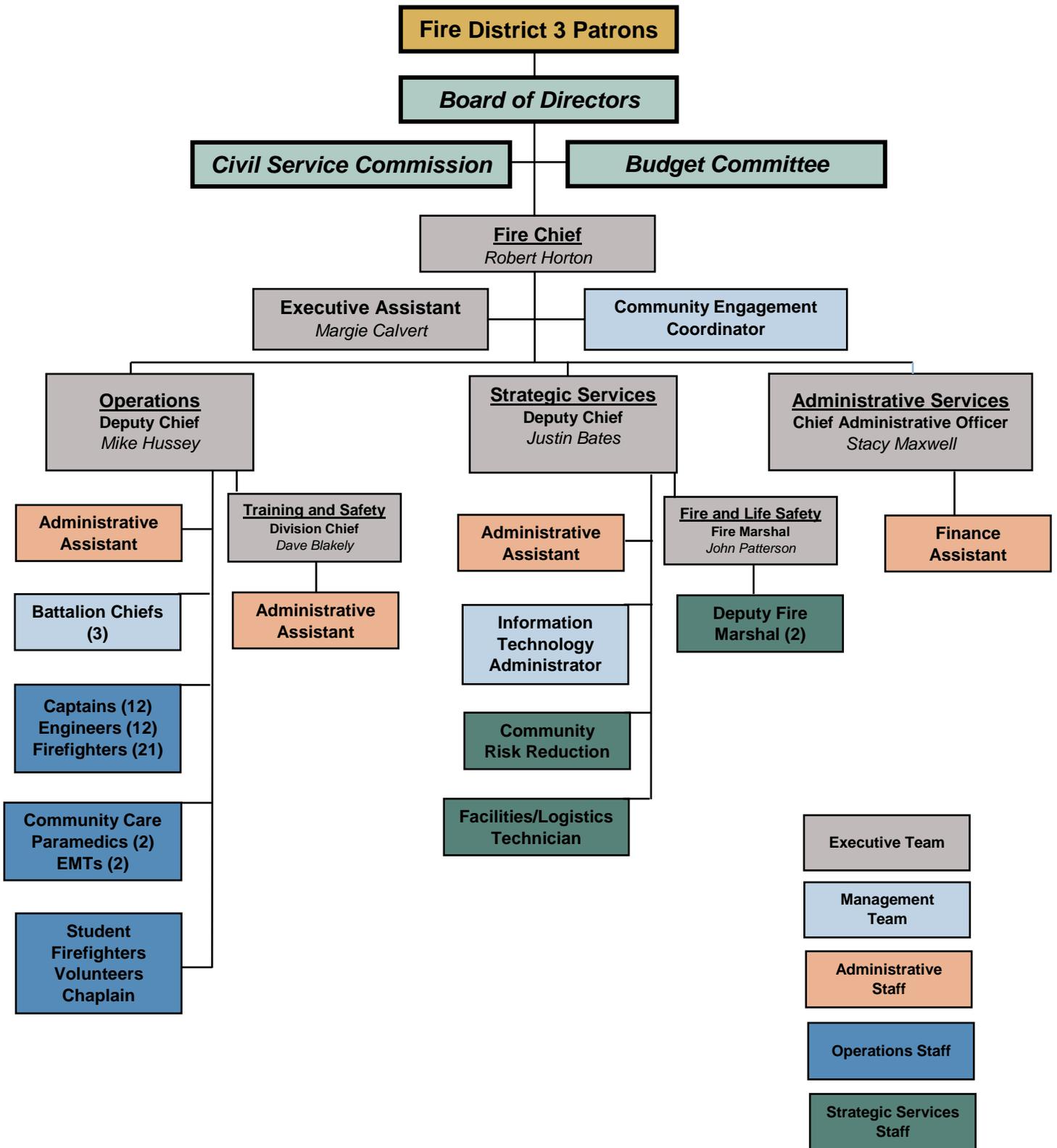
## **DISTRICT EXECUTIVE STAFF**

Robert Horton, Fire Chief  
Stacy Maxwell, Chief Administrative Officer  
Mike Hussey, Deputy Chief Operations  
Justin Bates, Deputy Chief Strategic Services  
John Patterson, Fire Marshal  
Dave Blakely, Division Chief Training and Safety  
Mergie Calvert, Executive Assistant

*Serving Since 2017*  
*Serving Since 1999*  
*Serving Since 1998*  
*Serving Since 2019*  
*Serving Since 2011*  
*Serving Since 2011*  
*Serving Since 2011*

# Organization Chart

2021/22 Fiscal Year



# Budget Process

2021/22 Fiscal Year

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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 chief officer level for their expenditure requests. Once the Administrative 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, tax collections, and assessed values and then presented to the Board during the strategic planning process.

**Budget Process.** In April, the Budget Committee (five appointed citizen members and the five elected Board of Directors), meet 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 and provided a copy of the resolution and required local budget form certifying the local government's property tax levy.

# Budget Process

2021/22 Fiscal Year

**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.

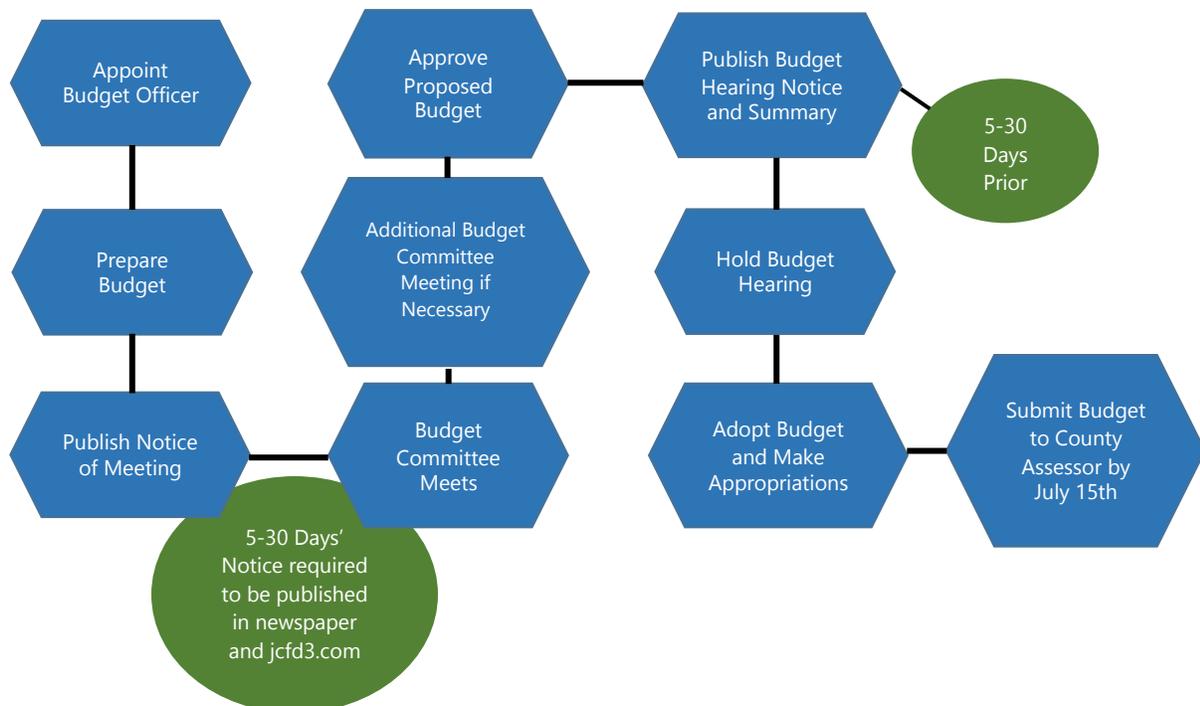
<p><b><u>January</u></b></p>	<p><b><u>Strategic Plan</u></b> Review the Strategic Plan’s identified goals and objectives under each initiative, ensuring priorities are in place that will drive the budget development.</p> <p><b><u>Budget Development</u></b></p> <ul style="list-style-type: none"> <li>• 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 develop their internal timelines with due dates for budget request worksheets to be submitted by</li> <li>• Chief Officers start preliminary review of performance measures and departmental objectives</li> </ul>
<p><b><u>February</u></b></p>	<p><b><u>Budget Development Continues</u></b></p> <ul style="list-style-type: none"> <li>• Meetings are held between support assignees and Chief Officers</li> <li>• Direction is communicated to support assignees regarding approval/modification/denial</li> </ul> <p>Finance develops the overarching components of the budget document Preliminary revenue estimates are projected; financial forecast updated</p>
<p><b><u>March</u></b> 03/01/21  03/01/21  03/01/21 – 03/12/21  03/12/21 03/18/21  <b>03/15/21</b></p>	<p>First draft of budget detail sheets completed by Chief Officers</p> <p>Review departmental budget requests – Chief Officers (Executive Team)</p> <p>Chief Officers work on any amendments to their first draft of respective budget</p> <ul style="list-style-type: none"> <li>• Review performance measurements, objectives, and departmental narratives</li> <li>• Budget revisions due back to Finance</li> <li>• Departmental narrative sections and performance measurements due back to Finance</li> </ul> <p><b><u>Executive Team Meeting</u></b></p> <ul style="list-style-type: none"> <li>• Chief Officers review and finalize departmental budget sections</li> <li>• Set initial direction on budget presentations for April 15th meeting</li> </ul>

# Budget Process

2021/22 Fiscal Year

<p><b>April</b> 04/01/21 – 04/12/21</p> <p>04/07/21 04/07/21 – 05/04/21</p>	<p>Budget document compilation, final touches, and assembly</p> <p>Publish notice of budget committee meetings in Mail Tribune Post notice of budget meetings on District website</p>
<p><b>04/15/21</b></p>	<p><b>Budget Committee Meeting</b></p> <ul style="list-style-type: none"> <li>Budget document delivered and budget message presented</li> </ul>
<p><b>May</b> <b>05/04/21</b></p>	<p><b>Budget Committee Meeting</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> 06/08/21</p>	<p>Publish budget hearing notice and budget summary</p>
<p><b>06/17/21</b></p>	<p><b>Public Hearing and Adoption of 2021/22 Fiscal Year Budget</b></p>
<p><b>July</b> No later than 07/15/21</p>	<p>Submit Local Budget (LB) Form 50 to Jackson County Assessor with two copies of District Resolution adopting the 2021/22 Fiscal Year Budget</p>

## BUDGET PROCESS TIMELINE



# Budget and Financial Policies

2021/22 Fiscal Year

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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 **2021/22 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. 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.

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 six departments that each depict their own unique set of accounts under the personal services and materials and services classifications. The General Fund is always considered a major fund, in which revenues and expenditures are at least ten percent of the corresponding totals for all governmental funds. The primary revenue source that sustains the General Fund is derived from property taxes.

# Budget and Financial Policies

2021/22 Fiscal Year

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.

To ensure consistency, the District considers the Capital Projects Fund as a major fund for financial statement presentation, although in some fiscal years it could be considered a non-major fund because the total fund appropriation does not constitute more than ten percent of the total of all governmental fund appropriations. 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, building construction and apparatus replacement.

## Governmental Funds

General Fund		
Major Fund		
Departments		
Administration		100%
Operations		100%
Fire and Life Safety		100%
Training		100%
Strategic Services		100%
Technology		100%
Capital Projects Fund		
Major Fund		
		100%

### General Fund

Source of funds	Use of funds
<ul style="list-style-type: none"> <li>Property taxes</li> <li>Interest on investment</li> <li>Program fees</li> <li>Miscellaneous and other revenues</li> </ul>	<ul style="list-style-type: none"> <li>Administration and Finance</li> <li>Operations and EMS</li> <li>Fire and Life Safety Programs</li> <li>Training</li> <li>Strategic Services/Logistics</li> <li>Technology</li> <li>Transfer to other funds</li> <li>Debt service payments</li> </ul>

### Capital Projects Fund

Source of funds	Use of funds
<ul style="list-style-type: none"> <li>Transfers from the General Fund</li> <li>Revenues from sale of capital equipment</li> <li>Grants related to equipment acquisition or facility improvements</li> <li>Loan proceeds</li> </ul>	<ul style="list-style-type: none"> <li>Acquisition of apparatus and vehicles</li> <li>Land acquisition</li> <li>Acquisition of department equipment with purchase cost greater than \$5,000</li> <li>Building construction and/or significant improvements</li> </ul>

### 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

# Budget and Financial Policies

2021/22 Fiscal Year

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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 72 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 is projecting an assessed value increase of 4.8 percent for the 2021/22 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.

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 2021/22 fiscal year is \$5,171,703,960.

## **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 26 percent of budgeted property tax revenue in order to ensure fiscal sustainability in meeting operating requirements before the receipt of property taxes. This budget represents \$4,036,500 for the 2021/22 fiscal year, an increase of \$182,000 over the prior year.

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.

## **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 flexibility to transfer funds to line item accounts within a major category should the need arise, with the approval from the Board of Directors via a Resolution. 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 six percent or \$931,500. 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 re-allocated for appropriation.

# Budget and Financial Policies

2021/22 Fiscal Year

## 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 2020 was \$7,423,871,219 up from \$7,118,107,045 in 2019. Jackson County Fire District 3’s current legal debt limit is approximately \$92,798,390.

The District is committed to provide for an adequate 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 and disperses the funds to all taxing entities.

Debt financing for long-term capital projects is evaluated based on several factors such as cost of the project, ability to sustain the debt repayment, growth and property tax projections, cash flow demands, and funds available in reserve that have been set aside in the Capital Projects Fund for future capital expenditures. The Board supports long-term debt issuance as a viable tool in achieving some of the District’s strategic goals in regards to capital expansion, but only in that it is used prudently and benefits the objectives identified under the Strategic Plan. The District will continue to reserve funds and pay cash for capital projects identified in the Capital Replacement Schedule as primary before debt is explored as a financing option. The District has not supported local option levies as a tool for funding capital acquisition or expansion.

The District entered into a Full Faith and Credit Refinancing Agreement with Wells Fargo Bank, NA on November 4, 2013 for an eight year note with a 2.38 percent coupon in the amount of \$1,908,510. The amount financed supported the consolidation of two existing debt holdings for property and equipment and included cost of issuance. The 2021/22 fiscal year budget identifies \$128,572 in principal payments and \$1,539 in interest payments. This debt will be fully satisfied in July of 2021.

## 2013 Refunding – Full Faith and Credit Obligations

Wells Fargo Bank, N.A.

Dated 11-04-13 at 2.38% - 8 Year Term

	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	\$ 12,089.39	\$ 131,734.98	\$ 261,819.75
FY 18-19	07/01/18	\$ 119,645.59	\$ 10,453.30	\$ 130,098.89	
	01/01/19	\$ 122,550.08	\$ 9,163.10	\$ 131,713.18	\$ 261,812.07
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>\$ 186,027.20</b>		
<b>Total Debt Service:</b>					<b>\$ 2,094,537.39</b>

# Budget and Financial Policies

2021/22 Fiscal Year

The District entered into a Full Faith and Credit Agreement with JP Morgan Chase Bank on July 9, 2019 for a ten year note with a 2.09 percent coupon in the amount of \$4,028,000. The amount financed supported the construction of the Scenic fire station and included cost of issuance. The 2021/22 fiscal year budget identifies \$378,000 in principal payments and \$70,642 in interest payments. At fiscal year end June 30, 2022 outstanding debt principal on this holding will be \$3,096,000.

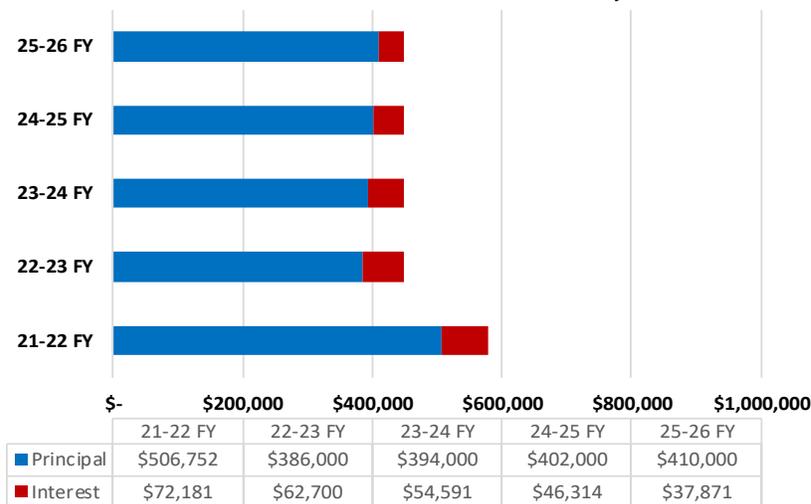
## 2019 Series Full Faith and Credit Obligations

JP Morgan Chase Bank

Dated 07-09-19 at 2.09% - 10 Year Term

	Debt Payments	Principal	Interest	Total	Annual Debt Service
FY 19-20	01/01/20	\$ 184,000.00	\$ 40,221.82	\$ 224,221.82	\$ 224,221.82
FY 20-21	07/01/20	\$ 184,000.00	\$ 40,169.80	\$ 224,169.80	
	01/01/21	\$ 186,000.00	\$ 38,247.00	\$ 224,247.00	\$ 448,416.80
FY 21-22	07/01/21	\$ 188,000.00	\$ 36,303.30	\$ 224,303.30	
	01/01/22	\$ 190,000.00	\$ 34,338.70	\$ 224,338.70	\$ 448,642.00
FY 22-23	07/01/22	\$ 192,000.00	\$ 32,353.20	\$ 224,353.20	
	01/01/23	\$ 194,000.00	\$ 30,346.80	\$ 224,346.80	\$ 448,700.00
FY 23-24	07/01/23	\$ 196,000.00	\$ 28,319.50	\$ 224,319.50	
	01/01/24	\$ 198,000.00	\$ 26,271.30	\$ 224,271.30	\$ 448,590.80
FY 24-25	07/01/24	\$ 200,000.00	\$ 24,202.20	\$ 224,202.20	
	01/01/25	\$ 202,000.00	\$ 22,112.20	\$ 224,112.20	\$ 448,314.40
FY 25-26	07/01/25	\$ 204,000.00	\$ 20,001.30	\$ 224,001.30	
	01/01/26	\$ 206,000.00	\$ 17,869.50	\$ 223,869.50	\$ 447,870.80
FY 26-27	07/01/26	\$ 208,000.00	\$ 15,716.80	\$ 223,716.80	
	01/01/27	\$ 210,000.00	\$ 13,543.20	\$ 223,543.20	\$ 447,260.00
FY 27-28	07/01/27	\$ 213,000.00	\$ 11,348.70	\$ 224,348.70	
	01/01/28	\$ 215,000.00	\$ 9,122.85	\$ 224,122.85	\$ 448,471.55
FY 28-29	07/01/28	\$ 217,000.00	\$ 6,876.10	\$ 223,876.10	
	01/01/29	\$ 219,000.00	\$ 4,608.45	\$ 223,608.45	\$ 447,484.55
FY 29-30	07/01/29	\$ 222,000.00	\$ 2,319.90	\$ 224,319.90	
					\$ 224,319.90
<b>Total Principal Paid:</b>		<b>\$ 4,028,000.00</b>			
<b>Total Interest Paid:</b>			<b>\$ 454,292.62</b>		
<b>Total Debt Service:</b>					<b>\$ 4,482,292.62</b>

Schedule of Combined Debt (next 5 fiscal years)



# Budget and Financial Policies

2021/22 Fiscal Year

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## **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 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 Program**

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 under 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 at least \$300,000 from the General Fund per fiscal year to support the Capital Fund. If the General Fund can support higher transfers then Staff will appropriate those additional funds, which contributes to the long-term health of the Capital Fund and reduces or eliminates the need for borrowing. If shortfalls are identified, management would 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 budgets a contingency based between five and ten percent of the budgeted expenditures. Unused contingency reverts to fund balance.

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

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, or automatic external defibrillators (AED).

# Budget and Financial Policies

2021/22 Fiscal Year

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The District will budget a \$1,000 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 another source 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 unless a supplemental budget process is conducted.

The 2021/22 fiscal year budget identifies \$1,417,000 in total capital expenditures.

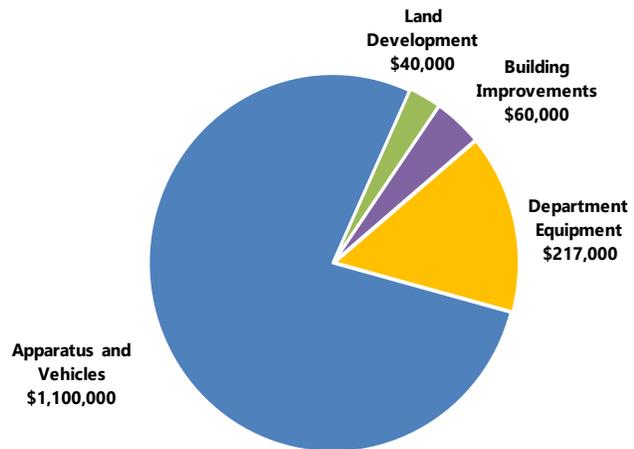
## Relationship of Capital Budget to Annual Operating Budget

When a capital project is developed, the new operating or maintenance costs associated with that new project are determined and this impact on the operating budget is considered as part of the District's budget justification process. Any savings to the operating budget is also considered when developing a new capital project.

Capital expenditures impacting the operating budget are considered as either routine in nature or non-routine. Routine or recurring expenditures are typically scheduled out and depicted on the Capital Replacement Schedule. These items are usually between the \$5,000 and \$300,000 dollar range and can be either response apparatus or replacement items like extrication equipment or defibrillators. They usually will have some impact on the operating budget, however in some situations, may have no significant impact at all.

Non-routine capital projects do not receive annual appropriations in the Capital Projects Fund and are typically one-time or stand-alone projects. The construction of a new fire station could be considered a non-routine or non-recurring capital project that would impact the operating budget. The District considers as significant, in both budgeting and its long-term forecasts, the costs of additional firefighting or other supporting personnel. Typically such capital projects are financed with loan proceeds or grant revenue. Because costs of personnel and operating a new station are the most financially significant operating costs, we would plan these additional capital projects to coincide with the financial resources in the operating budget and project sustainability under the District's 10-Year Financial Forecast.

**2021/22 Capital Expenditures**



# Budget and Financial Policies

2021/22 Fiscal Year

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## SUMMARY OF POLICIES

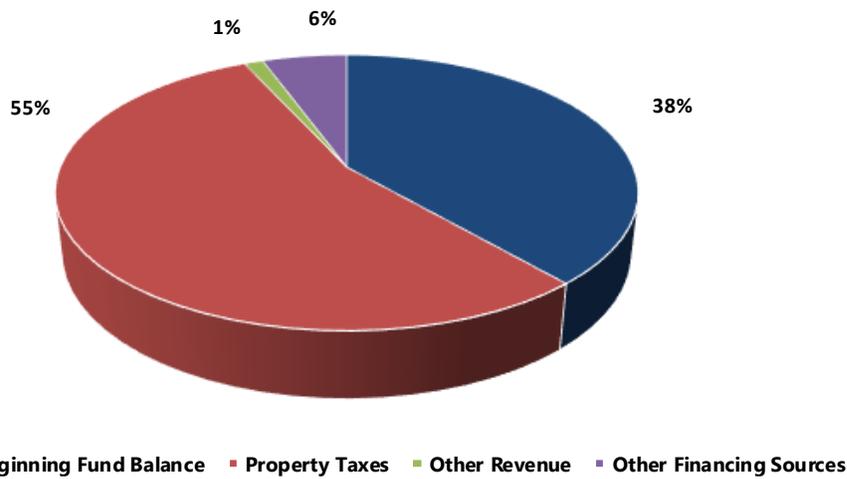
1. The District will adopt and maintain a **balanced budget** in which total resources of beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, and ending fund balance. The District will use one-time revenues to fund one-time expenditures 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 **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 budget **Unappropriated Ending Fund Balance** at 26 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 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 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 through Resolution at the July meeting.

# Financial Overview

2021/22 Fiscal Year

## Summary of Budgeted Resources

Resources	Beginning Fund Balance	Property Taxes	Other Revenue	Other Financing Sources	2021/22 Budget
Major Funds					
<b>General</b>	\$6,400,000	\$15,525,000	\$355,200		\$22,280,200
<b>Capital Projects</b>	\$4,570,200		\$800	\$1,591,400	\$6,162,400
<b>Total Budgeted Resources</b>	<b>\$10,970,200</b>	<b>\$15,525,000</b>	<b>\$356,000</b>	<b>\$1,591,400</b>	<b>\$28,442,600</b>



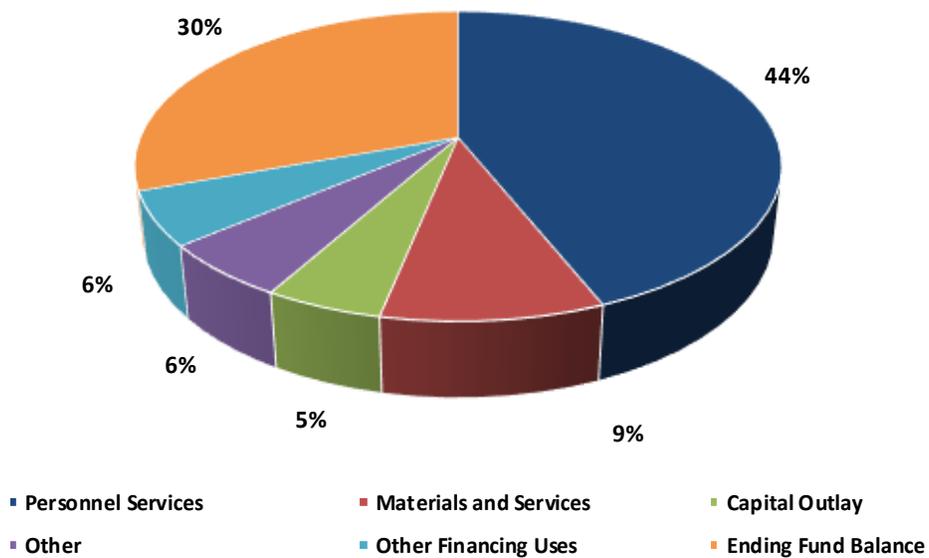
Fiscal Year Ended	Total Tax Levy	Current Tax Collections	Percent of Levy Collected	Delinquent Tax Collections	Total Tax Collections	Percent of Total Tax Collections to Tax Levy
2020	\$ 14,718,202	\$ 13,880,987	94.31%	\$ 324,887	\$ 14,205,874	96.52%
2019	\$ 14,193,426	\$ 13,409,890	94.48%	\$ 312,846	\$ 13,722,736	96.68%
2018	\$ 13,416,774	\$ 12,713,654	94.76%	\$ 310,257	\$ 13,023,911	97.07%
2017	\$ 12,911,941	\$ 12,239,478	94.79%	\$ 330,336	\$ 12,569,814	97.35%
2016	\$ 12,458,556	\$ 11,792,665	94.66%	\$ 341,393	\$ 12,134,058	97.40%
2015	\$ 11,909,282	\$ 11,231,211	94.31%	\$ 383,179	\$ 11,614,390	97.52%
2014	\$ 11,424,300	\$ 10,740,195	94.01%	\$ 513,404	\$ 11,253,599	98.51%
2013	\$ 11,112,431	\$ 10,362,351	93.25%	\$ 453,829	\$ 10,816,180	97.33%
2012	\$ 11,412,597	\$ 10,624,883	93.10%	\$ 507,661	\$ 11,132,544	97.55%
2011	\$ 11,254,507	\$ 10,459,640	92.94%	\$ 395,782	\$ 10,855,422	96.45%

# Financial Overview

2021/22 Fiscal Year

## Summary of Budgeted Requirements

Requirements	Personnel Services	Materials and Services	Capital Outlay	Other	Other Financing Uses	Ending Fund Balance	2021/22 Budget
Major Funds							
<b>General</b>	\$12,471,000	\$2,670,800		\$1,510,500	\$1,591,400	\$4,036,500	\$22,280,200
<b>Capital Projects</b>			\$1,417,000	\$119,000		\$4,626,400	\$6,162,400
<b>Total Budgeted Requirements</b>	<b>\$12,471,000</b>	<b>\$2,670,800</b>	<b>\$1,417,000</b>	<b>\$1,629,500</b>	<b>\$1,591,400</b>	<b>\$8,662,900</b>	<b>\$28,442,600</b>



# Financial Overview

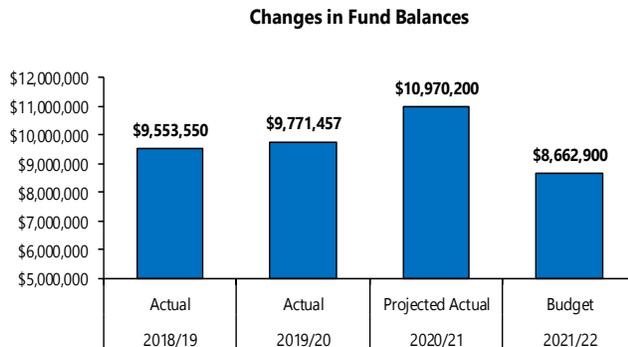
2021/22 Fiscal Year

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			2021/22 Budget
	2018/19 Actual	2019/20 Actual	2020/21 Projected Actual	
<b>Revenues</b>				
Property Taxes	13,722,736	14,205,874	15,335,000	15,525,000
Earnings on Investments	270,757	298,922	100,000	120,000
Grants	600,791	34,026	272,000	135,100
Lease Income	16,043	56,499	58,700	67,000
Donations	476,805	0	1,400	200
Contracts	26,004	5,000	0	0
Miscellaneous	443,219	146,797	393,600	32,000
	<b>\$15,556,355</b>	<b>\$14,747,117</b>	<b>\$16,160,700</b>	<b>\$15,879,300</b>
Other Revenue Sources:				
Proceeds from Sale of Equip	5,000	689	23,500	1,500
Loan Proceeds	0	4,028,000	0	200
Transfers to and from	1,546,100	1,266,200	996,200	1,591,400
<b>Total Revenue</b>	<b>\$17,107,455</b>	<b>\$20,042,007</b>	<b>\$17,180,400</b>	<b>\$17,472,400</b>
<b>Expenditures</b>				
Personnel Services	10,217,355	10,860,443	11,678,500	12,471,000
Materials and Services	2,057,778	2,077,144	2,310,800	2,670,800
Capital Outlay	2,182,460	5,134,291	285,500	1,417,000
Debt Service	261,820	486,021	710,200	579,000
Operating Contingency	0	0	0	1,050,500
<b>Total Expenditures</b>	<b>\$14,719,412</b>	<b>\$18,557,900</b>	<b>\$14,985,000</b>	<b>\$18,188,300</b>
<b>Excess or Deficiency</b>	<b>2,388,042</b>	<b>1,484,107</b>	<b>2,195,400</b>	<b>(715,900)</b>
<b>Changes in Fund Balance</b> <i>(The cash available at the end of the fiscal year)</i>				
Beginning Fund Balance	8,711,608	9,553,550	9,771,000	10,970,200
Excess Revenues over Expenditures	2,388,042	1,484,107	2,195,400	(715,900)
Interfund Transfers	(1,546,100)	(1,266,200)	(996,200)	(1,591,400)
<b>Ending Fund Balance</b>	<b>\$9,553,550</b>	<b>\$9,771,457</b>	<b>\$10,970,200</b>	<b>\$8,662,900</b>
Increase or Decrease in Fund Balance		2.28%	12.27%	-21.03%

The increase in total fund balance at fiscal year end June 30, 2020 is the result of actual spending lower than budget, specifically in the Capital Projects Fund due to timing of construction projects.

The projected increase in fund balance of \$1,198,743 at fiscal year end June 30, 2021 is the result of unanticipated tax revenue credited back from prior years due to a Charter Communications tax dispute settlement, 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.



# Financial Overview

2021/22 Fiscal Year

Total fund balance reflected at fiscal year end June 30, 2022 is \$8,662,900 or a decrease of 21 percent. It is important to note 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 via Board resolution 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.

The following schedule represents **fund balance itemized by revenues and expenditures between the two funds**. The ending fund balance figures represented in the 2021/22 adopted budget columns represent the minimum amount of cash the District would have on hand at fiscal year end, providing that all accounts and contingencies were spent in their entirety.

GENERAL FUND	Fiscal Year			2021/22 Budget
	2018/19 Actual	2019/20 Actual	2020/21 Projected Actual	
<b>Revenue/Expenditures</b>				
Revenue	14,536,373	14,775,107	16,162,700	15,880,200
Expenditures	12,536,952	13,423,609	14,699,500	16,652,300
Excess or Deficiency	<b>\$1,999,420</b>	<b>\$1,351,498</b>	<b>\$1,463,200</b>	<b>(\$772,100)</b>
<b>Changes in Fund Balance</b>				
Beginning Fund Balance	5,394,795	5,848,115	5,933,000	6,400,000
Excess Revenues over Expenditures	1,999,420	1,351,498	1,463,200	(772,100)
Interfund Transfers Out	(1,546,100)	(1,266,200)	(996,200)	(1,591,400)
Ending Fund Balances	<b>\$5,848,115</b>	<b>\$5,933,413</b>	<b>\$6,400,000</b>	<b>\$4,036,500</b>
Increase or Decrease		1.46%	7.86%	-36.93%

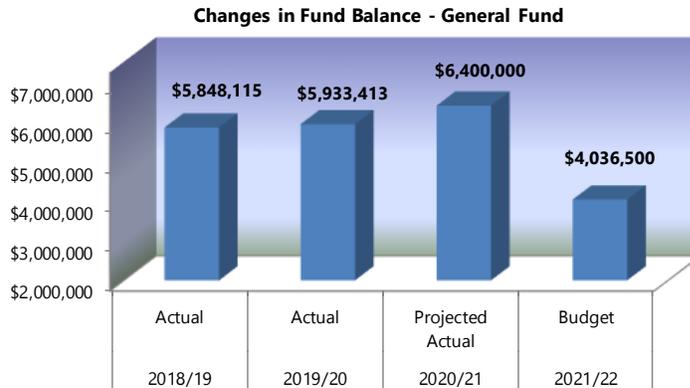
CAPITAL PROJECTS FUND	Fiscal Year			2021/22 Budget
	2018/19 Actual	2019/20 Actual	2020/21 Projected Actual	
<b>Revenue/Expenditures</b>				
Revenue	1,024,982	4,000,700	21,500	800
Expenditures	2,182,460	5,134,291	285,500	1,536,000
Excess or Deficiency	<b>(\$1,157,478)</b>	<b>(\$1,133,591)</b>	<b>(\$264,000)</b>	<b>(\$1,535,200)</b>
<b>Changes in Fund Balance</b>				
Beginning Fund Balance	3,316,813	3,705,435	3,838,000	4,570,200
Excess Revenues over Expenditures	(1,157,478)	(1,133,591)	(264,000)	(1,535,200)
Interfund Transfers In	1,546,100	1,266,200	996,200	1,591,400
Ending Fund Balances	<b>\$3,705,435</b>	<b>\$3,838,044</b>	<b>\$4,570,200</b>	<b>\$4,626,400</b>
Increase or Decrease		3.58%	19.08%	1.23%

In this schedule, expenditures in the General Fund consist of personnel services, materials and services, debt service, and contingency. Expenditures in the Capital Fund are those identified in the Capital Replacement Schedule and include equipment, apparatus, vehicles, and buildings and improvements.

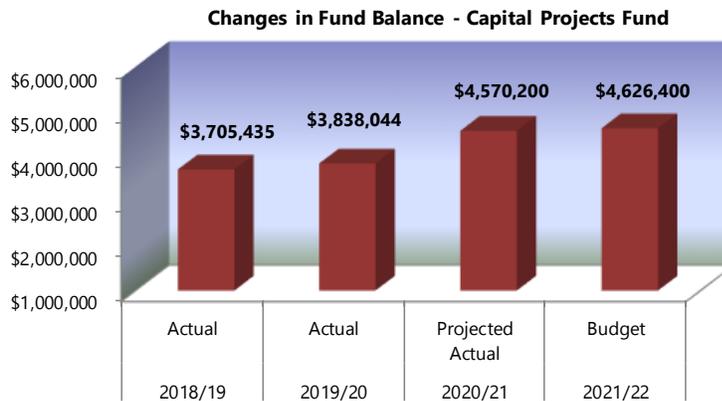
# Financial Overview

2021/22 Fiscal Year

The following graphs depict the District's **changes in fund balance by fund** 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, 2022 as established by policy.



- ➔ Fund balance in the **General Fund** increased at fiscal year end June 30, 2020 by 1.46 percent, the result of the systematic increase of unappropriated ending fund balance (UEFB) and spending levels more closely aligned with budget.
- ➔ Fund balance is projected to increase at fiscal year end June 30, 2021 by 7.86 percent, the result of additional revenue and spending levels lower than budget.
- ➔ Fund balance at fiscal year end June 30, 2022 reflects only the UEFB or \$4,036,500. The UEFB is based on 26 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, 2020 by 3.58 percent, the result of revenue through a transfer from the General Fund compared to the budgeted expenditures.
- ➔ Fund balance is projected to increase 19 percent at fiscal year end June 30, 2021, the result revenue compared to budgeted expenditures.
- ➔ Fund balance at fiscal year end June 30, 2022 represents a 1.23 percent increase due to budgeted expenditures in relation to the amount of the transfer from the General Fund.

# Financial Overview

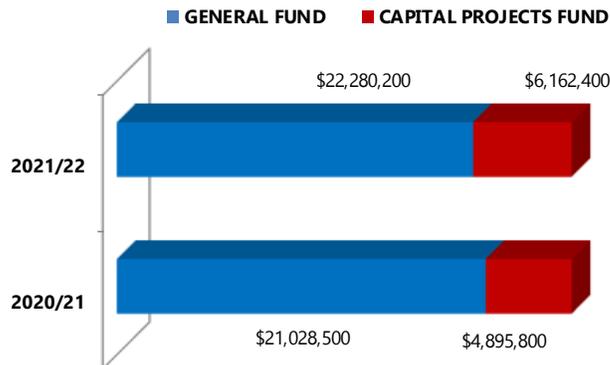
2021/22 Fiscal Year

The following schedule reflects a **budgetary comparison by fund and major object classification** between the current and prior fiscal year.

GENERAL FUND	Fiscal Year			
	2021/22 Budget	2020/21 Budget	Variance	Change
Personnel Services	\$12,471,000	12,082,000	389,000	3.22%
Materials and Services	\$2,670,800	2,551,300	119,500	4.68%
Operating Contingency	\$931,500	833,500	98,000	11.76%
Debt Service	\$579,000	711,000	(132,000)	-18.57%
Transfer to Capital Projects Fund	\$1,591,400	996,200	595,200	59.75%
Unappropriated Ending Fund Balance	\$4,036,500	3,854,500	182,000	4.72%
	<b>\$22,280,200</b>	<b>\$21,028,500</b>	<b>\$1,251,700</b>	<b>5.95%</b>

CAPITAL PROJECTS FUND	Fiscal Year			
	2021/22 Budget	2020/21 Budget	Variance	Change
Department Equipment	217,000	159,500	57,500	36.05%
Apparatus and Vehicles	1,100,000	207,000	893,000	431.40%
Land and Improvements	40,000	50,000	(10,000)	-20.00%
Building Construction/Improvements	60,000	1,000	59,000	5900.00%
Contingency	119,000	18,100	100,900	557.46%
Reserve for Future/Ending Fund Balance	4,626,400	4,460,200	166,200	3.73%
	<b>\$6,162,400</b>	<b>\$4,895,800</b>	<b>\$1,266,600</b>	<b>25.87%</b>

<b>TOTAL BUDGET</b>	<b>\$28,442,600</b>	<b>\$25,924,300</b>	<b>\$2,518,300</b>	<b>9.71%</b>
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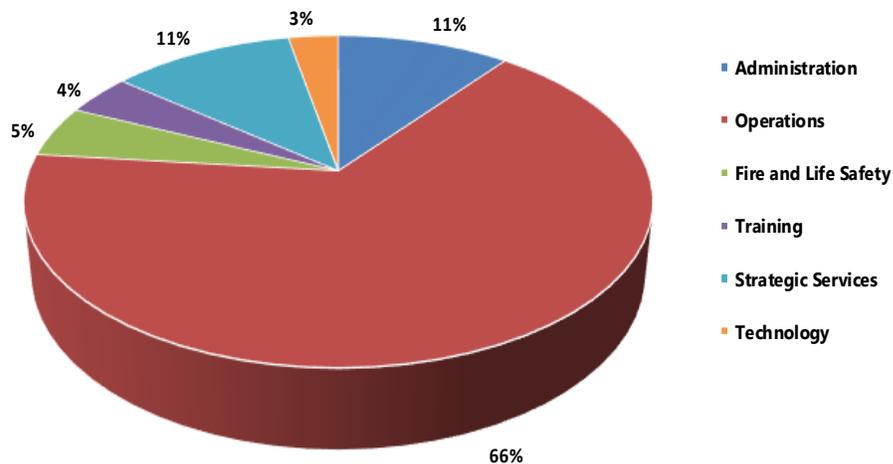


# Financial Overview

2021/22 Fiscal Year

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

GENERAL FUND	Fiscal Year			
	2021/22 Budget	2020/21 Budget	Variance	Change
<b>Department 01</b>				
<b>Administration</b>				
Personnel Services	837,000	779,000	58,000	7.45%
Materials and Services	768,000	785,600	(17,600)	-2.24%
	<b>\$1,605,000</b>	<b>\$1,564,600</b>	<b>\$40,400</b>	<b>2.58%</b>
<b>Department 02</b>				
<b>Operations</b>				
Personnel Services	9,616,000	9,467,000	149,000	1.57%
Materials and Services	385,500	354,800	30,700	8.65%
	<b>\$10,001,500</b>	<b>\$9,821,800</b>	<b>\$179,700</b>	<b>1.83%</b>
<b>Department 03</b>				
<b>Fire and Life Safety</b>				
Personnel Services	734,500	657,000	77,500	11.80%
Materials and Services	27,000	27,000	0	0.00%
	<b>\$761,500</b>	<b>\$684,000</b>	<b>\$77,500</b>	<b>11.33%</b>
<b>Department 04</b>				
<b>Training</b>				
Personnel Services	411,000	403,000	8,000	1.99%
Materials and Services	201,800	167,700	34,100	20.33%
	<b>\$612,800</b>	<b>\$570,700</b>	<b>\$42,100</b>	<b>7.38%</b>
<b>Department 05</b>				
<b>Strategic Services</b>				
Personnel Services	710,500	619,000	91,500	14.78%
Materials and Services	986,500	958,800	27,700	2.89%
	<b>\$1,697,000</b>	<b>\$1,577,800</b>	<b>\$119,200</b>	<b>7.55%</b>
<b>Department 07</b>				
<b>Technology</b>				
Personnel Services	162,000	157,000	5,000	3.18%
Materials and Services	302,000	257,400	44,600	17.33%
	<b>\$464,000</b>	<b>\$414,400</b>	<b>\$49,600</b>	<b>11.97%</b>
<b>TOTAL</b>	<b>\$15,141,800</b>	<b>\$14,633,300</b>	<b>\$508,500</b>	<b>3.47%</b>



# Financial Forecast

2021/22 Fiscal Year

### Long Range Financial Forecasting

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 December/January after the property tax certification is provided by the County Assessor and then reviewed and adjusted as necessary throughout 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. As constitutionally allowed for, a three percent increase on each taxing entity is certified each fiscal year. Exceptions to this is new construction or significant improvements, which provides for greater tax revenue than the three percent. In times of economic recession when the real market value of a property declines below the property’s assessed valuation, an assessment below three percent could occur resulting in a decrease in tax revenue.

The District’s projections are built using our permanent tax rate of \$3.1194 per \$1,000 of assessed valuation. Growth percentages are based on historical trends and future economic indicators. The District experienced a growth rate of 4.54 percent for 2020. Projections for the ensuing seven fiscal years is estimated to average 4.70 percent. The average assessed valuation growth for the previous seven years was 4.38 percent. Based on future industry growth projections and accelerated commercial construction we believe growth will be greater than has been experienced on recent average. We will continue however to take a moderately conservative approach in the development of the long-term financial forecast in order to ensure fiscal sustainability.

This forecast depicts all programs fully staffed including the new Community Care Program and one additional firefighter position. Also factored in is the Public Employees Retirement System pension rate increase effective July 1, 2021 and subsequent odd years based on estimated valuations. Modest cost of living adjustments have been projected across future years. Total revenue includes beginning fund balances. The current year reflects a balanced budget, thus no budget surplus or shortfall is depicted to reflect that.

### Financial Forecast Summary for General Fund

	Budget	Projected								
GENERAL FUND	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30	FY 30-31
<b>TOTAL REVENUE</b>	\$ 22,280,200	\$ 21,584,710	\$ 22,585,978	\$ 23,684,615	\$ 24,885,547	\$ 26,175,225	\$ 27,657,031	\$ 29,237,591	\$ 31,029,724	\$ 33,150,648
<b>TOTAL EXPENDITURES</b>	\$ 17,312,200	\$ 16,429,402	\$ 17,118,457	\$ 17,704,163	\$ 18,453,808	\$ 19,090,577	\$ 19,908,239	\$ 20,600,619	\$ 21,266,329	\$ 21,796,494
<b>Net Available for Policy Commitments</b>	<b>\$ 4,968,000</b>	<b>\$ 5,155,308</b>	<b>\$ 5,467,521</b>	<b>\$ 5,980,452</b>	<b>\$ 6,431,739</b>	<b>\$ 7,084,648</b>	<b>\$ 7,748,792</b>	<b>\$ 8,636,972</b>	<b>\$ 9,763,394</b>	<b>\$ 11,354,154</b>
Policy Commitments *										
Unappropriated Ending Fund Balance	\$ (4,036,500)	\$ (4,242,290)	\$ (4,452,582)	\$ (4,655,678)	\$ (4,852,621)	\$ (5,069,154)	\$ (5,283,179)	\$ (5,519,919)	\$ (5,753,376)	\$ (6,010,334)
Operating Contingency	\$ (931,500)	\$ (978,990)	\$ (1,027,519)	\$ (1,074,387)	\$ (1,119,836)	\$ (1,169,805)	\$ (1,219,195)	\$ (1,273,827)	\$ (1,327,702)	\$ (1,387,000)
Budget surplus/(shortfall)	\$ -	\$ (65,972)	\$ (12,579)	\$ 250,387	\$ 459,282	\$ 845,689	\$ 1,246,418	\$ 1,843,226	\$ 2,682,316	\$ 3,956,819
<i>Amount available for appropriation or amount needed to reduce budget by in order to meet policy commitments</i>										

\* UEFB is 26% and OC is 6% of budgeted property tax

The District has established financial policy commitments in the General Fund to help preserve financial stability. In the above model, the budget surplus or shortfall depicts the amount the District is able to, or not able to, meet those policy commitments. Depicted shortfalls may or may not materialize to the magnitude reflected above, as assessed values may be greater than the conservative estimates this schedule is based on. Measures that can be taken to help address potential shortfalls would be to find additional revenue sources, re-evaluate expenditures, and/or adjust the transfer out to the Capital Projects Fund (transfers are included under total expenditures and then correspondingly budgeted as a revenue in the receiving fund).

# Financial Forecast

2021/22 Fiscal Year

## Financial Forecast Summary for Capital Projects Fund

	Budget	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
CAPITAL PROJECTS FUND	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30	FY 30-31
<b>TOTAL REVENUE</b>	\$ 6,162,400	\$ 5,046,200	\$ 5,347,000	\$ 5,219,261	\$ 3,451,576	\$ 3,394,695	\$ 2,501,443	\$ 2,496,751	\$ 1,095,012	\$ 1,395,812
<b>TOTAL EXPENDITURES</b>	\$ 1,417,000	\$ -	\$ 428,539	\$ 2,068,485	\$ 357,681	\$ 1,194,052	\$ 305,492	\$ 1,702,539	\$ -	\$ -
<b>Net Available for Policy Commitments</b>	<b>\$ 4,745,400</b>	<b>\$ 5,046,200</b>	<b>\$ 4,918,461</b>	<b>\$ 3,150,776</b>	<b>\$ 3,093,895</b>	<b>\$ 2,200,643</b>	<b>\$ 2,195,951</b>	<b>\$ 794,212</b>	<b>\$ 1,095,012</b>	<b>\$ 1,395,812</b>
Ending Fund Policy Commitments										
Operating Contingency	\$ (119,000)	\$ -	\$ (42,854)	\$ (206,849)	\$ (35,768)	\$ (119,405)	\$ (30,549)	\$ (170,254)	\$ -	\$ -
Reserve for Future Capital Expenditure	\$ (4,626,400)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Budget surplus/(shortfall)	\$ -	\$ 5,046,200	\$ 4,875,607	\$ 2,943,928	\$ 3,058,127	\$ 2,081,238	\$ 2,165,402	\$ 623,958	\$ 1,095,012	\$ 1,395,812

### ALL FUNDS COMBINED

<b>Net Ending Fund Balances</b>	<b>\$ 8,662,900</b>	<b>\$ 9,222,518</b>	<b>\$ 9,315,610</b>	<b>\$ 7,849,993</b>	<b>\$ 8,370,030</b>	<b>\$ 7,996,081</b>	<b>\$ 8,694,998</b>	<b>\$ 7,987,103</b>	<b>\$ 9,530,704</b>	<b>\$ 11,362,966</b>
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In the above Capital Fund forecast, the budget surplus depicts the amount available in ending fund balance for years 2022 and out, which would be appropriated as reserve for future. The current year reflects a balanced budget.

Management reviews the growth at which operating revenues are increasing compared to operating expenditures. The District has a target that total personnel services will not exceed 80 percent of operating revenue and total materials and services will not exceed 20 percent. By using moderately conservative assessed valuation growth percentages of 4.70 percent per year and an average increase for personnel services and materials and services combined of six percent, operating expenditures will soon exceed revenue if measures are not put in place to safeguard sustainability. Financial forecasting allows the District to prepare for the future by monitoring and projecting impacts and making prudent decisions in the current period to help prevent deficits in the future.

The following table reflects a forecast of operating revenue (not including beginning fund balances) compared to operating expenditures based on the average 4.70 percent assessed valuation growth. Under this model, the District remains below the 80 percent and 20 percent target of operating revenue.

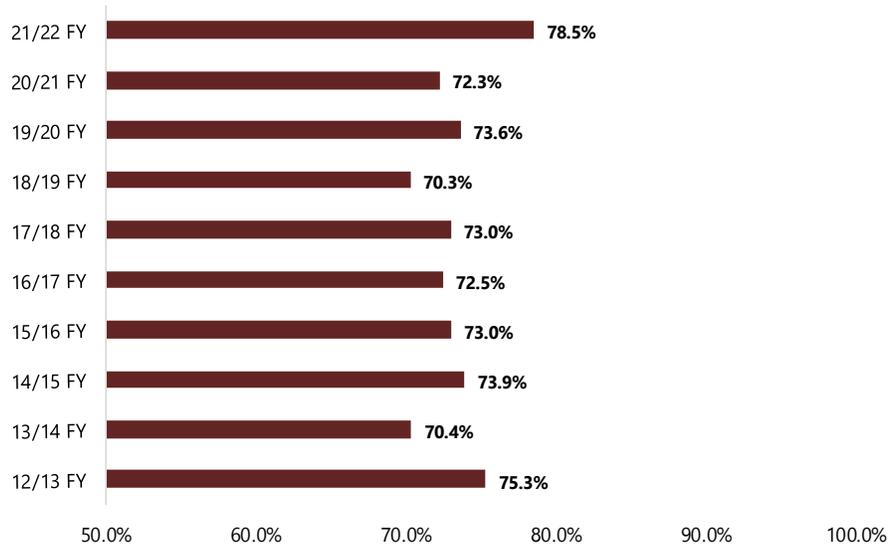
	Budget	Projected								
GENERAL FUND	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29	FY 29-30	FY 30-31
<b>OPERATING REVENUE</b>										
Taxes - Current & Prior	15,525,000	16,316,500	17,125,315	17,906,454	18,663,928	19,496,746	20,319,918	21,230,456	22,128,370	23,116,671
All Other Income	355,200	300,210	305,355	310,640	241,167	246,740	252,465	258,344	264,382	270,583
<b>TOTAL OPERATING REVENUE</b>	<b>15,880,200</b>	<b>16,616,710</b>	<b>17,430,670</b>	<b>18,217,094</b>	<b>18,905,095</b>	<b>19,743,486</b>	<b>20,572,383</b>	<b>21,488,800</b>	<b>22,392,751</b>	<b>23,387,254</b>
<b>OPERATING EXPENDITURES</b>										
Personnel Services	12,471,000	12,969,840	13,618,332	14,163,065	14,871,219	15,466,067	16,239,371	16,888,945	17,733,393	18,442,728
Materials and Services	2,670,800	2,710,862	2,751,525	2,792,798	2,834,690	2,877,210	2,920,368	2,964,174	3,008,636	3,053,766
Debt Service	579,000	448,700	448,600	448,300	447,900	447,300	448,500	447,500	224,300	0
<b>TOTAL OPERATING EXPENDITURES</b>	<b>15,720,800</b>	<b>16,129,402</b>	<b>16,818,457</b>	<b>17,404,163</b>	<b>18,153,808</b>	<b>18,790,577</b>	<b>19,608,239</b>	<b>20,300,619</b>	<b>20,966,329</b>	<b>21,496,494</b>
<b>Net Operating Revenue vs Expenditures</b>	159,400	487,308	612,213	812,931	751,286	952,909	964,144	1,188,180	1,426,422	1,890,760
<b>Percent of Operating Expenditures to Operating Revenue</b>										
Personnel Services	78.5%	78.1%	78.1%	77.7%	78.7%	78.3%	78.9%	78.6%	79.2%	78.9%
Materials and Services	16.8%	16.3%	15.8%	15.3%	15.0%	14.6%	14.2%	13.8%	13.4%	13.1%

# Financial Forecast

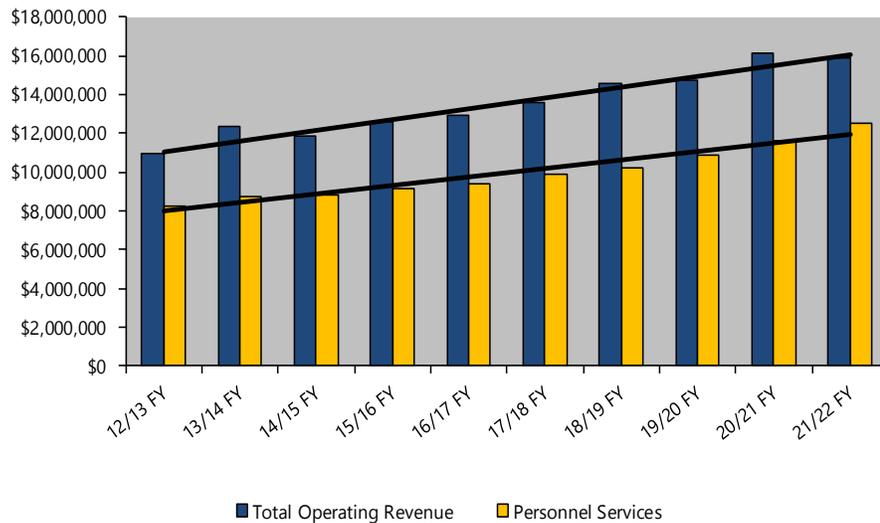
2021/22 Fiscal Year

The following graphs depicts total personnel services to operating revenue for the past ten fiscal years. In each fiscal year, the District has been able to maintain personnel services below the 80 percent target.

**Percent of Actual Personnel Services to Operating Revenue**



**Personal Services Compared with Operating Revenue**



# Strategic Plan

2021/22 Fiscal Year

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The District is committed in developing, implementing, and updating its strategic plan, as it serves as a guide for prioritizing annual work plans and supporting budgets. The 2021 – 2023 Strategic Plan was adopted by the Board of Directors on January 21, 2021 and is designed to guide the District for the next three years. This includes the initiatives, goals, and objectives adopted and are considered valid for the life of the plan with the opportunity to expand. The goals and objectives are dynamic and provide a living task plan for District leadership to identify, track, and report on the progress toward those initiatives.

This Plan is vision driven and focused on the work that we see necessary to advance that vision. During the planning process held in late 2020, a visioning exercise was held in which internal and external stakeholders were asked a series of questions that focused on “what does the District look like in the year 2030.” The feedback the District sought was to gain an awareness of current and anticipated challenges, successes, and strengths from an operational and financial standpoint and the consequent impact on service delivery. A virtual workshop was held after survey results were submitted, organized, and ranked that included these stakeholders consisting of internal staff, Board of Directors, Budget Committee, and community leaders.

This Strategic Plan describes our vision, mission, values and guiding principles, and the action items that are designed to make improvements in our service delivery. Each initiative identifies the goals and objectives that will drive the District throughout the life of the Plan with desired outcomes we hope to achieve. The Executive Team has established effective Specific, Measurable, Attainable, Realistic, and Timely (SMART) tasks that close the gap between desired and actual performance. These tasks are organized by department, and while target dates are developed at the staff level, this Plan should not be viewed as a rigid or all-inclusive list with hard deadlines.

## **Our Mission**

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 and what services are provided to the community, critical processes, and the desired level of performance.

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

## **Our Vision**

A vision statement communicates both the purpose and values of an organization. It describes the District’s inspiration and provides direction to employees on how they are expected to behave and encourages them to give their best. Further, it shapes our customers understanding of why we are passionate in serving them.

***“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

2021/22 Fiscal Year

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## **Our Values and Guiding Principles**

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. These values are shared throughout the District and provide a foundation for all personnel.

- **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 respectful to others.
- **Safety**  
Make personal, team, and the public's safety a priority.
- **Teamwork**  
Be receptive to the sharing of differing ideas. Be humble; help each other but don't walk on each other.
- **Health**  
Maintain physical and mental well-being.

## **Strategic Initiatives**

The following six strategic initiatives provide the ongoing direction for the District. These initiatives 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 by efficient use of our people, facilities, fleet, and finances.
3. Develop, promote, and demonstrate professionalism and excellence throughout the organization.
4. Maintain a high level of trust by promoting District engagement in the communities we serve.
5. Develop and strengthen collaborative efforts and strategic partnerships.
6. Commit to excellence through innovation.

# Strategic Plan

2021/22 Fiscal Year

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## **Initiative One:**

Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.

### **Goal: 1.1      Increase focus on prevention activities**

#### **Objectives:**

- Evaluate Greenway fires and fire response
- Focus on targeted areas to improve prevention
- Evaluate wildland fire reduction and resiliency
- Increase prevention in rural areas
- Ensure adequate water supplies exist for the suppression of fire

### **Goal: 1.2      Understand and focus on non-fire emergency response**

#### **Objectives:**

- Evaluate non-emergency response and resource allocation
- Understand needs of industry, business, land owners, traditional sectors, and demographics within sectors
- Implement appropriate response to non-fire incidents (mental health, drug addiction)
- Increase community delivered CPR training

## **Initiative Two:**

Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.

### **Goal: 2.1      Evaluate organizational and staffing models**

#### **Objectives:**

- Align resources with needs
- Evaluate the addition of more divisions to support the mission
- Assess the “right-size” for crew response
- Evaluate effectiveness of the community volunteer and volunteer firefighter programs
- Evaluate the need for additional administrative chief positions

### **Goal: 2.2      Evolve service delivery models to better focus resources**

#### **Objectives:**

- Utilize data to drive all service delivery models
- Develop and enhance programs within the District (Community Care and Risk Reduction)
- Offer alternative non-emergency transportation options to patients
- Keep up with technology to support communities

### **Goal: 2.3      Maintain fiscal responsibility**

#### **Objectives:**

- Assess capital needs and plan accordingly
- Evaluate sustainable practices
- Evaluate additional revenue sources beyond tax dollars
- Ensure appropriateness of compensation packages

# Strategic Plan

2021/22 Fiscal Year

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## **Initiative Three:**

Develop, promote, and demonstrate professionalism and excellence throughout the organization.

### **Goal: 3.1 Enhance employee development process**

#### **Objectives:**

- Ensure that all members have current development plans
- Establish mentor networks to break down silos
- Expand cross-training in functional areas
- Promote physical and mental health and wellness
- Evaluate career paths/succession planning beyond Battalion Chief

### **Goal: 3.2 Enhance internal communication**

#### **Objective:**

- Improve the effectiveness of internal communication opportunities
- Increase the exposure of leadership to internal teams and line staff
- Enhance team dynamics among all functional areas
- Create opportunities for line staff to engage with management
- Improve internal committee processes

## **Initiative Four:**

Maintain a high level of trust by promoting District engagement in the communities we serve.

### **Goal: 4.1 Increase the ways in which we engage with the communities we serve**

#### **Objectives:**

- Provide preparedness and prevention training
- Enhance public outreach and education opportunities
- Encourage increased community engagement at events
- Offer community listening events

### **Goal: 4.2 Increase effectiveness of virtual presence**

#### **Objectives:**

- Expand the use of social media platforms to include public education
- Offer more web-based information to the public
- Increase District brand recognition in the community

# Strategic Plan

2021/22 Fiscal Year

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## **Initiative Five:**

Develop and strengthen collaborative efforts and strategic partnerships.

**Goal: 5.1      Maintain and enhance partnerships to improve regional preparedness and response to emergency events**

**Objectives:**

- Develop and enhance collaboration with other partners
- Enhance communication among police/fire to improve effectiveness during incident response
- Participate in integrated training opportunities
- Explore regionalization of fire and emergency services
- Encourage the development of a Rogue Valley disaster response plan

**Goal: 5.2      Maintain and enhance partnerships to improve service delivery and organizational effectiveness**

**Objectives:**

- Explore shared services among agencies
- Work effectively with partner agencies for access to resources for elderly and at-risk patrons to affect broader change
- Conduct shared strategic planning
- Review collaboration of fire and medical services and improve effectiveness between agencies
- Partner with environmental agencies to reduce fire hazards

## **Initiative Six:**

Commit to excellence through innovation.

**Goal: 6.1      Focus on innovation to improve service delivery**

**Objectives:**

- Explore community paramedicine
- Explore treatment-in-place for patient care
- Address community needs through non-traditional programs
- Continue to improve options of service delivery using technology
- Embrace innovation to better support the service delivery models

**Goal: 6.2      Build organizational capacity and excellence**

**Objectives:**

- Continue to recruit and retain outstanding staff
- Provide excellent customer and public service
- Increase accountability at all levels
- Define and embrace norms of the culture throughout the organization

# General Fund

2021/22 Fiscal Year

## FUND DESCRIPTION

The purpose of the General Fund budget is to account for the day-to-day operations of the District. It includes appropriation categories like personal services, materials and services, debt service, operating contingency, inter-fund transfers, and ending fund balance. Within the fund the District has allocated six departments that each depict their own unique set of accounts under the personal services and materials and services classifications.

## BUDGET SUMMARY

The following table reflects a summary of General Fund requirements:

Requirements	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Personnel Services	\$ 10,217,355	\$ 10,860,443	\$ 12,082,000	\$ 12,471,000
Materials and Services	2,057,778	2,077,144	2,551,300	2,670,800
Operating Transfers Out	1,546,100	1,266,200	996,200	1,591,400
Operating Contingency	-	-	833,500	931,500
Debt Service	261,820	486,021	711,000	579,000
Ending Fund Balance	-	-	3,854,500	4,036,500
<b>Total Requirements</b>	<b>\$ 14,083,052</b>	<b>\$ 14,689,809</b>	<b>\$ 21,028,500</b>	<b>\$ 22,280,200</b>

Revenues budgeted within the General Fund support the budgeted requirements as identified above. Property taxes account for 71 percent of the total revenue appropriations.

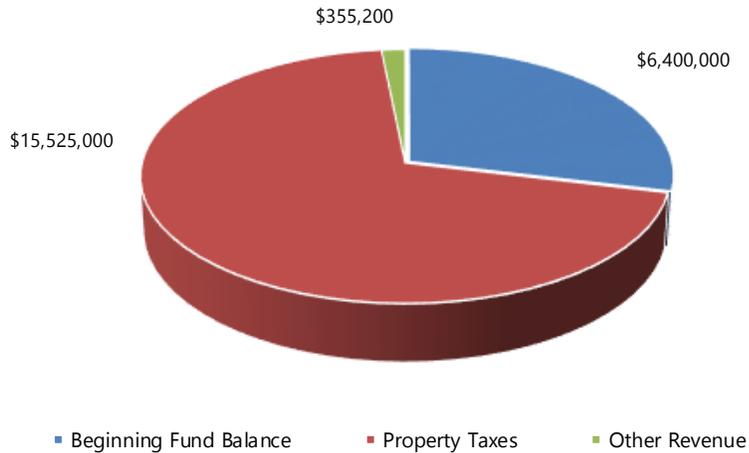
Revenue Appropriations Description	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22		
				Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Beginning Fund Balance	\$ 5,394,794.75	\$ 5,848,115.02	\$ 5,757,000	\$ 6,320,000	\$ 6,280,000	\$ 6,400,000
Taxes; Current	13,409,889.92	13,880,986.87	14,475,000	15,175,000	15,175,000	15,175,000
Taxes; Prior	312,845.95	324,887.18	350,000	350,000	350,000	350,000
Interest	270,757.34	298,922.17	300,000	120,000	120,000	120,000
Workers' Comp Refund & Reimb	7,635.41	11,015.40	10,000	10,000	10,000	10,000
Sale of Equipment	0.00	689.37	1,000	1,000	1,000	1,000
OSFM Conflagrations	353,660.00	111,795.36	1,000	1,000	1,000	1,000
Fees for Service; Suppression/EMS	22,025.00	14,270.78	10,000	10,000	10,000	10,000
Fees for Service; Drill Ground	0.00	690.00	1,000	1,000	1,000	1,000
Grants; Local, State, Federal	57,613.50	34,025.71	52,000	100,000	135,000	135,000
Contract; Financial Services	26,004.00	5,000.00	0	0	0	0
Lease Income	7,864.50	7,428.00	10,300	12,000	12,000	12,000
Lease Income; RCC	8,178.44	49,070.64	51,000	55,000	55,000	55,000
Miscellaneous	59,898.59	9,025.10	10,000	10,000	10,000	10,000
Donations	0.00	0.00	100	100	100	100
Loan Proceeds	0.00	27,300.00	100	100	100	100
<b>TOTAL</b>	<b>\$ 19,931,167.40</b>	<b>\$ 20,623,221.60</b>	<b>\$ 21,028,500</b>	<b>\$ 22,165,200</b>	<b>\$ 22,160,200</b>	<b>\$ 22,280,200</b>

# General Fund

2021/22 Fiscal Year

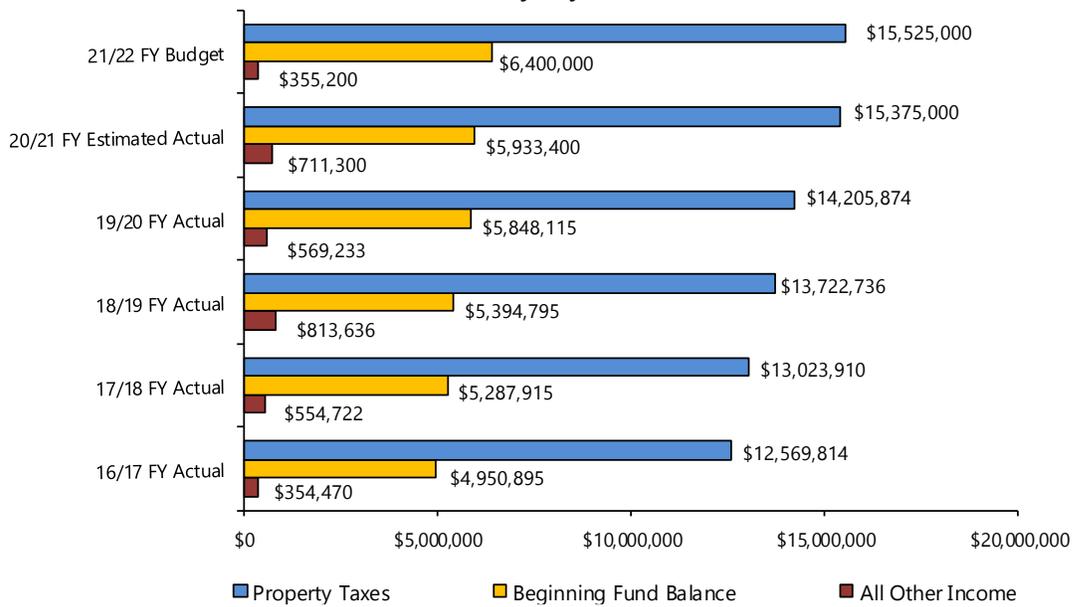
## REVENUE RESOURCES

2021/22 Fiscal Year Budgeted Resources by Category



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

Revenue by Major Source



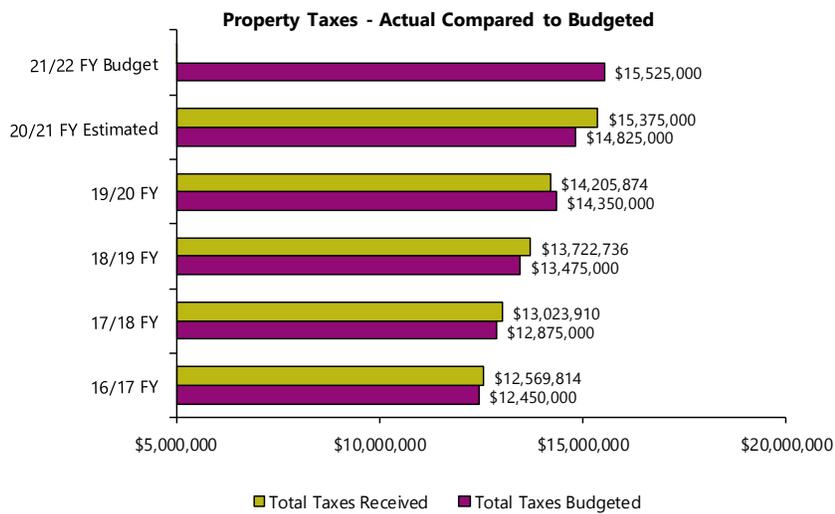
# General Fund

2021/22 Fiscal Year

As reflected in the **Revenue by Major Source** chart on the previous page, the three components are Property Taxes, Beginning Fund Balance, and All Other Income.

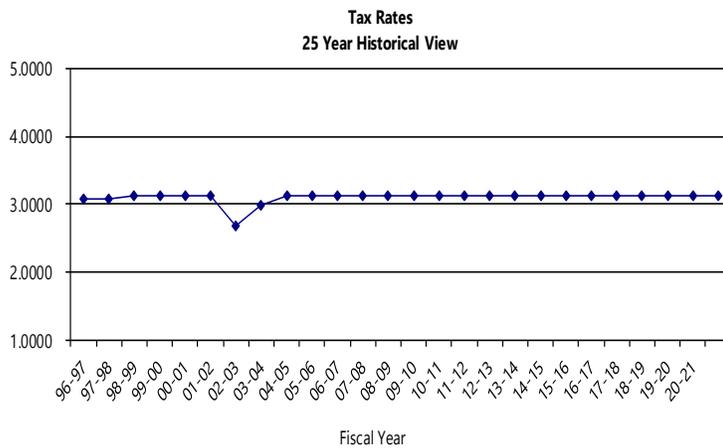
## Property Taxes

Property taxes account for both the current year levy and prior years. Current taxes for the 2021/22 fiscal year are budgeted based on assessed valuation growth projections of 4.80 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 94 percent collectible rate. Patrons receive a three percent discount if taxes are paid in full by November 15<sup>th</sup> upon assessment in October. If taxes are paid two-thirds by November 15<sup>th</sup> then a two percent discount would apply with the final one-third due by May 15<sup>th</sup>. If taxes are paid only one-third by November 15<sup>th</sup> then no discount would apply and the second one-third payment would be due by February 15<sup>th</sup> with the final payment due by May 15<sup>th</sup>.



Prior year taxes for the 2021/22 fiscal year are budgeted at 2.26 percent of the 2020/21 Jackson County Assessor’s certification of \$15,478,260 and account for delinquent tax payments. The delinquent collectible rate is based on the District’s average over the last five years. All personal property and real property machinery and equipment tax is considered delinquent by Jackson County when any installment is not paid when due. The taxpayer can be served with a warrant 30 days after delinquency. Property can be seized and other financial assets garnished. Real property tax is considered delinquent if not paid by May 15<sup>th</sup>. Foreclosure proceedings on real property begin when taxes have been delinquent for three years.

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 tax system based on property real market value and anticipated financial need of the taxing entity was replaced by this rate based tax system.



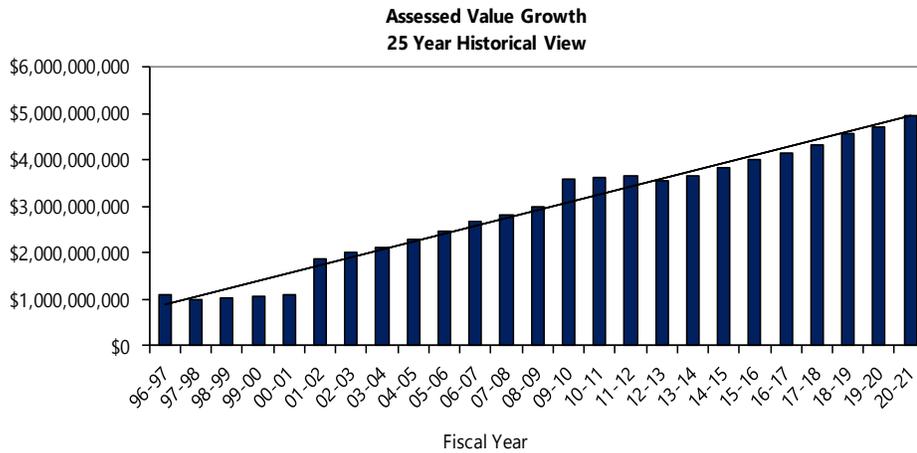
# General Fund

2021/22 Fiscal Year

The District has levied taxes at its permanent rate consistently, with the exception being in fiscal years 2001/02 and 2002/03 when the annexations of the City of Central and Eagle Point were made effective on the tax rolls. These annexations brought an increase in the District’s assessed valuation by \$739,356,740 or 67 percent.

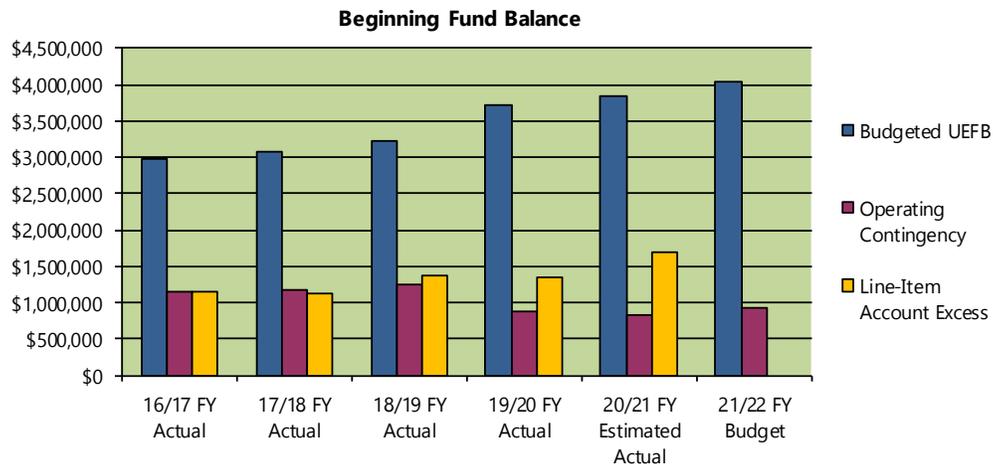
In 2009 the White City Urban Renewal tax increment financing ended, thus resulting in another increase in assessed valuation of \$470,000,000. Tax revenue generated from the frozen assessed value had been diverted to the Urban Renewal Agency since 1996.

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. From 2011-2013 the District experienced a gradual decline in taxable assessed valuation as the result of the economic recession. Real market housing values plummeted and fell below the maximum assessed value resulting in significant property tax loss.



## Beginning Fund Balance

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 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 the District has available at the beginning of each new fiscal year.



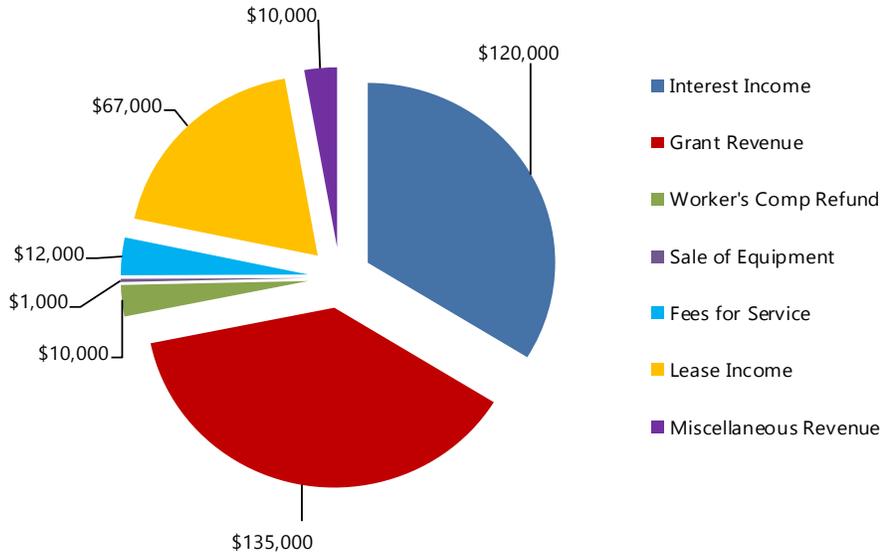
# General Fund

2021/22 Fiscal Year

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## Other Income

Various revenue sources under the “all other income” category consists of the following:



**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.

**Grant revenue** comes from Local, State, and Federal sources. 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. \$135,000 is identified in this budget year to account for a Staffing for Adequate Fire Emergency Response (SAFER) grant through FEMA and some other ancillary grants.

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.

Annual budgeted amounts from the **sale of equipment** sold during the fiscal year 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.

**Fees for service** include medical standby at sporting events and concerts. It also includes income from fire suppression costs incurred while responding to unprotected property and billable incidents along transportation routes. This category is broken out further and includes income and reimbursements from the State of Oregon for personnel deployed to serve on structural and wildland taskforce teams. These teams assist with fire suppression and life and property protection in Oregon and neighboring states during declared conflagrations.

**Lease income** consists of proceeds from leases the District has with other agencies. In this budget year, the District has \$55,000 identified in lease income from Rogue Community College (RCC) for utilization of our training facility and classroom to conduct their fire science programs. \$12,000 is identified from the Oregon Department of Public Safety Standards and Training (DPSST) for their utilization of a District office to administer their regional programs.

# General Fund

2021/22 Fiscal Year

The **miscellaneous revenue** category consists of 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. This results when the property loss ratio is maintained at 65 percent or below for the previous three calendar years.

## EXPENDITURE APPROPRIATIONS

The General Fund has expenditure appropriations balancing to revenue appropriations totaling \$22,280,200.

Requirements	2021/22 Budget	Percent of Budget
Personnel Services	\$ 12,471,000	55.97%
Materials and Services	2,670,800	11.99%
Operating Transfers Out	1,591,400	7.14%
Operating Contingency	931,500	4.18%
Debt Service	579,000	2.60%
Ending Fund Balance	4,036,500	18.12%
<b>Total Requirements</b>	<b>\$ 22,280,200</b>	<b>100.00%</b>

Requirements	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22		
				Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Personnel Services	\$ 10,217,355	\$ 10,860,443	\$ 12,082,000	\$ 12,488,000	\$ 12,450,500	\$ 12,471,000
Materials and Services	2,057,778	2,077,144	2,551,300	2,680,800	2,665,800	2,670,800
Transfers Out	1,546,100	1,266,200	996,200	1,449,400	1,496,900	1,591,400
Operating Contingency	-	-	833,500	931,500	931,500	931,500
Debt Service	261,820	486,021	711,000	579,000	579,000	579,000
Ending Fund Balance	5,848,115	5,933,413	3,854,500	4,036,500	4,036,500	4,036,500
<b>Total Requirements</b>	<b>\$ 19,931,167</b>	<b>\$ 20,623,222</b>	<b>\$ 21,028,500</b>	<b>\$ 22,165,200</b>	<b>\$ 22,160,200</b>	<b>\$ 22,280,200</b>

# General Fund

2021/22 Fiscal Year

## SUMMARY OF REQUIREMENTS

2018/19 Actual	2019/20 Actual	2020/21 Budgeted		2021/22 Proposed	2021/22 Approved	2021/22 Adopted	Inc/Dec from Prior Year
<b>Personnel Services</b>							
\$ 5,571,635	\$ 5,837,078	\$ 6,202,400	Salaries	\$ 6,426,000	\$ 6,434,000	\$ 6,441,500	3.85%
615,002	526,474	712,000	Overtime	717,000	717,000	717,000	0.70%
56,946	49,921	70,000	Out of Class	60,000	60,000	60,000	-14.29%
475,274	497,013	521,600	Incentives*	519,900	523,200	523,200	0.31%
102,289	119,587	127,000	Holiday Pay	102,000	108,300	108,300	-14.72%
20,981	25,328	142,000	Payouts	152,000	152,000	152,000	7.04%
34,541	35,589	37,400	Fringe Benefits**	37,600	39,700	39,700	6.15%
1,108,761	1,437,518	1,595,200	Retirement (PERS)	1,669,800	1,669,800	1,669,800	4.68%
155,284	173,584	238,500	Deferred Comp	245,100	246,800	246,800	3.48%
1,220,779	1,276,853	1,447,400	Insurances	1,527,900	1,487,200	1,500,200	3.65%
246,196	255,015	279,800	VEBA	292,800	295,800	295,800	5.72%
507,817	528,150	592,000	FICA/Medicare	615,200	615,200	615,200	3.92%
101,852	98,334	116,700	Workers Comp	122,700	101,500	101,500	-13.02%
\$ 10,217,355	\$ 10,860,443	\$ 12,082,000		\$ 12,488,000	\$ 12,450,500	\$ 12,471,000	3.22%
<b>Percent to Operating Revenue</b>							<b>78.53%</b>
\$ 2,057,778	\$ 2,077,144	\$ 2,551,300	<b>Materials and Services</b>	\$ 2,680,800	\$ 2,665,800	\$ 2,670,800	4.68%
<b>Percent to Operating Revenue</b>							<b>16.82%</b>
<b>Non-Departmental</b>							
1,546,100	1,266,200	996,200	Transfer to Capital	1,449,400	1,496,900	1,591,400	59.75%
0	0	833,500	Contingency	931,500	931,500	931,500	1176%
261,820	486,021	711,000	Debt Service	579,000	579,000	579,000	-8.57%
5,848,115	5,933,413	3,854,500	UEFB	4,036,500	4,036,500	4,036,500	4.72%
\$ 7,656,035	\$ 7,685,634	\$ 6,395,200		\$ 6,996,400	\$ 7,043,900	\$ 7,138,400	1162%
<b>\$ 19,931,167</b>	<b>\$ 20,623,222</b>	<b>\$ 21,028,500</b>	<b>Total General Fund Budget</b>	<b>\$ 22,165,200</b>	<b>\$ 22,160,200</b>	<b>\$ 22,280,200</b>	5.95%

\* Incentives include education, EMS, and longevity

\*\* Fringe benefits includes on-call pay to investigators, technology stipend, and car allowance

## SIGNIFICANT CHANGES

The General Fund is budgeted to increase 5.95 percent over the 2020/21 fiscal year. Personnel Services represents the majority of this increase (\$389,000) with significant drivers being an additional firefighter position (\$135,800), cost of living wage adjustments (\$87,800), pension expense (\$74,600), and health insurance costs (\$52,800).

Materials and services is budgeted to increase 4.68 percent with focus on technology, risk reduction, and outreach efforts. The transfer to Capital has increased from the prior year based on availability of funds. Debt Service has decreased in accordance with scheduled debt payments and the payoff of one holding. Operating Contingency and Unappropriated Ending Fund Balance (UEFB) has increased based on policy commitments.

# General Fund

2021/22 Fiscal Year

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## **PERSONNEL AND STAFFING CHANGES**

### **2020/21 Fiscal Year in Review**

Organizational structure and staffing during the 2020/21 fiscal year aligned with budget and did not result in significant movement of positions. The Community Care Response Unit (CCRU) launched in the summer of 2020 with two paramedics. In January of 2021 two budgeted EMT's were hired. The paramedics and EMT's now satisfy two teams of providers working a forty-hour work schedule, seven days a week. This unit is an additional response resource to manage non-emergent and lower acuity calls for service. In addition to responding through the 911 system, the teams are also referred by various contacts to provide outreach and risk reduction services to patrons in need.

In Operations, the District recruited and hired a Recruitment and Retention Coordinator in April of 2021. This is a part-time, temporary position funded by a four-year FEMA grant under their Staffing for Adequate Fire Emergency Response (SAFER) program. The purpose of this grant is to focus efforts on the volunteer program and recruiting and developing programs pertaining to building the volunteer corps. Volunteers play an essential part at the District in providing support on both on the fire ground and in support and risk reduction roles.

### **2021/22 Fiscal Year**

In Operations, the District is increasing the Firefighter full-time equivalency (FTE) from 20 to 21. This additional position will help meet minimum staffing levels for shift responders and help offset overtime costs due to a change in the Collective Bargaining Agreement that increases personnel eligible to be off on vacation from two to three daily.

The Fire and Life Safety department will see the retirement of a Deputy Fire Marshal in which a recruitment and hiring process will ensue to replace that position. A two month overlap of positions will occur to provide for training and mentorship.

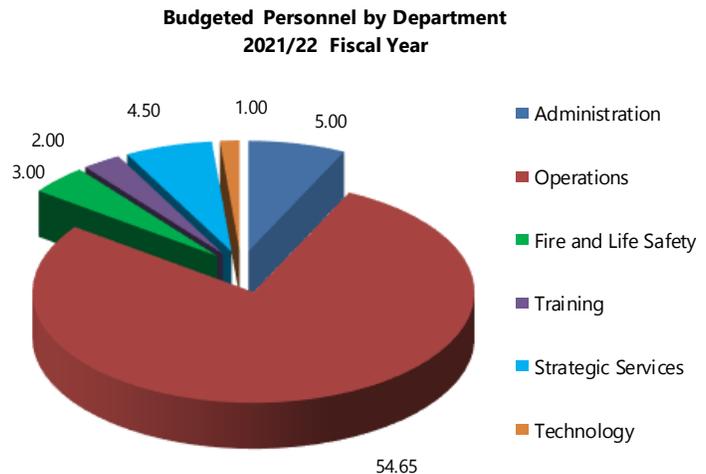
In Administration the Community Engagement Coordinator will transition from a part-time position to fulltime. In Strategic Services the District is implementing a new part-time Logistics Support Technician to help with the growth of that department and improve efficiencies with supply ordering and delivery.

### **Civil Service Processes**

The District held a promotional exam for the position of Engineer in June of 2021 to maintain a current Civil Service Register, valid for 23 months. The Firefighter register will expire in November of 2021 in which a new entrance exam process to maintain a current register will be held. This will be a 12 month register certified by the Civil Service Commission. The Captain promotional register will expire in March of 2022 in which an exam process will be held to maintain a current register, valid for 26 months.

Under Administration, Training, and Technology no new positions are being implemented and focus will continue on budgeted programs with respective personnel.

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.



# General Fund

2021/22 Fiscal Year

PERSONNEL ALLOCATION	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
<b>Administration</b>				
Fire Chief	1.00	1.00	1.00	1.00
Chief Administrative 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
Community Engagement Coordinator	0.00	0.50	0.50	1.00
Program Assistant	0.15	0.15	0.15	0.00
<b>Total</b>	<b>4.15</b>	<b>4.65</b>	<b>4.65</b>	<b>5.00</b>
<b>Operations</b>				
Deputy Chief	1.00	1.00	1.00	1.00
Battalion Chief – 56 Hour Shift	3.00	3.00	3.00	3.00
Battalion Chief – 40 Hour Staff	1.00	0.00	0.00	0.00
Fire Captain	12.00	12.00	12.00	12.00
Fire Engineer	12.00	12.00	12.00	12.00
Firefighter	20.00	20.00	20.00	21.00
Community EMT	0.00	0.00	2.00	2.00
Community Paramedic	0.00	2.00	2.00	2.00
Administrative Assistant	1.00	1.00	1.00	1.00
Recruitment and Retention Coordinator	0.00	0.00	0.15	0.50
Program Assistant	0.00	0.00	0.00	0.15
<b>Total</b>	<b>50.00</b>	<b>51.00</b>	<b>53.15</b>	<b>54.65</b>
<b>Fire and Life Safety</b>				
Fire Marshal	1.00	1.00	1.00	1.00
Deputy Fire Marshal	2.00	2.00	2.00	2.00
Fire and Life Safety Specialist	1.00	1.00	0.00	0.00
Administrative Assistant	1.00	1.00	0.00	0.00
<b>Total</b>	<b>5.00</b>	<b>5.00</b>	<b>3.00</b>	<b>3.00</b>
<b>Training</b>				
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>
<b>Strategic Services</b>				
Deputy Chief	0.00	1.00	1.00	1.00
Community Risk Reduction Captain	0.00	0.25	1.00	1.00
Facilities/Logistics Manager	1.00	0.25	0.00	0.00
Facilities/Logistics Technician	0.00	1.00	1.00	1.00
Administrative Assistant	0.00	0.00	1.00	1.00
Logistics Support Technician	0.00	0.00	0.00	0.50
<b>Total</b>	<b>1.00</b>	<b>2.50</b>	<b>4.00</b>	<b>4.50</b>
<b>Technology</b>				
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>
<b>Organizational Total</b>	<b>63.15</b>	<b>66.15</b>	<b>67.80</b>	<b>70.15</b>



# Administration

# Fire District 3



2021/22 Fiscal Year Budget

# Administration Department

2021/22 Fiscal Year

## DEPARTMENT DESCRIPTION

The Administration Department includes the functions of the Fire Chief, general administrative services, legal, contract administration, 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 be registered voters within the District. The Budget Committee members are appointed by the Board, serve three year terms, and also are required to be registered voters. There are five elected directors and five appointed budget members. Civil Service Commissioners serve four year terms and are also appointed by the Board.

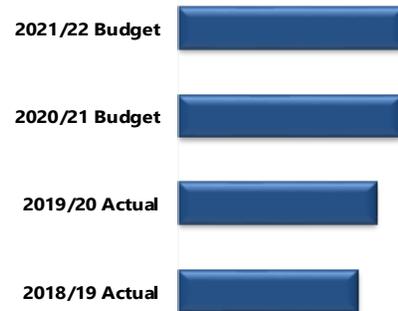
Finance provides financial accounting, budgeting, and reporting services for the District along with cash management and investments, fixed asset management, contract management, and strategic financial forecasting. Finance monitors all department budget activity and more importantly, assures compliance 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	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Personnel Services	\$608,788	\$679,754	\$779,000	\$837,000
Materials and Services	\$647,877	\$704,982	\$785,600	\$768,000
	<b>\$1,256,665</b>	<b>\$1,384,736</b>	<b>\$1,564,600</b>	<b>\$1,605,000</b>

### Budget Comparison



## PERSONNEL SUMMARY

Position	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Fire Chief	1.00	1.00	1.00	1.00
Chief Administrative Officer	1.00	1.00	1.00	1.00
Executive Assistant	1.00	1.00	1.00	1.00
Finance Assistant	1.00	1.00	1.00	1.00
Community Engagement Coordinator	0.00	0.50	0.50	1.00
Part-Time Program Assistant	0.00	0.15	0.15	0.00
<b>Total</b>	<b>4.00</b>	<b>4.65</b>	<b>4.65</b>	<b>5.00</b>

# Administration Department

2021/22 Fiscal Year

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 7.5 percent or \$58,000 over the prior fiscal year. Factors impacting this classification include budgeting the Community Engagement Coordinator position from half-time to full-time (budget impact of \$37,500), salary and benefit adjustments due to cost of living, and pension plan and insurance renewal increases.

The overall Materials and Services classification is budgeted to decrease 2.2 percent or \$17,600. Significant factors include a reduction in personal services contracts from account 60270-000; *Contractual Services* and account 60223-001; *Administrative Expenses* offset by some increases in property insurance related to industry trends and account 60491-000; *Hiring Processes* for upcoming recruitment efforts.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Completed long-term financial forecasting adjusting for modest economic improvement; revised the capital replacement plan that remains adequately funded.
- Received the Distinguished Budget Award and Certificate of Excellence in Financial Reporting from the Government Finance Officers Association (GFOA).
- Redeveloped and modernized the District’s website to provide for a more robust, user-friendly, and interactive platform.
- Administered a Civil Service entry level firefighter exam along with a promotional engineer exam.
- Administered hiring processes for new Community Care EMT positions and a new program manager focusing on volunteer recruitment and retention efforts.
- Administered hiring process and onboarding of four firefighters to fill vacancies due to retirements and promotions.
- Implemented an *Employee Self-Service* electronic platform that provides access to payroll documents such as check stubs and W-2’s.
- Navigated the Covid-19 pandemic ensuring safe practices to protect our workforce and worksites while maintaining service delivery to the community. Worked with partner agencies in navigating through the new normal and the impact on first responders.
- Conducted virtual community driven strategic planning process involving internal and external stakeholders for an outcome of a new three year plan.
- Distributed an annual newsletter to over 22,000 District households.
- Fire Chief appointed to serve as the Vice-Chair of the Western Fire Chiefs Association Wildfire Policy Committee to help lead wildfire initiatives across Oregon and 12 other western states and territories.

## **DEPARTMENT MEASUREMENTS AND TARGETS**

<i>Types of Transactions (Output Measures)</i>	<i>2017/18 Actual</i>	<i>2018/19 Actual</i>	<i>2019/20 Actual</i>	<i>2020/21 Estimated</i>	<i>2021/22 Projected</i>
<i>Accounts Payable Transactions</i>	1,289	1,343	1,457	1,575	1,703
<i>Payroll Disbursements (includes ACH)</i>	1,586	1,616	1,664	1,716	1,794
<i>Purchase Orders Issued</i>	986	1,006	1,126	1,000	1,100
<i>Cash Receipts Processed</i>	141	124	102	100	100

# Administration Department

2021/22 Fiscal Year

<i>Effectiveness Measures</i>	<i>2017/18 Actual</i>	<i>2018/19 Actual</i>	<i>2019/20 Actual</i>	<i>2020/21 Estimated</i>	<i>2021/22 Projected</i>
<i>Award for Distinguished Budget</i>					
<i>Award for Excellence in Financial Reporting</i>					
<i>Annual Report</i>					
<i>Citizen Newsletter</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; Annual financial report produced and approved by Board of Directors.
- Ensure overall expenditure growth does not exceed primary operating revenue.  
Measured By: Continued budgeting of 26 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 annual financial reports.  
Measured By: Continued receipt of GFOA Distinguished Budget Award and Excellence in Financial Reporting.
- Maintain a workers’ compensation experience modifier rating of under 1.0  
Measured By: Promoting a safe workplace, monthly safety committee meetings, quarterly worksite inspections, minimize time loss exposure and promote transitional duty assignments for injured workers; all which factor into lower experience modifiers that provide favorable and reduced premium rates.

<i>Effectiveness Measures</i>	<i>2017/18 Actual</i>	<i>2018/19 Actual</i>	<i>2019/20 Actual</i>	<i>2020/21 Estimated</i>	<i>2021/22 Projected</i>
<b><i>Financial Reporting</i></b> <i>Provide accurate financial reports on a monthly basis at Board Meetings</i>	100%	100%	100%	100%	100%
<b><i>Sound Audit Findings</i></b> <i>Number of audit findings</i>	None	None	None	None	None
<b><i>Investing</i></b> <i>Invest District surplus funds in secure holdings at all times</i>	100% in LGIP	100% in LGIP	100% in LGIP	100% in LGIP	100% in LGIP
<b><i>Workers’ Compensation</i></b> <i>Encourage safe work practices to maintain an “Experience Modifier” of below 1.0</i>	.73	.68	.69	.69	.70

# Administration Department

2021/22 Fiscal Year

## **2021/22 FISCAL YEAR DEPARTMENTAL TASKS**

The District’s adopted 2021-2023 Strategic Plan is the overarching document that provides direction for the organization. Six strategic initiatives identify what is critically important and the level of service the District desires to deliver for the community. Under each initiative a goal is identified that supports the success of the initiative and then objectives are identified that support the success of that goal. Under each objective several tasks may be identified that support the accomplishment of the intended outcome. The initiatives and goals stay constant with the plan however the objectives and corresponding tasks may change with the fiscal year and typically drive a lot of the budget development. Some tasks have cost impact; others have minimal impact.

The following tasks are assigned to the Administration Department and link back to one of the six organizational strategic initiatives.

### **Initiative 2**

**Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.**

<b>Goal 2.1</b>	<b>Evaluate organizational and staffing models</b>		
<b>Objective</b>	Align resources with needs		
<b>Task</b>	Maintain a 10 year financial forecast that reflects financial trends and provides a depiction of how those assumptions may have impact on future budget needs and financial stability	<b>Target Completion Date:</b>	June 30, 2022
<b>Objective</b>	Evaluate the addition of more divisions to support the mission		
<b>Task</b>	Conduct an organizational study that focuses on existing positions, workloads, efficiencies, redundancies, and future needs to determine if divisional restructuring is necessary	<b>Target Completion Date:</b>	June 30, 2023
<b>Objective</b>	Evaluate the need for additional administrative chief positions		
<b>Task</b>	Conduct an organizational study that focuses on existing positions, workloads, efficiencies, redundancies, and future needs to determine if additional personnel is necessary	<b>Target Completion Date:</b>	June 30, 2023
<b>Goal 2.3</b>	<b>Maintain fiscal responsibility</b>		
<b>Objective</b>	Assess capital needs and plan accordingly		
<b>Task</b>	Maintain a 10 year capital improvement plan that reflects targeted capital replacement, funding mechanisms, and financial sustainability modeling	<b>Target Completion Date:</b>	June 30, 2023
<b>Objective</b>	Evaluate additional revenue sources beyond tax dollars		
<b>Task</b>	Evaluate expanding revenue sources like fees for service and capitalize on federal and state grant opportunities	<b>Target Completion Date:</b>	December 31, 2022
<b>Objective</b>	Ensure appropriateness of compensation packages		
<b>Task</b>	Conduct non-bargaining wage and benefit comparisons with like agencies to determine scale and scope; ensure bargaining wages are within comparables during years of labor negotiations	<b>Target Completion Date:</b>	December 31, 2022

# Administration Department

2021/22 Fiscal Year

## Initiative 3

**Develop, promote, and demonstrate professionalism and excellence throughout the organization.**

<b>Goal 3.2</b>	<b>Enhance internal communication</b>		
<b>Objective</b>	Improve the effectiveness of internal communication opportunities		
<b>Task</b>	Collaborate on effective communication strategies and delivery methods that will promote interest and engagement	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Set organizational direction through clear, direct communication that is specific and appropriate throughout the workforce	<b>Target Completion Date:</b>	June 30, 2023
<b>Objective</b>	Increase the exposure of leadership to internal teams and line staff		
<b>Task</b>	Establish productive methods and opportunities for collaboration and feedback through engagement of workforce on a targeted basis	<b>Target Completion Date:</b>	June 30, 2023
<b>Objective</b>	Enhance team dynamics among all functional areas		
<b>Task</b>	Engage in teambuilding exercises and encourage collaborative interaction	<b>Target Completion Date:</b>	June 30, 2023
<b>Objective</b>	Create opportunities for line staff to engage with management		
<b>Task</b>	Continue holding labor/management breakfast meetings	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Analyze implementing theme based meeting sessions with executive leadership	<b>Target Completion Date:</b>	June 30, 2023

## Initiative 4

**Maintain a high level of trust by promoting District engagement in the communities we serve.**

<b>Goal 4.2</b>	<b>Increase effectiveness of virtual presence</b>		
<b>Objective</b>	Expand the use of social media platforms to include public education		
<b>Task</b>	Develop a public education page on District website	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Develop public education releases utilizing Twitter and Facebook	<b>Target Completion Date:</b>	June 30, 2023
<b>Objective</b>	Offer more web-based information to the public		
<b>Task</b>	Enhance District website to include a resources and informational page	<b>Target Completion Date:</b>	June 30, 2023
<b>Objective</b>	Increase District brand recognition within the community		
<b>Task</b>	Evaluate methods of advertising and marketing the services the District provides to the community	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Develop a formal communications plan (internal and external)	<b>Target Completion Date:</b>	June 30, 2023

# Administration Department

2021/22 Fiscal Year

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## Initiative 5

**Develop and strengthen collaborative efforts and strategic partnerships.**

<b>Goal 5.1</b>	<b>Maintain and enhance partnerships to improve regional preparedness and response to emergency events</b>		
<b>Objective</b>	Develop and enhance collaboration with other partners		
<b>Task</b>	Be open and receptive to opportunities that allow for collaboration with partner agencies that will increase efficiencies and reduce redundancies	<b>Target Completion Date:</b>	June 30, 2023

<b>Goal 5.2</b>	<b>Maintain and enhance partnerships to improve service delivery and organizational effectiveness</b>		
<b>Objective</b>	Conduct shared strategic planning		
<b>Task</b>	Look for opportunities to participate in neighboring partners strategic planning processes; continue to invite partners to participate in District planning processes	<b>Target Completion Date:</b>	June 30, 2023

## Initiative 6

**Commit to excellence through innovation.**

<b>Goal 6.2</b>	<b>Build organizational capacity and excellence</b>		
<b>Objective</b>	Continue to recruit and retain outstanding staff		
<b>Task</b>	Evaluate recruitment and hiring processes in light of pandemic and generational changes and adjust processes accordingly	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Evaluate diversity and inclusion methods in the hiring process	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Increase accountability at all levels		
<b>Task</b>	Establish clear expectations and develop accountability measurements for all positions	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Define and embrace norms of the culture throughout the organization		
<b>Task</b>	Conduct a cultural awareness study and encourage cultural diversity	<b>Target Completion Date:</b>	June 30, 2023

# Administration Department

2021/22 Fiscal Year

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2018/19 FY	2019/20 FY	2020/21 FY	2021/2022		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	386,929.30	415,821.29	469,000	475,000	483,000	480,500
Overtime	0.00	0.00	1,000	1,000	1,000	1,000
Incentives	30,848.45	35,302.05	38,000	39,400	39,900	39,900
Payouts	0.00	3,462.00	15,000	20,000	20,000	20,000
Retirement (PERS)	57,306.93	81,607.12	95,000	102,000	102,000	102,000
Unemployment Insurance	0.00	0.00	400	100	100	100
ER Deferred Comp Contrib	24,269.00	27,473.06	32,500	34,000	34,000	34,000
Health and Life Insurance	63,436.32	66,358.08	67,500	71,000	95,500	95,500
HRA-VEBA Contribution	15,830.40	17,245.38	19,600	20,000	21,000	21,000
FICA and Medicare PR Taxes	29,888.20	32,226.63	40,000	42,000	42,000	42,000
Workers' Comp Insurance	279.76	258.27	1,000	1,000	1,000	1,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$608,788.36</b>	<b>\$679,753.88</b>	<b>\$779,000</b>	<b>\$805,500</b>	<b>\$839,500</b>	<b>\$837,000</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	514.00	0.00	1,000	1,000	1,000	1,000
Printing	3,063.12	2,824.22	18,000	18,000	18,000	18,000
Supplies; Office	5,000.86	7,773.81	10,000	10,000	10,000	10,000
Supplies; Administrative	29,057.80	29,196.90	42,000	35,000	35,000	35,000
Licenses and Fees	7,998.14	32,454.02	13,000	10,000	10,000	10,000
Contractual/Professional Services	499,353.53	515,163.99	554,000	535,000	535,000	535,000
Property and Casualty Insurance	78,703.00	86,566.00	98,000	105,000	105,000	105,000
Mileage Reimbursements	354.09	408.77	2,000	1,000	1,000	1,000
Membership Dues	8,355.00	8,120.00	10,000	10,000	10,000	10,000
Books and Subscriptions	1,662.57	2,845.64	1,500	2,000	2,000	2,000
Advertising	2,993.22	2,487.57	12,000	12,000	12,000	12,000
Hiring Processes, CS, Backgrounds	8,362.30	13,746.18	10,000	15,000	15,000	15,000
Postage and Shipping	2,459.46	3,394.53	14,000	14,000	14,000	14,000
Interest on Bank Loan	0.00	0.00	100	0	0	0
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$647,877.09</b>	<b>\$704,981.63</b>	<b>\$785,600</b>	<b>\$768,000</b>	<b>\$768,000</b>	<b>\$768,000</b>
<b>TOTAL ADMINISTRATION</b>	<b>\$1,256,665.45</b>	<b>\$1,384,735.51</b>	<b>\$1,564,600</b>	<b>\$1,573,500</b>	<b>\$1,607,500</b>	<b>\$1,605,000</b>

# Administration Department

2021/22 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 newsletter, annual report, business cards	\$ 18,000
60222-000	<b>Supplies; Office</b> .....	\$ 10,000
60223-001	<b>Supplies; Administrative</b> ..... General administrative supplies and board expenses 15,000 Years of service awards and annual banquet 10,000 Miscellaneous office equipment, historical preservation, photo board 5,000 Community engagement 5,000	\$ 35,000
60223-002	<b>Licenses and Fees</b> ..... Expenses related to banking and loan fees, employee benefits administration fees, State of Oregon purchasing agreement, Oregon Ethics commission, ODOT land use fee, actuary fees, and other miscellaneous fees as required	\$ 10,000
60270-000	<b>Contractual/Professional Services</b> ..... 911 dispatch services contract 435,000 General legal counsel 25,000 Financial audit and filing expenses 13,000 Lobbyist 12,000 EMS physician supervisor contract 10,000 Employee assistance programs 30,000 Consultation services 10,000	\$ 535,000
60370-000	<b>Property and Casualty Insurance</b> .....	\$ 105,000
60380-001	<b>Mileage Reimbursements</b> .....	\$ 1,000
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, Society of Human Resource Mgmt, Int'l Public Mgmt Association/HR	\$ 10,000
60412-000	<b>Books and Subscriptions</b> .....	\$ 2,000

# Administration Department

2021/22 Fiscal Year

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

General Fund 1, Department 1

<b>Account</b>	<b>Description</b>	<b>Account Total</b>
<b>60430-001</b>	<b>Advertising</b> ..... Advertising for Board meetings, budget hearings, community events and engagement, public service announcements, and outreach through the Chamber of Commerce and Expo Center	\$ 12,000
<b>60490-000</b>	<b>Hiring Processes, Civil Service, Backgrounds</b> ..... Includes entry level hiring processes and promotional exams, expenses for Civil Service meetings, and all expenses related to pre-employment background evaluations	\$ 15,000
<b>60491-000</b>	<b>Postage and Shipping</b> .....	\$ 14,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 768,000</b>



# Operations

# Fire District 3



2021/22 Fiscal Year Budget

# Operations Department

2021/22 Fiscal Year

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## **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. Out of Hospital Emergency Medical Service (Basic and Advanced Life Support)
2. Fire Suppression
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 volunteers, student firefighters, and/or resident personnel for response. All 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.

Four of the District's fire stations are located in rural areas and served by volunteers who support the District's mission. The Agate Lake, Dodge Bridge, Sams Valley, and Gold Hill fire stations have volunteers assigned to them. 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 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 for by the District while pursuing their Associates Degree. Students typically finish the program in two or three years, depending upon their chosen degree program.

Resident Volunteers live on-site at the rural stations, either in the station or in a manufactured home placed on the station property. The advantage gained by having resident volunteers located on-site 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.

# Operations Department

2021/22 Fiscal Year

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## **DISTRICT STATIONS**

### **White City (WC) Station 110 – Career Staffed**

The White City station is located at 8333 Agate Road in White City and houses Engine Company 7702. The Battalion Chief is also stationed here. There were 1,933 requests for service in the White City area in 2020.



### **Central Point (CP) Station 111 – Career Staffed**

The Central Point station is located at 600 South Front Street and houses Engine Company 7701. There were 1,868 requests for service in the Central Point area in 2020.



### **Eagle Point (EP) Station 116 – Career Staffed**

The Eagle Point station is located at 213 Loto Street and houses Engine Company 7706. There were 1,216 requests for service in the Eagle Point area in 2020.



### **Scenic (SS) Station 117 – Career Staffed**

The Scenic station, opened June of 2020, is located at 1909 Scenic Avenue and houses Engine Company 7708. This station replaced staffing at the Table Rock station, which has been decommissioned. Based on analytic data, there would have been 1,316 requests for service in the Scenic area in 2020.



### **Dodge Bridge (DB) Station 112 – Volunteer Staffed**

The Dodge Bridge station is located at 60 Rogue River Drive. Career personnel from White City and/or the Eagle Point stations may respond to supplement volunteer resident response. There were 326 requests for service in the Dodge Bridge area in 2020.



### **Gold Hill (DB) Station 114 – Volunteer Staffed**

The Gold Hill station is located at 299 Access Road. Career personnel from the Central Point station may respond to supplement volunteer resident response. There were 524 requests for service in the Gold Hill area in 2020.



# Operations Department

2021/22 Fiscal Year

## Sams Valley (SV) Station 113 – Volunteer Staffed

The Sams Valley station is located at 3333 Tresham Lane. Career personnel from the White City, Eagle Point and/or Central Point stations may respond to supplement volunteer resident response. There were 264 requests for service in the Sams Valley area in 2020.



## Agate Lake (AL) Station 115 – Volunteer Staffed

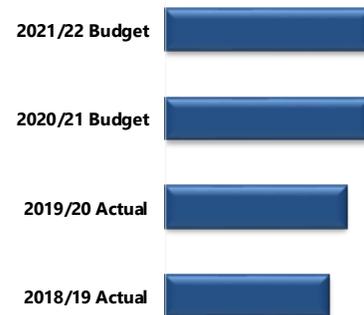
The Agate Lake station is located at 880 East Antelope Road. Career personnel from the White City and/or Eagle Point stations may respond to supplement volunteer resident response. There were 109 requests for service in the Agate Lake area in 2020.



## BUDGET SUMMARY

Expenditures	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Personnel Services	\$8,237,466	\$8,441,409	\$9,467,000	\$9,616,000
Materials and Services	\$260,544	\$246,859	\$354,800	\$385,500
	<b>\$8,498,010</b>	<b>\$8,688,268</b>	<b>\$9,821,800</b>	<b>\$10,001,500</b>

### Budget Comparison



## PERSONNEL SUMMARY

Position	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Deputy Chief of Operations	1.00	1.00	1.00	1.00
Battalion Chief – 56 Hour	3.00	3.00	3.00	3.00
Battalion Chief – 40 Hour	1.00	0.00	0.00	0.00
Fire Captain ( <i>Represented Positions</i> )	12.00	12.00	12.00	12.00
Fire Engineer ( <i>Represented Positions</i> )	12.00	12.00	12.00	12.00
Firefighter ( <i>Represented Positions</i> )	20.00	20.00	20.00	21.00
Community EMT	0.00	0.00	2.00	2.00
Community Paramedic	0.00	2.00	2.00	2.00
Administrative Assistant	1.00	1.00	1.00	1.00
Recruitment and Retention Coordinator	0.00	0.00	0.15	0.50
Part-Time Program Assistant	0.00	0.00	0.00	0.15
<b>Total</b>	<b>50.00</b>	<b>51.00</b>	<b>53.15</b>	<b>54.65</b>

# Operations Department

2021/22 Fiscal Year

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## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 1.6 percent or \$149,000 over the prior fiscal year. Significant factors impacting this classification include an additional firefighter position increasing the full-time equivalency (FTE) from 20 to 21 for a budget impact of \$135,800 and budgeting for a part-time program assistant to coordinate the Project Youth program. Health insurance for this department remains in a budgetary status quo due to some benefit adjustments. Workers' compensation reflects a 14.8 percent budgetary reduction to due class code reductions. Other impacts are salary and benefit adjustments due to cost of living and pension plan increases.

During months when fire activity is at its peak, the District supports the Oregon State Fire Marshal's (OSFM) mobilization plan, making a unit available for deployment throughout the state. Overtime for state conflagration fire deployment is budgeted with a \$1,000 placeholder. The District receives reimbursement for all personnel and apparatus costs during deployment. As this may significantly impact the budget, reimbursement may be appropriated to a specific line item through a resolution.

The Materials and Services classification is budgeted to increase 8.7 percent or \$30,700. Along with routine expenditures and supplies needed to maintain safe operations, other factors impacting this classification include budgeting for additional personal protection equipment, purchasing voice amps for self-contained breathing apparatus, and purchasing more automated external defibrillators (AED). Also in this budget year the District will place the new battalion command unit into service. Account *60225-008; Equipment for New Apparatus* reflects those expenditures that are consumable in nature needed to equip that unit for service.

The District continues to experience the benefit of the student program and maintains the funding for six student firefighters to attain their fire science degree with Rogue Community College. The student and volunteer section of the operations budget has been expanded to account for expenditures directly related to the Staffing for Adequate Fire Emergency Response (SAFER) grant through FEMA. Specifically identified are uniforms and personal protection equipment for new volunteers and advertising and marketing costs for recruitment efforts.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Promoted two Battalion Chiefs, two Captains, and three Engineers.
- Exceptional performance and commitment by the workforce in combatting the regional fires in September of 2020.
- Successful in being awarded the Staffing for Adequate Fire Emergency Response (SAFER) grant from FEMA, providing a part-time Recruitment and Retention Coordinator and funding for training and equipment.
- Successfully transitioned a new Fire Service Supervising Physician, further aligning EMS protocols and response with Mercy Flights.
- Implemented new CAD dispatch protocol, informing a better dispatch recommendation.
- Completed the specification bid and order sequence for the new Battalion Chief command vehicle.
- Completed a structural glove assessment, providing two pairs of NFPA gloves to each responder.
- Purchased and implemented midrise standpipe kits.
- Obtained five new volunteer firefighters, one resident firefighter, and three new student firefighters.
- Completed the purchase and training on new extrication equipment, providing capability to match new vehicle technology.

# Operations Department

2021/22 Fiscal Year

## 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.

### 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.

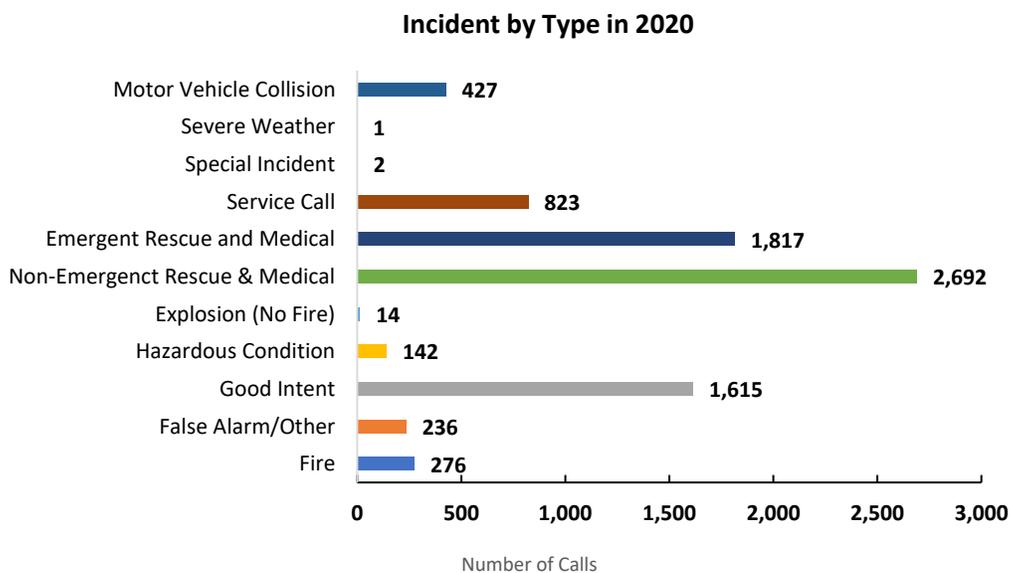
**Non-Emergent Rescue/Medical:** An incident where seconds will not significantly impact the outcome of the call. Crews will normally respond "Code 1" to these calls, meaning no lights and sirens and regular speed limit.

**Emergent Rescue/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 (MVC)/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.



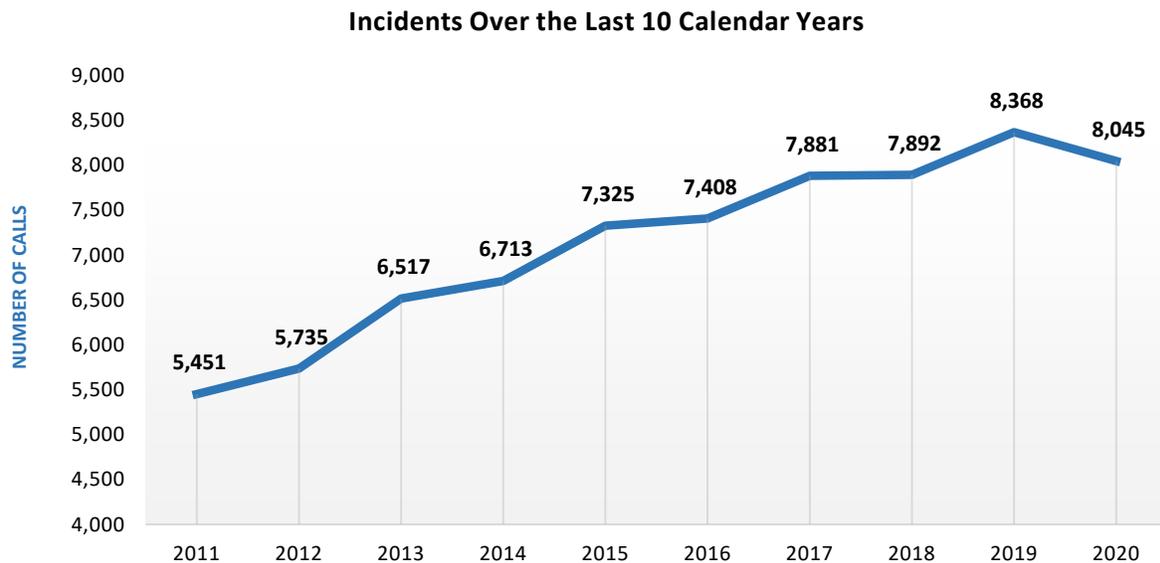
# Operations Department

2021/22 Fiscal Year

<i>Types of Emergent Incidents (Outputs)</i>	<i>2017 Actual</i>	<i>2018 Actual</i>	<i>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Target</i>
<i>Fire</i>	235	236	232	276	254
<i>Explosion (No Fire)</i>	0	1	1	14	15
<i>Emergent Rescue/Medical</i>	3,471	3,417	3,339	1,817	3,245
<i>Non-Emergent Rescue/Medical</i>	797	894	1,324	2,692	1,570
<i>Hazardous Condition (No Fire)</i>	134	108	146	142	153
<i>Motor Vehicle Collision</i>	470	399	460	427	488
<i>Severe Weather/Natural Disaster</i>	0	3	4	1	4
<i>Special Incident</i>	5	10	6	2	7
<i>Service Call</i>	630	682	694	823	726
<i>False Alarm / Other</i>	251	214	262	236	288
<i>Good Intent</i>	1,888	1,928	1,900	1,615	2,000
<b>Total</b>	<b>7,881</b>	<b>7,892</b>	<b>8,368</b>	<b>8,045</b>	<b>8,750</b>

The COVID-19 Pandemic resulted in a reduction of calls from the previous year. It is anticipated that overall incident volume will return to historic numbers post-pandemic. The 2021 target is based on overall growth of 4.56 percent from 2019 numbers and then trending annually thereafter.

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.



# Operations Department

2021/22 Fiscal Year

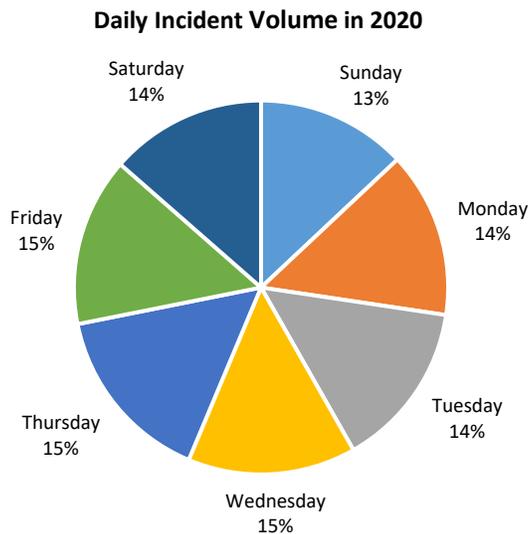
Incident statistics are evaluated in the Standards of Cover and integrated into the strategic planning process. The Standards of Cover is the policy document adopted by the Board of Directors that formalizes the District’s response time criteria. Critical decisions, such as whether or not to increase 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 has been increasing on average 4.56 percent per year the past five years prior to 2020. In 2020 the District experienced a reduction of calls during the onset of the COVID-19 pandemic. Incident trends are returning to pre-pandemic levels.

The following chart depicts 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.

<b>Number of Incidents by Response Area (Outputs)</b>	<b>2017 Actual</b>	<b>2018 Actual</b>	<b>2019 Actual</b>	<b>2020 Actual</b>
<i>Agate Lake</i>	57	68	62	109
<i>Central Point</i>	2,955	2,927	3,303	3,184
<i>Dodge Bridge</i>	190	193	373	326
<i>Eagle Point</i>	1,394	1,426	1,370	1,216
<i>Gold Hill</i>	414	430	451	524
<i>Sams Valley</i>	250	279	274	264
<i>White City</i>	1,981	1,974	1,853	1,933
<i>Mutual Aid Calls</i>	640	595	682	489
<b>Total</b>	<b>7,881</b>	<b>7,892</b>	<b>8,368</b>	<b>8,045</b>

## When Responses Occur

Incident responses are tracked and measured by the day, month, and the time of day. This data is expressed in percentages to allow for a comparison between the two most recent years.

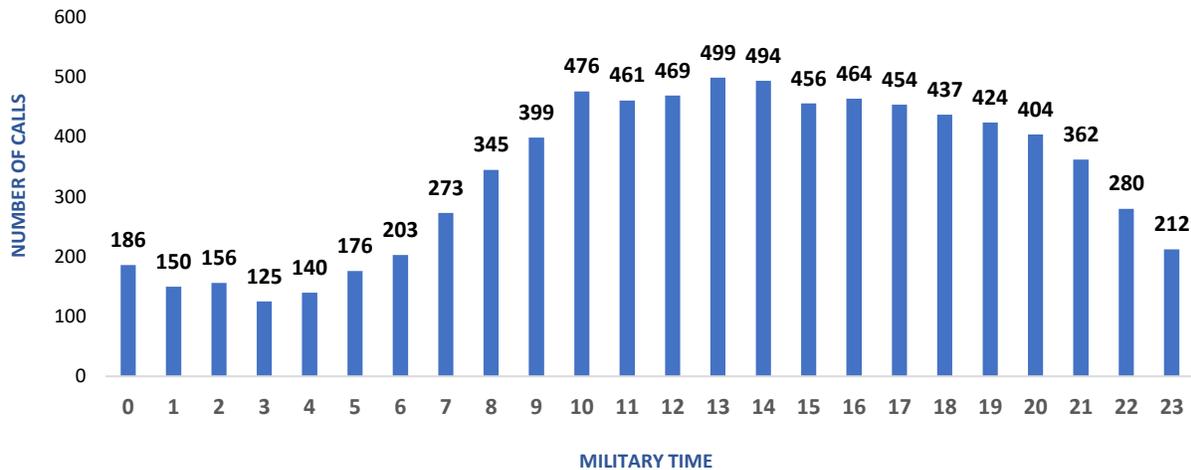


# Operations Department

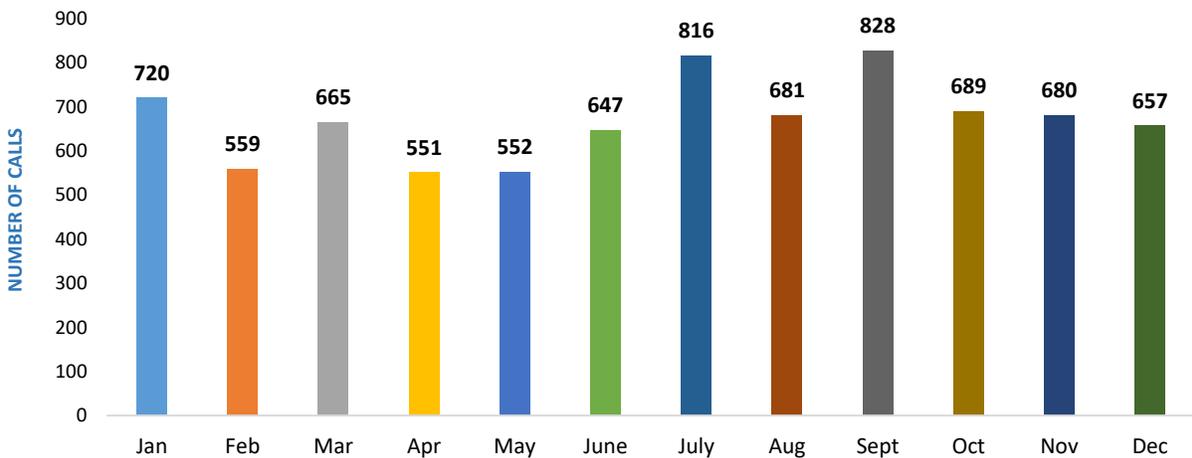
2021/22 Fiscal Year

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### Calls for Service by Hour in 2020



### Monthly Incident Volume 2020



## **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.

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.

The Standards of Cover establishes the desired time standard for the various census-based zones. The District recognizes Urban, Suburban and Rural zones. The Suburban zone is further broken down into two distinct areas: Suburban 1 is comprised of all suburban areas surrounding the cities of Central Point, Eagle Point, and White City. Suburban 2 represents the City of Gold Hill. Separating this reporting zone out provides a more focused look at the response times.

# Operations Department

2021/22 Fiscal Year

The District uses the National Fire Operations Reporting System (NFORS) for incident reporting and analyzing response standards.

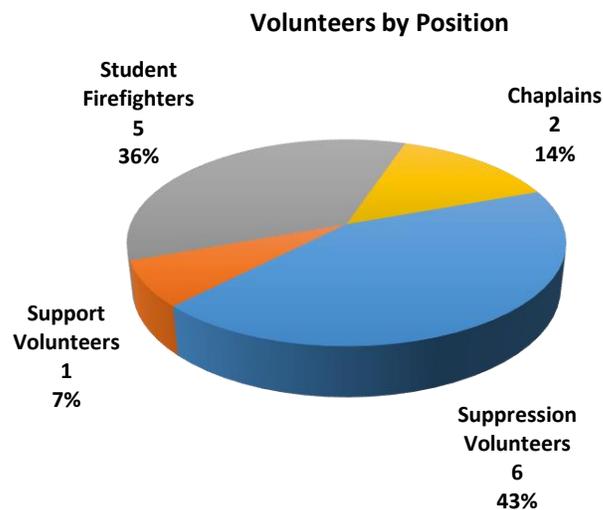
<b>Emergent Incident Response Goals</b>			
	CODE 3 Incidents in 2020	ACTUAL 80% Fractile Time	GOAL 80% Fractile Time
<i>Urban</i>	1,389	7:21	7 minutes
<i>Suburban 1</i>	98	8:17	11 minutes
<i>Suburban 2</i>	32	16:31	13 minutes
<i>Rural</i>	466	13:56	13 minutes

*Urban* Population greater than 1,000  
*Suburban 1* Population 500-1,000 and less than 6 miles from a staffed 24/7 station  
*Suburban 2* Population 500-1,000 and greater than 6 miles from a staffed 24/7 station  
*Rural* Population less than 500 people

### Analysis:

- The District is not meeting the goal in the **urban area**. This is influenced by the additional call triaging crews perform during response in accordance with the COVID ID-X protocol.
- The District is meeting the goal and the baseline standard in the **Suburban 1 area**, however we are not meeting the goal in **Suburban 2**. Travel distance and a lack of consistent volunteer availability at the Gold Hill station are primary factors.
- The District is not meeting the goal or the baseline standard in the **rural area**. These response times are frequently influenced by distance, remoteness, or the availability of volunteers in the outlying areas.

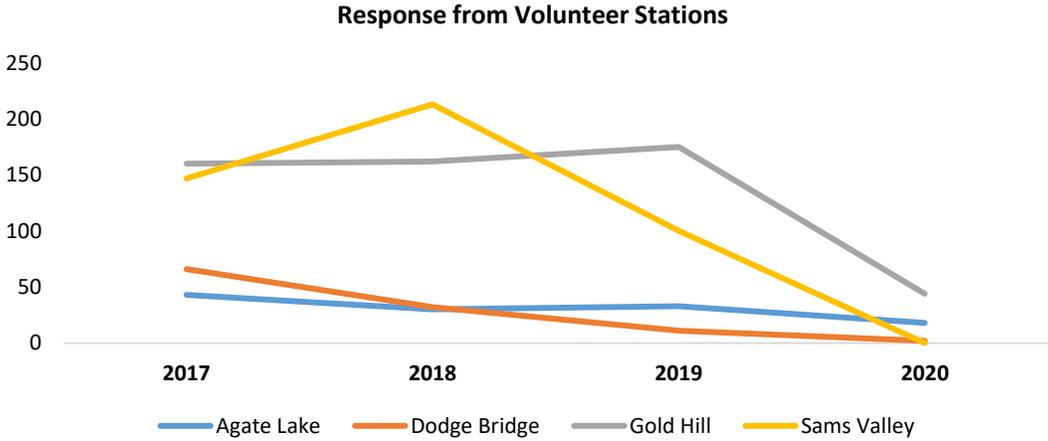
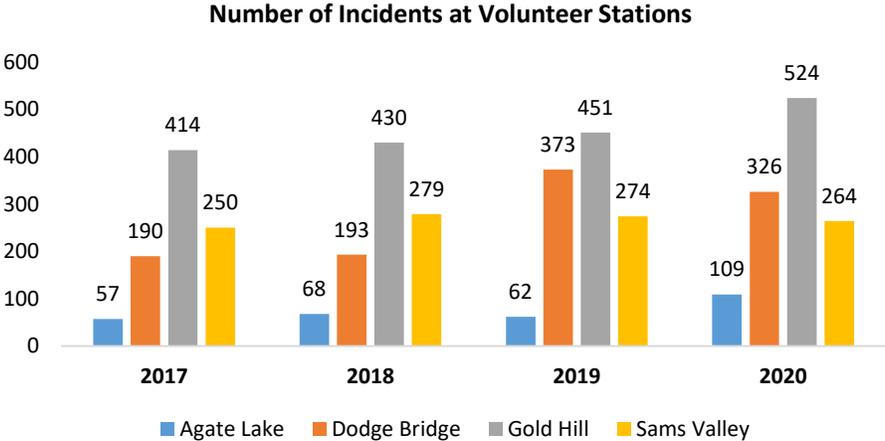
### Volunteer Response Times



# Operations Department

2021/22 Fiscal Year

The District tracks volunteer response from the volunteer stations in the four identified zones; Agate Lake, Dodge Bridge, Gold Hill, and Sams Valley. Utilizing resident volunteer firefighters can make a significant impact in meeting the goal of an initial response. The following charts identifies the number of incidents as well as responses by the volunteers. Every response into these response zones also receive a responding engine from a career station, although it is the District’s goal to have volunteer stations provide the initial response.



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 79 percent of the time. We recognize we are not meeting the goal and with refinement of our data analysis program and volunteer recruitment and retention, we hope to determine solutions for addressing the problem.

# Operations Department

2021/22 Fiscal Year

## **2021/22 FISCAL YEAR DEPARTMENTAL TASKS**

The District’s adopted 2021-2023 Strategic Plan is the overarching document that provides direction for the organization. Six strategic initiatives identify what is critically important and the level of service the District desires to deliver for the community. Under each initiative a goal is identified that supports the success of the initiative and then objectives are identified that support the success of that goal. Under each objective several tasks may be identified that support the accomplishment of the intended outcome. The initiatives and goals stay constant with the plan however the objectives and corresponding tasks may change with the fiscal year and typically drive a lot of the budget development. Some tasks have cost impact; others have minimal impact.

The following tasks are assigned to the Operations Department and link back to one of the six organizational strategic initiatives.

### **Initiative 1**

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

<b>Goal 1.1</b>	<b>Increase focus on prevention activities</b>		
<b>Objective</b>	Evaluate Greenway fires and fire response		
<b>Task</b>	Preplan Greenway access/control points	<b>Target Completion Date:</b>	December 31, 2021
<b>Task</b>	Evaluate creation of a separate FMZ for the Greenway	<b>Target Completion Date:</b>	December 31, 2021

<b>Objective</b>	Focus on targeted areas to improve prevention		
<b>Task</b>	Fully integrate FirstDue into daily engine company operations	<b>Target Completion Date:</b>	December 31, 2021

<b>Objective</b>	Evaluate wildland fire reduction and resiliency		
<b>Task</b>	Research fuel reduction crews to develop resiliency in public areas	<b>Target Completion Date:</b>	December 31, 2021

<b>Objective</b>	Increase prevention in rural areas		
<b>Task</b>	Integrate wildfire and resiliency messages as part of the daily engine company interaction with patrons	<b>Target Completion Date:</b>	June 30, 2022
<b>Task</b>	Conduct wildfire safety zone and escape route preplanning (to include bridge assessments)	<b>Target Completion Date:</b>	June 30, 2022

<b>Objective</b>	Ensure adequate water supplies exist for fighting fires		
<b>Task</b>	Conduct annual fixed water storage inspections, adding enhancements or automation where possible	<b>Target Completion Date:</b>	June 30, 2023

<b>Goal 1.2</b>	<b>Understand and focus on non-fire emergency response</b>		
<b>Objective</b>	Evaluate non-emergency response and resource allocation		
<b>Task</b>	Evaluate tiered response to various call types	<b>Target Completion Date:</b>	June 30, 2022

# Operations Department

2021/22 Fiscal Year

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## Initiative 2

Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.

<b>Goal 2.1</b>	<b>Evaluate organizational and staffing models</b>		
<b>Objective</b>	Align resources with needs		
<b>Task</b>	Continued evaluation of fleet specifications and suitability in advance of scheduled replacement	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Evaluate the addition of more divisions to support the mission		
<b>Task</b>	Evaluate opportunities for additional resources during fire season	<b>Target Completion Date:</b>	December 31, 2021

<b>Objective</b>	Assess the "right-size" for crew response		
<b>Task</b>	Conduct a review of the RVFSO and hazard zone critical task assessment	<b>Target Completion Date:</b>	December 31, 2021
<b>Task</b>	Compare and contrast peak activity periods and resource availability	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Evaluate effectiveness of the community volunteer and volunteer firefighter programs		
<b>Task</b>	Integrate the Recruitment Retention Coordinator position, supporting diversification in volunteer opportunities	<b>Target Completion Date:</b>	December 31, 2021

<b>Goal 2.2</b>	<b>Evolve service delivery models to better focus resources</b>		
<b>Objective</b>	Utilize data to drive all service delivery models		
<b>Task</b>	Integrate data at the Battalion Chief level to inform performance measures	<b>Target Completion Date:</b>	December 31, 2021

<b>Goal 2.3</b>	<b>Maintain fiscal responsibility</b>		
<b>Objective</b>	Evaluate sustainable practices		
<b>Task</b>	Monitor proposed changes to industry standards, ordinances, and statutes	<b>Target Completion Date:</b>	December 31, 2023

<b>Objective</b>	Evaluate additional revenue sources beyond tax dollars		
<b>Task</b>	Evaluate wildfire response agreements	<b>Target Completion Date:</b>	December 31, 2023

# Operations Department

2021/22 Fiscal Year

## Initiative 3

**Develop, promote, and demonstrate professionalism and excellence throughout the organization.**

<b>Goal 3.1</b>	<b>Enhance employee development process</b>		
<b>Objective</b>	Establish mentor networks to break down silos		
<b>Task</b>	Research effective mentoring models utilized in other fields or trades	<b>Target Completion Date:</b>	June 30, 2022

<b>Objective</b>	Expand cross-training in functional areas		
<b>Task</b>	Develop a bullpen for key positions	<b>Target Completion Date:</b>	June 30, 2023

<b>Goal 3.2</b>	<b>Enhance internal communication</b>		
<b>Objective</b>	Improve the effectiveness of internal communication opportunities		
<b>Task</b>	Ensure all members have access to timely information	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Improve internal committee processes		
<b>Task</b>	Conduct needs assessment for standing committees vs. task groups	<b>Target Completion Date:</b>	June 30, 2022
<b>Task</b>	Recruit members and establish regular participation, support, and budgetary support	<b>Target Completion Date:</b>	June 30, 2022

## Initiative 4

**Maintain a high level of trust by promoting District engagement in the communities we serve.**

<b>Goal 4.1</b>	<b>Increase the ways in which we engage with the communities we serve</b>		
<b>Objective</b>	Provide preparedness and prevention training		
<b>Task</b>	Increase volunteer opportunities to broaden the reach of prevention activities	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Enhance public outreach and education opportunities		
<b>Task</b>	Increase crew visibility and engagement in rural areas	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Encourage increased community engagement at events		
<b>Task</b>	Participate in local school events, endorse their image in local response areas	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Offer community listening events		
<b>Task</b>	Post event community sessions or AAR	<b>Target Completion Date:</b>	June 30, 2023

<b>Goal 4.2</b>	<b>Increase effectiveness of virtual presence</b>		
<b>Objective</b>	Offer more web-based information to the public		
<b>Task</b>	Improve volunteer recruitment efforts on media platforms	<b>Target Completion Date:</b>	June 30, 2023

# Operations Department

2021/22 Fiscal Year

## Initiative 5

Develop and strengthen collaborative efforts and strategic partnerships.

<b>Goal 5.1</b>	<b>Maintain and enhance partnerships to improve regional preparedness and response to emergency events</b>		
<b>Objective</b>	Develop and enhance collaboration with other partners		
<b>Task</b>	Invest in marketing of volunteerism in the fire service	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Enhance communication among police/fire to improve effectiveness during incident response		
<b>Task</b>	Actively participate in joint event planning and training	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Seek opportunities to develop cross-discipline joint policies and response procedures	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Improve joint radio communications and establish common operating frequencies	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Encourage the development of a Rogue Valley Disaster Response Plan		
<b>Task</b>	Influence synthesized evacuation and wildfire plans that do not unduly burden neighboring communities or jurisdictions	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Actively participate in statewide planning and policy efforts	<b>Target Completion Date:</b>	June 30, 2023

<b>Goal 5.2</b>	<b>Maintain and enhance partnerships to improve service delivery and organizational effectiveness</b>		
<b>Objective</b>	Explore shared services among agencies		
<b>Task</b>	Increase allocating of response resources	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Work effectively with partner agencies for access to resources for elderly and at-risk patrons to affect broader changes		
<b>Task</b>	Introduce alternatives to fire based lift assists in care facilities	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Review collaboration of fire and medical services and improve effectiveness between agencies		
<b>Task</b>	Implement improved apparatus numbering system	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Implement fire based PRO QA	<b>Target Completion Date:</b>	June 30, 2023

# Operations Department

2021/22 Fiscal Year

## Initiative 6

Commit to excellence through innovation.

<b>Goal 6.1</b>	<b>Focus on innovation to improve service delivery</b>		
<b>Objective</b>	Continue to improve options of service delivery using technology		
<b>Task</b>	Fully integrate First Due into daily engine company operations	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Increase use of telemedicine in EMS response	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Increase availability of real-time video for responders and incident managers	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Embrace innovation to better support the service delivery models		
<b>Task</b>	Increase availability and capability of UAS program	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Adjust to encryption and priority data in conjunction with FirstNet and radio project development	<b>Target Completion Date:</b>	June 30, 2023

<b>Goal 6.2</b>	<b>Build organizational capacity and excellence</b>		
<b>Objective</b>	Continue to recruit and retain outstanding staff		
<b>Task</b>	Participate in career fairs, mentoring, and career marketing	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Actively support the RCC student program	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Provide excellent customer and public service		
<b>Task</b>	Encourage public feedback, praise or critique of response services	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Define and embrace norms of the culture through the organization		
<b>Task</b>	Establish performance expectations of volunteer personnel	<b>Target Completion Date:</b>	June 30, 2023

# Operations Department

2021/22 Fiscal Year

General Fund Description	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2018/19 FY	2019/20 FY	2020/21 FY	2021/2022		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	4,396,461.55	4,396,570.45	4,751,000	4,903,000	4,903,000	4,913,000
Overtime	543,182.19	477,257.87	636,000	641,000	641,000	641,000
Incentives	579,747.03	586,521.76	632,000	583,000	593,300	593,300
Payouts	0.00	6,098.00	82,000	57,000	57,000	57,000
Retirement (PERS)	912,481.02	1,149,340.51	1,260,000	1,295,000	1,295,000	1,295,000
ER Deferred Comp Contrib	109,252.66	124,004.87	164,000	165,000	166,700	166,700
Health and Life Insurance	995,793.51	1,003,785.29	1,150,000	1,215,000	1,150,000	1,150,000
HRA-VEBA Contribution	193,452.23	193,654.42	219,000	230,000	230,000	230,000
FICA and Medicare PR Taxes	409,689.66	409,373.02	464,000	475,000	475,000	475,000
Workers' Comp Insurance	97,406.05	94,802.80	109,000	115,000	95,000	95,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$8,237,465.90</b>	<b>\$8,441,408.99</b>	<b>\$9,467,000</b>	<b>\$9,679,000</b>	<b>\$9,606,000</b>	<b>\$9,616,000</b>
<b>Materials and Services</b>						
<b>Career Firefighter Group</b>						
Physicals and Vaccinations	21,275.11	25,864.00	22,500	38,000	38,000	38,000
Licenses and Fees	6,415.00	1,502.00	7,000	2,500	2,500	2,500
Supplies; Operations	3,744.55	1,537.57	5,000	5,000	5,000	5,000
Supplies; Special Projects	5,630.92	5,583.19	5,100	14,000	14,000	14,000
<b>Fire Suppression Expenses</b>						
Personal Protective Equipment	52,814.95	50,155.95	113,000	74,000	74,000	74,000
Hose and Appliances	8,859.26	21,146.06	11,000	20,000	20,000	20,000
Apparatus Equipment and Supplies	25,540.02	12,932.49	36,000	14,000	14,000	14,000
Safety Equipment	6,481.41	10,360.93	24,500	45,000	45,000	45,000
Specialty Equipment	3,615.10	3,519.87	7,500	22,500	22,500	22,500
Technical Rescue Equipment	6,248.26	6,801.50	3,000	5,000	5,000	5,000
Rehabilitation and Consumables	5,492.51	4,695.43	6,000	6,000	6,000	6,000
Equipment for New Apparatus	39,202.62	7,185.66	12,000	4,000	4,000	4,000
M&R; Emergency Response Equip	32,850.46	39,054.41	42,000	40,000	40,000	40,000
Contractual/Professional Services	10,166.10	10,857.20	14,000	14,000	14,000	14,000
Membership Dues	1,107.00	1,118.50	1,000	1,500	1,500	1,500
Books and Subscriptions	1,427.27	1,726.02	2,200	2,000	2,000	2,000
<b>Student Firefighter / Volunteer Group</b>						
Pre-Entrance Screenings, Backgrounds, Vaccinations	7,735.00	3,033.00	4,000	4,000	4,000	4,000
Personal Protective Equipment		0.00	0	30,000	30,000	30,000
Student Firefighter Tuition Program	20,738.66	38,585.08	35,000	35,000	35,000	35,000
Length of Service Award Program (LOSAP)	200.00	200.00	3,000	3,000	3,000	3,000
Scholarship Donations	1,000.00	1,000.00	1,000	1,000	1,000	1,000
Advertising and Marketing	0.00	0.00	0	5,000	5,000	5,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$260,544.20</b>	<b>\$246,858.86</b>	<b>\$354,800</b>	<b>\$385,500</b>	<b>\$385,500</b>	<b>\$385,500</b>
<b>TOTAL OPERATIONS</b>	<b>\$8,498,010.10</b>	<b>\$8,688,267.85</b>	<b>\$9,821,800</b>	<b>\$10,064,500</b>	<b>\$9,991,500</b>	<b>\$10,001,500</b>

# Operations Department

2021/22 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 2

Account	Description	Account Total
<b>CAREER FIREFIGHTER GROUP</b>		
<b>58203-000</b>	<b>Physicals and Vaccinations.....</b>	\$ 38,000
<b>60223-002</b>	<b>Licenses and Fees.....</b> Oregon ambulance licensing fees, CLIA, DEA, FCC, Motorola, Drone, EMT Licensing	\$ 2,500
<b>60223-007</b>	<b>Supplies; Operations.....</b> Purchase of operational supplies, meeting refreshments,	\$ 5,000
<b>60224-000</b>	<b>Special Projects.....</b> Standby events 2,000 Emergency preparedness 2,000 UAS Support 10,000	\$ 14,000
<b>60225</b>	<b><u>Fire Suppression Expenses</u></b>	
<b>60225-001</b>	<b>Personal Protective Equipment.....</b> Routine purchase of structural and wildland personal protective equip 14,000 Structural turnouts (4 year rotation cycle) 60,000	\$ 74,000
<b>60225-002</b>	<b>Hose and Appliances.....</b> Routine purchase of structural and wildland hose 15,000 Routine purchase of structural and wildland nozzles and adapters 5,000	\$ 20,000
<b>60225-003</b>	<b>Apparatus Equipment and Supplies.....</b> Routine purchase of small tools, chainsaws and power equipment, foam, salvage and overhaul, lettering / decals, and mounting supplies 10,000 Rapid Intervention Team (RIT) supplies 2,500 PROJECT: Man-in-machine kit 1,500	\$ 14,000
<b>60225-004</b>	<b>Safety Equipment.....</b> Routine purchase of safety vests, flares, cones, warning tape, flashlights, passport identification, ladders, batteries, fire extinguishers, and miscellaneous equipment 6,000 Self-contained breathing apparatus (SCBA) masks and annual fit testing 14,000 PROJECT: SCBA voice amps 25,000	\$ 45,000
<b>60225-005</b>	<b>Specialty Equipment.....</b> Routine purchase of gas monitors, calibration, and testing equipment 2,000 Routine purchase of extrication equipment 5,000 PROJECT: 6 verified responder AED's 9,000 PROJECT: Gas monitor calibration stations 6,500	\$ 22,500
<b>60225-006</b>	<b>Technical Rescue Equipment.....</b> Routine replacement of rescue equipment, ropes, harnesses, and swift water equipment 5,000	\$ 5,000

# Operations Department

2021/22 Fiscal Year

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

General Fund 1, Department 2

Account	Description	Account Total
60225-007	<b>Rehabilitation and Consumables</b> ..... Purchase of incident rehabilitation supplies	\$ 6,000
60225-008	<b>Equipment for New Apparatus</b> ..... Loose equipment for the Battalion Chief vehicle	\$ 4,000
60254-000	<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) 7,500 SCBA equipment maintenance 2,000 Extrication equipment maintenance 7,500 Defibrillators 5,000 PPE inspection and repair 18,000	\$ 40,000
60270-000	<b>Contractual/Professional Services</b> ..... Hose and ladder testing contract	\$ 14,000
60410-000	<b>Membership Dues</b> ..... International Association of Fire Chief's, Oregon Fire Chief's Association, Rogue Valley Fire Chief's Association, Federation of Chaplains, Oregon Volunteer Firefighters Association	\$ 1,500
60412-000	<b>Books and Subscriptions</b> .....	\$ 2,000
<b>STUDENT FIREFIGHTER AND VOLUNTEER GROUP</b>		
65001-000	<b>Pre-Entrance Screenings, Backgrounds, Vaccinations, Physicals</b> .....	\$ 4,000
65003-000	<b>Personal Protective Equipment</b> ..... Uniforms 7,500 Structural and Wildland PPE, Gloves, Helmets 30,000	\$ 30,000
65005-000	<b>Student Firefighter Program</b> ..... Associate's degree program for nine students (includes tuitions, books, and supplies)	\$ 35,000
65007-000	<b>Length of Service Award Program (LOSAP)</b> ..... Annual District contribution for volunteer length of service	\$ 3,000
65010-000	<b>Scholarship Donations</b> ..... Student scholarship program for Crater and Eagle Point High Schools	\$ 1,000
65011-000	<b>Advertising and Marketing</b> ..... Marketing of volunteer and student programs	\$ 5,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 385,500</b>



# Fire and Life Safety

# Fire District 3



## 2021/22 Fiscal Year Budget

# Fire and Life Safety Department

2021/22 Fiscal Year

## DEPARTMENT DESCRIPTION

The Fire and Life Safety (FLS) team consists of the Fire Marshal and two Deputy Fire Marshals. These positions are focused on providing specialized public education, fire prevention inspections, new construction plan reviews, general fire safety consultations, and conducting fire investigations. Periodically fire suppression personnel with an interest in fire prevention will assist the team as a cross-training opportunity to gain new skills and experience.

The FLS team reviews commercial construction plans for fire code compliance specific to fire safety systems. They also attend pre-application land development conferences to provide technical advice on fire service apparatus access and firefighting water supply requirements.

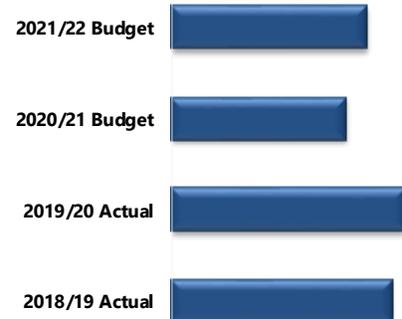
Each member of the team partners with assigned inspectable occupancies and the public to help them meet fire and life safety requirements imposed by State laws, fire codes, and other recognized national standards. Once new building construction is completed, fire and life safety construction maintenance codes are enforced for the safety of occupants and firefighters.

Enforcement of laws relating to fire safety also includes investigating all fires to determine the origin, cause, circumstance, and responsibility that led to the ignition of hostile fires. The FLS team provides on-duty investigation standby 24 hours a day, seven days a week.

## BUDGET SUMMARY

Expenditures	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Personnel Services	\$778,806	\$848,919	\$657,000	\$734,500
Materials and Services	\$82,154	\$65,239	\$27,000	\$27,000
	<b>\$860,960</b>	<b>\$914,158</b>	<b>\$684,000</b>	<b>\$761,500</b>

## Budget Comparison



## PERSONNEL SUMMARY

Personnel	2018/19 Actual	2018/19 Actual	2019/20 Budget	2021/22 Budget
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> )	1.00	1.00	0.00	0.00
Administrative Assistant	1.00	1.00	0.00	0.00
<b>Total</b>	<b>5.00</b>	<b>5.00</b>	<b>3.00</b>	<b>3.00</b>

# Fire and Life Safety Department

2021/22 Fiscal Year

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## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 11.8 percent or \$77,500 over the prior fiscal year. Significant factors impacting this classification include a two month overlap in wages and benefits (\$53,000) of the Deputy Fire Marshal position to accommodate training and mentorship of the retiring member's replacement and the vacation accrual payout of the retiring member. Other factors impacting this classification include salary and benefit adjustments and pension plan and insurance renewal increases.

The overall Materials and Services classification is budgeted with a zero percent increase. Programs and initiatives will remain status quo for this fiscal year with emphasis on fire investigations, fire safety, code enforcement, construction plan reviews, and public education.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Completed 2,407 inspections and calls for service.
- Inspectable occupancy inventory increased to 1,140 regular hazard, 336 moderate hazard, and 386 high hazard occupancies.
- 554 fire safety system inspections were completed by third party contractors and uploaded to our tracking system.
- Completed public education activities including CPR Anytime, team teaching with Smokey Bear, and fire safety information for targeted grades at each elementary school in the District.
- Provided prevention tips and information regarding emergency response and ongoing District projects through social media.
- Maintained State level requirements to receive competency recognition and exempt jurisdiction status.
- Continued District representation with the Local International Association of Arson Investigators, Oregon Fire Code Committee, Legislative Committees, the Governor's Fire Service Policy Council and the Oregon Fire Marshal's Association.

## **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 facilities, properties and processes. 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.

Total completed inspections for 2020 and overall calls for service continue to increase. 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 within communities across the nation when performed effectively.

# Fire and Life Safety Department

2021/22 Fiscal Year

## FIRE LIFE SAFETY INSPECTIONS

### Statement of Measurement

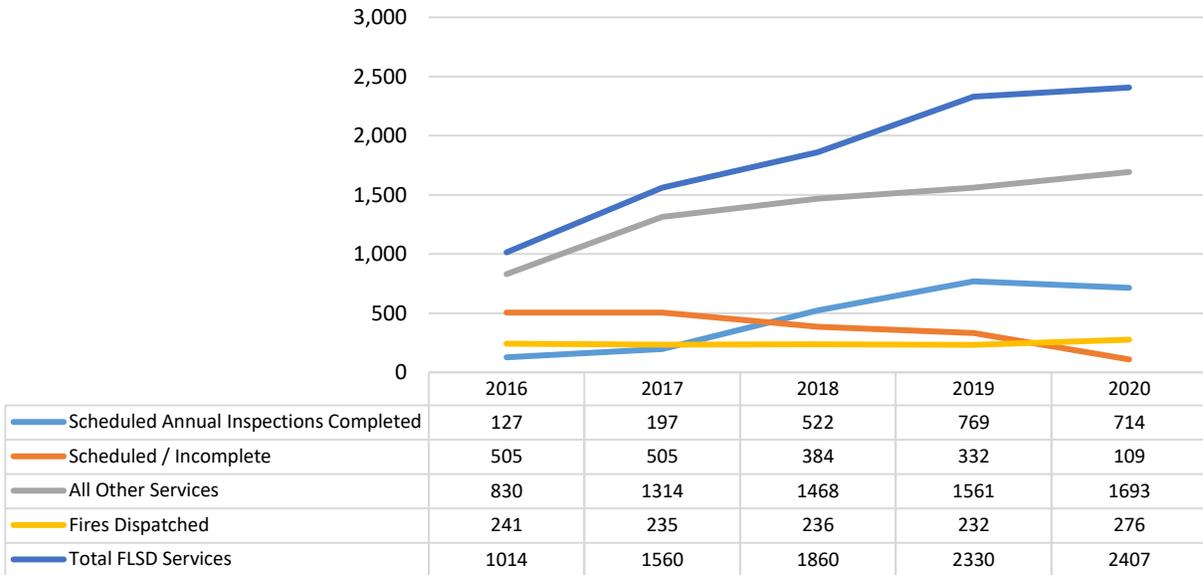
- Inspect low hazard occupancies on a three year rotation.
- Inspect moderate hazard occupancies on a two year rotation.
- Inspect high hazard occupancies annually.
- Conduct re-inspections 100 percent of the time to confirm noted hazards have been abated.
- Conduct inspections generated by citizen complaints 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.

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2017 Actual</i>	<i>2018 Actual</i>	<i>2019 Actual</i>	<i>2020 Targets</i>	<i>2020 Actual</i>	<i>2021 Targets</i>
<i>Low Hazard Inspections</i>	82	222	483	389	409	380
<i>Moderate Hazard Inspections</i>	33	89	85	171	97	168
<i>High Hazard Inspections</i>	82	211	201	263	208	386
<i>Re-Inspections</i>	74	94	124	100%	257	100%
<i>Consultations</i>	230	210	191	100%	219	100%
<i>Complaints</i>	24	28	31	100%	24	100%
<i>Fire District Annexation Requests</i>	0	11	6	100%	4	100%
<i>Land Development Consultations</i>	33	60	57	100%	73	100%
<i>Construction Plan Reviews</i>	41	28	42	100%	40	100%
<i>Construction Permit Inspections</i>	70	100	72	100%	64	100%
<i>Home Fire Safety Inspections</i>	85	70	57	100%	85	100%
<i>Wildland Urban Interface Fuels Reduction</i>	83	70	63	100%	81	100%
<i>Target Hazard Familiarization Tours</i>	35	23	47	100%	20	100%
<i>Expo and Special Events</i>	137	123	118	100%	39	100%
<i>State Fire Marshal Certifications</i>	35	41	40	100%	30	100%
<i>Referrals</i>	21	19	40	100%	18	100%
<i>FLSD Fire Investigations</i>	49	44	49	100%	45	100%
<i>Brycer &amp; Fire Protection Systems</i>	347	415	559	100%	554	100%
<i>Firewise Property Assessments</i>	99	2	65	100%	37	100%
<i>Miscellaneous Fire Safety Assessments</i>	0	0	0	100%	103	100%
<b>Totals</b>	<b>1,560</b>	<b>1,860</b>	<b>2,330</b>		<b>2,407</b>	

# Fire and Life Safety Department

2021/22 Fiscal Year

## Outputs - Five Year Comparison



Note: September 2020 Almeda and Obenchain fires resulted in an increase in the fires dispatched category.

## 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 and support services to partner agencies as necessary.

<b>Services Provided (Outputs) and Effectiveness Measures</b>	<b>2017 Actual</b>	<b>2018 Actual</b>	<b>2019 Actual</b>	<b>2020 Actual</b>	<b>2021 Target</b>
<i>Investigations Performed – FLS Staff</i>	49	44	49	45	100%
<i>Investigations Performed – Operations Staff</i>	235	236	232	276	100%
<i>Juvenile Fire Setter Intervention</i>	2	2	2	4	100%
<b>Totals</b>	<b>286</b>	<b>282</b>	<b>283</b>	<b>325</b>	

# Fire and Life Safety Department

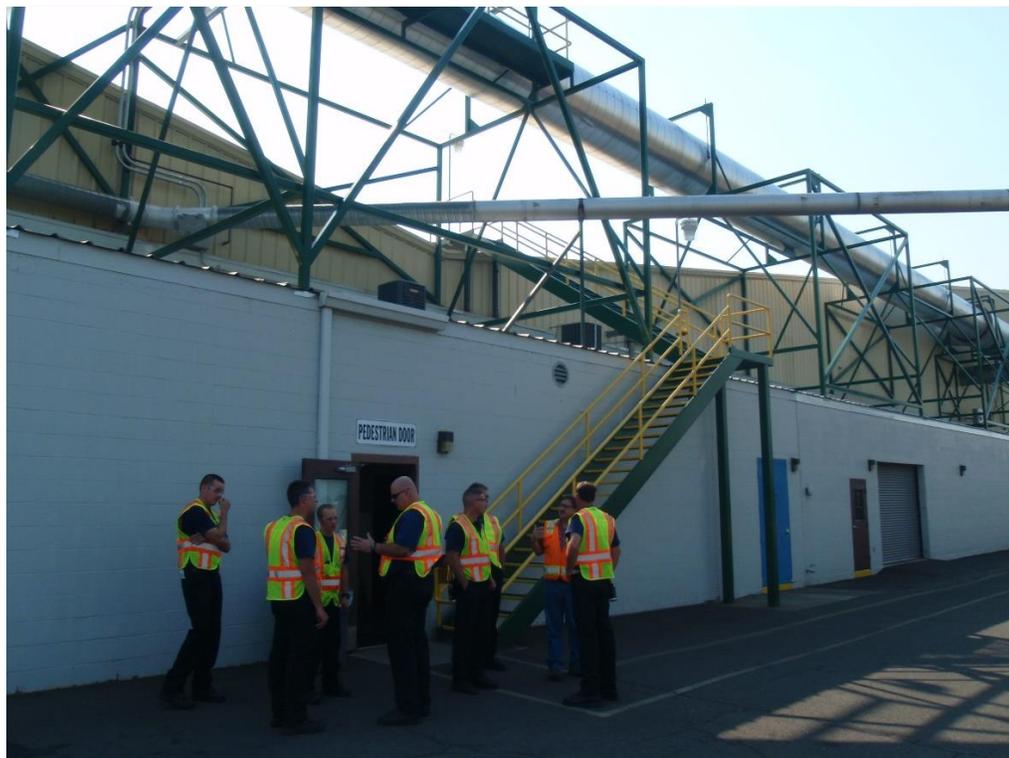
2021/22 Fiscal Year

## COMMUNITY AND INDUSTRIAL DEVELOPMENT

### Statement of Measurement

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

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2017 Actual</i>	<i>2018 Actual</i>	<i>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Target</i>
<i>Number of Plan Reviews</i>	41	28	42	40	100%
<i>Plan Review Turn-around Time</i>	5 Days				
<i>Construction Permit Inspections</i>	70	100	72	60	100%
<i>Development Consultations</i>	177	210	191	173	100%
<b>Totals</b>	<b>288</b>	<b>338</b>	<b>305</b>	<b>273</b>	



# Fire and Life Safety Department

2021/22 Fiscal Year

## **2021/22 FISCAL YEAR DEPARTMENTAL TASKS**

The District’s adopted 2021-2023 Strategic Plan is the overarching document that provides direction for the organization. Six strategic initiatives identify what is critically important and the level of service the District desires to deliver for the community. Under each initiative a goal is identified that supports the success of the initiative and then objectives are identified that support the success of that goal. Under each objective several tasks may be identified that support the accomplishment of the intended outcome. The initiatives and goals stay constant with the plan however the objectives and corresponding tasks may change with the fiscal year and typically drive a lot of the budget development. Some tasks have cost impact; others have minimal impact.

The following tasks are assigned to the Fire and Life Safety Department and link back to one of the six organizational strategic initiatives.

### **Initiative 1**

**Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.**

<b>Goal 1.1</b>	<b>Increase focus on prevention activities</b>		
<b>Objective</b>	Evaluate Greenway fires and fire response		
<b>Task</b>	Create a taskforce to research five year history of Greenway fires from Ashland to Rogue River to establish a list of causes and possible prevention measures	<b>Target Completion Date:</b>	June 30, 2022
<b>Objective</b>	Focus on targeted areas to improve prevention		
<b>Task</b>	Define target areas and prevention programs selected for improvement	<b>Target Completion Date:</b>	June 30, 2022
<b>Objective</b>	Ensure adequate water supplies exist for fighting fires		
<b>Task</b>	Remain poised to take advantage of emerging conditions that enhance rural water supply by continuing to allocate funds in each fiscal year	<b>Target Completion Date:</b>	June 30, 2023

### **Initiative 2**

**Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.**

<b>Goal 2.2</b>	<b>Evolve service delivery models to better focus resources</b>		
<b>Objective</b>	Utilize data to drive all service delivery models		
<b>Task</b>	Utilize NFPA 1730 Standard on Deployment of Fire Prevention Inspection and Code Enforcement. Evaluate the number of required personnel against forecasted FLS workload	<b>Target Completion Date:</b>	June 30, 2022

# Fire and Life Safety Department

2021/22 Fiscal Year

General Fund Description	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2018/19 FY	2019/20 FY	2020/21 FY	2021/2022		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	451,138.66	505,884.98	340,800	373,000	373,000	373,000
Overtime	6,714.11	2,804.54	10,000	10,000	10,000	10,000
Incentives	50,389.15	50,087.32	49,900	45,300	45,300	45,300
Payouts	10,092.90	9,147.00	20,000	50,000	50,000	50,000
Retirement (PERS)	91,770.31	110,234.46	105,000	112,000	112,000	112,000
ER Deferred Comp Contrib	7,441.93	8,967.99	15,000	16,000	16,000	16,000
Health and Life Insurance	102,741.60	98,269.88	71,500	77,000	77,000	77,000
HRA-VEBA Contribution	19,471.89	21,661.67	12,400	13,200	13,200	13,200
FICA and Medicare PR Taxes	38,470.21	41,424.21	31,400	37,000	37,000	37,000
Workers' Comp Insurance	574.91	437.30	1,000	1,000	1,000	1,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$778,805.67</b>	<b>\$848,919.35</b>	<b>\$657,000</b>	<b>\$734,500</b>	<b>\$734,500</b>	<b>\$734,500</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	1,770.00	1,521.00	2,000	2,000	2,000	2,000
Printing	1,735.83	0.00	1,500	1,500	1,500	1,500
Licenses and Fees	505.00	115.00	1,000	1,000	1,000	1,000
Supplies; Fire Life Safety	2,641.15	5,336.22	10,000	10,000	10,000	10,000
Supplies; Public Education Materials	4,470.06	5,000.61	7000	7,000	7,000	7,000
Community Risk Reduction	51,398.95	37,275.81	0	0	0	0
Contractual/Professional Services	14,414.93	11,801.45	0	0	0	0
Membership Dues	1,229.00	600.00	2,000	2,000	2,000	2,000
Books and Subscriptions	1,914.00	2,888.50	3,500	3,500	3,500	3,500
Advertising	2,075.00	700.00	0	0	0	0
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$82,153.92</b>	<b>\$65,238.59</b>	<b>\$27,000</b>	<b>\$27,000</b>	<b>\$27,000</b>	<b>\$27,000</b>
<b>TOTAL FIRE AND LIFE SAFETY</b>	<b>\$860,959.59</b>	<b>\$914,157.94</b>	<b>\$684,000</b>	<b>\$761,500</b>	<b>\$761,500</b>	<b>\$761,500</b>

# Fire and Life Safety Department

2021/22 Fiscal Year

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## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 3

<u>Account</u>	<u>Description</u>	<u>Account Total</u>
58203-000	Physicals and Vaccinations.....	\$ 2,000
60220-000	Printing.....	\$ 1,500
60223-002	Licenses and Fees..... Code recertification's and certification renewals	\$ 1,000
60223-004	Supplies; Fire Life Safety..... Supplies including address signs and reflective numbers, customer service kits, fire investigation tools, and personal protective equipment	\$ 10,000
60223-005	Supplies; Public Education Materials..... Supplies including school event handouts and public education materials such as fire hats, bracelets, stickers, and coloring books	\$ 7,000
60410-000	Membership Dues..... 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	\$ 2,000
60412-000	Books and Subscriptions..... NFPA online access, reference materials, code updates	\$ 3,500
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 27,000</b>



# Training

# Fire District 3



2021/22 Fiscal Year Budget

# Training Department

2021/22 Fiscal Year

## DEPARTMENT DESCRIPTION

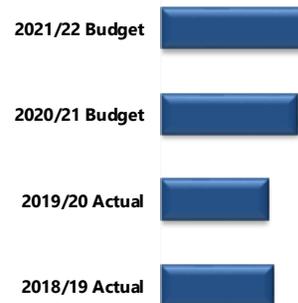
The Training Department is responsible for delivering a variety of training programs, developing proper safety techniques and procedures, maintaining accurate and complete training records, and fostering professional growth and development to all members of the organization. Safety and career development 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 and maintenance of fire rescue standing orders, performance standards, and management of the District's staffing software.

## BUDGET SUMMARY

Expenditures	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Personnel Services	\$348,545	\$357,421	\$403,000	\$411,000
Materials and Services	\$118,078	\$88,728	\$167,700	\$201,800
	<b>\$466,623</b>	<b>\$446,149</b>	<b>\$570,700</b>	<b>\$612,800</b>

### Budget Comparison



## PERSONNEL SUMMARY

Personnel	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
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>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase two percent or \$8,000 over the prior fiscal year. Factors impacting this classification include salary and benefit adjustments due to cost of living and pension plan and insurance renewal increases.

The Materials and Services classification is budgeted to increase 20.3 percent or \$34,100. With additional focus on leadership development and education, dollars have been increased in account 60455-001 for administrative/leadership training. All other training accounts are comparable to the prior year and reflect continued development across the various disciplines.

# Training Department

2021/22 Fiscal Year

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## **PRIOR YEAR ACCOMPLISHMENTS**

- Hosted the National Fire Academy's Leadership in Supervision courses (three courses, two days each).
- Assisted the Chief Examiner to conduct a successful entry level Firefighter exam resulting in a Civil Service Register of 46 candidates.
- Provided leadership, supervision, and a training site for the first annual Southern Oregon Wildfire School (SOWS).
- Enhanced the end-user experience with functionality of TargetSolutions, the District's learning management software.
- Partnered with Ashland Fire & Rescue to provide Advanced Cardiac Life Support (ACLS) and Pediatric Advanced Life Support (PALS) courses.
- The Safety Committee completed various reviews and projects to provide a safe work environment for all members of the District.
- Delivered an eight-week Firefighter recruit academy to train four new Firefighters.
- Implemented new software to assign, track, and complete performance task books and skill evaluations for all levels within the organization.
- Updated all probationary task books for Battalion Chief, Captain, Engineer, and Firefighter.
- Assisted the Chief Examiner to conduct a successful Engineer promotional exam resulting in a Civil Service Register of three candidates, all of which have been promoted to Engineer.
- Partnered with a local training provider to deliver leadership training to select members of the District.
- Redefined the Volunteer and Student training program.
- Recertified all Blue Card Incident Commanders and provided initial certification for one new incident commander.



# Training Department

2021/22 Fiscal Year

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## **DEPARTMENT MEASUREMENTS AND TARGETS**

### **TRAINING PROGRAM MANAGEMENT**

#### Statements of Measurement

- Evaluate and implement an Ethics training program for all members of the District.
- Evaluate and implement a leadership training program for supervisors within the District.
- Implement an Incident Management training manual.
- Implement Performance Standards for individual, company, and multi-company tasks.
- Coordinate a multi-agency Mass Casualty Incident training event that focuses on communications and inter-agency interoperability.
- Evaluate the ability to provide and participate in a county-wide EMS training plan.
- 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**

- Assisted with Firefighter recruitment and an Engineer promotional exam; four Firefighters were hired in March of 2021, two Engineers were promoted in 2020, 2 Engineers were promoted between January and March 2021.
- Two Captain promotions and 2 Battalion Chief promotions were made Between January and March 2021.
- Hosted an eight-week recruit academy to train four new Firefighters, led by Firefighter Rob Miller.
- The Safety Committee reviewed 16 reported injuries and four 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.
- 11 applications for certification were submitted and approved by DPSST on behalf of 10 members.
- Workplace safety inspections were conducted with 100 percent compliance within OR-OSHA requirements.
- The District strives to support developmental opportunities by seeking outside training for members in various trainings and conferences locally, regionally, and outside of Oregon. The COVID-19 pandemic has had a significant impact on our ability to support outside training; the District was able to support attendance and participation to 20 outside courses.

# Training Department

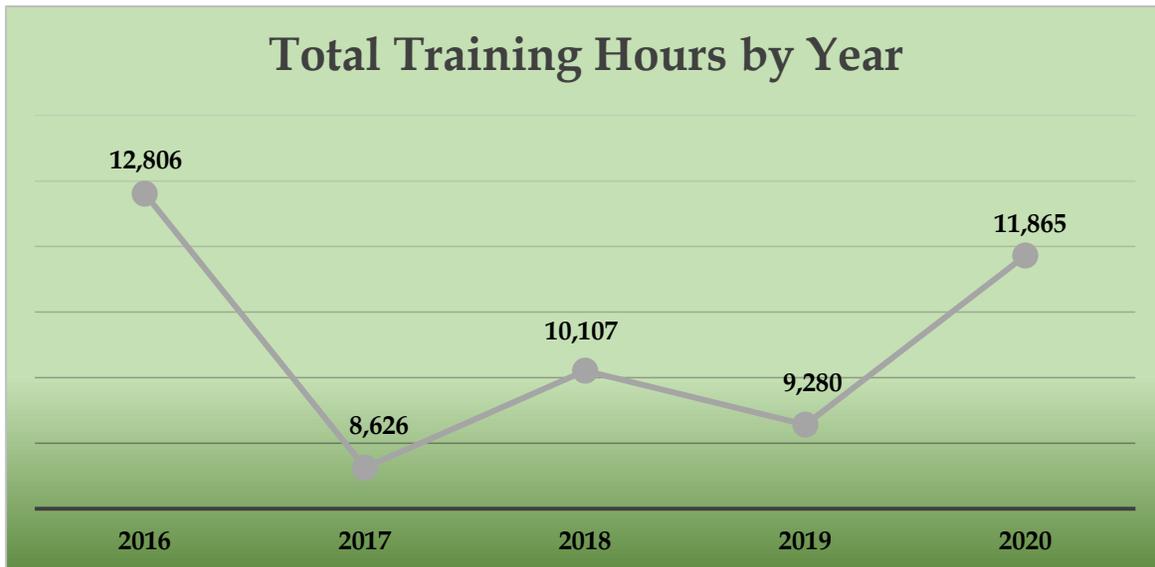
2021/22 Fiscal Year

## TRAINING DEPARTMENT STATISTICS

### Outputs

- The following categories identify how training was completed for District members:
  - Lecture/Conferences accounted for 456 hours.
  - Online Video/Computer accounted for 655 hours
  - Practical Drill accounted for 1,643 hours
  - Self-Study accounted for 302 hours
  - Uncategorized accounted for 8,809 hours

<i>Number of Training Hours (Outputs)</i>	<i>2016 Actual</i>	<i>2017 Actual</i>	<i>2018 Actual</i>	<i>2019 Actual</i>	<i>2020 Actual</i>
<i>Administration</i>	1,013	333	404	622	336
<i>Apparatus</i>	1,193	913	928	542	459
<i>EMS</i>	2,577	1,333	2,332	2,001	1,931
<i>Fire Officer</i>	305	1,484	1,605	1,173	737
<i>Haz-Mat</i>	15	53	145	134	79
<i>Health and Safety</i>	153	223	155	317	578
<i>Instructional</i>	225	34	104	23	54
<i>Mandated</i>	176	150	16	65	686
<i>Prevention</i>	1,000	467	505	555	408
<i>Suppression</i>	4,296	2,499	2,629	3,071	4,921
<i>Technical Rescue</i>	1,223	695	756	597	1,069
<i>Wildland</i>	630	442	528	180	607
<b>Totals</b>	<b>12,806</b>	<b>8,626</b>	<b>10,107</b>	<b>9,280</b>	<b>11,865</b>



# Training Department

2021/22 Fiscal Year

## **2021/22 FISCAL YEAR DEPARTMENTAL TASKS**

The District's adopted 2021-2023 Strategic Plan is the overarching document that provides direction for the organization. Six strategic initiatives identify what is critically important and the level of service the District desires to deliver for the community. Under each initiative a goal is identified that supports the success of the initiative and then objectives are identified that support the success of that goal. Under each objective several tasks may be identified that support the accomplishment of the intended outcome. The initiatives and goals stay constant with the plan however the objectives and corresponding tasks may change with the fiscal year and typically drive a lot of the budget development. Some tasks have cost impact; others have minimal impact.

The following tasks are assigned to the Training Department and link back to one of the six organizational strategic initiatives.

### **Initiative 2**

**Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.**

<b>Goal 2.1</b>	<b>Evaluate organizational and staffing models</b>		
<b>Objective</b>	Evaluate effectiveness of the community volunteer and volunteer firefighter programs		
<b>Task</b>	Evaluate the impacts of volunteer training requirements	<b>Target Completion Date:</b>	December 31, 2021
<b>Task</b>	Evaluate non-traditional training for volunteer firefighters	<b>Target Completion Date:</b>	June 30, 2023

### **Initiative 3**

**Develop, promote, and demonstrate professionalism and excellence throughout the organization.**

<b>Goal 3.1</b>	<b>Enhance employee development process</b>		
<b>Objective</b>	Ensure that all members have current development plans		
<b>Task</b>	Evaluate the effectiveness of individualized development plans, integrating into annual performance reviews if necessary	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Develop, implement, and update appropriate Acting in Capacity programs	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Update the District's current Development Plan	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Establish mentor networks to break down silos		
<b>Task</b>	Encourage ride along programs with other agencies	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Encourage dedicated Special Assignment opportunities to line personnel	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Promote physical and mental health and wellness		
<b>Task</b>	Evaluate effectiveness of current wellness programs	<b>Target Completion Date:</b>	June 30, 2022
<b>Task</b>	Advocate and implement Rebound with SDAO	<b>Target Completion Date:</b>	December 31, 2021

<b>Objective</b>	Evaluate career paths/succession planning beyond Battalion Chief		
<b>Task</b>	Provide soft skill training to organization to improve administrative skills	<b>Target Completion Date:</b>	June 30, 2023

# Training Department

2021/22 Fiscal Year

<b>Goal 3.2</b>	<b>Enhance internal communication</b>		
<b>Objective</b>	Create opportunities for line staff to engage with management		
<b>Task</b>	Encourage management to participate in crew training events	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Improve internal committee process		
<b>Task</b>	Evaluate the need for a training committee	<b>Target Completion Date:</b>	December 31, 2021

## Initiative 5

**Develop and strengthen collaborative efforts and strategic partnerships.**

<b>Goal 5.1</b>	<b>Maintain and enhance partnerships to improve regional preparedness and response to emergency events</b>		
<b>Objective</b>	Participate in integrated training opportunities		
<b>Task</b>	Provide multi-company training with partner agencies and industry	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Develop and implement an Incident Command training manual	<b>Target Completion Date:</b>	June 30, 2023

## Initiative 6

**Commit to excellence through innovation.**

<b>Goal 6.2</b>	<b>Build organizational capacity and excellence</b>		
<b>Objective</b>	Increase accountability at all levels		
<b>Task</b>	Develop and implement performance standards for individual, company, and multi-company tasks	<b>Target Completion Date:</b>	June 30, 2023

# Training Department

2021/22 Fiscal Year

General Fund  Description	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2018/19 FY	2019/20 FY	2020/21 FY	2021/2022		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	171,766.43	178,080.00	183,000	186,000	186,000	186,000
Overtime *	65,105.61	46,411.53	60,000	60,000	60,000	60,000
Incentives	11,883.36	11,856.00	12,300	12,300	12,500	12,500
Payouts	339.36	1,742.40	9,000	9,000	9,000	9,000
Retirement (PERS)	32,798.19	39,502.39	48,000	51,800	51,800	51,800
ER Deferred Comp Contrib	6,878.78	8,249.20	10,400	10,600	10,600	10,600
Health and Life Insurance	30,374.40	41,982.54	47,900	50,000	50,000	50,000
HRA-VEBA Contribution	9,518.53	9,419.81	8,200	8,400	8,400	8,400
FICA and Medicare PR Taxes	16,651.61	17,624.43	20,000	19,700	19,700	19,700
Workers' Comp Insurance	3,568.01	2,552.58	4,200	4,200	3,000	3,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$348,884.28</b>	<b>\$357,420.88</b>	<b>\$403,000</b>	<b>\$412,000</b>	<b>\$411,000</b>	<b>\$411,000</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	565.00	308.00	1,000	1,000	1,000	1,000
Licenses and Fees	320.00	80.00	1,000	500	500	500
Supplies; Training and Safety Equip	7,130.40	6,449.79	15,000	15,000	15,000	15,000
Training Props and Equipment	9,228.28	3,041.47	6,200	7,800	7,800	7,800
M&R; Training Equipment and Props	1,447.10	600.00	1,000	2,000	2,000	2,000
Health and Wellness	1,706.26	5,264.23	7,500	5,000	5,000	5,000
Contractual/Professional Services	8,000.00	1,175.00	10,000	20,000	20,000	20,000
Membership Dues	660.00	635.00	1,000	1,000	1,000	1,000
Books and Subscriptions	2,324.80	7,116.63	5,000	9,000	9,000	9,000
Meeting Travel Expenses	5,706.37	3,993.20	8,000	8,000	8,000	8,000
Trng & Conferences; Admin & Leadership	43,118.10	39,195.59	55,000	69,000	69,000	69,000
Trng & Conferences; Board	1,573.66	1,649.68	2,500	2,500	2,500	2,500
Trng & Conferences; Operations	19,629.26	10,011.75	25,000	25,000	25,000	25,000
Trng & Conferences; Fire Life Safety	6,945.90	2,817.87	10,000	10,000	10,000	10,000
Trng & Conferences; Students & Vol's	5,453.72	964.22	3,500	10,000	10,000	10,000
Trng & Conferences; Tech and Data Analytics	1,068.55	2,153.38	10,000	10,000	10,000	10,000
Trng & Conferences; EMS	3,200.80	3,272.18	6,000	6,000	6,000	6,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$118,078.20</b>	<b>\$88,727.99</b>	<b>\$167,700</b>	<b>\$201,800</b>	<b>\$201,800</b>	<b>\$201,800</b>
<b>TOTAL TRAINING</b>	<b>\$466,962.48</b>	<b>\$446,148.87</b>	<b>\$570,700</b>	<b>\$613,800</b>	<b>\$612,800</b>	<b>\$612,800</b>

# Training Department

2021/22 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 4

Account	Description	Account Total
58203-000	<b>Physicals and Vaccinations</b> .....	\$ 1,000
60223-002	<b>Licenses and Fees</b> ..... DPSST fingerprinting costs for certification process	\$ 500
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	\$ 15,000
60223-014	<b>Training Props and Equipment</b> ..... Miscellaneous training props and equipment 3,000 PROJECT: QCPR manikins (laerdal family pack) 1,400 PROJECT: Simpad plus 3,400	\$ 7,800
60254-000	<b>M&amp;R; Training Equipment and Props</b> ..... Maintenance and repair of training equipment and props	\$ 2,000
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	\$ 20,000
60410-000	<b>Membership Dues</b> ..... Annual dues for Oregon Fire Chief's Association and Safety and Health Section, Rogue Valley Fire Chief's Association, Int'l Association of Fire Chief's, Int'l 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, emergency medical continuing education resources, technical rescue training, TotalEvals, and Blue Card RMS	\$ 9,000
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 Association, National Fire Protection Association, DPSST, Oregon State Fire Marshal, Governor's Fire Service Policy Council, and other meetings as necessary	\$ 8,000
60455-001	<b>Training and Conferences; Administrative and Leadership</b> ..... Continued education and training through Oregon Fire Chief's Association, Special District's Association of Oregon, Oregon Municipal Finance Officers Association, Oregon Fire Service Office Administrators, Int'l Association of Fire Chief's, staffing and scheduling training, approved higher education, supervision and leadership seminars, logistics inventory systems, and various other conferences, training, and workshops	\$ 69,000

# Training Department

2021/22 Fiscal Year

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

General Fund 1, Department 4

Account	Description	Account Total
60455-002	<b>Training and Conferences; Board</b> ..... Continued education for the Board of Directors such as the Special District's Association of Oregon conferences	\$ 2,500
60455-003	<b>Training and Conferences; Operations</b> ..... Continued education and certification for fire suppression and technical rescue, professional development, safety and committee functions, Fire Department Instructors Conference (FDIC), Firemanship Conference, ETHOS training, and other relevant training, conferences, and workshops	\$ 25,000
60455-004	<b>Training and Conferences; Fire and Life Safety</b> ..... Continued education through the Oregon Fire Marshal's Association, local and state Int'l Association of Arson Investigators, Fire Marshal's Roundtable, fire code training, and other relevant conferences, training, and workshops	\$ 10,000
60455-006	<b>Training and Conferences; Students and Volunteers</b> ..... Continued education and training for all students and volunteer firefighters; includes EMS skills training and attendance at the Oregon Volunteer Firefighters Conference, Int'l Association of Fire Chaplains, and other relevant conferences, training, and workshops	\$ 10,000
60455-007	<b>Training and Conferences; Technology and Data Analytics</b> ..... Continued technology training such as conferences, geographic information systems, data analysis, and other relevant conferences, training, and workshops	\$ 10,000
60455-008	<b>Training and Conferences; EMS</b> ..... EMS-focused continuing education for all EMS personnel including ACLS, PALS, ICLS, RCC workshops, State of Jefferson EMS conference, Oregon EMS conference, CPR refresher and certification, EMS skills workshops, and other professional development opportunities	\$ 6,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 201,800</b>



# Strategic Services

# Fire District 3



2021/22 Fiscal Year Budget

# Strategic Services Department

2021/22 Fiscal Year

## DEPARTMENT DESCRIPTION

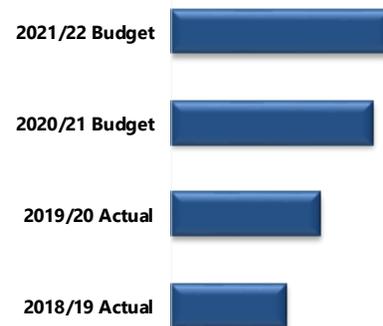
The Strategic Services Department is responsible for the coordination and oversight of the District’s Community Risk Reduction efforts. Through our systems of analysis and data driven decision making, the Strategic Services department is tasked with collaborating with other stakeholders in a community risk analysis followed by the coordinated application of resources through a community risk reduction strategy to minimize the probability of occurrence and the impact of risks within the community.

The Department is also tasked with coordinating all preventative and routine maintenance activities for the District’s eight stations, training facility, classrooms, resident volunteer housing, and administrative building totaling over 102,000 square feet with an estimated value of over \$31 million dollars. The Department also maintains over 30 acres of property that includes asphalt and gravel driveways, parking lots, and open fields. The Department also oversees the District’s logistics program such as 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 equipment and to ensure effective and uninterrupted emergency response by maintaining and supporting the District’s facilities and equipment assets.

## BUDGET SUMMARY

Expenditures	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Personnel Services	\$106,453	\$386,204	\$619,000	\$710,500
Materials and Services	\$790,298	\$773,227	\$958,800	\$986,500
	<b>\$896,750</b>	<b>\$1,159,430</b>	<b>\$1,577,800</b>	<b>\$1,697,000</b>

### Budget Comparison



## PERSONNEL SUMMARY

Personnel	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Deputy Chief of Strategic Services	0.00	1.00	1.00	1.00
Captain – Community Risk Reduction	0.00	0.25	1.00	1.00
Facilities/Logistics Manager	1.00	0.25	0.00	0.00
Facilities/Logistics Technician	0.00	1.00	1.00	1.00
Administrative Assistant	0.00	0.00	1.00	1.00
Logistics Support Technician	0.00	0.00	0.00	0.50
<b>Total</b>	<b>1.00</b>	<b>2.50</b>	<b>4.00</b>	<b>4.50</b>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase 14.8 percent or \$91,500 over the prior fiscal year. Factors impacting this classification include the addition of a part-time logistics support position (\$33,400), salary and benefit adjustments due to cost of living, and pension plan and insurance renewal increases.

# Strategic Services Department

2021/22 Fiscal Year

The Materials and Services classification is budgeted to increase 2.9 percent or \$27,700. Significant factors include increased costs in apparatus maintenance and the establishment of a new account 60267-000; *Community Care Program*, which will focus on expenses related to that mission. Community risk reduction is a significant priority under Strategic Services with projects aimed at reducing risk within the communities served such as hazardous fuels mitigation, firewise gardens, rural water supply enhancements, community events, and smoke alarm campaigns. Some notable projects across facilities include repair and painting at the Dodge Bridge station and asphalt resealing at the White City campus and Central Point station.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Replaced the SCBA compressor at the White City fire station.
- Purchased, outfitted, and placed in service a new staff vehicle for Strategic Service Chief.
- Implemented FirstDue preplanning and Community Connect programs.
- Worked with Administration in the hiring of two new Community Care EMT's and implemented 7 day a week coverage.
- Moved Community Care team into their own office space on the White City campus.
- Completed 3 wildland fuels collection events for the City of Gold Hill.
- Implemented a wildland fuels drop-off site at the Dodge Bridge station.
- Coordinated the creation of a Hazardous Materials Emergency Plan for Jackson County.
- Promoted a new Captain into Strategic Services to fill vacancy.
- Implemented data analysis strategy to produce an Annual Data Report.
- Connected all career and admin facilities to networked electronic cardlock access system.

## **DEPARTMENT MEASUREMENTS AND TARGETS**

### **FLEET**

#### Statement of Measurement

- Maintain fleet for maximum service life as identified in lifespan schedule.
- Complete apparatus preventative maintenance services within the scheduled service period as determined by manufacturers' recommended service intervals.

<i><b>Types of Transactions (Output Measures)</b></i>	<i><b>2018 Actual</b></i>	<i><b>2019 Actual</b></i>	<i><b>2020 Actual</b></i>	<i><b>2021 Target</b></i>	<i><b>2022 Target</b></i>
<i><b><u>Vehicles Maintained</u></b></i>					
<i>Fire Engines</i>	11	11	11	11	11
<i>Aerial Ladder Truck</i>	1	1	1	1	1
<i>Wildland Engines</i>	9	8	8	8	8
<i>Water Tenders</i>	3	3	2	2	2
<i>Tactical Tenders</i>	3	3	3	3	3
<i>Rescue Equipment</i>	2	2	2	2	2
<i>Support Vehicles</i>	17	17	17	18	18
<i><b>Total</b></i>	<b>46</b>	<b>45</b>	<b>44</b>	<b>45</b>	<b>45</b>

# Strategic Services Department

2021/22 Fiscal Year

## FACILITIES

### Statement of Measurement

- Maintain facilities utilizing preventative maintenance schedule to help reduce long-term costs.
- Maximize energy efficiencies where available and seek innovative methods for reducing future energy costs.

<i>Types of Transactions (Output Measures)</i>	<i>2018 Actual</i>	<i>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Target</i>	<i>2022 Target</i>
<b><i>Facilities Maintained</i></b>					
<i>Fire Stations</i>	8	8	8	8	8
<i>Training Grounds</i>	1	1	1	1	1
<i>Training Classroom</i>	0	1	1	1	1
<i>Maintenance Shop</i>	1	1	1	1	1
<i>Administrative Building</i>	1	1	1	1	1
<i>Resident Volunteer Housing</i>	4	4	4	4	4
<i>Warehouse Facility/Grounds</i>	1	1	1	2	2
<b><i>Total</i></b>	<b>16</b>	<b>17</b>	<b>17</b>	<b>18</b>	<b>18</b>

## COMMUNITY RISK REDUCTION\*

### Statement of Measurement

- Ensure that all residences within the District have working smoke alarms.
- Provide dump trailer access to District residents to help facilitate the removal of hazardous wildland fuels.
- Increase the number of PulsePoint subscribers within the District.

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2018 Actual</i>	<i>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Target</i>	<i>2022 Target</i>
<i>Smoke Alarms Installed</i>		945	33 <sup>a</sup>	100	500
<i>Loads of Hazardous Wildland Fuel Removed</i>			32	50	55
<i>PulsePoint Subscribers</i>	3,493	5,979	16,049 <sup>b</sup>	17,000	18,000

<sup>a</sup> Due to the Covid-19 pandemic the District was not able to promote on-site smoke alarm campaigns with the Red Cross. These outreach events in 2019 provided over 150 free, in-home installations per event.

<sup>b</sup> In 2020 the District launched a very successful campaign to promote PulsePoint and the life-saving benefits of using the app, which resulted in a significant increase in users.

\* The District started tracking the majority of these measurements in 2020 with the start of the new community care and risk reduction programs, therefore historical data is not available for some outputs.

# Strategic Services Department

2021/22 Fiscal Year

## COMMUNITY CARE\*

### Statement of Measurement

- Follow-up with engine company referrals to explore service options outside of the 911 system.
- Engage community members inside their homes to provide community risk reduction services.
- Respond to non-emergency medical calls to increase 911 response reliability.

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2018 Actual</i>	<i>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Target</i>	<i>2022 Target</i>
<i>Engine Crew Referrals</i>			138	200	200
<i>Community Care Home Visits</i>			113	120	120
<i>911 Calls Handled</i>			95	360	360

\* The District started tracking the majority of these measurements in 2020 with the start of the new community care and risk reduction programs, therefore historical data is not available for these outputs. Although community care responders are budgeted under Operations, a lot of their work is in partnership with the Strategic Services mission of reducing risk within the communities we serve.



# Strategic Services Department

2021/22 Fiscal Year

## **2021/22 FISCAL YEAR DEPARTMENTAL TASKS**

The District's adopted 2021-2023 Strategic Plan is the overarching document that provides direction for the organization. Six strategic initiatives identify what is critically important and the level of service the District desires to deliver for the community. Under each initiative a goal is identified that supports the success of the initiative and then objectives are identified that support the success of that goal. Under each objective several tasks may be identified that support the accomplishment of the intended outcome. The initiatives and goals stay constant with the plan however the objectives and corresponding tasks may change with the fiscal year and typically drive a lot of the budget development. Some tasks have cost impact; others have minimal impact.

The following tasks are assigned to the Strategic Services Department and link back to one of the six organizational strategic initiatives.

### **Initiative 1**

**Minimize the direct and indirect impacts associated with fire, EMS, and rescue emergencies.**

<b>Goal 1.1</b>	<b>Increase focus on prevention activities</b>		
<b>Objective</b>	Evaluate Greenway fires and fire response		
<b>Task</b>	Collaborate with Jackson County, cities, and local stakeholders to develop and implement a risk reduction plan for the Bear Creek Greenway prior to the 2022 fire season	<b>Target Completion Date:</b>	June 30, 2022
<b>Objective</b>	Focus on targeted areas to improve prevention		
<b>Task</b>	Identify areas at risk through a comprehensive risk analysis and implement a community risk reduction plan to reduce the risks in these areas	<b>Target Completion Date:</b>	December 31, 2021
<b>Objective</b>	Evaluate wildland fire reduction and resiliency		
<b>Task</b>	Identify and implement strategies and programs to reduce the risk in the home ignition zone for homes in the wildland urban interface areas of the District	<b>Target Completion Date:</b>	June 30, 2022
<b>Task</b>	Support the efforts of Jackson County in the implementation of the Rogue Valley Integrated Community Wildfire Protection Plan (RVCWPP)	<b>Target Completion Date:</b>	June 30, 2022
<b>Objective</b>	Increase prevention in rural areas		
<b>Task</b>	Partner with Rebuilding Together Rogue Valley to implement fall prevention evaluations and strategies for the aging population in the rural communities with a goal of reaching 36 District patrons	<b>Target Completion Date:</b>	December 31, 2021

# Strategic Services Department

2021/22 Fiscal Year

<b>Goal 1.2</b>	<b>Understand and focus on non-fire emergency response</b>		
<b>Objective</b>	Evaluate non-emergency response and resource allocation		
<b>Task</b>	Research and categorize totality of non-emergency response	<b>Target Completion Date:</b>	December 31, 2021
<b>Objective</b>	Implement appropriate response to non-fire incidents (mental health, drug addiction)		
<b>Task</b>	Enhance the deployment of the Community Care Program to respond to non-critical medical and social service incidents	<b>Target Completion Date:</b>	June 30, 2022
<b>Objective</b>	Increase community delivered CPR training		
<b>Task</b>	Develop a rapid deploy CPR class	<b>Target Completion Date:</b>	December 31, 2021
<b>Task</b>	Implement and support community CPR classes with a goal of providing 6 classes per year	<b>Target Completion Date:</b>	December 31, 2021

## Initiative 2

**Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.**

<b>Goal 2.2</b>	<b>Evolve service delivery models to better focus resources</b>		
<b>Objective</b>	Develop and enhance programs within the District (Community Care and Risk Reduction)		
<b>Task</b>	Evaluate the use of current and emerging technologies to enhance current programs and response	<b>Target Completion Date:</b>	December 31, 2023
<b>Objective</b>	Offer alternative non-emergency transportation options to patients		
<b>Task</b>	Develop and implement treat-in-place and alternate destination protocols	<b>Target Completion Date:</b>	December 31, 2021
<b>Goal 2.3</b>	<b>Maintain fiscal responsibility</b>		
<b>Objective</b>	Evaluate sustainable practices		
<b>Task</b>	Evaluate and develop a plan to utilize solar energy to reduce facility energy costs	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Evaluate the use of electric or hybrid technology for non-emergency response vehicles	<b>Target Completion Date:</b>	June 30, 2023

## Initiative 5

**Develop and strengthen collaborative efforts and strategic partnerships.**

<b>Goal 5.1</b>	<b>Maintain and enhance partnerships to improve regional preparedness and response to emergency events</b>		
<b>Objective</b>	Encourage the development of a Rogue Valley Disaster Response Plan		
<b>Task</b>	Support the development of the Jackson County Hazardous Materials Emergency Plan by participating in the Jackson County Local Emergency Planning Committee (LEPC)	<b>Target Completion Date:</b>	June 30, 2023

# Strategic Services Department

2021/22 Fiscal Year

<b>Goal 5.2</b>	<b>Maintain and enhance partnerships to improve service delivery and organizational effectiveness</b>		
<b>Objective</b>	Explore shared services among agencies		
<b>Task</b>	Explore regional opportunities to collaborate on logistics supply chain	<b>Target Completion Date:</b>	June 30, 2023
<b>Task</b>	Explore opportunities to implement data and information sharing with Oregon Department of Forestry	<b>Target Completion Date:</b>	June 30, 2023

<b>Objective</b>	Work effectively with partner agencies for access to resources for elderly and at-risk patrons to affect broader changes		
<b>Task</b>	Develop and foster relationships with Rebuilding Together Rogue Valley, Aging and Disability Resource Center (ADRC) and other stakeholders who provide service to the aging population	<b>Target Completion Date:</b>	June 30, 2023

## Initiative 6

**Commit to excellence through innovation.**

<b>Goal 6.1</b>	<b>Focus on innovation to improve service delivery</b>		
<b>Objective</b>	Explore treatment-in-place for patient care		
<b>Task</b>	Develop and implement treat-in-place and alternate destination protocols	<b>Target Completion Date:</b>	June 30, 2023

<b>Goal 6.2</b>	<b>Build organizational capacity and excellence</b>		
<b>Objective</b>	Provide excellent customer and public service		
<b>Task</b>	Conduct internal customer service satisfaction survey for facility, logistics, and technology services	<b>Target Completion Date:</b>	June 30, 2023

# Strategic Services Department

2021/22 Fiscal Year

General Fund Description	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2018/19 FY	2019/20 FY	2020/21 FY	2021/2022		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	69,513.50	241,370.59	357,100	386,500	386,500	386,500
Overtime	0.00	0.00	5,000	5,000	5,000	5,000
Incentives	2,517.30	13,680.68	18,300	33,300	34,000	34,000
Payouts	0.00	4,878.40	12,000	12,000	12,000	12,000
Retirement (PERS)	6,007.41	43,707.29	74,000	93,000	93,000	93,000
ER Deferred Comp Contrib	3,120.00	472.41	11,100	14,000	14,000	14,000
Health and Life Insurance	15,859.08	53,280.19	95,500	100,200	100,000	113,000
HRA-VEBA Contribution	3,957.60	8,969.80	16,500	17,000	19,000	19,000
FICA and Medicare PR Taxes	5,461.72	19,585.96	28,500	33,000	33,000	33,000
Workers' Comp Insurance	15.86	258.49	1,000	1,000	1,000	1,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$106,452.47</b>	<b>\$386,203.81</b>	<b>\$619,000</b>	<b>\$695,000</b>	<b>\$697,500</b>	<b>\$710,500</b>
<b>Materials and Services</b>						
Uniforms	36,876.33	26,902.07	35,000	56,300	56,300	56,300
Janitorial Supplies and Laundry Services	30,128.01	31,614.89	55,000	35,000	35,000	35,000
Supplies/Equipment; Medical	72,913.36	66,886.82	80,000	80,000	80,000	80,000
Supplies; Logistics and Facility Maint	0.00	0.00	5,000	5,000	5,000	5,000
Supplies; Station Consumables	2,920.60	1,900.10	6,000	6,000	6,000	6,000
Supplies; Furnishings and Appliances	30,004.36	30,628.96	15,000	17,000	17,000	17,000
Supplies; Facilities	3,334.47	4,464.50	13,000	13,000	13,000	13,000
Fuel and Lubricants	63,014.95	52,086.99	80,000	80,000	80,000	80,000
M&R of Vehicles and Apparatus	212,184.14	216,924.60	200,000	225,000	225,000	225,000
Bldgs & Grounds - WC Station	33,078.23	12,742.60	17,000	24,200	24,200	24,200
Bldgs & Grounds - CP Station	23,264.60	48,076.59	13,800	32,400	32,400	32,400
Bldgs & Grounds - DB Station	13,172.63	936.99	21,000	20,000	5,000	5,000
Bldgs & Grounds - SV Station	11,126.76	6,408.26	15,000	5,000	5,000	5,000
Bldgs & Grounds - GH Station	15,573.77	14,061.09	13,000	6,000	6,000	6,000
Bldgs & Grounds - AL Station	2,252.52	2,848.92	12,000	5,000	5,000	10,000
Bldgs & Grounds - EP Station	7,240.74	35,791.35	12,000	10,000	10,000	10,000
Bldgs & Grounds - TR Station	3,416.40	3,971.64	10,000	3,000	3,000	3,000
Bldgs & Grounds - SNC Station	0.00	5,453.77	10,500	5,000	5,000	5,000
Bldgs & Grounds - TRNG Center	1,290.71	4,752.43	6,000	23,000	23,000	23,000
Bldgs & Grounds - ADM Bldg	31,544.86	19,923.80	35,000	30,600	30,600	30,600
Bldgs & Grounds - LOG Warehouse	3,794.72	785.03	2,000	2,000	2,000	2,000
Bldgs & Grounds - Fire Science Center	3,710.18	4,395.91	7,500	2,000	2,000	2,000
M&R; District Equipment	7,252.84	2,169.85	7,500	10,000	10,000	10,000
M&R; Appliances and Furnishings	1,277.60	914.14	5,000	5,000	5,000	5,000
Community Risk Reduction	0.00	0.00	55,000	55,000	55,000	55,000
Community Care Program	0.00	0.00	0	13,500	13,500	13,500
Contractual/Professional Services	5,157.50	5,306.55	8,000	8,000	8,000	8,000
Membership and Certifications	0.00	370.00	1,000	1,000	1,000	1,000
Subscriptions	0.00	0.00	500	500	500	500
Utilities; WC	31,927.77	30,107.80	35,000	35,000	35,000	35,000
Utilities; CP	21,011.45	20,111.75	23,000	23,000	23,000	23,000
Utilities; DB	8,328.52	8,167.52	14,000	14,000	14,000	14,000
Utilities; SV	11,480.64	6,318.17	14,000	14,000	14,000	14,000
Utilities; GH	10,870.33	11,000.70	14,000	14,000	14,000	14,000
Utilities; AL	7,794.00	6,823.00	10,000	10,000	10,000	10,000
Utilities; EP	20,111.45	21,067.89	23,000	23,000	23,000	23,000
Utilities; TR	10,764.84	10,622.67	5,000	5,000	5,000	5,000
Utilities; SNC	0.00	2,820.08	23,000	23,000	23,000	23,000
Utilities; TC	15,079.02	15,422.31	15,000	15,000	15,000	15,000
Utilities; AB	37,041.24	36,848.54	37,000	37,000	37,000	37,000
Utilities; FSC	1,358.18	3,598.35	5,000	5,000	5,000	5,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$790,297.72</b>	<b>\$773,226.63</b>	<b>\$958,800</b>	<b>\$996,500</b>	<b>\$981,500</b>	<b>\$986,500</b>
<b>TOTAL STRATEGIC SERVICES</b>	<b>\$896,750.19</b>	<b>\$1,159,430.44</b>	<b>\$1,577,800</b>	<b>\$1,691,500</b>	<b>\$1,679,000</b>	<b>\$1,697,000</b>

# Strategic Services Department

2021/22 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 5

Account	Description	Account Total
<b>58213-000</b>	<b>Uniforms.....</b>	\$ 56,300
	Attire for all uniformed positions in all departments including shirts, pants, duty boots, accessories, badges, belts, sweatshirts, and alterations	45,000
	PROJECT: Flame resistant uniform t-shirts	11,300
<b>60221-000</b>	<b>Janitorial Supplies and Laundry Services.....</b>	\$ 35,000
	Janitorial and cleaning supplies for all District facilities; truck towel and floor mat laundry	
<b>60223-003</b>	<b>Supplies/Equipment; Medical.....</b>	\$ 80,000
	Medical equipment and supplies, pharmaceuticals, automatic external defibrillators (AED's) bio-waste disposal, medical oxygen cylinders, and personal protective equipment	
<b>60223-006</b>	<b>Supplies; Logistics and Facility Maintenance.....</b>	\$ 5,000
	Tools, supplies, and equipment for the performance of logistics and facility maintenance activities	
<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>	\$ 17,000
	General facility furnishings and appliances including televisions	
<b>60223-016</b>	<b>Supplies; Facilities.....</b>	\$ 13,000
	Supplies for all facilities including but not limited to lightbulbs, extension cords, garden supplies, mattress covers, kitchen 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>	\$ 225,000
<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>		\$ 24,200
	General maintenance and repair	12,000
	PROJECT: Asphalt sealing	10,700
	PROJECT: BC office remodel	1,500
<b>111- Central Point Station.....</b>		\$ 32,400
	General maintenance and repair	10,000
	PROJECT: Asphalt sealing and repair	22,400

# Strategic Services Department

2021/22 Fiscal Year

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

General Fund 1, Department 5

Account	Description	Account Total
112-	<b>Dodge Bridge Station</b> ..... General maintenance and repair	\$ 5,000
113-	<b>Sam's Valley Station</b> ..... General maintenance and repair	\$ 5,000
114-	<b>Gold Hill Station</b> ..... General maintenance and repair	\$ 6,000
115-	<b>Agate Lake Station</b> ..... General maintenance and repair	\$ 10,000
116-	<b>Eagle Point Station</b> ..... General maintenance and repair	\$ 10,000
117-	<b>Table Rock Station</b> ..... General maintenance and repair	\$ 3,000
118-	<b>Scenic Station</b> ..... General maintenance and repair	\$ 5,000
120-	<b>Training Center/Storage/Offices</b> ..... General maintenance and repair PROJECT: Asphalt sealing	\$ 23,000 6,000 17,000
121-	<b>Administrative Building</b> ..... General maintenance and repair PROJECT: HVAC Filter Relocation PROJECT: Asphalt sealing	\$ 30,600 15,000 6,600 9,000
122-	<b>Logistics Warehouse</b> ..... General maintenance and repair	\$ 2,000
123-	<b>Fire Science Center</b> ..... General maintenance and repair	\$ 2,000
60254-000	<b>M&amp;R; District Equipment</b> ..... Includes but is not limited to breathing air compressors, forklift, ATV, flatbed trailer, scissor lift, blowers, sprayer, and fuel tanks	\$ 10,000
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	\$ 5,000

# Strategic Services Department

2021/22 Fiscal Year

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

General Fund 1, Department 5

Account	Description	Account Total
60265-000	<b>Community Risk Reduction</b> ..... Provide for Community Risk Reduction efforts 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	\$ 55,000
60267-000	<b>Community Care Program</b> ..... Support for the Community Care Program such as specialized medical and diagnostic equipment, supplies, etc.	\$ 13,500
60270-000	<b>Contractual/Professional Services</b> ..... Includes annual fire alarm monitoring, fire sprinkler testing	\$ 8,000
60410-000	<b>Membership and Certifications</b> .....	\$ 1,000
60412-000	<b>Subscriptions</b> .....	\$ 500
60500-	<b>Utilities; Stations and Facilities</b> ..... Includes electricity, natural gas, propane, water, garbage, sewer, telephone, internet, and cable or satellite television services	\$ 218,000
110-	<b>White City Station</b>	35,000
111-	<b>Central Point Station</b>	23,000
112-	<b>Dodge Bridge Station</b>	14,000
113-	<b>Sams Valley Station</b>	14,000
114-	<b>Gold Hill Station</b>	14,000
115-	<b>Agate Lake Station</b>	10,000
116-	<b>Eagle Point Station</b>	23,000
117-	<b>Table Rock Station</b>	5,000
118-	<b>Scenic Station</b>	23,000
120-	<b>Training Center/Storage/Offices</b>	15,000
121-	<b>Administrative Building</b>	37,000
123-	<b>Fire Science Center</b>	5,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 986,500</b>



# Technology

# Fire District 3



## 2021/22 Fiscal Year Budget

# Technology Department

2021/22 Fiscal Year

## DEPARTMENT DESCRIPTION

The Information Technology Department (IT) is responsible for supporting the District’s data management and computing infrastructure that connects all District facilities, 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 data computers, mobile and portable radios, and cellular phones.

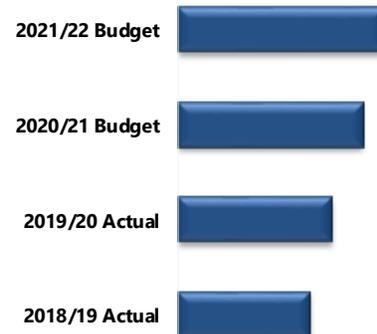
IT maintains proper licensing and maintenance contracts for District owned software and hardware. The department partners with all divisions to evaluate technology requirements and helps determine the best solutions to meet both immediate and long-term needs.

IT manages Geographical Information Systems (GIS) and produces GIS maps for response zone analysis, workflow analysis, and deployment standards. 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	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
Personnel Services	\$137,297	\$146,736	\$157,000	\$162,000
Materials and Services	\$158,827	\$198,111	\$257,400	\$302,000
	<b>\$296,124</b>	<b>\$344,847</b>	<b>\$414,400</b>	<b>\$464,000</b>

## Budget Comparison



## PERSONNEL SUMMARY

Position	2018/19 Actual	2019/20 Actual	2020/21 Budget	2021/22 Budget
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>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase 3.2 percent or \$5,000 over the prior fiscal year. Factors impacting this classification include salary and benefit adjustments due to cost of living and pension plan and insurance renewal increases.

The Materials and Services classification is budgeted to increase 17.3 percent or \$44,600. Contributing factors include continued emphasis in data analytics programs that support emergency response, reporting, records management, and citizen involvement in their own safety. Technology supplies and equipment has increased \$25,000 due to replacing mobile computer hardware and implementing some smartboard projectors. Technical support has increased \$5,000 to accommodate hiring outside data development consultants and communication services has increased \$5,000 to accommodate more devices requiring data usage.

# Technology Department

2021/22 Fiscal Year

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## **PRIOR YEAR ACCOMPLISHMENTS**

- Implemented a new digital information dashboard at Administration.
- Implemented FirstDue preplanning system to Operations and Fire & Life Safety staff.
- Implemented Community Connect program to facilitate better community engagement.
- Supported the uploading of incident reports to the State Fire Marshal’s office.
- Upgraded the network, internet connections, and servers at several District facilities.
- Replaced and maintained mobile data computer systems in District apparatus.
- Coordinated technology items for Community Care program.
- Provided desktop computer support to over 100 users.
- Continued maintenance of network security to prevent infection or hacking of District technology systems.

## **DEPARTMENT MEASUREMENTS AND TARGETS**

<i>Types of Transactions (Output Measures)</i>	<i>2017/18 Actual</i>	<i>2018/19 Actual</i>	<i>2019/20 Actual</i>	<i>2020/21 Target</i>	<i>2021/22 Target</i>
<i>Maintain Computer Workstations</i>	50	50	60	70	75
<i>Mobile Display Computers and Tablets</i>	10	15	18	20	21
<i>Network Servers</i>	2	4	8	15	15
<i>Network Services Uptime Target</i>	99%	99%	99%	99%	99%

## **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 implement data information dashboard in Admin building in preparation for buildout to fire stations.
- 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.

# Technology Department

2021/22 Fiscal Year

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## **2021/22 FISCAL YEAR DEPARTMENTAL TASKS**

The District's adopted 2021-2023 Strategic Plan is the overarching document that provides direction for the organization. Six strategic initiatives identify what is critically important and the level of service the District desires to deliver for the community. Under each initiative a goal is identified that supports the success of the initiative and then objectives are identified that support the success of that goal. Under each objective several tasks may be identified that support the accomplishment of the intended outcome. The initiatives and goals stay constant with the plan however the objectives and corresponding tasks may change with the fiscal year and typically drive a lot of the budget development. Some tasks have cost impact; others have minimal impact.

The following tasks are assigned to the Technology Department and link back to one of the six organizational strategic initiatives.

### **Initiative 2**

**Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.**

<b>Goal 2.2</b>	<b>Evolve service delivery models to better focus resources</b>		
<b>Objective</b>	Utilize data to drive all service delivery models		
<b>Task</b>	Develop and enhance a data dashboard with connection to applicable data resources	<b>Target Completion Date:</b>	June 30, 2022
<b>Task</b>	Provide an informational dashboard in responder work locations to enhance service delivery	<b>Target Completion Date:</b>	December 31, 2021

<b>Objective</b>	Keep up with technology to support communities		
<b>Task</b>	Evaluate and integrate technology solutions that enhance and support service to communities within the District	<b>Target Completion Date:</b>	December 31, 2023

<b>Goal 2.3</b>	<b>Maintain fiscal responsibility</b>		
<b>Objective</b>	Assess capital needs and plan accordingly		
<b>Task</b>	Develop a formalized technology related capital resources plan	<b>Target Completion Date:</b>	December 31, 2021

### **Initiative 3**

**Develop, promote, and demonstrate professionalism and excellence throughout the organization.**

<b>Goal 3.1</b>	<b>Enhance employee development process</b>		
<b>Objective</b>	Expand cross-training in functional areas		
<b>Task</b>	Provide personnel the opportunities to grow and understand the District's technology needs	<b>Target Completion Date:</b>	December 31, 2021

# Technology Department

2021/22 Fiscal Year

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## Initiative 6

**Commit to excellence through innovation.**

<b>Goal 6.1</b>	<b>Focus on innovation to improve service delivery</b>		
<b>Objective</b>	Continue to improve options of service delivery using technology		
<b>Task</b>	Evaluate the use of current and emerging technologies to enhance current programs and response	<b>Target Completion Date:</b>	June 30, 2023
<b>Objective</b>	Embrace innovation to better support the service delivery models		
<b>Task</b>	Explore opportunities to test and evaluate technologies to enhance service delivery	<b>Target Completion Date:</b>	June 30, 2023

# Technology Department

2021/22 Fiscal Year

General Fund	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2018/19 FY	2019/20 FY	2020/21 FY	2021/2022		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	95,825.61	99,351.02	101,500	102,500	102,500	102,500
Incentives	4,551.60	4,661.85	5,100	6,100	6,100	6,100
Payouts	0.00	0.00	4,000	4,000	4,000	4,000
Retirement (PERS)	8,397.08	13,126.42	13,200	16,000	16,000	16,000
ER Deferred Comp Contrib	4,321.63	4,416.00	5,500	5,500	5,500	5,500
Health & Life Insurance	12,573.72	13,176.60	15,000	14,700	14,700	14,700
HRA-VEBA Contribution	3,965.05	4,063.92	4,100	4,200	4,200	4,200
FICA and Medicare PR Taxes	7,655.32	7,916.04	8,100	8,500	8,500	8,500
Workers' Comp Insurance	7.34	24.63	500	500	500	500
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$137,297.35</b>	<b>\$146,736.48</b>	<b>\$157,000</b>	<b>\$162,000</b>	<b>\$162,000</b>	<b>\$162,000</b>
<b>Materials and Services</b>						
Supplies; Computers and Tech	37,809.85	51,724.71	30,000	55,000	55,000	55,000
Supplies; Communication Devices	12,023.15	15,913.05	25,000	20,000	20,000	20,000
Licenses and Subscriptions	70,286.72	94,737.06	150,400	165,000	165,000	165,000
Technical Support	7,318.15	4,505.25	13,000	18,000	18,000	18,000
M&R; Office and Tech Equip	5,205.52	5,822.81	7,000	7,000	7,000	7,000
M&R; Communication Devices	5,149.23	3,659.84	7,000	7,000	7,000	7,000
Communication Services	21,033.88	21,747.80	25,000	30,000	30,000	30,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$158,826.50</b>	<b>\$198,110.52</b>	<b>\$257,400</b>	<b>\$302,000</b>	<b>\$302,000</b>	<b>\$302,000</b>
<b>TOTAL TECHNOLOGY</b>	<b>\$296,123.85</b>	<b>\$344,847.00</b>	<b>\$414,400</b>	<b>\$464,000</b>	<b>\$464,000</b>	<b>\$464,000</b>

# Technology Department

2021/22 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>	\$ 55,000
	Technology related equipment and supplies including computers, laptops, tablets, monitors, printers, keyboards, speakers, software, routers, cables, connectors, switches, and general supply items	30,000
	PROJECT: Mobile data computers (3)	14,000
	PROJECT: Smartboard projectors for FSC	8,000
	PROJECT: Network backup system	3,000
<b>60223-013</b>	<b>Supplies; Communication Devices.....</b>	\$ 20,000
	Radio equipment, communication devices, and batteries for pagers	
<b>60240-000</b>	<b>Licenses and Subscriptions.....</b>	\$ 165,000
	Image Trend annual subscription (records management system)	25,000
	Vector Solutions (staffing, training, logistics software platform)	20,000
	First Due (preplanning software)	15,000
	Springbrook (financial, HR, employee self-service software)	14,000
	First Pass patient centric view software setup	10,000
	Office 365	13,000
	911 Eye (911 over video)	10,000
	First Watch annual subscription for CAD and ImageTrend surveillance	8,000
	Datto Network Cloud Backup	6,600
	Sierra Wireless for WiFi engine routers	4,800
	ArcMail service (Email backup)	4,500
	Website hosting	4,100
	Shortel annual license and limited support (phone system)	3,500
	Radio over LTE Interface (Tango Tango)	4,000
	First Arriving dashboard subscriptions	2,800
	Pulse Point Verified Responder	2,500
	Trend security (antivirus)	2,400
	Archive social media records retention	2,400
	Emergency Reporting (records management system)	2,000
	Photocopier lease payment	1,700
	SonicWall (server firewall), Experts Exchange, Adobe InDesign	1,500
	Cisco smartnet subscription for firmware updates	1,500
	GIS software	1,000
	Zoom video conferencing	2,000
	Appraver secure spam filter (Email)	500
	DNS hosting and Active 911	700
	BDR support	500
	IBM support (backup server and Shortel phone server)	500
	3E online safety data sheet management	500
<b>60241-000</b>	<b>Technical Support and Contracts.....</b>	\$ 18,000
	Core Business Solutions updates and monitoring support	4,000
	GIS support, RMS support, other hardware/software support	4,000
	Data analytics support	10,000
<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>	\$ 7,000
	Reprogramming and repair of pagers, radios, tablets, mobile computers	
<b>60290-000</b>	<b>Communication Services.....</b>	\$ 30,000
	Monthly expenses for mobile phone plans, WiFi cards for mobile devices	
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 302,000</b>



# Capital Projects Fund

# Fire District 3



## 2021/22 Fiscal Year Budget

# Capital Projects Fund

2021/22 Fiscal Year

## **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.

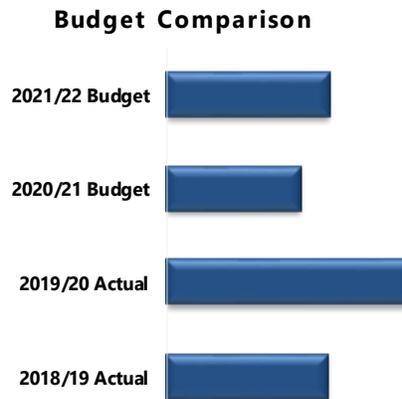
The Specification Committee consisting of District members develop the technical requirements of each apparatus purchased. The Committee reviews specifications and makes site visits to the manufacturing plant ensuring that the unit purchased will meet the District’s requirements. Once an apparatus is 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 identified in the Capital Replacement Schedule. They are usually planned out on a rotation cycle for replacement based on their expected life span. Capital expenditures considered non-routine are those projects not typically scheduled out on a replacement plan and may be unique in nature.

## **BUDGET SUMMARY**

<b>Expenditures</b>	<b>2018/19 Actual</b>	<b>2019/20 Actual</b>	<b>2020/21 Budget</b>	<b>2021/22 Budget</b>
Capital Expenditures	\$2,182,460	\$5,134,291	\$417,500	\$1,417,000
Contingency	\$0	\$0	\$18,100	\$119,000
Reserve for Future/Ending Fund Balance	\$3,705,435	\$3,838,044	\$4,460,200	\$4,626,400
	<b>\$5,887,895</b>	<b>\$8,972,335</b>	<b>\$4,895,800</b>	<b>\$6,162,400</b>



# Capital Projects Fund

2021/22 Fiscal Year

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## **NEW BUDGETARY SIGNIFICANT CHANGES**

Capital expenditures planned for and considered routine in nature for this budget include the purchase of a new network computer server to replace an outdated model and medical equipment in the form of an i-STAT system. The i-STAT will provide medical responders with an advanced, easy-to-use monitor that will deliver real-time, lab quality results on a patient's blood, electrolytes, metabolites, and coagulation. These items are budgeted for a total cost of \$27,000.

The District received a \$190,000 grant from the Oregon State Fire Marshal's Office at the end of fiscal year 2021. Appropriated in this budget is the grant expenditure of \$40,000 for a wood chipper and \$150,000 as a pass-through to the 911 dispatch center (ECSO) for CAD to CAD interface technology to link the various dispatch entities into one system.

Identified in the Capital Replacement Schedule is the purchase of two tactical tenders. These tenders will replace a 1991 and 1994 unit that will be surplus'd out of the fleet. The tenders will be on a Freightliner chassis with a 500 gallon pump tank. The District has budgeted \$800,000 for these units.

Two staff vehicles are budgeted to be replaced in accordance with the Capital Replacement Schedule and are considered purchases routine in nature. Ford F150 pickup trucks are spec'd and will be equipped with response ready equipment for a total budgeted cost of \$140,000. These units will replace older staff vehicles that will transition to reserve car pool.

A new command unit for the battalion chief will be purchased in accordance with the Capital Replacement Schedule. This unit will replace the existing unit due to mileage, wear, and tear. In the 2020/21 fiscal year the Ford F350 chassis was purchased from the vendor; this budget recognizes \$125,000 for the completion of the unit which includes the manufacturing of the custom box, radios, electronics, and emergency lighting. The existing unit will go into reserve status.

This budget has identified \$35,000 for the purchase of a van for logistics personnel. This unit is a new concept for the District and therefore is not considered a routine capital purchase identified on the replacement schedule. The van will improve efficiencies in logistics with transferring supplies between District locations and by providing a space in transporting that is safe from the weather elements.

This budget also has \$35,000 budgeted for exterior siding and painting of the Dodge Bridge station and \$25,000 budgeted for enclosing the outdoor training classroom at the White City campus.

The budget has identified \$40,000 to finish out the infrastructure of the Scenic Park, a joint effort between the City of Central Point, School District 6, and the Central Point Rotary Club. Located next to the new Scenic fire station and the Scenic Middle School, the park will serve students and local residents.



# Capital Projects Fund

2021/22 Fiscal Year

## CAPITAL REPLACEMENT SCHEDULE

The Capital Replacement Schedule reflects apparatus and equipment to be replaced within the next ten years. Expenditures are considered routine in nature because they are on a rotation replacement schedule. In addition, other non-routine items are identified on the plan during the immediate years the purchase is planned for or during construction, in order to provide transparency and depict funding status.

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
		20/21 FY	21/22 FY	22/23 FY	23/24 FY	24/25 FY	25/26 FY	26/27 FY	27/28 FY	28/29 FY	29/30 FY	30/31
Structural Engine	10/20/25 years					2				2		
Interface Engine	20/30 years											
Wildland Engine	20/30 years				4		2			1		
Tactical Tender	20/30 years		2			1						
Aerial Ladder Truck	25 years							1				
Rescue/Ambulance	25 years											
Battalion Chief Command Unit	5/10/15 years	1	1				1					
Technical Rescue Truck	20 years											
Staff Vehicle	10/20 years	1	2						3			
Service Vehicle	20 years											
<b>Suppression Equipment</b>												
Breathing Apparatus	15 years											
Defibrillators/AED's	10 years	1				6						
Extrication Equipment	10 years	2			2							
Thermal Imagers	7 years	5							5			
Radio's - Portable and Mobile	15 years											
<b>Technology</b>												
Computer Main Server	5 years		1			1			1			

### 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.

# Capital Projects Fund

2021/22 Fiscal Year

## 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.

## Capital Projects and Costs

The Capital Replacement Schedule below details apparatus and equipment to be replaced and the estimated cost ten years into the future. The prior year is also depicted as a reference only. The District has based this schedule on a three percent inflationary factor per year from today's replacement cost value.

SCHEDULED - Apparatus and Vehicles	Current Cost	Prior Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
		20/21 FY	21/22 FY	22/23 FY	23/24 FY	24/25 FY	25/26 FY	26/27 FY	27/28 FY	28/29 FY	29/30 FY	30/31
Structural Engine	\$630,000		-	-	-	1,418,141	-	-	-	1,596,130	-	-
Interface Engine	\$385,000		-	-	-	-	-	-	-	-	-	-
Wildland Engine	\$84,000		-	-	367,156	-	194,758	-	-	106,409	-	-
Tactical Tender	\$390,000		800,000	-	-	438,948	-	-	-	-	-	-
Aerial Ladder Truck	\$1,000,000		-	-	-	-	-	1,194,052	-	-	-	-
Rescue/Ambulance	\$160,000		-	-	-	-	-	-	-	-	-	-
Battalion Chief Command Unit	\$144,000	147,000	125,000	-	-	-	162,923	-	-	-	-	-
Technical Rescue Truck	\$90,000		-	-	-	-	-	-	-	-	-	-
Staff Vehicle	\$69,000	60,000	140,000	-	-	-	-	-	246,058	-	-	-
Service Vehicle	\$75,000		-	-	-	-	-	-	-	-	-	-
		\$ 207,000	\$ 1,065,000	\$ -	\$ 367,156	\$ 1,857,090	\$ 357,681	\$ 1,194,052	\$ 246,058	\$ 1,702,539	\$ -	\$ -
<b>SCHEDULED - Suppression</b>												
Breathing Apparatus	\$450,000		-	-	-	-	-	-	-	-	-	-
Defibrillators/AED's	\$30,000	25,000	-	-	-	194,838	-	-	-	-	-	-
Extrication Equipment	\$28,500	35,000	-	-	61,383	-	-	-	-	-	-	-
Thermal Imagers	\$7,000	37,000	-	-	-	-	-	41,604	-	-	-	-
Radio's - Portable and Mobile	\$4,800		-	-	-	-	-	-	-	-	-	-
		\$ 97,000	\$ -	\$ -	\$ 61,383	\$ 194,838	\$ -	\$ -	\$ 41,604	\$ -	\$ -	\$ -
<b>SCHEDULED - Technology</b>												
Computer Main Server	\$15,000		-	-	-	16,557	-	-	17,830	-	-	-
		\$ -	\$ 15,000	\$ -	\$ -	\$ 16,557	\$ -	\$ -	\$ 17,830	\$ -	\$ -	\$ -
<b>Other Proposed Projects (non-routine in nature)</b>												
Fire Station Site Development and Construction	1,000		-	-	-	-	-	-	-	-	-	-
Scenic Fuel Station	8,000		-	-	-	-	-	-	-	-	-	-
Scenic Park Development	50,000		40,000	-	-	-	-	-	-	-	-	-
Outdoor Classroom Enclosure			25,000	-	-	-	-	-	-	-	-	-
Dodge Bridge Siding and Paintings			35,000	-	-	-	-	-	-	-	-	-
i-STAT Lab Monitor			12,000	-	-	-	-	-	-	-	-	-
Logistics Van			35,000	-	-	-	-	-	-	-	-	-
OSFM Grant (Chipper and CAD)			190,000	-	-	-	-	-	-	-	-	-
		\$ 59,000	\$ 337,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Project Costs</b>	<b>\$ 363,000</b>	<b>\$ 1,417,000</b>	<b>\$ -</b>	<b>\$ 428,539</b>	<b>\$ 2,068,485</b>	<b>\$ 357,681</b>	<b>\$ 1,194,052</b>	<b>\$ 305,492</b>	<b>\$ 1,702,539</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

# Capital Projects Fund

2021/22 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 potential fund deficits and overall fund sustainability. Year one of the schedule is the current year budget and represents the actual transfer that the General Fund is able to support. Years two through ten depict the minimum transfer amount of \$300,000 as established by policy. In years where the ending fund balance represents a deficit, the District uses this information to prepare for the future by providing either higher transfers or planning for other revenue sources to prevent an actual fund deficit from occurring.

Prior Year 20/21 FY	Year 1 21/22 FY	Year 2 22/23 FY	Year 3 23/24 FY	Year 4 24/25 FY	Year 5 25/26 FY	Year 6 26/27 FY	Year 7 27/28 FY	Year 8 28/29 FY	Year 9 29/30 FY	Year 10 30/31	
<b>Beginning Fund Balance</b>	\$3,838,000	\$4,570,200	\$4,745,400	\$5,045,400	\$4,916,861	\$3,148,376	\$3,090,696	\$2,196,643	\$2,191,151	\$788,612	\$1,088,612
Transfers in from General Fund *	996,200	1,591,400	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Other Revenue **	21,500	800	-	-	-	-	-	-	-	-	-
Expenditures	285,500	1,417,000	-	428,539	2,068,485	357,681	1,194,052	305,492	1,702,539	-	-
<b>Ending Fund Balance ***</b>	<b>\$4,570,200</b>	<b>\$4,745,400</b>	<b>\$5,045,400</b>	<b>\$4,916,861</b>	<b>\$3,148,376</b>	<b>\$3,090,696</b>	<b>\$2,196,643</b>	<b>\$2,191,151</b>	<b>\$788,612</b>	<b>\$1,088,612</b>	<b>\$1,388,612</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

## Future Projects

After the completion of the Scenic station in 2020, no other immediate construction projects are planned. In the ensuing fiscal years the replacement of apparatus will be budgeted for in accordance with the normal life cycle.

## Capital Construction Historical

The following is a list of capital projects the District has completed over the years and how they were funded.

### 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*
- Scenic Fire Station – *Constructed 2020*

### Projects funded with budgeted District funds:

- Eagle Point Land Acquisition – *Purchased 2002*
- Training Center Complex and Parking Lot – *Constructed 2003*
- Central Point Station Remodel – *Constructed 2004*
- White City Fire Station Remodel – *Constructed 2009/2010*
- Manufactured Residences – *Placed in 2013; Two additional homes placed in 2016*
- Table Rock Temporary Station and Residence Quarters – *Constructed 2015*
- Scenic Avenue Land Acquisition, Central Point – *Purchased 2018*

### Projects funded by donations:

- Training Center Tower, Warehouse, and Training Grounds – *Constructed 2003*
- Simulation Training House – *Constructed 2016*
- Fire Science Educational Facility – *Constructed 2018/2019*  
*\*Funded by RCC and the District 50/50*

# Capital Projects Fund

2021/22 Fiscal Year

**RELATIONSHIP OF CAPITAL EXPENDITURE BUDGET TO ANNUAL OPERATING BUDGET**

When analyzing the District’s capital replacement an evaluation is also made on how certain expenditures will impact annual operations in the **General Fund**. The effect on the General Fund is an important factor because the majority of resources to the Capital Fund derive from transfers from the General Fund. If the General Fund is not able to sustain transfers, such as 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.

The budgeted capital expenditures identified below are anticipated to have the following impact on the General Fund operating budget. Those capital expenditures budgeted but not identified below are not expected to have any significant impact on the operating budget. These items are either replacing existing inventory that have met their life expectancy or are items in nature that do not have significant maintenance and/or operating costs associated with them.

Project	Budgeted Cost	Description and Operating Budget Impact
<b><u>Apparatus and Vehicles</u></b>		
Tactical Tenders (2)	\$800,000	The impact of these units on the operating budget is anticipated to be \$7,000 each in fuel and operating costs, although these costs will be offset by their replacement of two older units whose front-line lifespans have been met. The older units will be surplus and sold. The new units will be under warranty so maintenance costs are expected to be minimal. In year’s three to seven, operating costs are projected to increase an additional 25 percent per unit, per year due to age, wear, and tear.
Staff Vehicles (2)	\$140,000	The impact of these new staff vehicles on the operating budget is anticipated to be an additional \$8,000 in fuel and operating costs. These vehicle will be under warranty so maintenance costs are expected to be minimal in the first three years. These vehicles are currently spec’d as Ford F150 pickups that will be assigned to Chief Officers as replacement units. Existing units will go into reserve car pool. In year’s three to seven, operating costs are projected to increase by an additional 20 percent per unit, per year due to age, wear, and tear.
Battalion Chief Command Unit	\$125,000	The impact of this unit on the operating budget is anticipated to be an additional \$5,000 annually in fuel and operating costs. This unit is replacing an existing unit whose front-line lifespan has been met. The older unit will go into a reserve status and only be used when needed. The new unit will be under warranty so maintenance costs are expected to be minimal. In year’s three to seven, operating costs are projected to increase an additional 25 percent per year due to age, wear, and tear.
Van for Logistics	\$35,000	The impact on the operating budget of adding a van to the District fleet is anticipated to be an additional \$8,000 in fuel and operating costs.

# Capital Projects Fund

2021/22 Fiscal Year

## APPARATUS AND VEHICLE LIFESPAN

	FD3 No.	Unit No.	VIN	Make	Model	Status	Mfg Year	Year to Replace
<b>STRUCTURAL ENGINES - LIFESPAN: 10 - Front Line Career (4) / 20 - Primary Reserve (2) / 25 - Volunteer (4)</b>								
7701	55	SE 18-01	4P18AAFF7KA019463	PIERCE	PUC	Career	2018	2028
7708	48	SE-14-01	4P1CJ01A6EA014530	PIERCE	PUC	Career	2014	2024
7706	49	SE-14-02	4P1CJ01A6EA014531	PIERCE	PUC	Career	2014	2024
7702	56	SE 18-02	4P1BAAFF9KA019464	PIERCE	PUC	Career	2018	2028
7711	2	SE 05-01	4P1CS01A75A005039	PIERCE	SABER	Reserve	2005	2025
7712	1	SE 08-01	4P1CJ01A28A008554	PIERCE	IMPEL	Reserve	2008	2028
7704	4	SE 02-01	4P1CT02U72A002286	PIERCE	SABER	Volunteer	2002	2027
7703	6	SE 03-01	4P1CT02U33A003212	PIERCE	SABER	Volunteer	2003	2028
7707	5	SE 90-01	1FDYD80U0LVA00334	FORD	PIERCE	Volunteer	1990	2015
7705	8	SE 99-01	4P1CT02U6XA01005	PIERCE	SABER	Volunteer	1999	2024
7713	9	SE 97-01	4P1CT02U5VA000363	PIERCE	SABER	Vol Reserve	1997	2022
7718	59	SE 20-01	1FVDCYFE3LHLR2119	PIERCE	FX3	Career	2020	2030
<b>AERIAL - LIFESPAN: 25 Years</b>								
7722	10	LT 01-01	4P1CT02S21A001320	PIERCE	AERIAL	Career	2001	2026
<b>TENDER - LIFESPAN: 20 - Tactical (2) / 30 - 3000+ (3)</b>								
7741	54	TN 17-01	1FVACYBS4DHB2663	PIERCE	TENDER	Tactical	2017	2037
7744	12	TN 91-01	1FDYU90T2MV A08708	FORD	TENDER	3000+	1991	2021
7747	11	TN 94-01	1FTY Y95R3RV A32738	FORD	TENDER	3000+	1994	2024
7745	47	TN 13-01	1FVACYBS4DHB2663	PIERCE	TENDER	Tactical	2013	2033
7746	46	TN-13-02	1FVACYBS6DHB2664	PIERCE	TENDER	Tactical	2013	2033
<b>WILDLAND ENGINES - LIFESPAN: 20 - Career / 30 - Volunteer</b>								
7766	19	WL 00-01	1FDXF47F8YEC47548	FORD	F450	Career	2000	2020
7768	25	WL 03-01	1FDXF47F93EC03351	FORD	F450	Career	2003	2023
7762	26	WL 04-01	1FDXF47F94EB87539	FORD	F450	Career	2004	2024
7761	29	WL 08-02	3D6VD66A18G119694	DODGE	S4T	Career	2008	2028
7764	21	WL 96-01	2FDKF38F7TCA56768	FORD	F350	Volunteer	1996	2026
7765	22	WL 96-02	2FDKF38F5TCA56770	FORD	F350	Volunteer	1996	2026
7767	24	WL 96-03	2FDKF38F9TCA56769	FORD	F350	Volunteer	1996	2026
7763	20	WL 97-01	1FDKF38F2VEA14876	FORD	F350	Volunteer	1997	2027
<b>AMBULANCE - LIFESPAN: 25 YEARS</b>								
7732	17	AM 07-01	1FDWE35P67DA11974	FORD	AMB	Career	2007	2032
7731	18	AM 10-01	1FDWE3FP9ADA40990	FORD	AMB	Career	2010	2035
<b>TECHNICAL RESCUE TEAM - LIFESPAN: Truck - 25 Years</b>								
7792	23	TRT 08-01	1FDXW47RX8EA56742	FORD	F450	WC	2008	2033
		TRT 1996	1WC200D18T4025539	WELCA	TRAILER	WC		
<b>BATTALION CHIEF - LIFESPAN - 5 for front line, 10 for reserve</b>								
BAT3	50	SV 15-01	1FD8X3FT9FEA35502	FORD	F350	7753	2015	2020
RBAT3	33	SV 08-01	3D7MX39AX8G213884	DODGE	3500 PU	Reserve BC	2008	2018
<b>STAFF - Duty Officer and FLS - 10 Years, Service Truck - 20 years</b>								
7754	51	SV 16-01	1FTFW1EG6GFA56004	FORD	F150	Duty Officer	2016	2026
7752	43	SV 11-01	1D7RV1CT7BS634164	DODGE	PU	FLS	2011	2021
7755	60	SV 20-01	1FTEW1E45LFC73930	FORD	F150	Duty Officer	2020	2030
7756	44	SV 11-02	1D7RV1CT9BS634165	DODGE	PU	Duty Officer	2011	2021
7730	52	SV 17-01	1FM5K8ATXHGB54642	FORD	INTERCEPTOR	Duty Officer	2017	2027
7770	16	AM 02-01	1FDWE35F12HA73162	FORD	AMB	Training	2002	
7771	45	SV 11-03	3D6WZ4EL0BG586461	DODGE	R3500	Service Trk	2011	2031
7774	57	SV 19-01	1FTFX1E49KKE84006	FORD	F150	FLS	2019	2029
7776	58	SV 19-02	1FTFX1E47KKE84005	FORD	F150	FLS	2019	2029
7778	53	SV 17-02	1FM5K8AT1HGB54643	FORD	INTERCEPTOR	FLS	2017	2027
<b>POOL - 15-20 Years</b>								
	31	SV 03-01	1D4HS58N23F578454	DODGE	DUR	Pool	2003	
7773	35	SV 02-02	1B7HU18Z62J105090	DODGE	1500 PU	Training	2002	
	39	SV 06-01	1D7HW48NX6S570616	DODGE	DAK PU	Pool	2006	
	40	SV 06-02	1D7HW48N16S570617	DODGE	DAK PU	Pool	2006	
7700	37	SV 09-01	1GCDDT13E298135095	CHEVY	COLORADO	FLS	2009	
	41	SV 09-02	1GCDDT13EX98124992	CHEVY	COLORADO	FLS	2009	
<b>MISCELLANEOUS</b>								
7779		SV 38-01	BF3846L1022	LAFR	ANTIQUA	Antique	1938	
		2001	16HCB12281U024107	HAULM	TRAILER	WC		
		1995	1WC200G29S4019168	WELCA	TRAILER	WC		
		2005	JK1AFEB175B500717	KAWAS	ATV	WC		
		2019	5PTBD1014K1032922	SNAKE RVR	TRAILER	WC	2019	
		2017	58XBF2024H1000698	FABFM	TRAILER	WC	2017	

# Capital Projects Fund

2021/22 Fiscal Year

## Revenues and Expenditures by Account

Capital Projects Fund Description	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2018/19 FY	2019/20 FY	2020/21 FY	2021/2022		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Beginning Fund Balance	3,316,812.61	3,705,434.78	3,898,800	4,521,200	4,521,200	4,570,200
Sale of Capital Equip & Vehicles	5,000.00	0.00	500	500	500	500
Grants; Local, State, Federal	543,177.00	0.00	100	100	100	100
Donations	476,804.91	0.00	100	100	100	100
Transfer from General Fund	1,546,100.00	1,266,200.00	996,200	1,439,400	1,496,900	1,591,400
Loan Proceeds	0.00	4,000,700.00	100	100	100	100
	<b>5,887,894.52</b>	<b>8,972,334.78</b>	<b>\$4,895,800</b>	<b>\$5,961,400</b>	<b>\$6,018,900</b>	<b>\$6,162,400</b>
Department Equipment	0.00	725,693.69	159,500	27,000	27,000	217,000
Apparatus and Vehicles	421,523.69	107,220.19	207,000	1,100,000	1,100,000	1,100,000
Land and Improvements	21,075.00	152,906.11	50,000	1,000	1,000	40,000
Building Construction & Improvements	1,739,861.05	4,148,470.98	1,000	1,000	60,000	60,000
Contingency	0.00	0.00	18,100	113,000	119,000	119,000
Reserve for Future Exp & End Fund Bal	0.00	0.00	4,460,200	4,719,400	4,711,900	4,626,400
	<b>2,182,459.74</b>	<b>5,134,290.97</b>	<b>\$4,895,800</b>	<b>\$5,961,400</b>	<b>\$6,018,900</b>	<b>\$6,162,400</b>
<b>Ending Fund Balance</b>	<b>\$3,705,435</b>	<b>\$3,838,044</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## Detail by Account

Capital Projects Fund

Account	Description	Account Total
<b>70530-000</b>	<b>Department Equipment.....</b>	<b>\$ 217,000</b>
	CAD to CAD interface system (pass-through funds to ECSO)	150,000
	Wood chipper for fuels reduction program	40,000
	i-STAT lab analysis monitor	12,000
	Network server	15,000
<b>70531-000</b>	<b>Apparatus and Vehicles.....</b>	<b>\$ 1,100,000</b>
	Tactical tender (2) (Freightliner)	800,000
	Staff vehicle (2) (Ford F150 pickup)	140,000
	BC vehicle (completion of unit started in 20/21 FY)	125,000
	Van for logistics	35,000
<b>70532-000</b>	<b>Land and Improvements.....</b>	<b>\$ 40,000</b>
	Scenic park infrastructure	40,000
<b>70533-000</b>	<b>Building Construction/Improvements.....</b>	<b>\$ 60,000</b>
	Dodge Bridge station exterior siding and painting project	35,000
	Outdoor training classroom exterior siding (enclosure of space)	25,000
<b>TOTAL CAPITAL EXPENDITURES</b>		<b>\$ 1,417,000</b>



# Supplemental Information

# Fire District 3



## 2021/22 Fiscal Year Budget

# Top Taxpayers

2021/22 Fiscal Year

**TOP TAXPAYERS:** The District tracks the top taxpayers for the current fiscal year and of ten years ago.

Top Taxpayers	Type of Business	2020			2010		
		Rank	Taxable Assessed Valuation	Tax Paid to District	Rank	Taxable Assessed Valuation	Tax Paid to District
Pacificorp	Electric Utilities	1	\$ 73,444,000	\$ 229,101	4	\$ 39,166,000	\$ 122,174
Boise Cascade Wood Products	Wood Manufacturer	2	\$ 68,737,068	\$ 214,418	3	\$ 41,183,000	\$ 128,466
Avista Corp	Natural Gas Utilities	3	\$ 52,918,000	\$ 165,072	10	\$ 15,426,000	\$ 48,120
Amy's Kitchen	Organic Food Mfg	4	\$ 50,527,950	\$ 157,617	7	\$ 17,541,330	\$ 54,718
Carestream Health Inc	Medical Mfg Plant	5	\$ 49,721,130	\$ 155,100	1	\$ 76,212,870	\$ 237,738
Linde LLC	Industrial Gases	6	\$ 43,198,860	\$ 134,755	8	\$ 17,538,070	\$ 54,708
Costco Wholesale Corp	Wholesale Retail	7	\$ 26,858,170	\$ 83,781			
CenturyLink	Telephone	8	\$ 23,428,000	\$ 73,081	9	\$ 17,363,600	\$ 54,164
Plycem USA LLC	Wood Siding Plant	9	\$ 16,580,110	\$ 51,720			\$ -
Table Rock Group LLC	Real Estate Developers	10	\$ 14,180,750	\$ 44,235	5	\$ 25,124,620	\$ 78,374
Wal-Mart	Retail	11	\$ 12,091,390	\$ 37,718	14	\$ 8,200,310	\$ 25,580
Murphy Company	Wood Products Mill	12	\$ 11,526,190	\$ 35,955			
Charter Communications	Cable Comm Provider	13	\$ 11,459,000	\$ 35,745			\$ -
Space LLC	Property Holdings	14	\$ 11,157,310	\$ 34,804	13	\$ 9,608,240	\$ 29,972
Smith Crossing LLC	Property Holdings	15	\$ 9,817,220	\$ 30,624			\$ -
USF Reddaway Inc	Trucking	16	\$ 9,599,090	\$ 29,943	18	\$ 7,046,420	\$ 21,981
PC Central Point LLC	Property Holdings	17	\$ 9,095,550	\$ 28,373			
Tomchi Oregon LLC	Investments	18	\$ 8,887,630	\$ 27,724			
Ron Deluca Trustee	Property Holdings	19	\$ 8,801,110	\$ 27,454			
Cascade Wood Products	Wood Products Mill	20	\$ 8,236,480	\$ 25,693			\$ -
			<b>\$ 520,265,008</b>	<b>\$ 1,622,915</b>			
Total District assessed value certified by Jackson County Treasurer			\$4,934,751,546		\$3,605,600,896		
Percent of top twenty taxpayers to total District assessed value			10.543%		7.611%		
Total property tax revenue received for year ending June 30th as stated on the governmental fund financial statements				\$ 14,205,874	\$ 10,855,422		
Percent of top twenty taxpayers to total District property tax revenue received				11.424%	7.885%		

# Summary of Assessed Values

2021/22 Fiscal Year

**SUMMARY OF ASSESSED VALUES:** The District tracks assessed valuation increases broken out between the cities and the unincorporated areas.

## Unincorporated Areas including White City

2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
\$2,086,359,059	\$2,192,594,013	\$2,263,221,391	\$2,340,508,449	\$2,466,173,066	\$2,554,351,321	\$2,666,376,219
	5.09%	3.22%	3.41%	5.37%	3.58%	4.39%

## City of Gold Hill

2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
\$68,264,529	\$71,355,116	\$73,155,754	\$75,354,098	\$80,446,032	\$83,752,472	\$88,069,402
	4.53%	2.52%	3.01%	6.76%	4.11%	5.15%

## City of Central Point

2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
\$1,091,728,520	\$1,131,372,600	\$1,173,815,611	\$1,226,268,279	\$1,299,855,035	\$1,343,235,803	\$1,400,692,822
	3.63%	3.75%	4.47%	6.00%	3.34%	4.28%

## City of Eagle Point

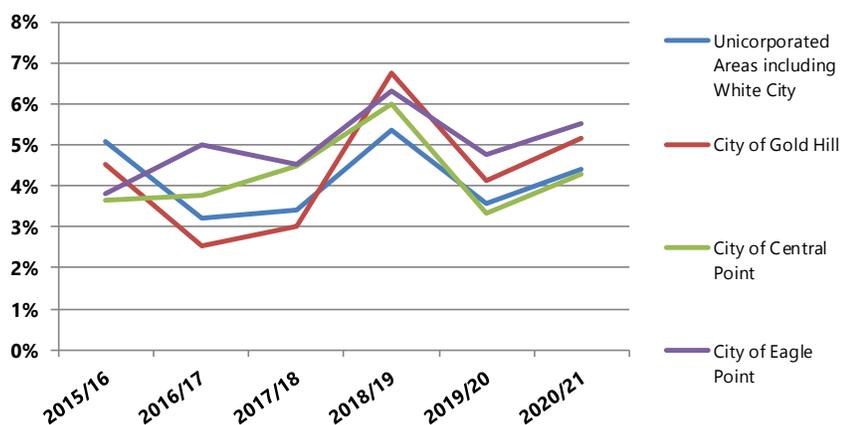
2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
\$582,331,866	\$604,425,784	\$634,616,194	\$663,251,693	\$705,232,847	\$738,930,152	\$779,613,103
	3.79%	4.99%	4.51%	6.33%	4.78%	5.51%

## Total Assessed Valuation for all Areas Combined

2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
\$3,828,683,974	\$3,999,747,513	\$4,144,808,950	\$4,305,382,519	\$4,551,706,980	\$4,720,269,748	\$4,934,751,546
	4.47%	3.63%	3.87%	5.72%	3.70%	4.54%

**AVERAGE 4.3229%**

**Assessed Value Growth Change by Area**



# Market and Assessed Value of Taxable Property

2021/22 Fiscal Year

**MARKET AND ASSESSED VALUES OF PROPERTY:** The District tracks the real market value and assessed value of all property within our jurisdictional boundaries in order to provide historical trend information.

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		
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
2017	5,023,056,736	3,851,671,032	166,414,930	162,100,918	131,053,865	131,037,000	5,320,525,531	4,144,808,950	77.90%	3.12
2018	5,382,278,747	3,992,477,093	169,434,429	165,001,496	146,841,330	147,903,930	5,698,554,506	4,305,382,519	75.55%	3.12
2019	6,105,191,638	4,170,153,832	187,655,842	182,831,248	199,297,456	198,721,900	6,492,144,936	4,551,706,980	70.11%	3.12
2020	6,519,859,904	4,356,883,298	190,738,622	184,799,150	178,593,115	178,587,300	6,889,191,641	4,720,269,748	68.52%	3.12

**Source:** Jackson County Assessment Department.

**Notes:** Tax rates are per \$1,000 of assessed value.

In May 1997, Oregon voters approved Measure 50 that revised the property tax system state-wide effective July 1, 1997. For property tax purposes, the measure changed a property's assessed valuation from real market value to a value for tax purposes. In addition, the maximum assessed value of a property was limited to a maximum of three percent growth per year. Accordingly since that date, there is a difference between market value and assessed value.

# Acronyms

2021/22 Fiscal Year

TERM	STANDS FOR
ADM	Administrative
AFG	Assistance to Firefighters Grant
AL	Agate Lake Station
ALS	Advanced Life Support
BC	Battalion Chief
BLS	Basic Life Support
BOD	Board of Directors
CAD	Computer Aided Dispatch
CAFR	Comprehensive Annual Financial Report
CAO	Chief Administrative Officer
CCP	Community Care Program
CFAI	Commission of Fire Accreditation International
CFOD	Chief Fire Officer Designation
CLIA	Clinical Laboratory Improvement Amendments
CO	Carbon Monoxide
COP	Certificates of Participation
CP	Central Point Station
CPR	Cardiopulmonary Resuscitation
CRR	Community Risk Reduction
CSC	Civil Service Commission
DB	Dodge Bridge Station
DC	Deputy Chief
DC	Division Chief
DEA	Drug Enforcement Agency
DFM	Deputy Fire Marshal
DPSST	Department of Public Safety Standards and Training
ECISO	Emergency Communications of Southern Oregon
EKG	Electro Cardio-Gram
EMS	Emergency Medical Services
EMT	Emergency Medical Technician
EP	Eagle Point Station
FC	Fire Chief
FCC	Federal Communications Commission
FEMA	Federal Emergency Management Agency
FF	Firefighter
FLS	Fire and Life Safety
FLSA	Fair Labor Standards Act
FLSS	Fire and Life Safety Specialist
FM	Fire Marshal
FMZ	Fire Management Zone
FTE	Full Time Equivalent
FY	Fiscal Year
GAAP	General Accepted Accounting Practices
GASB	Government Accounting Standards Board
GFOA	Government Finance Officers Association
GH	Gold Hill
GIS	Geographical Information System
HIPPA	Health Insurance Portability and Privacy Act

TERM	STANDS FOR
HRA VEBA	Health Reimbursement Arrangement Voluntary Employee's Beneficiary Association
I&M	Inspection and Maintenance
IAAI	International Association of Arson Investigators
IAFF	International Association of Firefighters
IFC	International Fire Code
IFSTA	International Fire Service Training Association
ITA	Information Technology Administrator
JC	Jackson County
JCFD4	Jackson County Fire District 4
LEPC	Local Emergency Planning Committee
LGIP	Local Government Investment Pool
LGPI	Local Government Personnel Institute
LTD	Long Term Disability
MDA	Mobile Display Computer
NEMSIS	National EMS Information System
NFORS	National Fire Operations Reporting System
NFPA	National Fire Protection Association
ODF	Oregon Department of Forestry
OFCA	Oregon Fire Chiefs Association
OFMA	Oregon Fire Marshals Association
OFSOA	Oregon Fire Service Office Administrators
OPS	Operations
OPSRP	Oregon Public Service Retirement Plan
OR	Oregon
OR-OSHA	Oregon Occupational Safety and Health Administration
PERS	Public Employees Retirement System
PPE	Personal Protective Equipment
RCC	Rogue Community College
RIT	Rapid Intervention Team
RITA	Rogue Interagency Training Association
RVFCA	Rogue Valley Fire Chiefs Association
RVPFF	Rogue Valley Prof Firefighters Local 1817
SAFER	Staffing for Adequate Fire and Emergency Response
SCBA	Self-Contained Breathing Apparatus
SDAO	Special Districts Association of Oregon
SS	Scenic Station
SV	Sams Valley Station
TAN	Tax Anticipation Note
TC	Training Center
TR	Table Rock Station
TRT	Technical Rescue Team
UEFB	Unappropriated Ending Fund Balance
UR	Urban Renewal
WC	White City Station
WCURA	White City Urban Renewal Agency

# Glossary of Terms

2021/22 Fiscal Year

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## **Account**

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

## **Accrual**

Term used in accounting in which revenues or expenses are recorded when a transaction occurs rather than when payment is received or made.

## **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.

## **Audit**

An annual process that involves an independent third party to review the financial records of the District and compliance with accounting standards.

## **Assets**

Property owned by the District that has monetary value.

## **Balanced Budget**

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

## **Bonds**

A form of a funding instrument, usually passed by voters, in which bonds are sold and the proceeds are used for a designated purpose.

## **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.

## **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.

# Glossary of Terms and Acronyms - *Continued*

2021/22 Fiscal Year

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## **Capital Outlays**

Expenditures for the acquisition of capital assets.

## **Chart of Accounts**

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

## **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.

## **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.

## **Dispatch**

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

## **Engine**

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

## **Expenses**

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

## **Full-time Equivalent**

Term used that indicates the workload of an employed person, typically 40 hours per week.

## **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.

# Glossary of Terms and Acronyms - *Continued*

2021/22 Fiscal Year

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## **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.

## **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.

## **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.

## **Incident**

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

## **Interface**

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

## **Levy**

Tax imposed/collected for the support of District activities.

## **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 statements.

## **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.

## **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.

## **Performance Measures**

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

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# Glossary of Terms and Acronyms - *Continued*

2021/22 Fiscal Year

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## **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.

## **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.

## **Shift**

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

## **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.

## **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.

## **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.

## **VA Southern Oregon Rehabilitation Center**

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

# JACKSON COUNTY FIRE DISTRICT 3

## Motion to Approve Budget for the 2021/2022 Fiscal Year

May 4, 2021

Motion by John Rachor and seconded by Rob Hernandez to impose a tax rate of \$3.1194 per \$1,000 assessed value upon all taxable property within the District and approve the budget as follows:

### GENERAL FUND

Personnel Services	\$12,450,500	
Materials and Services	\$2,665,800	
Operating Contingency	\$931,500	
Transfer to Capital Projects Fund	\$1,496,900	
Debt Service	<u>\$579,000</u>	\$ 18,123,700

### CAPITAL PROJECTS FUND

Capital Outlay	\$1,417,000	
Contingency	<u>\$119,000</u>	\$ 1,536,000

Unappropriated Ending Fund Balance - General Fund \$ 4,036,500

Reserve for Future/Ending Fund Balance - Capital Projects Fund \$ 4,711,900

**TOTAL APPROPRIATIONS - ALL FUNDS \$ 28,408,100**

**TOTAL RESOURCES - ALL FUNDS \$ 28,179,100**

# JACKSON COUNTY COUNTY FIRE DISTRICT 3

## RESOLUTION 21-07

### RESOLUTION ADOPTING THE BUDGET FOR THE 2021/2022 FISCAL YEAR

BE IT RESOLVED, that the Board of Directors of Jackson County Fire District 3 hereby adopts the budget for fiscal year 2021/2022 for a total of \$28,442,600. This budget is on file at 8383 Agate Road, White City, Oregon.

#### RESOLUTION MAKING APPROPRIATIONS

BE IT RESOLVED, that the amounts for the fiscal year beginning July 1, 2021, and for the purposes shown below are hereby appropriated:

#### GENERAL FUND

##### Appropriations - Allocated to Organizational Programs

Administration	\$	1,605,000
Operations	\$	10,001,500
Fire and Life Safety	\$	761,500
Training	\$	612,800
Strategic Services	\$	1,697,000
Technology	\$	464,000

##### Not Allocated to Organizational Programs

Debt Service	\$	579,000
Transfers	\$	1,591,400
Contingency	\$	931,500
<b>Total</b>	<b>\$</b>	<b>18,243,700</b>

#### CAPITAL PROJECTS FUND

##### Capital Outlay Allocated to Organizational Programs

Administration	\$	165,000
Operations	\$	1,077,000
Strategic Services	\$	75,000

##### Not Allocated to Organizational Programs

Land and Improvements	\$	40,000
Building Construction	\$	60,000
Contingency	\$	119,000
<b>Total</b>	<b>\$</b>	<b>1,536,000</b>

**Total Appropriations - All Funds** **\$ 19,779,700**

**Total Unappropriated and Reserve Amounts - All Funds** **\$ 8,662,900**

**TOTAL ADOPTED BUDGET** **\$ 28,442,600**

#### RESOLUTION IMPOSING THE TAX

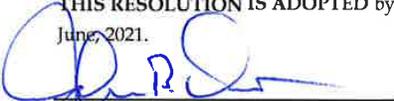
BE IT RESOLVED, that the Board of Directors of Jackson County Fire District 3 hereby imposes the following ad valorem property tax rate for tax year 2021/2022 upon the assessed value of all taxable property within the District:

**Tax rate of \$3.1194 per \$1,000 of assessed value for permanent rate tax**

#### RESOLUTION CATEGORIZING THE TAX

BE IT FINALLY RESOLVED that the taxes imposed are hereby categorized at the District's permanent tax rate under the General Government Limitation of \$3.1194 per \$1,000 of assessed value.

THIS RESOLUTION IS ADOPTED by the Board of Directors of Jackson County Fire District 3, this 17th day of June, 2021.

  
Board of Directors

  
Board of Directors