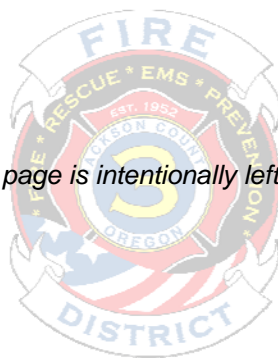


Jackson County Fire District 3



Annual Budget
Fiscal Year 2022/2023

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2022/2023 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

Jackson County Fire District 3

8383 Agate Road, White City, Oregon 97503

541-826-7100

www.jcfd3.com

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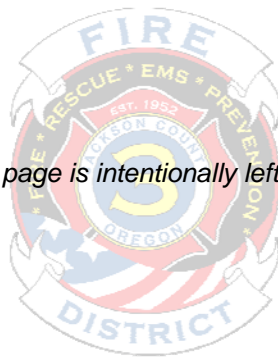


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GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished
Budget Presentation
Award*

PRESENTED TO

**Jackson County Fire District No. 3
Oregon**

For the Fiscal Year Beginning

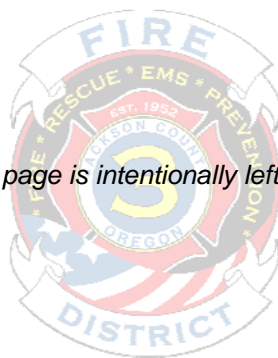
July 01, 2021

A handwritten signature in black ink that reads "Christopher P. Merrill".

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, 2021. 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 16, 2022

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 2022/2023 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 2021-2023 Strategic Plan. This past January, staff reviewed our community-driven strategic plan to inform our approach to this year's budget.

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.

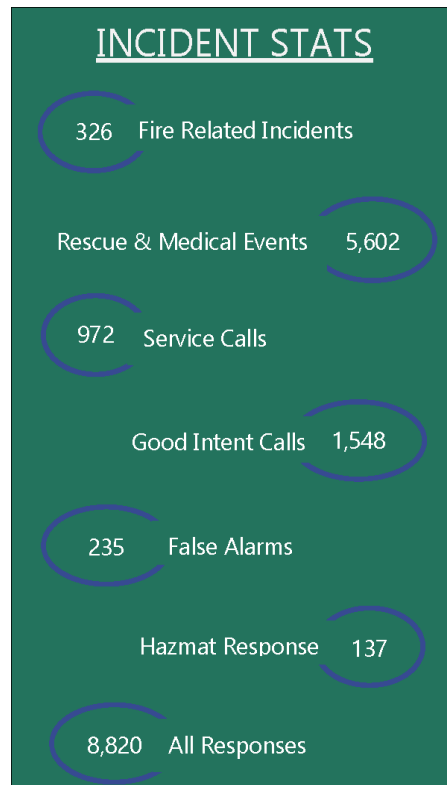
Budget Message

2022/23 Fiscal Year

2021 Year in Review

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

- Implemented a multi-pronged wildland fuels reduction program to support the community for wildfire preparedness.
- Continued the integration of technology into the command-level decision-making environment supporting the District's "Tactical Advantage" initiatives.
- Continued implementation and enhancements of District data collection and analysis programs to include Imagetrend, FirstWatch, and FirstDue. This data infrastructure allows the District's leaders to use an evidence-based standard 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.
- Refined service delivery through the District's Community Care Program. The team has further integrated service partners to set up community patrons for success while reducing demand on the 911 system.
- Continued navigating through the Covid-19 pandemic ensuring safe practices to protect our workforce and worksites while maintaining service delivery to the community.
- Developed a more robust community engagement program expanding our presence and connection to the community both virtually and in-person.



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 2022/23 fiscal year. The economic rebound following the pandemic has been quick and robust, however inflationary costs are a concern. 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.
- The unemployment rate for Jackson County in February 2022 was 4.2 percent compared to 6.4 percent for the same month a year ago. Projections from state and local economists suggest that job growth will continue to increase with demand occurring in hospitality, private health care, and social assistance sectors, however a shortage in the labor market will continue to put pressure on these industries.

Budget Message

2022/23 Fiscal Year

- Call volume for the District increased 9.6 percent in 2021 compared to a 3.97 percent decrease in 2020. The ten-year average reflects an overall five (5) percent increase for all incidents. The Central Point fire management zone (FMZ) is our busiest service area with approximately 38 percent of the volume of incidents occurring in that area followed by the White City FMZ with 25 percent.
- 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 59 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.

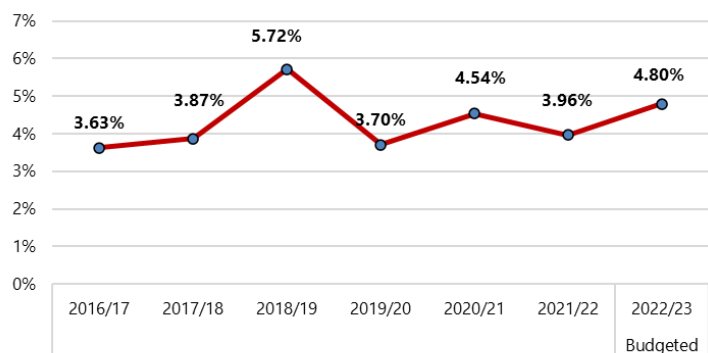
The District remains committed to long range financial planning as a tool to meet strategic requirements, maintain expenditures at levels that do not exceed general operating revenues, and to determine the impact of various “what if” scenarios related to meeting the increasing demands for service. With 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 3.96 percent for the 2021/22 fiscal year. The District’s financial forecast for the 2022/23 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 ninth 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 \$172,726 in tax revenue for fiscal year 2021/22 and \$638,124 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.

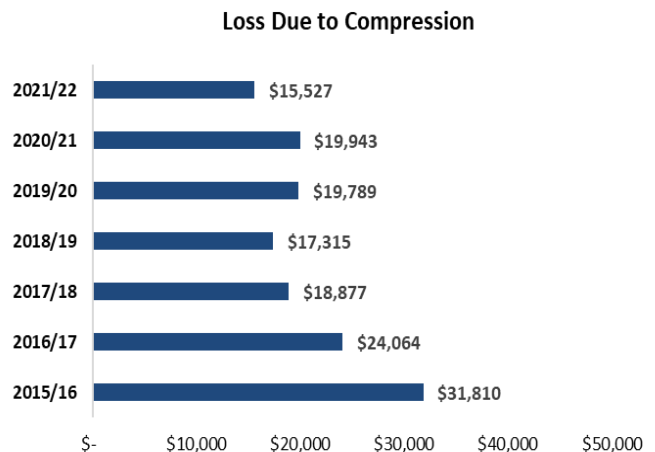
Assessed Value Growth Change



Budget Message

2022/23 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 \$10.74. 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.



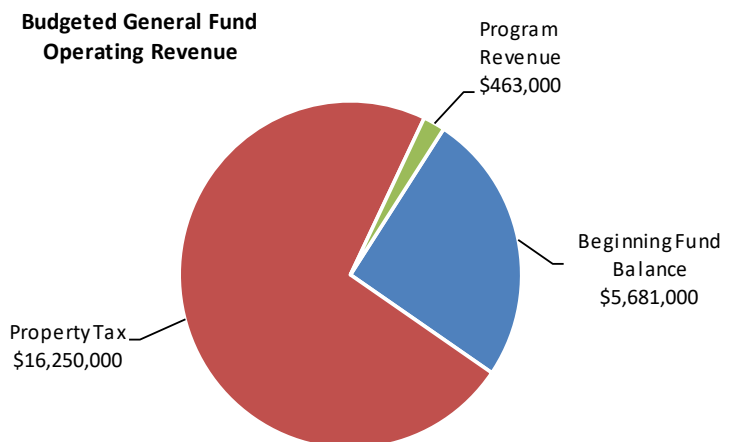
Summary of Revenue and Expenditures / Noteworthy Budgetary Items

General Fund Revenue

This adopted budget reflects \$16,250,000 in property tax revenue, an increase of 4.67 percent or \$725,000 from the fiscal year 2021/22 budget. Current year taxes are calculated at our permanent tax rate of \$3.1194 per \$1,000 of assessed value with a 95 percent collectible rate. Prior year taxes are budgeted at \$350,000. All property taxes combined account for 97 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 is budgeted at \$16,713,000. Overall General Fund revenue is budgeted at \$22,394,000, a 0.51 percent increase over the 2021/22 fiscal year budget or \$113,800.



Personnel Services

This adopted budget reflects an overall increase in Personnel Services of 9.58 percent or \$1,203,600 from what was budgeted in the prior year. Within personnel services, this budget reflects a three percent cost of living adjustment for both represented and non-represented employees. The District will enter into the third year of a four-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.

PERSONNEL: This budget reflects four additional firefighter positions for a budget impact of \$600,000. These positions will help augment staffing for expanded service in special operations, particularly to staff a new Wildland-Urban Interface Response Unit (WUIRU) during fire season. This specialty unit is necessary to support the daily operations of the District, who is now facing longer and more intense wildfire seasons year over year. After the program ends for the season, these positions will supplement staffing until future retirements occur. We are not currently proposing to permanently increase the firefighter full-time equivalency (FTE) from the adopted 21.

Budget Message

2022/23 Fiscal Year

This budget reflects the addition of an Administrative Battalion Chief position for a budget impact of \$202,000. This position aims to provide management level program and personnel support in the District's non-station-based special operations response resources. These specialty teams include the Wildland-Urban Interface Response Unit, the Community Care Response Unit, the Technical Rescue Program, and the implementation of our community risk reduction initiatives.

This budget also reflects a full year of salary and benefits (\$142,000) for the new position, People Services Administrator, established in the 2021/22 fiscal year and budgeted through a Resolution for six months. Helping to offset some of this budget impact was the reallocation of an Administrative Assistant position out of the Training Department in January of this year (\$108,000 savings).

PERS: For this budget year the District will not experience an employer rate contribution 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 established 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) is 24.17 percent of payroll. Rates for firefighters in the tier three (OPSRP) group (those employees that have established membership after August 29, 2003) is 18.82 percent of payroll and the rate for general service members in the OPSRP group is 14.46 percent of payroll. The total budgeted PERS expense is \$1,811,000, an increase of \$130,700 from fiscal year 2021/22 due to new positions and cost of living adjustments. Of total personnel, 34 percent are in the Tier 1 and 2 group, 49 percent are in the OPSRP firefighter group, and 17 percent are in the OPSRP general service group.

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, 2022 to June 30, 2023 represent an overall increase of 5.8 percent. The total budgeted health insurance expense is \$1,702,000, an increase of \$189,300 over the prior year.

In addition to health insurance benefits, an HRA-VEBA Health Reimbursement Plan is provided in which the District contributes a fixed dollar amount for all employees. The budgeted contribution per employee for this budget is \$361 per month for a total annualized expense of \$329,500.

Total Personnel Services is budgeted at \$13,764,000 which is a 9.58 percent increase over the current year. Personnel Services for this proposed budget is 82.36% of General Fund operating revenue. 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.

Materials and Services

This adopted budget reflects an increase in Materials and Services of 8.67 percent or \$233,500 from the current 2021/22 fiscal year. The District has focused efforts across all departments from the Strategic Plan to ensure fiscally sound spending practices are at sustainable levels. 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 \$2,926,300 which is 17.51 percent of operating revenue.

Debt Service

This adopted budget represents \$448,700 towards principal and interest payments through a Series 2019 Full Faith and Credit Obligation with JP Morgan Chase Bank.

Contingency

The District has policy that Operating Contingency will be six percent of budgeted property tax revenue. This budget has allocated \$975,000 in contingency.

Budget Message

2022/23 Fiscal Year

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 \$4,225,000 in ending fund balance.

Capital Projects Fund

This fund has a budgeted transfer of \$55,000 coming from the General Fund. With this contribution and after all budgeted expenditures, the fund is projected to have an ending balance of \$3,878,400, a decrease of \$748,000 from the current fiscal year.

Capital expenditures are budgeted at \$1,196,000 and reflect projects in accordance with our Capital Replacement Plan. Significant projects include:

- Three wildland engines to replace/upgrade existing fleet for a total budget of \$605,000.
- Three staff vehicles to replace existing fleet spec'd as Ford F150 pickups for a total budget of \$205,000 (this is a carryover project from the prior year).
- Completion of a new battalion chief command unit for a total budget of \$145,000 (this is a carryover project from the prior year).
- The purchase of a logistics van to provide for better efficiencies in supply delivery for a total budget of \$50,000 (this is also a carryover project from the prior year).
- An outdoor solar carport at the White City/Administration Campus for a total budget of \$180,000.

Budget Summary

The 2022/23 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.

| Appropriations: General Fund | 2021/22 FY Budget | 2022/23 FY Budget | Increase/ (Decrease) |
|---|------------------------------|------------------------------|---------------------------------|
| Administration | \$ 1,678,800 | \$ 1,946,000 | 15.92% |
| Operations | \$ 10,001,500 | \$ 11,166,100 | 11.64% |
| Fire and Life Safety | \$ 828,400 | \$ 773,000 | -6.69% |
| Training | \$ 561,500 | \$ 489,000 | -12.91% |
| Strategic Services | \$ 1,719,000 | \$ 1,823,000 | 6.05% |
| Technology | \$ 464,000 | \$ 493,200 | 6.29% |
| Non-Departmental | \$ 7,027,000 | \$ 5,703,700 | -18.83% |
| | \$ 22,280,200 | \$ 22,394,000 | 0.51% |
| Capital Projects Fund | \$ 6,162,400 | \$ 5,196,000 | -15.68% |
| Total Appropriated Budget | \$ 28,442,600 | \$ 27,590,000 | -3.00% |

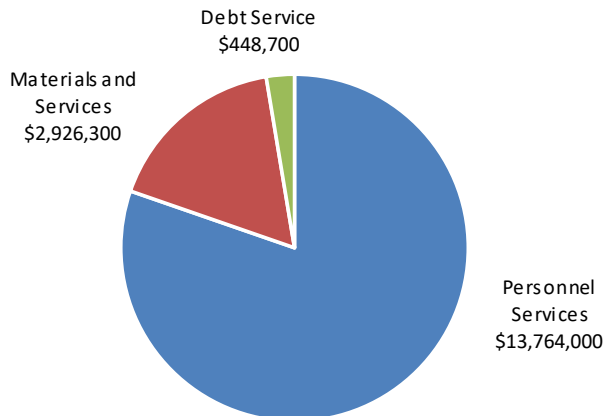
Budget Message

2022/23 Fiscal Year

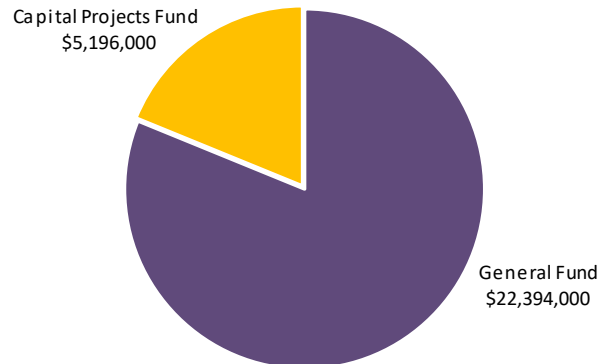
The District has prepared this budget for all funds subject to the budget requirements of state law, including the legal requirement for a balanced budget, meaning that total beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, contingency, 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 \$17,139,000, an increase of \$1,306,800 over the current 2021/22 fiscal year or 8.25 percent.

**General Fund
Operating Expenses**



Total Budget by Fund



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 \$27,590,000, a decrease of \$852,600 or three 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.

Respectfully submitted,

Robert B. Horton

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

Budget Summary - All Funds

| Appropriations | 2021/22 FY Budget | 2022/23 FY Budget | Increase/ (Decrease) |
|-----------------------------|----------------------|----------------------|----------------------|
| Personnel Services | \$ 12,560,400 | \$ 13,764,000 | \$ 1,203,600 |
| Materials and Services | \$ 2,692,800 | \$ 2,926,300 | \$ 233,500 |
| Capital Outlay | \$ 1,417,000 | \$ 1,196,000 | \$ (221,000) |
| Debt Service | \$ 579,000 | \$ 448,700 | \$ (130,300) |
| Operating Transfers Out | \$ 1,591,400 | \$ 55,000 | \$ (1,536,400) |
| Operating Contingency | \$ 939,100 | \$ 1,096,600 | \$ 157,500 |
| Ending Fund Balance | \$ 8,662,900 | \$ 8,103,400 | \$ (559,500) |
| Total Appropriations | \$ 28,442,600 | \$ 27,590,000 | \$ (852,600) |

District Overview

2022/23 Fiscal Year

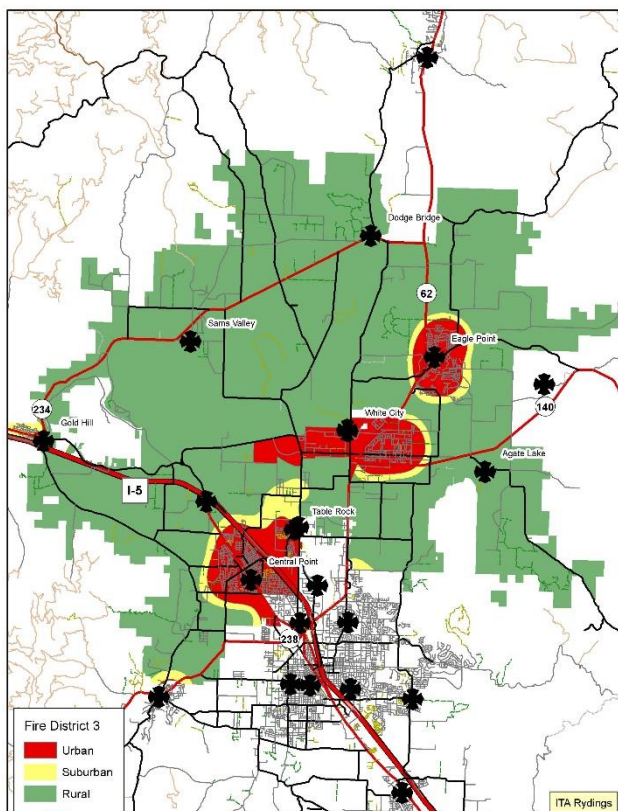
Jackson County Fire District 3 is a special district operating under Oregon Revised Statutes (ORS) Chapter 478 as a separate municipal corporation. A Board of Directors is elected by District citizens and is comprised of a President and four Directors, who include a Vice-President and Secretary-Treasurer. 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 76 full-time career employees, two part-time employees, 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.

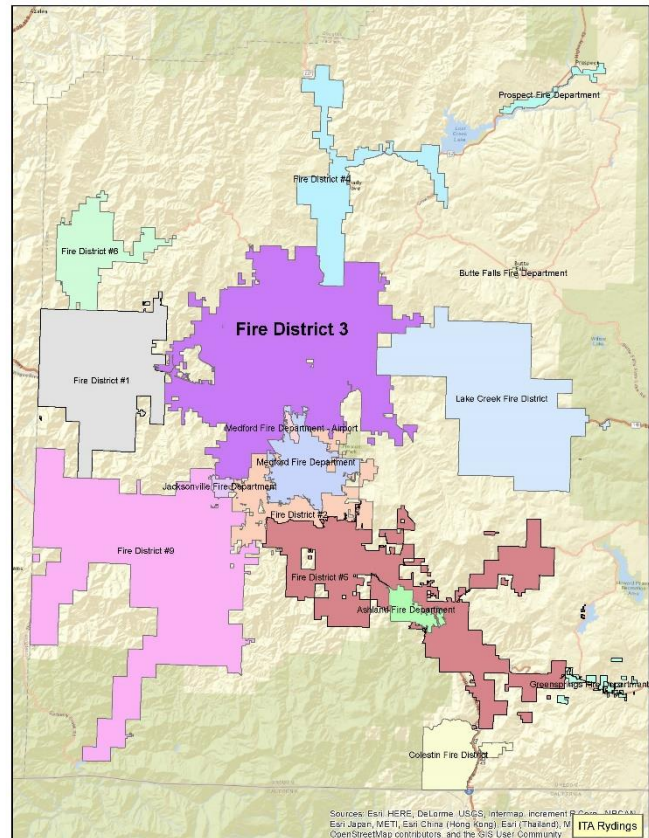
The District’s administrative offices are adjacent to the White City fire station, located in an unincorporated industrial area of Jackson County known as White City. A regional training facility is also at this location, which includes a training tower, burn simulation props, water drafting pits, fire 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

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, 27 are certified advanced life support (ALS) Paramedics and 10 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.



Assessed and Real Market Value

The District's assessed valuation increased from \$4,934,751,546 in the 2020/21 fiscal year to \$5,130,186,355 for the 2021/22 fiscal year, a 3.96 percent increase. This is down slightly from the prior year's growth of 4.5 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 Ballot Measure 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, than 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 recessionary years of 2010 to 2012.

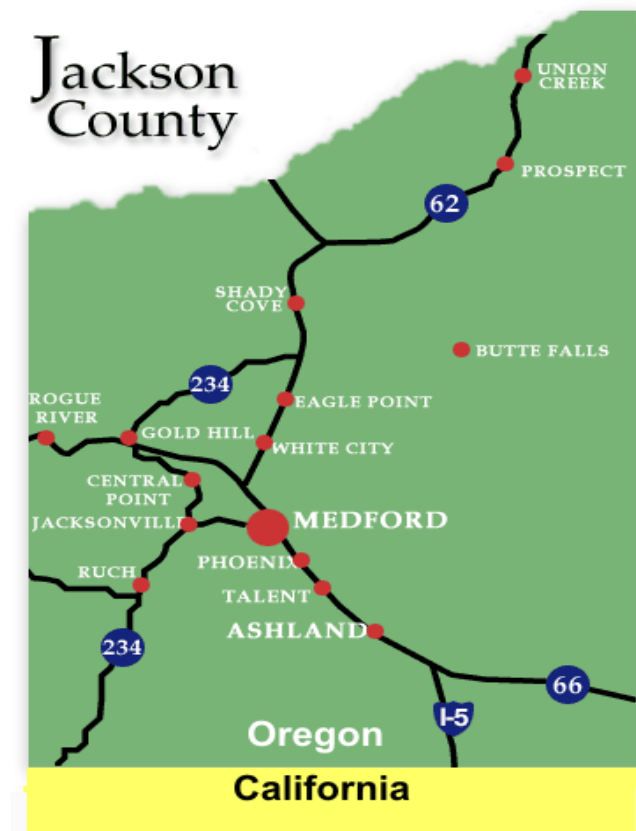
District Funding

The District's funding is based upon our permanent tax rate of \$3.1194 per \$1,000 of assessed valuation, which was also established under Ballot Measure 50. The District receives 97 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 to accomplish its strategic goals and objectives.

District Overview

Location and Geography

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.

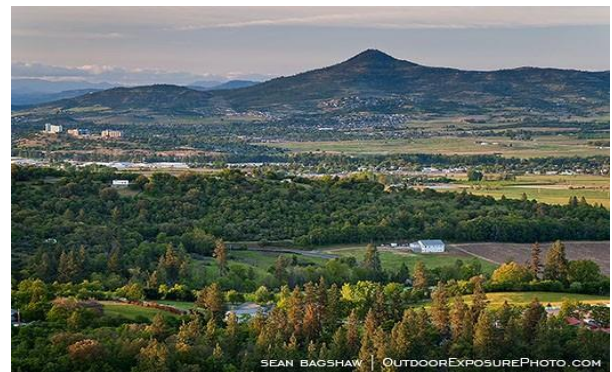


The Rogue Valley is home of the legendary Rogue River where you'll find jet boating, rafting, and fishing, mountains for snow skiing, biking, and hiking, and green valleys that produce award-winning wines. It's also home to North America's deepest lake and Oregon's only National Park, Crater Lake, which 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 19th 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.



District Overview

Economy and Employment

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.

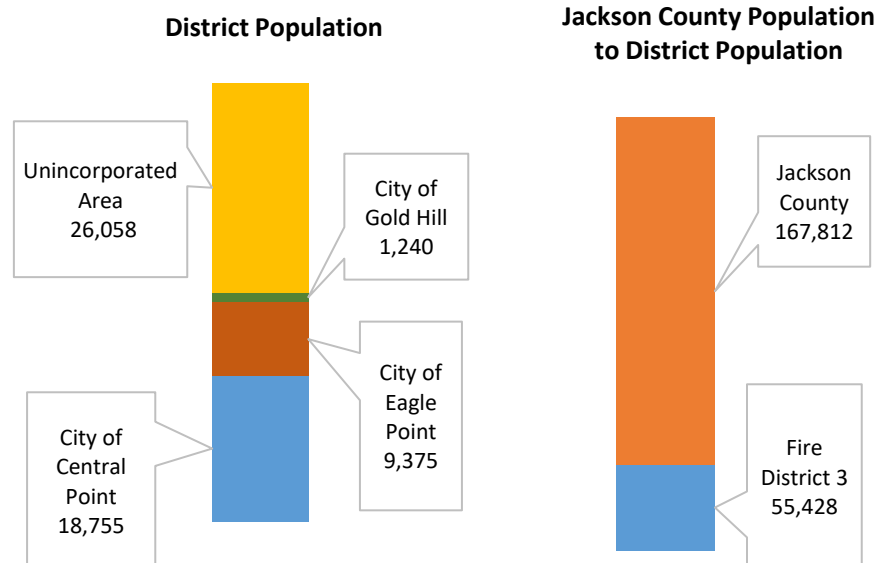
Jackson County's unemployment rate as of February 2022 was 4.2 percent compared to the State of Oregon's unemployment rate of four (4) percent. During the height of the Covid-19 pandemic the unemployment rate peaked at 13.3 percent for the region and 14.1 percent for the State. As with other areas of the Nation, the Rogue Valley is experiencing a robust job market with demand for workers and difficulty attracting applicants. The sectors experiencing the most hiring and demand for workers is hospitality, heavy equipment and tractor-trailer truck drivers, medical, 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.

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.

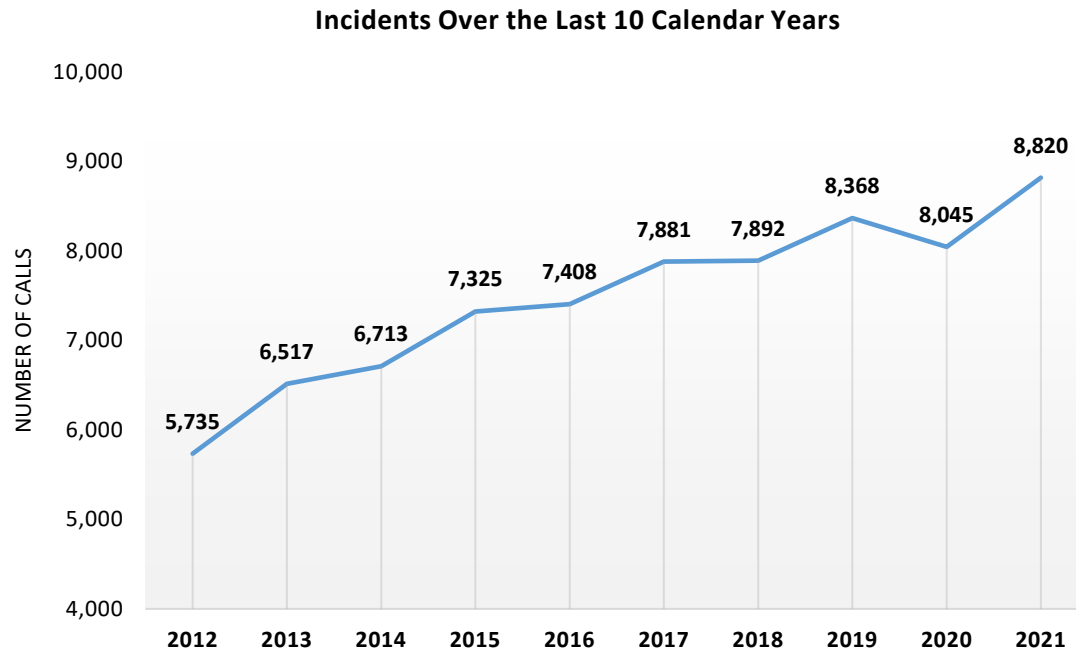
The District's population is expected to continue to moderately increase over the next 10 years. Staff will continue to work proactively with other governments and regional planning groups to ensure continued ability to serve this future population. This includes working across jurisdictional boundaries to ensure closest-force response to population centers, regardless of city boundaries.



District Overview

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 a five (5) percent year-to-year 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 2021, 59 percent of total incidents were classified as rescue/medical followed by good intent (18%). Fire related incidents accounted for only 3.7 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

2022/23 Fiscal Year

BOARD OF DIRECTORS

As of July 2022

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

Term Expires

June 30, 2023
June 30, 2023
June 30, 2023
June 30, 2025
June 30, 2025

BUDGET COMMITTEE

As of July 2022

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

Rob Hernandez
Steven Weber
Ken Cummings
Tom Rambo
Mark Hefley

Term Expires

December 31, 2022
December 31, 2022
December 31, 2023
December 31, 2023
December 31, 2024

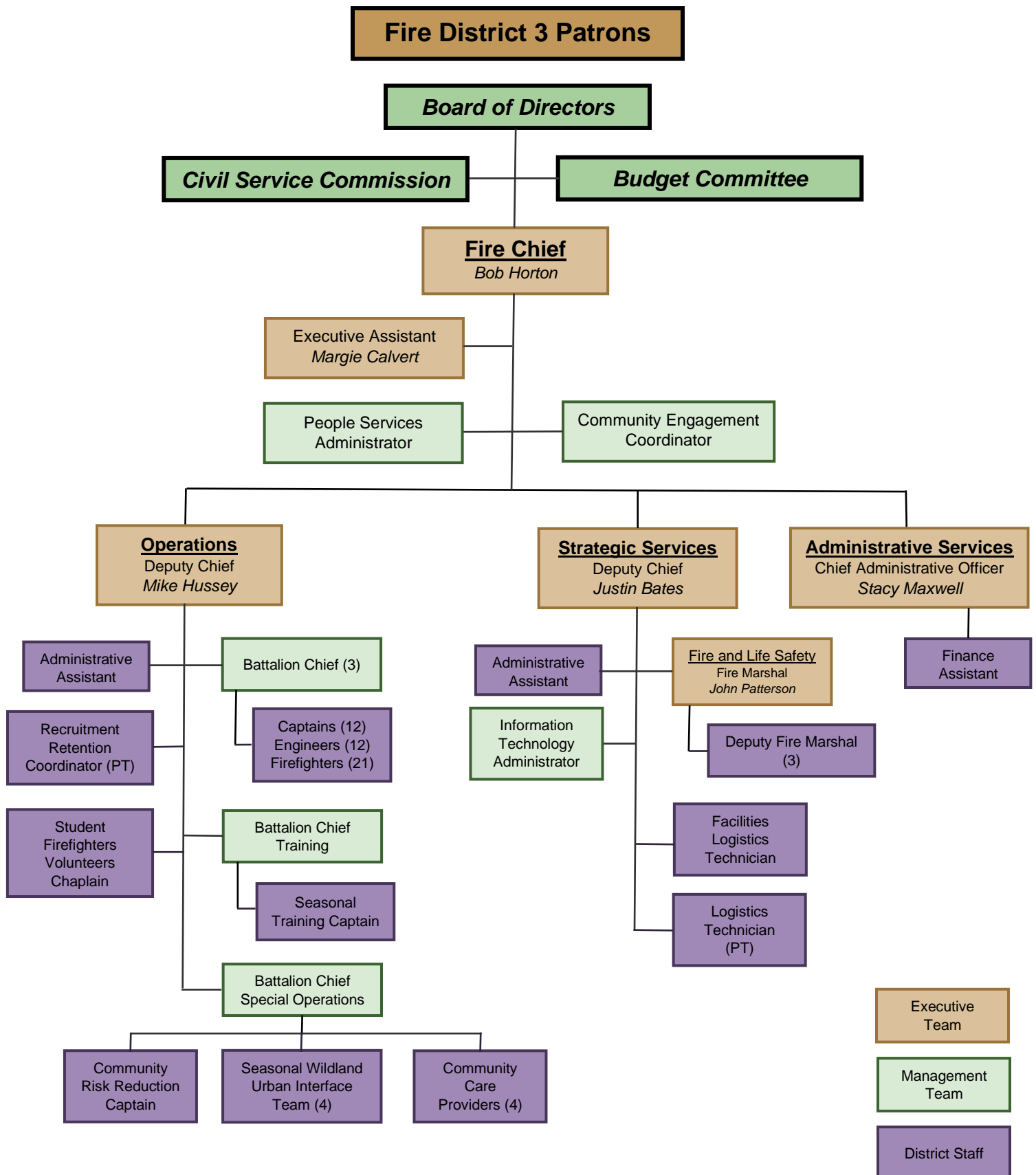
DISTRICT EXECUTIVE STAFF

Robert Horton, Fire Chief
Stacy Maxwell, Chief Administrative Officer
Mike Hussey, Deputy Chief Operations
Justin Bates, Deputy Chief Strategic Services
John Patterson, Fire Marshal
Margie Calvert, Executive Assistant

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

Organization Chart

2022/23 Fiscal Year



Budget Process

2022/23 Fiscal Year

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 measurable 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

2022/23 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.

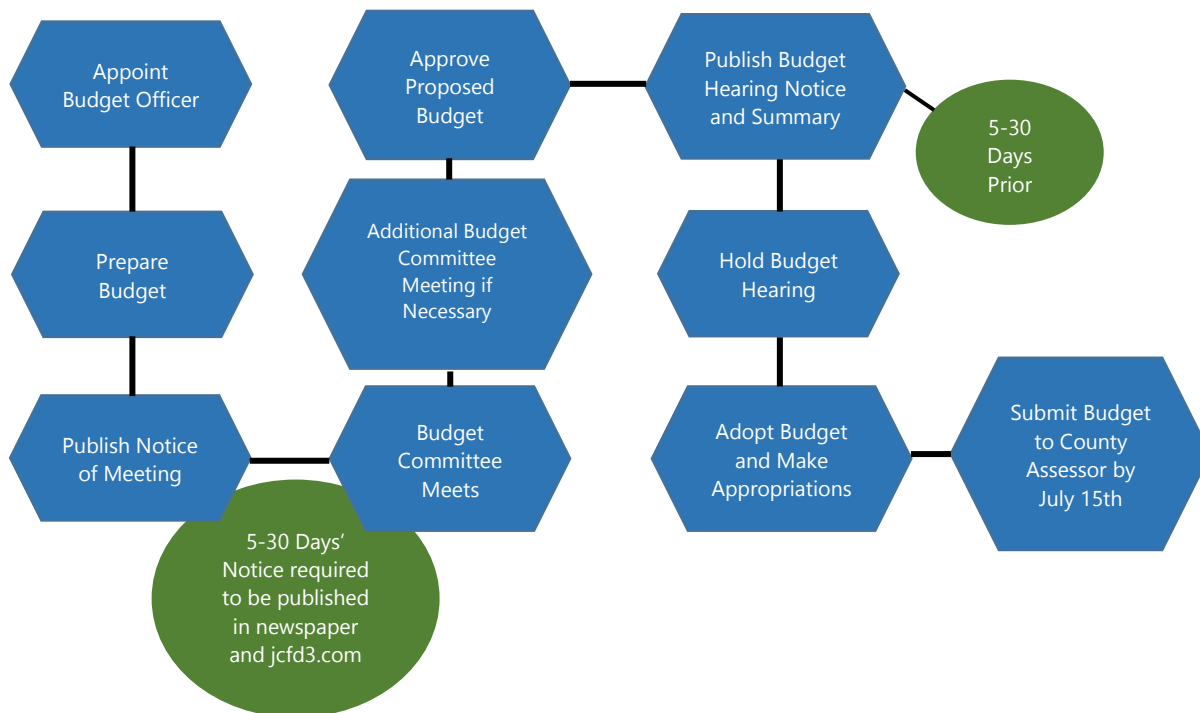
| | |
|---|--|
| <p><u>January</u></p> | <p><u>Strategic Plan</u> Review the Strategic Plan's identified goals and objectives under each initiative, ensuring priorities are in place that will drive the budget development.</p> <p><u>Budget Development</u></p> <ul style="list-style-type: none"> • Budget worksheets distributed • Support assignee's start preparing their respective budget requests • Meetings are scheduled with support assignee's to review requests • Chief Officers develop their internal timelines with due dates for budget request worksheets to be submitted by • Chief Officers start preliminary review of performance measures and departmental objectives |
| <p><u>February</u></p> | <p><u>Budget Development Continues</u></p> <ul style="list-style-type: none"> • Meetings are held between support assignees and Chief Officers • Direction is communicated to support assignees regarding approval/modification/denial <p>Finance develops the overarching components of the budget document Preliminary revenue estimates are projected; financial forecast updated</p> |
| <p><u>February - March</u></p> <p>02/28/22</p> <p>02/28/22</p> <p>03/01/22 – 03/23/22</p> <p>03/11/22</p> <p>03/23/22</p> <p>03/30/22</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"> • Review performance measurements, objectives, and departmental narratives • Budget revisions due back to Finance • Departmental narrative sections and performance measurements due back to Finance <p><u>Executive Team Meeting</u></p> <ul style="list-style-type: none"> • Chief Officers review and finalize departmental budget sections • Set initial direction on budget presentations for April 21st meeting |

Budget Process

2022/23 Fiscal Year

| | |
|---|--|
| <u>April</u> 04/01/22 – 04/18/22 04/12/22 04/12/22 – 05/10/22 | Budget document compilation, final touches, and assembly Publish notice of budget committee meetings in Mail Tribune Post notice of budget meetings on District website |
| 04/21/22 | <u>Budget Committee Meeting</u> <ul style="list-style-type: none"> Budget document delivered and budget message presented |
| <u>May</u> 05/10/22 | <u>Budget Committee Meeting</u> <ul style="list-style-type: none"> 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. |
| <u>June</u> 06/07/22 | Publish budget hearing notice and budget summary |
| 06/16/22 | <u>Public Hearing and Adoption of 2022/23 Fiscal Year Budget</u> |
| <u>July</u> No later than 07/15/22 | Submit Local Budget (LB) Form 50 to Jackson County Assessor with two copies of District Resolution adopting the 2022/23 Fiscal Year Budget |

BUDGET PROCESS TIMELINE



Budget and Financial Policies

2022/23 Fiscal Year

Jackson County Fire District 3 (the “District”) 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 **2022/23 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

2022/23 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"> Property taxes Interest on investment Program fees Miscellaneous and other revenues | <ul style="list-style-type: none"> Administration and Finance Operations and EMS Fire and Life Safety Programs Training Strategic Services/Logistics Technology Transfer to other funds Debt service payments |

Capital Projects Fund

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

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

Budget and Financial Policies

2022/23 Fiscal Year

period in which they become measurable and available. An example of significant revenues that are considered measurable and available at June 30th is property tax revenue (paid by District patrons in June, but received in July by the County Treasurer). The District utilizes a 31-day availability or look-back period for purposes of revenue recognition.

Revenue

Property taxes account for 72 percent of the District's total General Fund revenue, which includes beginning fund balance. Not factoring in beginning fund balance, current and prior year property taxes combined account for 97 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 valuation increase of 4.8 percent for the 2022/23 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 2022/23 fiscal year is \$5,376,234,366.

Ending Fund Balances

As a policy, the District 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 \$4,225,000 for the 2022/23 fiscal year, an increase of \$188,500 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, the District 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 \$975,000. 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

2022/23 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 2021 was \$8,478,586,935 up from \$7,423,871,219 in 2020. Jackson County Fire District 3's current legal debt limit is approximately \$105,982,337.

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 currently has one debt holding; a Full Faith and Credit Agreement with JP Morgan Chase Bank issued on July 9, 2019 for a face value of \$4,028,000 on a ten year term with a 2.09 percent coupon. The amount financed supported the construction of the Scenic Fire Station and included cost of issuance. The 2022/23 fiscal year budget identifies \$386,000 in principal payments and \$62,700 in interest payments. At fiscal year end June 30, 2023 outstanding debt principal on this holding will be \$2,710,000.

2019 Series Full Faith and Credit Obligations

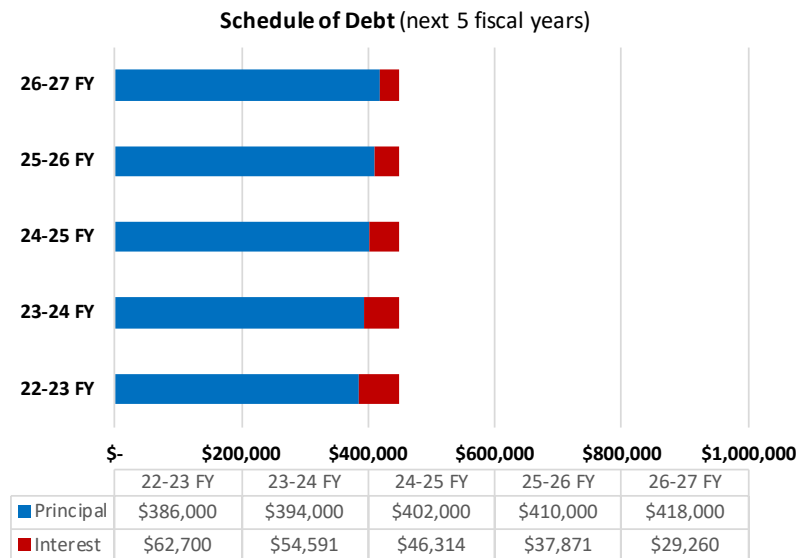
JP Morgan Chase Bank

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 |
| Total Principal Paid: | \$ | 4,028,000.00 | | | |
| Total Interest Paid: | | | \$ 454,292.62 | | |
| Total Debt Service: | | | | | \$ 4,482,292.62 |

Budget and Financial Policies

2022/23 Fiscal Year



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 \$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.

Budget and Financial Policies

2022/23 Fiscal Year

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).

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 or supplemental budget 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 2022/23 fiscal year budget identifies \$1,196,000 in total capital expenditures.

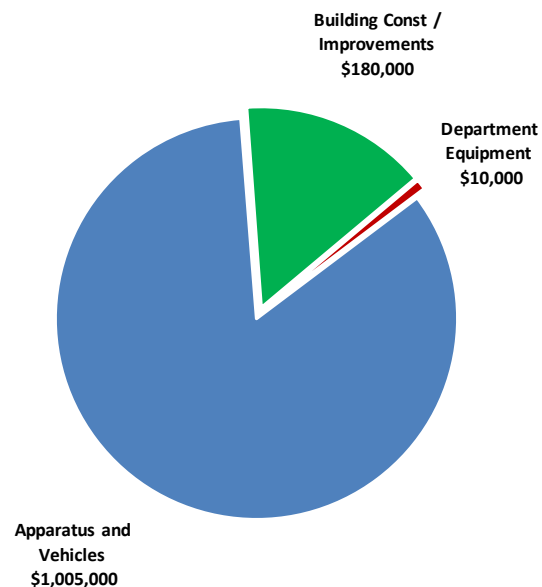
Relationship of Capital Budget to Annual Operating Budget

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. Typically, such capital projects are financed with loan proceeds or grant revenue. The District considers just as significant, in both budgeting and long-term forecasts, the related cost of additional firefighters or other supporting personnel. Since personnel and operating costs are significant, 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.

2022/23 Capital Expenditures



Budget and Financial Policies

2022/23 Fiscal Year

SUMMARY OF POLICIES

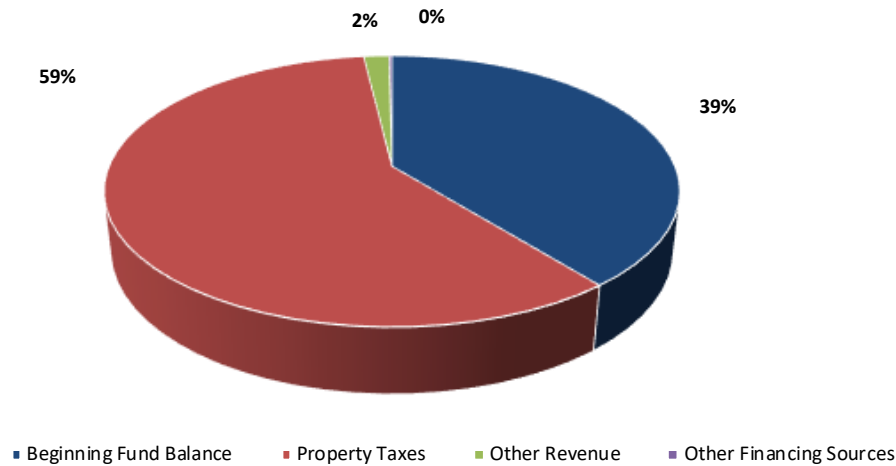
1. The District will adopt and maintain a **balanced budget** in which total resources of beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, and ending fund balance. The District will use one-time revenues to fund one-time expenditures 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 obliged 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 to be used only 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

2022/23 Fiscal Year

Summary of Budgeted Resources

| Resources | Beginning Fund Balance | Property Taxes | Other Revenue | Other Financing Sources | 2022/23 Budget |
|---------------------------------|------------------------|---------------------|------------------|-------------------------|---------------------|
| Major Funds | | | | | |
| General | \$5,681,000 | \$16,250,000 | \$463,000 | | \$22,394,000 |
| Capital Projects | \$5,137,000 | | \$4,000 | \$55,000 | \$5,196,000 |
| Total Budgeted Resources | \$10,818,000 | \$16,250,000 | \$467,000 | \$55,000 | \$27,590,000 |



| 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 |
|-------------------|----------------|-------------------------|---------------------------|----------------------------|-----------------------|--|
| 2021 | \$ 15,478,260 | \$ 14,588,632 | 94.25 | \$ 814,984 | \$ 15,403,616 | 99.52% |
| 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% |

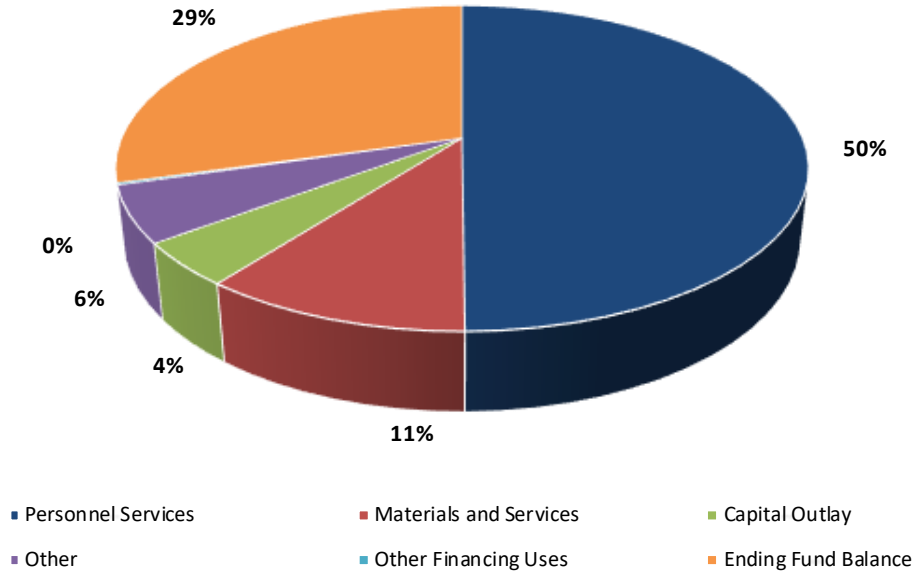
Financial Overview

2022/23 Fiscal Year

Summary of Budgeted Requirements

| Requirements | Personnel Services | Materials and Services | Capital Outlay | Other | Other Financing Uses | Ending Fund Balance | 2022/23 Budget |
|------------------------------------|---------------------|------------------------|--------------------|--------------------|----------------------|---------------------|---------------------|
| Major Funds | | | | | | | |
| General | \$13,764,000 | \$2,926,300 | | \$1,423,700 | \$55,000 | \$4,225,000 | \$22,394,000 |
| Capital Projects | | | \$1,196,000 | \$121,600 | | \$3,878,400 | \$5,196,000 |
| Total Budgeted Requirements | \$13,764,000 | \$2,926,300 | \$1,196,000 | \$1,545,300 | \$55,000 | \$8,103,400 | \$27,590,000 |

The "other" category contains debt payments and contingency funds.



Financial Overview

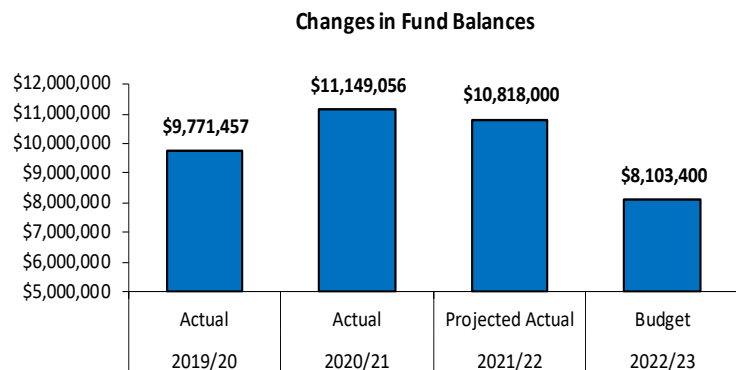
2022/23 Fiscal Year

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 | | | 2022/23 Budget |
|--|----------------------|----------------------|-----------------------------|-----------------------|
| | 2019/20 Actual | 2020/21 Actual | 2021/22 Projected Actual | |
| Revenues | | | | |
| Property Taxes | \$ 14,205,874 | \$ 15,403,617 | \$ 15,575,000 | \$ 16,250,000 |
| Earnings on Investments | 298,922 | 101,243 | 70,000 | 120,000 |
| Grants | 34,026 | 271,734 | 175,000 | 151,000 |
| Lease Income | 56,499 | 58,194 | 60,000 | 67,000 |
| Donations | - | 1,360 | 5,100 | 2,000 |
| Contracts | 5,000 | - | - | 1,000 |
| Miscellaneous | 146,797 | 391,045 | 236,500 | 122,000 |
| | \$ 14,747,117 | \$ 16,227,193 | \$ 16,121,600 | \$ 16,713,000 |
| Other Revenue Sources: | | | | |
| Proceeds from Sale of Equip | \$ 689 | \$ 23,497 | \$ 8,000 | \$ 2,000 |
| Loan Proceeds | 4,028,000 | - | - | 2,000 |
| Transfers to and from | 1,266,200 | 996,200 | 1,591,400 | 55,000 |
| Total Revenue | \$ 20,042,007 | \$ 17,246,890 | \$ 17,721,000 | \$ 16,772,000 |
| Expenditures | | | | |
| Personnel Services | \$ 10,860,443 | \$ 11,653,352 | \$ 12,315,900 | \$ 13,764,000 |
| Materials and Services | 2,077,144 | 2,226,753 | 2,538,300 | 2,926,300 |
| Capital Outlay | 5,134,291 | 282,743 | 1,027,400 | 1,196,000 |
| Debt Service | 486,021 | 710,242 | 579,000 | 448,700 |
| Operating Contingency | - | - | - | 1,096,600 |
| Total Expenditures | \$ 18,557,900 | \$ 14,873,090 | \$ 16,460,600 | \$ 19,431,600 |
| Excess or Deficiency | \$ 1,484,107 | \$ 2,373,799 | \$ 1,260,400 | \$ (2,659,600) |
| Changes in Fund Balance <i>(The cash available at the end of the fiscal year)</i> | | | | |
| Beginning Fund Balance | \$ 9,553,550 | \$ 9,771,457 | \$ 11,149,000 | \$ 10,818,000 |
| Excess Revenues over Expenditures | 1,484,107 | 2,373,799 | 1,260,400 | (2,659,600) |
| Interfund Transfers | (1,266,200) | (996,200) | (1,591,400) | (55,000) |
| Ending Fund Balance | \$ 9,771,457 | \$ 11,149,056 | \$ 10,818,000 | \$ 8,103,400 |
| Increase or Decrease in Fund Balance | | 14.10% | -2.97% | -25.09% |

The increase in total fund balance (14%) at fiscal year end June 30, 2021 was the result of actual spending lower than budget and unanticipated revenue from the Jackson County Treasurer for some tax dispute settlements. Instead of appropriating that revenue in the fiscal year received, the District set it aside for future appropriation.

The projected decrease in fund balance of \$331,056 at fiscal year end June 30, 2022 is the result of reduced revenue compared to actual expenditures that trended higher and some mid-year staffing additions.



Financial Overview

2022/23 Fiscal Year

Total fund balance reflected at fiscal year end June 30, 2023 is \$8,103,400 or a decrease of 25 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 depicted under the 2022/23 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 | | | 2022/23 Budget |
|-----------------------------------|---------------------|---------------------|-----------------------------|-----------------------|
| | 2019/20 Actual | 2020/21 Actual | 2021/22 Projected Actual | |
| Revenue/Expenditures | | | | |
| Revenue | \$ 14,775,107 | \$ 16,229,190 | \$ 16,129,600 | \$ 16,713,000 |
| Expenditures | 13,423,609 | 14,590,347 | 15,433,200 | 18,114,000 |
| Excess or Deficiency | \$ 1,351,498 | \$ 1,638,842 | \$ 696,400 | \$ (1,401,000) |
| Changes in Fund Balance | | | | |
| Beginning Fund Balance | \$ 5,848,115 | \$ 5,933,413 | \$ 6,576,000 | \$ 5,681,000 |
| Excess Revenues over Expenditures | 1,351,498 | 1,638,842 | 696,400 | (1,401,000) |
| Interfund Transfers Out | (1,266,200) | (996,200) | (1,591,400) | (55,000) |
| Ending Fund Balances | \$ 5,933,413 | \$ 6,576,055 | \$ 5,681,000 | \$ 4,225,000 |
| Increase or Decrease | | 10.83% | -13.61% | -25.63% |

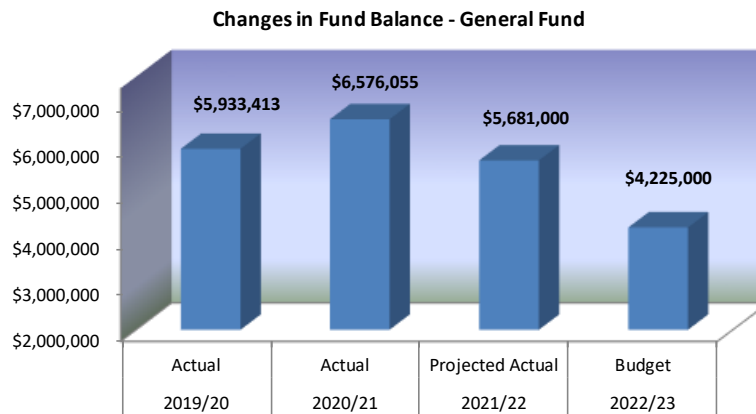
| CAPITAL PROJECTS FUND | Fiscal Year | | | 2022/23 Budget |
|-----------------------------------|-----------------------|---------------------|-----------------------------|-----------------------|
| | 2019/20 Actual | 2020/21 Actual | 2021/22 Projected Actual | |
| Revenue/Expenditures | | | | |
| Revenue | \$ 4,000,700 | \$ 21,500 | \$ - | \$ 4,000 |
| Expenditures | 5,134,291 | 282,743 | 1,027,400 | 1,317,600 |
| Excess or Deficiency | \$ (1,133,591) | \$ (261,243) | \$ (1,027,400) | \$ (1,313,600) |
| Changes in Fund Balance | | | | |
| Beginning Fund Balance | \$ 3,705,435 | \$ 3,838,044 | \$ 4,573,000 | \$ 5,137,000 |
| Excess Revenues over Expenditures | (1,133,591) | (261,243) | (1,027,400) | (1,313,600) |
| Interfund Transfers In | 1,266,200 | 996,200 | 1,591,400 | 55,000 |
| Ending Fund Balances | \$ 3,838,044 | \$ 4,573,001 | \$ 5,137,000 | \$ 3,878,400 |
| Increase or Decrease | | 19.15% | 12.33% | -24.50% |

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.

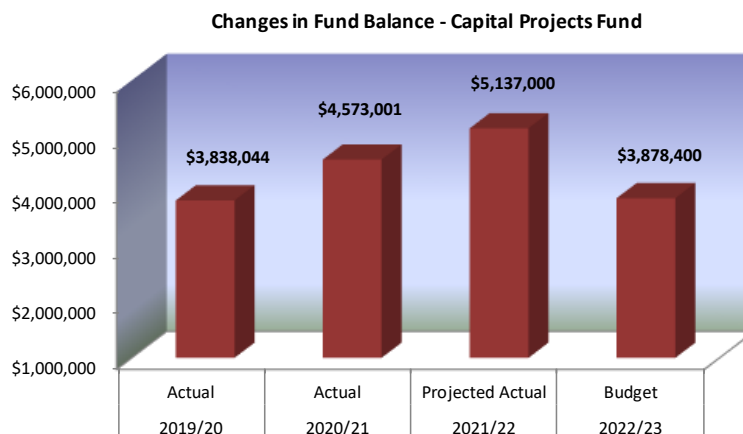
Financial Overview

2022/23 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, 2023, as established by policy.



- ➔ Fund balance in the **General Fund** increased at fiscal year end June 30, 2021 by 10.83 percent, the result of the systematic increase of unappropriated ending fund balance (UEFB), actual spending lower than budget, and unanticipated revenue from the Jackson County Treasurer for some tax dispute settlements that was then not appropriated for expenditure in the fiscal year received.
- ➔ Fund balance is projected to decrease at fiscal year end June 30, 2022 by 13.6 percent, the result of lower revenue and increased spending related to budget.
- ➔ Fund balance at fiscal year end June 30, 2023 reflects only the UEFB or \$4,225,000. 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.



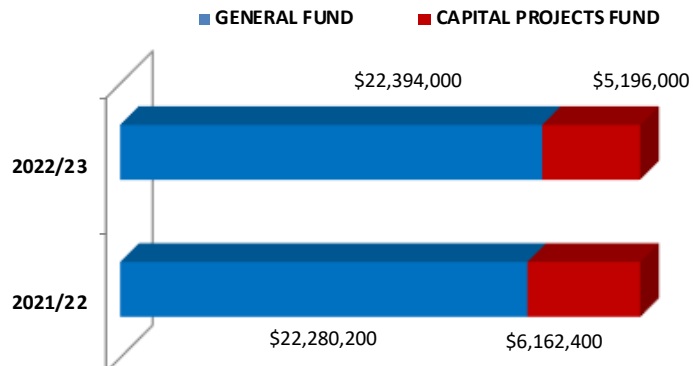
- ➔ Changes in fund balance in the **Capital Projects Fund** are the result of General Fund transfers that sustain the fund and the corresponding budgeted expenditures as identified and planned for in the Capital Replacement Schedule. The District's strategic priority is to allocate all additional funds 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, 2021 by 19.15 percent, the result of revenue through a transfer from the General Fund compared to the budgeted expenditures.
- ➔ Fund balance is projected to increase 12.3 percent at fiscal year end June 30, 2022, the result revenue compared to budgeted expenditures.
- ➔ Fund balance at fiscal year end June 30, 2023 represents a 24.5 percent decrease due to budgeted expenditures in relation to the amount of the transfer from the General Fund.

Financial Overview

2022/23 Fiscal Year

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

| | Fiscal Year | | | |
|--|----------------------|----------------------|---------------------|----------------|
| | 2022/23 Budget | 2021/22 Budget | Variance | Change |
| GENERAL FUND | | | | |
| Personnel Services | \$ 13,764,000 | \$ 12,560,400 | \$ 1,203,600 | 9.58% |
| Materials and Services | 2,926,300 | 2,692,800 | 233,500 | 8.67% |
| Operating Contingency | 975,000 | 820,100 | 154,900 | 18.89% |
| Debt Service | 448,700 | 579,000 | (130,300) | -22.50% |
| Transfer to Capital Projects Fund | 55,000 | 1,591,400 | (1,536,400) | -96.54% |
| Unappropriated Ending Fund Balance | 4,225,000 | 4,036,500 | 188,500 | 4.67% |
| | \$ 22,394,000 | \$ 22,280,200 | \$ 113,800 | 0.51% |
| CAPITAL PROJECTS FUND | | | | |
| Department Equipment | \$ 10,000 | \$ 217,000 | \$ (207,000) | -95.39% |
| Apparatus and Vehicles | 1,005,000 | 1,100,000 | (95,000) | -8.64% |
| Land and Improvements | 1,000 | 40,000 | (39,000) | -97.50% |
| Building Construction/Improvements | 180,000 | 60,000 | 120,000 | 200.00% |
| Contingency | 121,600 | 119,000 | 2,600 | 2.18% |
| Reserve for Future/Ending Fund Balance | \$ 3,878,400 | \$ 4,626,400 | \$ (748,000) | -16.17% |
| | \$5,196,000 | \$6,162,400 | (\$966,400) | -15.68% |
| TOTAL BUDGET | \$ 27,590,000 | \$ 28,442,600 | \$ (852,600) | -3.00% |

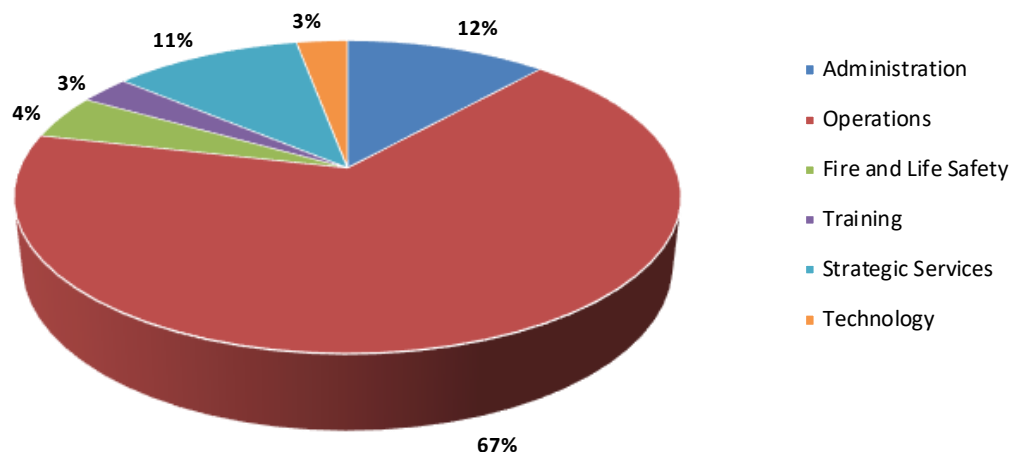


Financial Overview

2022/23 Fiscal Year

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

| GENERAL FUND | Fiscal Year | | | |
|-----------------------------|----------------------|----------------------|---------------------|----------------|
| | 2022/23 Budget | 2021/22 Budget | Variance | Change |
| Department 01 | | | | |
| Administration | | | | |
| Personnel Services | \$ 1,036,000 | \$ 910,800 | \$ 125,200 | 13.75% |
| Materials and Services | 910,000 | 768,000 | 142,000 | 18.49% |
| | \$ 1,946,000 | \$ 1,678,800 | \$ 267,200 | 15.92% |
| Department 02 | | | | |
| Operations | | | | |
| Personnel Services | \$ 10,775,600 | \$ 9,616,000 | \$ 1,159,600 | 12.06% |
| Materials and Services | 390,500 | 385,500 | 5,000 | 1.30% |
| | \$ 11,166,100 | \$ 10,001,500 | \$ 1,164,600 | 11.64% |
| Department 03 | | | | |
| Fire and Life Safety | | | | |
| Personnel Services | \$ 748,000 | \$ 801,400 | \$ (53,400) | -6.66% |
| Materials and Services | 25,000 | 27,000 | (2,000) | -7.41% |
| | \$ 773,000 | \$ 828,400 | \$ (55,400) | -6.69% |
| Department 04 | | | | |
| Training | | | | |
| Personnel Services | \$ 285,000 | \$ 359,700 | \$ (74,700) | -20.77% |
| Materials and Services | 204,000 | 201,800 | 2,200 | 1.09% |
| | \$ 489,000 | \$ 561,500 | \$ (72,500) | -12.91% |
| Department 05 | | | | |
| Strategic Services | | | | |
| Personnel Services | \$ 750,000 | \$ 710,500 | \$ 39,500 | 5.56% |
| Materials and Services | 1,073,000 | 1,008,500 | 64,500 | 6.40% |
| | \$ 1,823,000 | \$ 1,719,000 | \$ 104,000 | 6.05% |
| Department 07 | | | | |
| Technology | | | | |
| Personnel Services | \$ 169,400 | \$ 162,000 | \$ 7,400 | 4.57% |
| Materials and Services | 323,800 | 302,000 | 21,800 | 7.22% |
| | \$ 493,200 | \$ 464,000 | \$ 29,200 | 6.29% |
| TOTAL | \$ 16,690,300 | \$ 15,253,200 | \$ 1,437,100 | 9.42% |



Financial Forecast

2022/23 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 97 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 allowed for 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 3.96 percent for 2021. Projections for the ensuing seven fiscal years is estimated to average 4.63 percent. The average assessed valuation growth for the previous seven years was 4.27 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 across all divisions including the four new firefighter positions and the administrative battalion chief. Also factored in is the Public Employees Retirement System pension rate increases effective in odd years based on estimated valuations. Modest cost of living adjustments has 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.

Financial Forecast Summary for General Fund

| | Budget | Projected | Projected | Projected | Projected | Projected | Projected | Projected | Projected | Projected |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| GENERAL FUND | 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 | FY 31-32 |
| TOTAL REVENUE | \$ 22,394,000 | \$ 23,586,740 | \$ 24,603,477 | \$ 25,774,328 | \$ 26,995,777 | \$ 28,235,262 | \$ 29,546,346 | \$ 30,844,623 | \$ 32,403,623 | \$ 34,283,603 |
| TOTAL EXPENDITURES | \$ 17,194,000 | \$ 18,170,995 | \$ 18,793,335 | \$ 19,589,671 | \$ 20,424,061 | \$ 21,300,393 | \$ 22,216,652 | \$ 22,954,919 | \$ 23,738,479 | \$ 24,795,027 |
| Net Available for Policy Commitments | \$ 5,200,000 | \$ 5,415,746 | \$ 5,810,141 | \$ 6,184,657 | \$ 6,571,717 | \$ 6,934,869 | \$ 7,329,694 | \$ 7,889,705 | \$ 8,665,144 | \$ 9,488,576 |
| Policy Commitments * | | | | | | | | | | |
| Operating Contingency | \$ (975,000) | \$ (1,025,130) | \$ (1,072,879) | \$ (1,119,147) | \$ (1,169,636) | \$ (1,220,445) | \$ (1,276,975) | \$ (1,330,827) | \$ (1,390,402) | \$ (1,456,300) |
| Unappropriated Ending Fund Balance | \$ (4,225,000) | \$ (4,442,230) | \$ (4,649,142) | \$ (4,849,638) | \$ (5,068,421) | \$ (5,288,594) | \$ (5,533,559) | \$ (5,766,919) | \$ (6,025,076) | \$ (6,310,634) |
| Budget surplus/(shortfall) | \$ - | \$ (51,615) | \$ 88,120 | \$ 215,872 | \$ 333,660 | \$ 425,830 | \$ 519,160 | \$ 791,959 | \$ 1,249,666 | \$ 1,721,642 |
| Amount available for appropriation or amount needed to reduce the budget by in order to meet policy commitments | | | | | | | | | | |

* 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, 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, and actual expenditures may come in under budget. 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

2022/23 Fiscal Year

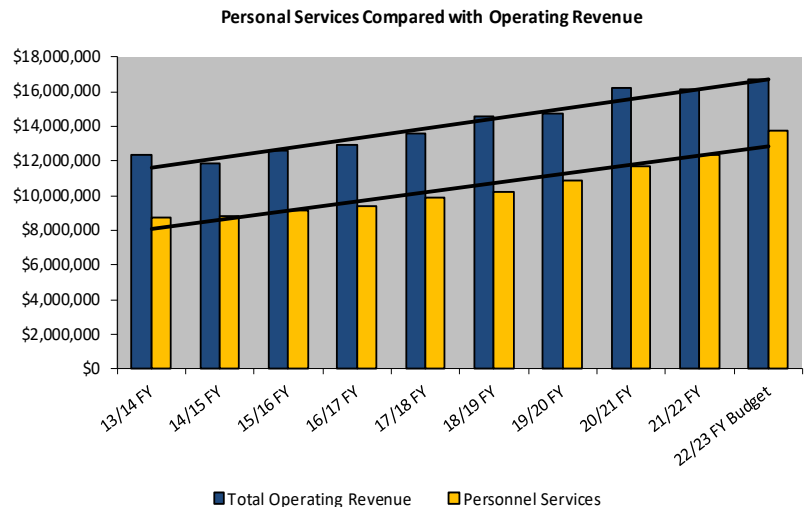
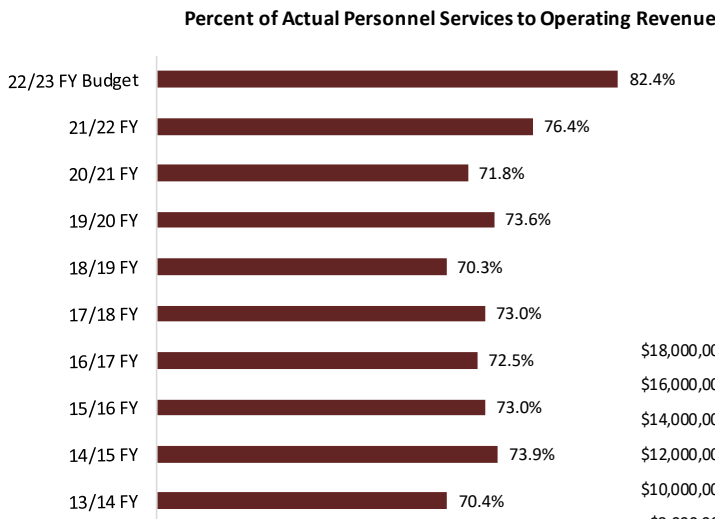
Financial Forecast Summary for Capital Projects Fund

| | Budget | Projected | Projected | Projected | Projected | Projected | Projected | Projected | Projected | Projected |
|---|----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| CAPITAL PROJECTS FUND | 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 | FY 31-32 |
| TOTAL REVENUE | \$ 5,196,000 | \$ 4,304,000 | \$ 4,547,415 | \$ 3,221,004 | \$ 2,900,300 | \$ 1,987,647 | \$ 1,970,023 | \$ 359,342 | \$ 136,443 | \$ 215,914 |
| TOTAL EXPENDITURES | \$ 1,196,000 | \$ 60,585 | \$ 1,630,411 | \$ 624,704 | \$ 1,216,653 | \$ 321,624 | \$ 1,914,681 | \$ 526,899 | \$ 224,529 | \$ 306,411 |
| Net Available for Policy Commitments | \$ 4,000,000 | \$ 4,243,415 | \$ 2,917,004 | \$ 2,596,300 | \$ 1,683,647 | \$ 1,666,023 | \$ 55,342 | \$ (167,557) | \$ (88,086) | \$ (90,497) |
| Ending Fund Policy Commitments | | | | | | | | | | |
| Operating Contingency | \$ (121,600) | \$ (6,059) | \$ (163,041) | \$ (62,470) | \$ (121,665) | \$ (32,162) | \$ (191,468) | \$ (52,690) | \$ (22,453) | \$ (30,641) |
| Reserve for Future Capital Expenditures | \$ (3,878,400) | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Budget surplus/(shortfall) | \$ - | \$ 4,237,357 | \$ 2,753,963 | \$ 2,533,830 | \$ 1,561,982 | \$ 1,633,861 | \$ (136,126) | \$ (220,247) | \$ (110,539) | \$ (121,138) |

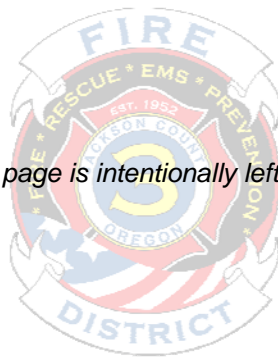
In the above Capital Fund forecast, the budget surplus depicts the amount available in ending fund balance for years 2024 and out, which would be appropriated as reserve for future. The current year reflects a balanced budget and thus nets to zero.

Management reviews the growth at which operating revenues are increasing compared to operating expenditures. The District has a target that the total personnel services classification will not exceed 80 percent of operating revenue and the total materials and services classification will not exceed 20 percent. In some years, expenditure totals in one of the classifications may exceed the target but financial forecasting allows the District to prepare for the future by monitoring and projecting those impacts and making prudent decisions in the current period to help prevent deficits in the future.

The following graphs depict total personnel services to operating revenue for the past ten fiscal years.



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Strategic Plan

2022/23 Fiscal Year

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

2022/23 Fiscal Year

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

2022/23 Fiscal Year

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

2022/23 Fiscal Year

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

2022/23 Fiscal Year

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:

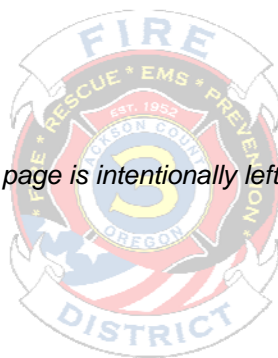
- Explore community paramedicine
- Explore treatment-in-place for patient care
- Address community needs through non-traditional programs
- Continue to improve options of service delivery using technology
- Embrace innovation to better support the service delivery models

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

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General Fund

2022/23 Fiscal Year

FUND DESCRIPTION

The purpose of the General Fund 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 | 2019/20 Actual | 2020/21 Actual | 2020/21 Budget | 2022/23 Budget |
|---------------------------|----------------------|----------------------|----------------------|----------------------|
| Personnel Services | \$ 10,860,443 | \$ 11,653,352 | \$ 12,560,400 | \$ 13,764,000 |
| Materials and Services | 2,077,144 | 2,226,753 | 2,692,800 | 2,926,300 |
| Operating Transfers Out | 1,266,200 | 996,200 | 1,591,400 | 55,000 |
| Operating Contingency | - | - | 820,100 | 975,000 |
| Debt Service | 486,021 | 710,242 | 579,000 | 448,700 |
| Ending Fund Balance | - | - | 4,036,500 | 4,225,000 |
| Total Requirements | \$ 14,689,809 | \$ 15,586,547 | \$ 22,280,200 | \$ 22,394,000 |

Revenues budgeted within the General Fund support the budgeted requirements as identified above. Property taxes account for 72 percent of the total revenue appropriations.

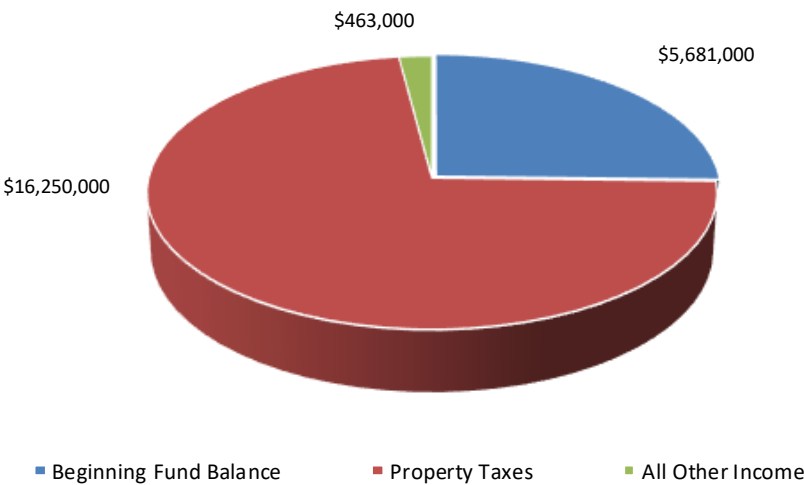
| Revenue Appropriations Description | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 | | |
|---------------------------------------|-------------------------|-------------------------|----------------------|-------------------------------|---------------------------------|------------------------------|
| | | | | Proposed By Budget Officer | Approved By Budget Committee | Adopted By Governing Body |
| Beginning Fund Balance | \$ 5,848,115.02 | \$ 5,933,412.80 | \$ 6,400,000 | \$ 5,943,000 | \$ 5,943,000 | \$ 5,681,000 |
| Taxes; Current | 13,880,986.87 | 14,588,632.54 | 15,175,000 | 15,900,000 | 15,900,000 | 15,900,000 |
| Taxes; Prior | 324,887.18 | 814,984.48 | 350,000 | 350,000 | 350,000 | 350,000 |
| Interest | 298,922.17 | 101,243.07 | 120,000 | 120,000 | 120,000 | 120,000 |
| Workers' Comp Refund & Reimb | 11,015.40 | 12,594.12 | 10,000 | 10,000 | 10,000 | 10,000 |
| Sale of Equipment | 689.37 | 1,997.00 | 1,000 | 1,000 | 1,000 | 1,000 |
| OSFM Conflagrations | 111,795.36 | 319,535.03 | 1,000 | 1,000 | 1,000 | 1,000 |
| Fees for Service; Suppression/EMS | 14,270.78 | 0.00 | 10,000 | 10,000 | 10,000 | 10,000 |
| Fees for Service; Drill Ground | 690.00 | 1,640.00 | 1,000 | 1,000 | 1,000 | 1,000 |
| Grants; Local, State, Federal | 34,025.71 | 271,733.74 | 135,000 | 150,000 | 150,000 | 150,000 |
| Contract; Financial Services | 5,000.00 | 0.00 | 0 | 0 | 0 | 0 |
| Contract; General Services | 0.00 | 0.00 | 0 | 1,000 | 1,000 | 1,000 |
| Lease Income | 7,428.00 | 7,651.20 | 12,000 | 12,000 | 12,000 | 12,000 |
| Lease Income; RCC | 49,070.64 | 50,542.80 | 55,000 | 55,000 | 55,000 | 55,000 |
| Miscellaneous | 9,025.10 | 57,275.58 | 10,000 | 100,000 | 100,000 | 100,000 |
| Donations | 0.00 | 1,360.00 | 100 | 1,000 | 1,000 | 1,000 |
| Loan Proceeds | 27,300.00 | 0.00 | 100 | 1,000 | 1,000 | 1,000 |
| TOTAL | \$ 20,623,221.60 | \$ 22,162,602.36 | \$ 22,280,200 | \$ 22,656,000 | \$ 22,656,000 | \$ 22,394,000 |

General Fund

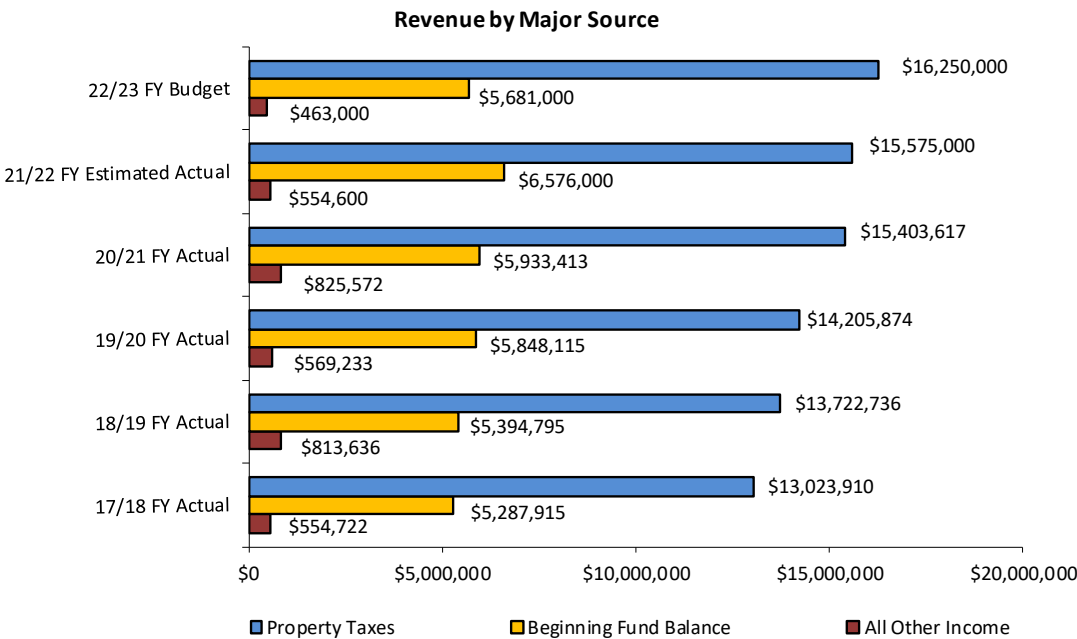
2022/23 Fiscal Year

REVENUE RESOURCES

2022/23 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 future budget developments.



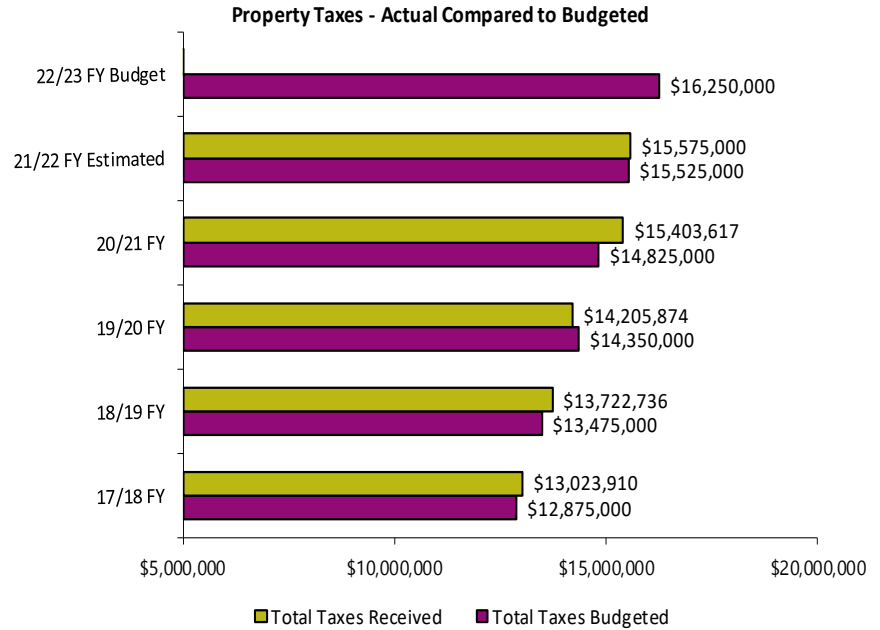
General Fund

2022/23 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.

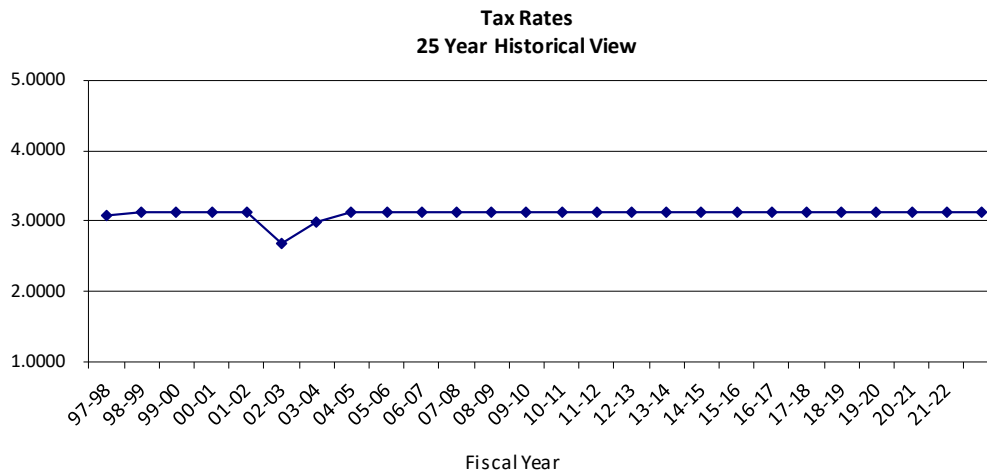
Property Taxes

Property taxes account for both the current year levy and prior years. Current taxes for the 2022/23 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 95 percent collectible rate. Patrons receive a three percent discount if taxes are paid in full by November 15th upon assessment in October. If taxes are paid two-thirds by November 15th then a two percent discount would apply with the final one-third due by May 15th. If taxes are paid only one-third by November 15th then no discount would apply and the second one-third payment would be due by February 15th with the final payment due by May 15th.



Prior year taxes for the 2022/23 fiscal year are budgeted at 2.18 percent of the 2021/22 Jackson County Assessor's certification of \$16,028,243 and account for delinquent tax payments. The delinquent collectible rate is based on the District's average over the last five years. All personal and real property tax along with 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 15th. 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.



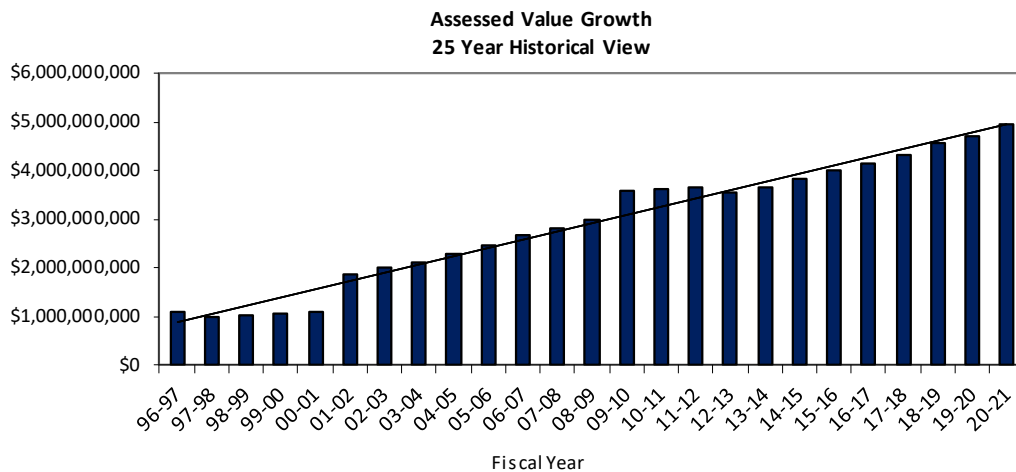
General Fund

2022/23 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. At that time, those annexations brought an increase in the District's assessed valuation by \$739,356,740 or 67 percent.

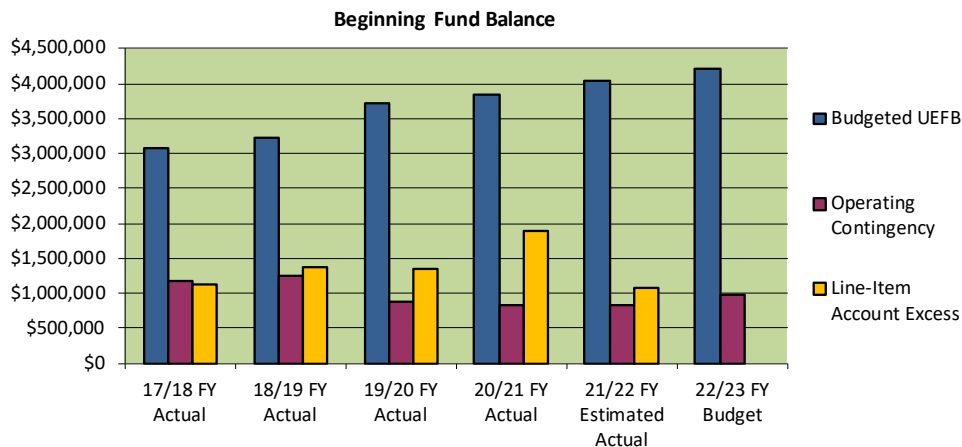
In 2009 the White City Urban Renewal tax increment financing ended, thus resulting in another increase in assessed valuation of \$470,000,000. Tax revenue generated from the frozen assessed value had been diverted to the Urban Renewal Agency since 1996. As of 2013 the City of Central Point has had an established urban renewal district which is diverting tax revenue from the District to fund their designated projects within their 20 year plan.

Another impact of Ballot Measure 50 is the limitation of increases in assessed valuation of each property to only three percent per year. Special exemptions for property that is improved, rezoned, subdivided, or ceases to qualify for exemption is allowed for, which could result in a higher or reduced valuation. A caveat though would be if real market value (RMV) falls below a property's maximum assessed value (MAV), then the lower of the two becomes the new assessed value (AV) for which the property taxes are calculated on. This continues each year until the real market value exceeds the MAV. This typically does not present to be a significant problem except for in years where there is a housing recession with declining market values. From 2011-2013 the District experienced this impact through 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 a significant loss of property taxes for the District.



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.

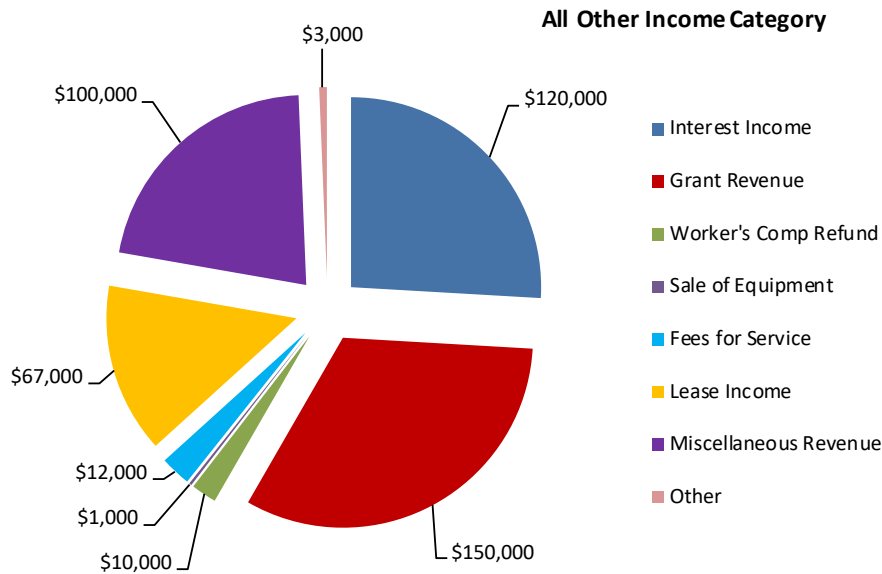


General Fund

2022/23 Fiscal Year

Other Income

Various revenue sources under the “all other income” category depicted in the chart on page 50 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. \$150,000 is identified in this budget to account for a Staffing for Adequate Fire Emergency Response (SAFER) grant through FEMA and also includes 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), which provides the College opportunity to conduct their fire science program through the utilization of the District’s training facility and classroom. \$12,000 is identified from the Oregon Department of Public Safety Standards and Training (DPSST) for their utilization of a District office to conduct their regional programs.

General Fund

2022/23 Fiscal Year

The **miscellaneous revenue** category consists of report copies, research fees, and any other non-anticipated income. Annual budgeted amounts tend to be based on conservative estimates. The District 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. Special tax distributions from the County Treasurer apart from property tax is also recorded under this category.

EXPENDITURE APPROPRIATIONS

The General Fund has expenditure appropriations balancing to revenue appropriations totaling \$22,394,000.

| Requirements | 2022/23 Budget | Percent of Budget |
|---------------------------|----------------------|----------------------|
| Personnel Services | \$ 13,764,000 | 61.46% |
| Materials and Services | 2,926,300 | 13.07% |
| Operating Transfers Out | 55,000 | 0.25% |
| Operating Contingency | 975,000 | 4.35% |
| Debt Service | 448,700 | 2.00% |
| Ending Fund Balance | 4,225,000 | 18.87% |
| Total Requirements | \$ 22,394,000 | 100.00% |

| Requirements | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 | | |
|---------------------------|---------------------|---------------------|---------------------|-------------------------------|---------------------------------|------------------------------|
| | | | | Proposed By Budget Officer | Approved By Budget Committee | Adopted By Governing Body |
| Personnel Services | \$10,860,443 | \$11,653,352 | \$12,560,400 | \$ 13,932,000 | \$ 13,932,000 | \$ 13,764,000 |
| Materials and Services | 2,077,144 | 2,226,753 | 2,692,800 | 2,810,300 | 2,810,300 | 2,926,300 |
| Transfers Out | 1,266,200 | 996,200 | 1,591,400 | 265,000 | 265,000 | 55,000 |
| Operating Contingency | - | - | 820,100 | 975,000 | 975,000 | 975,000 |
| Debt Service | 486,021 | 710,242 | 579,000 | 448,700 | 448,700 | 448,700 |
| Ending Fund Balance | 5,933,413 | 6,576,055 | 4,036,500 | 4,225,000 | 4,225,000 | 4,225,000 |
| Total Requirements | \$20,623,222 | \$22,162,602 | \$22,280,200 | \$ 22,656,000 | \$ 22,656,000 | \$ 22,394,000 |

General Fund

2022/23 Fiscal Year

SUMMARY OF REQUIREMENTS

| 2019/20 Actual | 2020/21 Actual | 2021/22 Budgeted | | 2022/23 Proposed | 202/23 Approved | 2022/23 Adopted | Inc / Dec from Prior Year |
|------------------------------|----------------------|----------------------|----------------------------------|----------------------|----------------------|----------------------|---------------------------------|
| Personnel Services | | | | | | | |
| \$ 5,837,078 | \$ 6,085,967 | \$ 6,499,400 | Salaries | \$ 7,284,900 | \$ 7,284,900 | \$ 7,162,900 | 10.21% |
| 526,474 | 641,025 | 717,000 | Overtime | 721,000 | 721,000 | 721,000 | 0.56% |
| 49,921 | 52,379 | 60,000 | Out of Class | 75,000 | 75,000 | 75,000 | 25.00% |
| 497,013 | 511,017 | 525,100 | Incentives* | 590,900 | 590,900 | 590,900 | 12.53% |
| 119,587 | 125,191 | 108,300 | Holiday Pay | 116,000 | 116,000 | 114,000 | 5.26% |
| 25,328 | 191,053 | 152,000 | Payouts | 120,200 | 120,200 | 120,200 | -20.92% |
| 35,589 | 35,233 | 39,700 | Fringe Benefits** | 65,300 | 65,300 | 65,300 | 64.48% |
| 1,437,518 | 1,536,304 | 1,680,300 | Retirement (PERS) | 1,841,000 | 1,841,000 | 1,811,000 | 7.78% |
| 173,584 | 219,856 | 246,800 | Deferred Comp | 264,700 | 264,700 | 264,700 | 7.25% |
| 1,276,853 | 1,328,495 | 1,512,700 | Insurances | 1,702,000 | 1,702,000 | 1,702,000 | 12.51% |
| 255,015 | 272,462 | 297,900 | VEBA | 333,500 | 333,500 | 329,500 | 10.61% |
| 528,150 | 560,028 | 619,700 | FICA/Medicare | 686,000 | 686,000 | 676,000 | 9.09% |
| 98,334 | 94,344 | 101,500 | Workers Comp | 131,500 | 131,500 | 131,500 | 29.56% |
| \$ 10,860,443 | \$ 11,653,352 | \$ 12,560,400 | | \$ 13,932,000 | \$ 13,932,000 | \$ 13,764,000 | 9.58% |
| Percent to Operating Revenue | | | | | | | 82.36% |
| | | | | | | | |
| \$ 2,077,144 | \$ 2,226,753 | \$ 2,692,800 | Materials and Services | \$ 2,810,300 | \$ 2,810,300 | \$ 2,926,300 | 8.67% |
| Percent to Operating Revenue | | | | | | | 17.51% |
| | | | | | | | |
| Non-Departmental | | | | | | | |
| 1,266,200 | 996,200 | 1,591,400 | Transfer to Capital | 265,000 | 265,000 | 55,000 | -96.54% |
| 0 | 0 | 820,100 | Contingency | 975,000 | 975,000 | 975,000 | 18.89% |
| 486,021 | 710,242 | 579,000 | Debt Service | 448,700 | 448,700 | 448,700 | -22.50% |
| 5,933,413 | 6,576,055 | 4,036,500 | UEFB | 4,225,000 | 4,225,000 | 4,225,000 | 4.67% |
| \$ 7,685,634 | \$ 8,282,497 | \$ 7,027,000 | | \$ 5,913,700 | \$ 5,913,700 | \$ 5,703,700 | -18.83% |
| \$ 20,623,222 | \$ 22,162,602 | \$ 22,280,200 | Total General Fund Budget | \$ 22,656,000 | \$ 22,656,000 | \$ 22,394,000 | 0.51% |

* 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 0.51 percent over the 2021/22 fiscal year. Personnel Services represents the majority of this increase (\$1,203,600) with significant drivers being four additional firefighter positions (\$600,000), a new administrative battalion chief position (\$202,000), full year budget impact of the People Services Administrator position (additional \$68,200), cost of living wage adjustments across all salaries and applicable benefits (\$188,900), pension expense (\$85,500), and health insurance costs (\$59,000, not including new positions).

Materials and services is budgeted to increase 8.67 percent or \$233,500 with focus on consultant contracts, technology, risk reduction, and outreach efforts.

The transfer to the Capital Fund has decreased over 96 percent or over \$1.5 million from the prior year, which is helping to offset the budget increases in the above classifications. Debt Service has decreased in accordance with scheduled debt payments and the final payoff of one holding. Operating Contingency and Unappropriated Ending Fund Balance (UEFB) has increased based on policy commitments.

General Fund

2022/23 Fiscal Year

PERSONNEL AND STAFFING CHANGES

2021/22 Fiscal Year in Review

During this past fiscal year, the District made some organizational changes in concert with the Chief's 2022 Staffing Initiative, introduced in December of 2021 ahead of budget development for 2022/23. In the Administration Department, a new position, People Services Administrator (PSA), was developed, recruited, and hired for. This position is responsible for employee recruitment and retention, onboarding, succession planning, employee engagement, and administering all of the District's entry level and promotional exams under Civil Service. A supplemental budget process in November of 2021 established and funded this position for the remainder of the fiscal year (six months). In the Training Department, the Administrative Assistant position was reallocated to the Strategic Services Department after a position vacancy occurred, which helped offset costs for the new PSA position.

Within the Fire and Life Safety Department the District saw the retirement of a long-standing Deputy Fire Marshal. This retirement allowed opportunity for an evaluation of the department's structure, workflow efficiencies, and future staffing needs and shortfalls. The Deputy Fire Marshal (DFM) position within the fire service is very technical in nature and, coupled with the stringent certification requirements, has created an industry shortage of advanced level applicants. Forecasting this shortage and working in concert with the Union Leadership, the District developed a structure that allows for entry level hiring that provides on-the-job training and certification. As a result, the DFM position was restructured into three levels: DFM 1- Entry, DFM 2- Mid, and DFM 3- Advanced. The new DFM levels are correspondingly represented along a new salary scale. With the retirement of a top-salary advanced-level DFM, the District had the opportunity to hire two DFM's at the entry-level position at a reduced initial cost. This increase in staffing will help the department grow into the future with enhanced workload distribution and will allow expanded concentration within different areas of the communities served.

The District administered a Firefighter entrance exam in November of 2021 under the Civil Service rules and attained a register of 31 qualified candidates. This register is valid for 12 months. In November of 2021 the District administered a Deputy Fire Marshal entrance exam under Civil Service rules and attained a register of eight qualified individuals. The register expires in September of 2023. In March of 2022, the District administered an internal Captain's promotional exam and attained a register of five qualified individuals. This register is valid for 24 months.

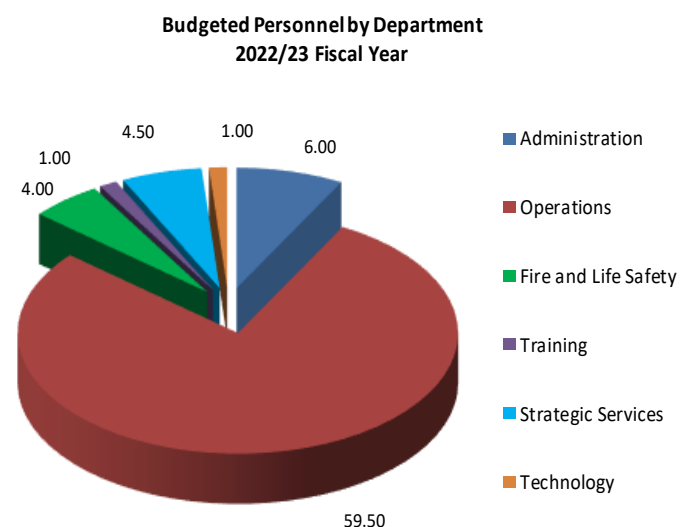
2022/23 Fiscal Year

Under the Chief's 2022 Staffing Initiative, new positions and programs are being introduced within the Operations Department: Administrative Battalion Chief, four firefighter positions, and a Wildland-Urban Interface Response Unit (WUIRU). The four new firefighter positions will augment staffing for those personnel assigned to the WUIRU.

Under Administration, Fire and Life Safety, Strategic Services, and Technology no new positions are being introduced that are different from the 2022 Staffing Initiative and reorganization. The Division Chief of Training and Safety has been reclassified to rank of Battalion Chief. All departments remain focused and committed to the mission and support budgeted programs with respective personnel.

In July and August of 2022 the District will conduct a hiring process for the positions of Battalion Chief of Administration and Training. In November of 2022 the District will administer another Firefighter entrance exam and in May of 2023 the District will administer an Engineer's promotional exam.

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.

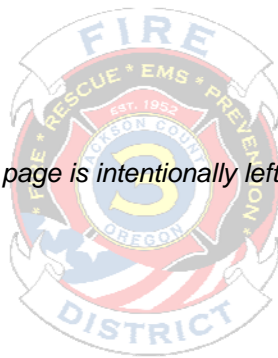


General Fund

2022/23 Fiscal Year

| PERSONNEL ALLOCATION | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|---------------------------------------|-------------------|-------------------|-------------------|-------------------|
| Administration | | | | |
| Fire Chief | 1.00 | 1.00 | 1.00 | 1.00 |
| Chief Administrative Officer | 1.00 | 1.00 | 1.00 | 1.00 |
| People Services Administrator | 0.00 | 0.00 | 0.50 | 1.00 |
| Community Engagement Coordinator | 0.50 | 0.50 | 1.00 | 1.00 |
| Executive Assistant | 1.00 | 1.00 | 1.00 | 1.00 |
| Finance Assistant | 1.00 | 1.00 | 1.00 | 1.00 |
| Program Assistant | 0.15 | 0.00 | 0.00 | 0.00 |
| Total | 4.65 | 4.50 | 5.50 | 6.00 |
| Operations | | | | |
| Deputy Chief | 1.00 | 1.00 | 1.00 | 1.00 |
| Battalion Chief – Command | 3.00 | 3.00 | 3.00 | 3.00 |
| Battalion Chief – Administrative | 0.00 | 0.00 | 0.00 | 1.00 |
| 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 | 21.00 | 25.00 |
| Community EMT | 0.00 | 2.00 | 2.00 | 2.00 |
| Community Paramedic | 2.00 | 2.00 | 2.00 | 2.00 |
| Administrative Assistant | 1.00 | 1.00 | 1.00 | 1.00 |
| Recruitment and Retention Coordinator | 0.00 | 0.15 | 0.50 | 0.50 |
| Program Assistant | 0.00 | 0.00 | 0.15 | 0.00 |
| Total | 51.00 | 53.15 | 54.65 | 59.50 |
| Fire and Life Safety | | | | |
| Fire Marshal | 1.00 | 1.00 | 1.00 | 1.00 |
| Deputy Fire Marshal 1 | 0.00 | 0.00 | 2.00 | 2.00 |
| Deputy Fire Marshal 2 | 0.00 | 0.00 | 0.00 | 0.00 |
| Deputy Fire Marshal 3 | 2.00 | 2.00 | 2.00 | 1.00 |
| Fire and Life Safety Specialist | 1.00 | 0.00 | 0.00 | 0.00 |
| Administrative Assistant | 1.00 | 0.00 | 0.00 | 0.00 |
| Total | 5.00 | 3.00 | 5.00 | 4.00 |
| Training | | | | |
| Division Chief of Training and Safety | 1.00 | 1.00 | 1.00 | 0.00 |
| Battalion Chief - Training | 0.00 | 0.00 | 0.00 | 1.00 |
| Administrative Assistant | 1.00 | 1.00 | 0.50 | 0.00 |
| Total | 2.00 | 2.00 | 1.50 | 1.00 |
| Strategic Services | | | | |
| Deputy Chief | 1.00 | 1.00 | 1.00 | 1.00 |
| Captain of Community Risk Reduction | 0.25 | 1.00 | 1.00 | 1.00 |
| Facilities/Logistics Manager | 0.25 | 0.00 | 0.00 | 0.00 |
| Facilities/Logistics Technician | 1.00 | 1.00 | 1.00 | 1.00 |
| Administrative Assistant | 0.00 | 1.00 | 1.00 | 1.00 |
| Logistics Support Technician | 0.00 | 0.00 | 0.50 | 0.50 |
| Total | 2.50 | 4.00 | 4.50 | 4.50 |
| Technology | | | | |
| Information Technology Administrator | 1.00 | 1.00 | 1.00 | 1.00 |
| Total | 1.00 | 1.00 | 1.00 | 1.00 |
| Organizational Total | 66.15 | 67.65 | 72.15 | 76.00 |

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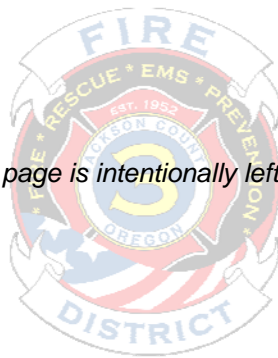
Administration

FIRE DISTRICT 3



2022/23 Fiscal Year Budget

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Administration Department

2022/23 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

| | | | | | Budget Comparison | |
|---------------------------|--------------------|--------------------|--------------------|--------------------|-------------------|---|
| Expenditures | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget | 2022/23 Budget |  |
| Personnel Services | \$679,754 | \$739,129 | \$910,800 | \$1,036,000 | 2021/22 Budget |  |
| Materials and Services | \$704,982 | \$713,190 | \$768,000 | \$910,000 | 2020/21 Actual |  |
| | \$1,384,736 | \$1,452,320 | \$1,678,800 | \$1,946,000 | 2019/20 Actual |  |

PERSONNEL SUMMARY

| Position | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|--|-------------------|-------------------|-------------------|-------------------|
| Fire Chief | 1.00 | 1.00 | 1.00 | 1.00 |
| Chief Administrative Officer | 1.00 | 1.00 | 1.00 | 1.00 |
| People Services Administrator | 0.00 | 0.00 | 0.50 | 1.00 |
| Community Engagement Coordinator | 0.50 | 0.50 | 1.00 | 1.00 |
| Executive Assistant | 1.00 | 1.00 | 1.00 | 1.00 |
| Finance Assistant | 1.00 | 1.00 | 1.00 | 1.00 |
| Program Assistant (<i>part-time</i>) | 0.15 | 0.00 | 0.00 | 0.00 |
| Total | 4.65 | 4.50 | 5.50 | 6.00 |

Administration Department

2022/23 Fiscal Year

NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase 13.75 percent or \$125,000 over the prior fiscal year. Factors impacting this classification include budgeting a full year salary and benefits for the new People Services Administrator position (budget impact of \$93,000) that was established in the 2021/22 fiscal year through a budget resolution. Other impacts are 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 increase 18.5 percent or \$142,000. Significant factors include an increase in consultation contracts under account 60270-000; *Contractual Services*, the creation of a new account 60280-000; *Community Engagement*, and an increase in account 60490-000; *Hiring Processes* for upcoming recruitment efforts.

PRIOR YEAR ACCOMPLISHMENTS


















- Completed long-term financial forecasting adjusting for modest economic improvement; revised the capital replacement plan which remains adequately funded.
- Received the Distinguished Budget Award and Certificate of Excellence in Financial Reporting from the Government Finance Officers Association (GFOA).
- Developed a more robust community engagement program expanding our presence and connection to the community both virtually and in-person.
- Administered a Civil Service entry level firefighter exam along with a promotional captain exam.
- Launched a “Staffing 2022 Initiative Plan” that added positions and resulted in a reorganization, aimed to add depth among uniformed positions and address the summer wildfire season.
- Revised the District’s workers’ compensation injury process and developed an electronic reporting platform.
- Evaluated support staff duties and workflow efficiencies; made modifications in those areas where duplication was found and developed new systems to improve productivity.
- Administered a hiring process and the subsequent onboarding of seven new firefighters to fill vacancies as a result of some retirements, promotions, and organizational restructuring.
- Continued navigating through the Covid-19 pandemic ensuring safe practices to protect our workforce and worksites while maintaining service delivery to the community. Administered State mandates for all healthcare workers on vaccination requirements.
- Distributed an annual newsletter to over 22,000 District households.

DEPARTMENT MEASUREMENTS AND TARGETS

| <i>Types of Transactions (Output Measures)</i> | <i>2018/19 Actual</i> | <i>2019/20 Actual</i> | <i>2020/21 Actual</i> | <i>2021/22 Estimated</i> | <i>2022/23 Projected</i> |
|--|---------------------------|---------------------------|---------------------------|------------------------------|------------------------------|
| <i>Accounts Payable Transactions</i> | 1,343 | 1,457 | 1,357 | 1,416 | 1,500 |
| <i>Payroll Disbursements (includes ACH)</i> | 1,616 | 1,628 | 1,685 | 1,712 | 1,820 |
| <i>Purchase Orders Issued</i> | 1,006 | 1,126 | 1,082 | 1,000 | 1,000 |
| <i>Cash Receipts Processed</i> | 124 | 102 | 103 | 100 | 100 |

Administration Department

2022/23 Fiscal Year

| <i>Effectiveness Measures</i> | <i>2018/19 Actual</i> | <i>2019/20 Actual</i> | <i>2020/21 Actual</i> | <i>2021/22 Estimated</i> | <i>2022/23 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>2018/19 Actual</i> | <i>2019/20 Actual</i> | <i>2020/21 Actual</i> | <i>2021/22 Estimated</i> | <i>2022/23 Projected</i> |
|--|---------------------------|---------------------------|---------------------------|------------------------------|------------------------------|
| <i>Financial Reporting</i> | | | | | |
| <i>Provide accurate financial reports on a monthly basis at Board Meetings</i> | 100% | 100% | 100% | 100% | 100% |
| <i>Sound Audit Findings</i> | | | | | |
| <i>Number of audit findings</i> | None | None | None | None | None |
| <i>Investing</i> | | | | | |
| <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 |
| <i>Workers' Compensation</i> | | | | | |
| <i>Encourage safe work practices to maintain an "Experience Modifier" of below 1.0</i> | .68 | .69 | .69 | .61 | .83 |

Administration Department

2022/23 Fiscal Year

2022/23 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.

| Goal 2.1 | Evaluate organizational and staffing models | | |
|-----------|---|---|---------------|
| Objective | Align resources with needs | | |
| Task | 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 | Completed: Continues into new fiscal year | June 30, 2023 |

| Objective | Evaluate the addition of more divisions to support the mission | | |
|-----------|---|-------------------------|---------------|
| Task | Conduct an organizational study that focuses on existing positions, workloads, efficiencies, redundancies, and future needs to determine if divisional restructuring is necessary | Target Completion Date: | June 30, 2023 |

| Objective | Evaluate the need for additional administrative chief positions | | |
|-----------|---|-------------------------|---------------|
| Task | Conduct an organizational study that focuses on existing positions, workloads, efficiencies, redundancies, and future needs to determine if additional personnel is necessary | Target Completion Date: | June 30, 2023 |

| Goal 2.3 | Maintain fiscal responsibility | | |
|-----------|---|---|---------------|
| Objective | Assess capital needs and plan accordingly | | |
| Task | Maintain a 10-year capital improvement plan that reflects targeted capital replacement, funding mechanisms, and financial sustainability modeling | Completed: Continues into new fiscal year | June 30, 2023 |

| Objective | Evaluate additional revenue sources beyond tax dollars | | |
|-----------|--|-------------------------|-------------------|
| Task | Evaluate expanding revenue sources like fees for service and capitalize on federal and state grant opportunities | Target Completion Date: | December 31, 2022 |

| Objective | Ensure appropriateness of compensation packages | | |
|-----------|--|-------------------------|-------------------|
| Task | 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 | Target Completion Date: | December 31, 2022 |

Administration Department

2022/23 Fiscal Year

Initiative 3

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

| Goal 3.2 | Enhance internal communication | | |
|-----------|---|-------------------------|---------------|
| Objective | Improve the effectiveness of internal communication opportunities | | |
| Task | Collaborate on effective communication strategies and delivery methods that will promote interest and engagement | Target Completion Date: | June 30, 2023 |
| Task | Set organizational direction through clear, direct communication that is specific and appropriate throughout the workforce | Target Completion Date: | June 30, 2023 |
| Objective | Increase the exposure of leadership to internal teams and line staff | | |
| Task | Establish productive methods and opportunities for collaboration and feedback through engagement of workforce on a targeted basis | Completed Date: | December 2021 |
| Objective | Enhance team dynamics among all functional areas | | |
| Task | Engage in teambuilding exercises and encourage collaborative interaction | Target Completion Date: | June 30, 2023 |
| Objective | Create opportunities for line staff to engage with management | | |
| Task | Continue holding labor/management breakfast meetings | Target Completion Date: | June 30, 2023 |
| Task | Analyze implementing theme-based meeting sessions with executive leadership | Target Completion Date: | June 30, 2023 |

Initiative 4

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

| Goal 4.2 | Increase effectiveness of virtual presence | | |
|-----------|---|-------------------------|---------------|
| Objective | Expand the use of social media platforms to include public education | | |
| Task | Develop a public education page on District website | Target Completion Date: | June 30, 2023 |
| Task | Develop public education releases utilizing Twitter and Facebook | Completed Date: | December 2021 |
| Objective | Offer more web-based information to the public | | |
| Task | Enhance District website to include a resources and informational page | Target Completion Date: | June 30, 2023 |
| Objective | Increase District brand recognition within the community | | |
| Task | Evaluate methods of advertising and marketing the services the District provides to the community | Target Completion Date: | June 30, 2023 |
| Task | Develop a formal communications plan (internal and external) | Target Completion Date: | June 30, 2023 |

Administration Department

2022/23 Fiscal Year

Initiative 5

Develop and strengthen collaborative efforts and strategic partnerships.

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

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

Initiative 6

Commit to excellence through innovation.

| Goal 6.2 | Build organizational capacity and excellence | | |
|-----------|--|-------------------------|---------------|
| Objective | Continue to recruit and retain outstanding staff | | |
| Task | Evaluate recruitment and hiring processes in light of pandemic and generational changes and adjust processes accordingly | Completed Date: | March 2022 |
| Task | Evaluate diversity and inclusion methods in the hiring process | Target Completion Date: | June 30, 2023 |

| Objective | Increase accountability at all levels | | |
|-----------|--|-------------------------|---------------|
| Task | Establish clear expectations and develop accountability measurements for all positions | Target Completion Date: | June 30, 2023 |

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

Administration Department

2022/23 Fiscal Year

| General Fund | <u>HISTORICAL</u> | | 2021/22 FY | <u>BUDGET FOR NEXT FISCAL YEAR</u> | | |
|-------------------------------------|-----------------------|-----------------------|--------------------|------------------------------------|------------------------------|---------------------------|
| | 2019/20 FY | 2020/21 FY | | 2022/2023 | | |
| Description | Actual | Actual | Adopted Budget | Proposed By Budget Officer | Approved By Budget Committee | Adopted By Governing Body |
| Personnel Services | | | | | | |
| Salaries | 415,821.29 | 438,994.00 | 526,700 | 595,200 | 595,200 | 595,200 |
| Overtime | 0.00 | 0.00 | 1,000 | 1,000 | 1,000 | 1,000 |
| Incentives | 35,302.05 | 36,627.00 | 42,200 | 47,300 | 47,300 | 47,300 |
| Payouts | 3,462.00 | 24,421.44 | 20,000 | 25,000 | 25,000 | 25,000 |
| Retirement (PERS) | 81,607.12 | 87,507.66 | 109,000 | 123,000 | 123,000 | 123,000 |
| Unemployment Insurance | 0.00 | 0.00 | 100 | 15,000 | 15,000 | 15,000 |
| ER Deferred Comp Contrib | 27,473.06 | 32,101.00 | 34,000 | 41,500 | 41,500 | 41,500 |
| Health and Life Insurance | 66,358.08 | 66,404.81 | 108,000 | 110,000 | 110,000 | 110,000 |
| HRA-VEBA Contribution | 17,245.38 | 18,221.40 | 23,100 | 26,000 | 26,000 | 26,000 |
| FICA and Medicare PR Taxes | 32,226.63 | 34,557.30 | 45,700 | 51,000 | 51,000 | 51,000 |
| Workers' Comp Insurance | 258.27 | 294.44 | 1,000 | 1,000 | 1,000 | 1,000 |
| TOTAL PERSONNEL SERVICES | \$679,753.88 | \$739,129.05 | \$910,800 | \$1,036,000 | \$1,036,000 | \$1,036,000 |
| Materials and Services | | | | | | |
| Physicals and Vaccinations | 0.00 | 597.00 | 1,000 | 1,000 | 1,000 | 1,000 |
| Printing | 2,824.22 | 11,454.65 | 18,000 | 18,000 | 18,000 | 18,000 |
| Supplies; Office | 7,773.81 | 6,315.16 | 10,000 | 10,000 | 10,000 | 10,000 |
| Supplies; Administrative | 29,196.90 | 21,848.56 | 35,000 | 40,000 | 40,000 | 40,000 |
| Licenses and Fees | 32,454.02 | 8,375.44 | 10,000 | 10,000 | 10,000 | 10,000 |
| Contractual/Professional Service | 515,163.99 | 520,522.29 | 535,000 | 630,000 | 630,000 | 660,000 |
| Property and Casualty Insurance | 86,566.00 | 0.00 | 0 | 10,000 | 10,000 | 10,000 |
| Community Engagement | 0.00 | 102,016.00 | 105,000 | 106,000 | 106,000 | 106,000 |
| Mileage Reimbursements | 408.77 | 625.48 | 1,000 | 1,000 | 1,000 | 1,000 |
| Membership Dues | 8,120.00 | 9,144.00 | 10,000 | 10,000 | 10,000 | 10,000 |
| Books and Subscriptions | 2,845.64 | 2,954.51 | 2,000 | 2,000 | 2,000 | 2,000 |
| Advertising | 2,487.57 | 2,493.70 | 12,000 | 12,000 | 12,000 | 12,000 |
| Hiring Processes, CS, Background | 13,746.18 | 18,371.81 | 15,000 | 20,000 | 20,000 | 20,000 |
| Postage and Shipping | 3,394.53 | 8,471.69 | 14,000 | 10,000 | 10,000 | 10,000 |
| TOTAL MATERIALS and SERVICES | \$704,981.63 | \$713,190.29 | \$768,000 | \$880,000 | \$880,000 | \$910,000 |
| TOTAL ADMINISTRATION | \$1,384,735.51 | \$1,452,319.34 | \$1,678,800 | \$1,916,000 | \$1,916,000 | \$1,946,000 |

Administration Department

2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 1

| Account | Description | Account Total |
|-----------|---|---------------|
| 58203-000 | Physicals and Vaccinations..... | \$ 1,000 |
| 60220-000 | Printing..... General administrative printing by outside sources including newsletter, annual report, business cards | \$ 18,000 |
| 60222-000 | Office Supplies..... | \$ 10,000 |
| 60223-001 | Administrative Expenses..... General administrative supplies and board expenses 15,000 Years of service awards and annual banquet 10,000 Board of Director elections 10,000 Miscellaneous office equipment, historical preservation, photo board 5,000 | \$ 40,000 |
| 60223-002 | Licenses and Fees..... 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 | Contractual/Professional Services..... 911 dispatch services contract 443,000 General legal counsel 25,000 Financial audit and filing expenses 14,000 Lobbyist 12,000 EMS physician supervisor contract 10,000 Employee assistance programs 32,000 Civil Service Chief Examiner 10,000 Fire consolidation exploratory services 50,000 Consultation services 64,000 | \$ 660,000 |
| 60280-000 | Community Engagement..... Expenses related to community engagement and public education | \$ 10,000 |
| 60370-000 | Property and Casualty Insurance..... | \$ 106,000 |
| 60380-001 | Mileage Reimbursements..... | \$ 1,000 |
| 60410-000 | Membership Dues..... 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 | Books and Subscriptions..... | \$ 2,000 |

Administration Department

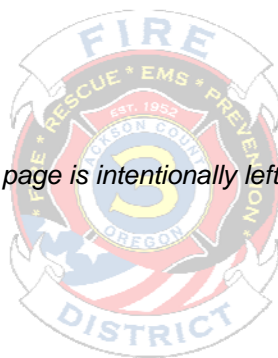
2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued*

General Fund 1, Department 1

| Account | Description | Account Total |
|-------------------------------------|---|-------------------|
| 60430-001 | Advertising..... 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 |
| 60490-000 | Hiring Processes, Civil Service, Backgrounds..... Includes entry level hiring processes and promotional exams, expenses for Civil Service meetings, and all expenses related to pre-employment background evaluations | \$ 20,000 |
| 60491-000 | Postage and Shipping..... | \$ 10,000 |
| TOTAL MATERIALS AND SERVICES | | \$ 910,000 |

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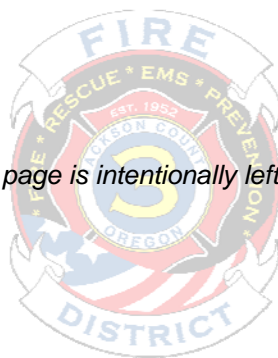
Operations

FIRE DISTRICT 3



2022/23 Fiscal Year Budget

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Operations Department

2022/23 Fiscal Year

DEPARTMENT DESCRIPTION

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

1. 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. 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 community risk reduction, 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

2022/23 Fiscal Year

DISTRICT STATIONS

White City (WC) Station 22 – Career Staffed

The White City station is located at 8333 Agate Road in White City and houses Engine Company 22. The Battalion Chief is also stationed here. There were 2,250 requests for service in the White City FMZ in 2021.



Central Point (CP) Station 20 – Career Staffed

The Central Point station is located at 600 South Front Street and houses Engine Company 20. There were 1,986 requests for service in the Central Point station in 2021.



Eagle Point (EP) Station 23 – Career Staffed

The Eagle Point station is located at 213 Loto Street and houses Engine Company 23. There were 1,357 requests for service in the Eagle Point FMZ in 2021.



Scenic (SS) Station 21 – Career Staffed

The Scenic station is located at 1909 Scenic Avenue and houses Engine Company 21. There were 1,398 requests for service in the Scenic station in 2021.



Dodge Bridge (DB) Station 25 – 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 339 requests for service in the Dodge Bridge FMZ in 2021.



Gold Hill (DB) Station 27 – 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 518 requests for service in the Gold Hill FMZ in 2021.



Operations Department

2022/23 Fiscal Year

Sams Valley (SV) Station 26 – 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 316 requests for service in the Sams Valley FMZ in 2021.



Agate Lake (AL) Station 24 – Volunteer Staffed

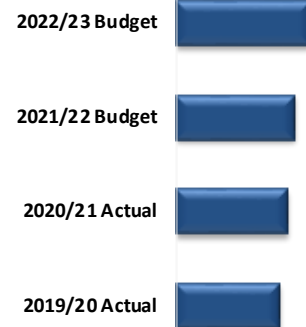
The Agate Lake station is located at 880 East Antelope Road. Career personnel from the White City and/or Eagle Point stations may respond to supplement volunteer resident response. There were 110 requests for service in the Agate Lake FMZ in 2021.



BUDGET SUMMARY

| Expenditures | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|------------------------|--------------------|--------------------|---------------------|---------------------|
| Personnel Services | \$8,441,409 | \$9,128,177 | \$9,616,000 | \$10,775,600 |
| Materials and Services | \$246,859 | \$312,127 | \$385,500 | \$390,500 |
| | \$8,688,268 | \$9,440,305 | \$10,001,500 | \$11,166,100 |

Budget Comparison



PERSONNEL SUMMARY

| Position | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|--|-------------------|-------------------|-------------------|-------------------|
| Deputy Chief of Operations | 1.00 | 1.00 | 1.00 | 1.00 |
| Battalion Chief – Command (IAFF Local 1817) | 3.00 | 3.00 | 3.00 | 3.00 |
| Battalion Chief – Administrative (IAFF Local 1817) | 0.00 | 0.00 | 0.00 | 1.00 |
| Fire Captain (IAFF Local 1817) | 12.00 | 12.00 | 12.00 | 12.00 |
| Fire Engineer (IAFF Local 1817) | 12.00 | 12.00 | 12.00 | 12.00 |
| Firefighter (IAFF Local 1817) | 20.00 | 20.00 | 21.00 | 25.00 |
| Community EMT (IAFF Local 1817) | 0.00 | 2.00 | 2.00 | 1.00 |
| Community Paramedic (IAFF Local 1817) | 2.00 | 2.00 | 2.00 | 3.00 |
| Administrative Assistant | 1.00 | 1.00 | 1.00 | 1.00 |
| Recruitment and Retention Coordinator | 0.00 | 0.15 | 0.50 | 0.50 |
| Program Assistant (part-time) | 0.00 | 0.00 | 0.15 | 0.00 |
| Total | 51.00 | 53.15 | 54.65 | 59.50 |

Operations Department

2022/23 Fiscal Year

NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase 12 percent or \$1,159,600 over the prior fiscal year. Significant factors impacting this classification is the hiring of four additional firefighter positions. These positions will provide for expanded service in special operations, particularly to help augment staffing of a new Wildland-Urban Interface Response Unit (WUIRU), which is a new summer program the District is introducing. After the program ends for the season the positions will supplement staffing until future retirements occur, thus offsetting those vacancies. The budget impact for these additional positions is \$600,000.

Operations will also see the addition of a new Administrative Battalion Chief position for a total budget impact of \$202,000. This position is aimed at providing management level program and personnel support in the District's non-station based special operations response resources. These specialty teams consist of the Community Care Response Unit, Technical Rescue Program, and the Wildland-Urban Interface Response Unit. In addition, this position will be tasked with assisting in the implementation of the District's community risk reduction initiatives.

Other factors impacting Personnel Services are salary and benefit adjustments due to cost of living and pension plan and health insurance increases. Workers' compensation reflects a 30.5 percent budgetary increase due to unfavorable claims experience for the past three years and a slight increase in the firefighter industrial class code rating.

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, at which time the necessary budget adjustments will be made.

The Materials and Services classification is budgeted to increase 1.3 percent. This budget supports the routine expenditures and supplies needed to maintain safe operations and program initiatives factoring in inflationary increases. Some specialty programs identified include the purchase of six automatic external defibrillators (AED) to enhance the verified responder initiative and updates to breathing masks and annual fit testing.

The District also continues to experience the benefit of the student program and maintains the funding for six student firefighters to attain their fire science degree through 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.

PRIOR YEAR ACCOMPLISHMENTS

- Provided regional support of wildfire response while maintaining capacity within the District.
- Completed apparatus renumbering and programming for the Rogue Valley.
- Completed the bid, purchasing, and construction sequences for two water tenders.
- Specification Committee developed a design and expense projection for a new Type 6 wildland platform for development of the 2022/23 budget.
- Implemented SCBA voice amplifiers for all riding positions.
- Purchased and implemented man-in-the-machine kits.
- Onboarded the Recruitment and Retention Coordinator position who brought on nine new volunteer firefighters and three new student firefighters.
- Completed the purchase and training on new extrication equipment, providing capability to match new vehicle technology.

Operations Department

2022/23 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.

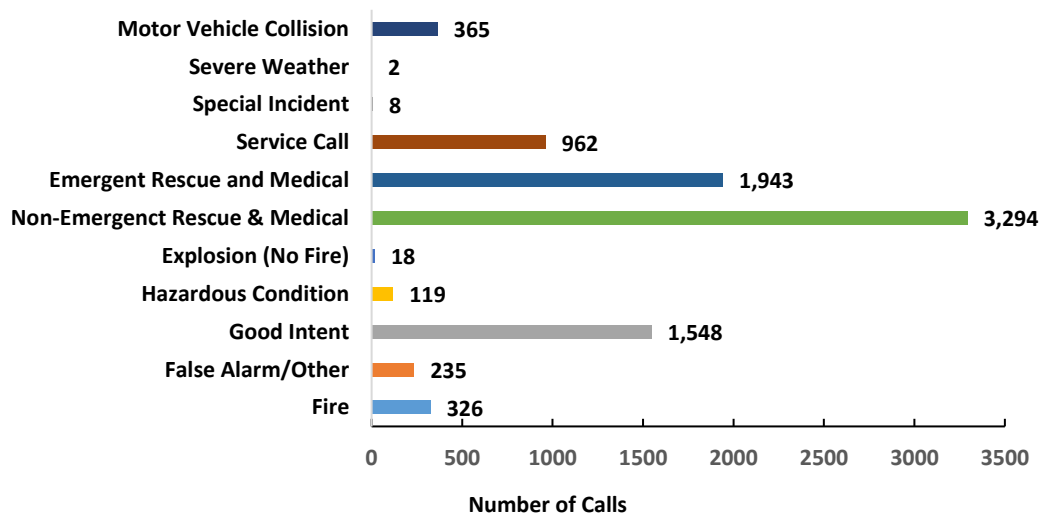
Emergent Rescue/Medical: This type of call is one where timeliness of the medical intervention has an impact on the positive outcome of the patient. Some examples of this type of call are chest pain, cardiac arrest, stroke, and difficulty breathing. Crews normally respond "Code 3" (lights and sirens)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

Incidents by Type in 2021



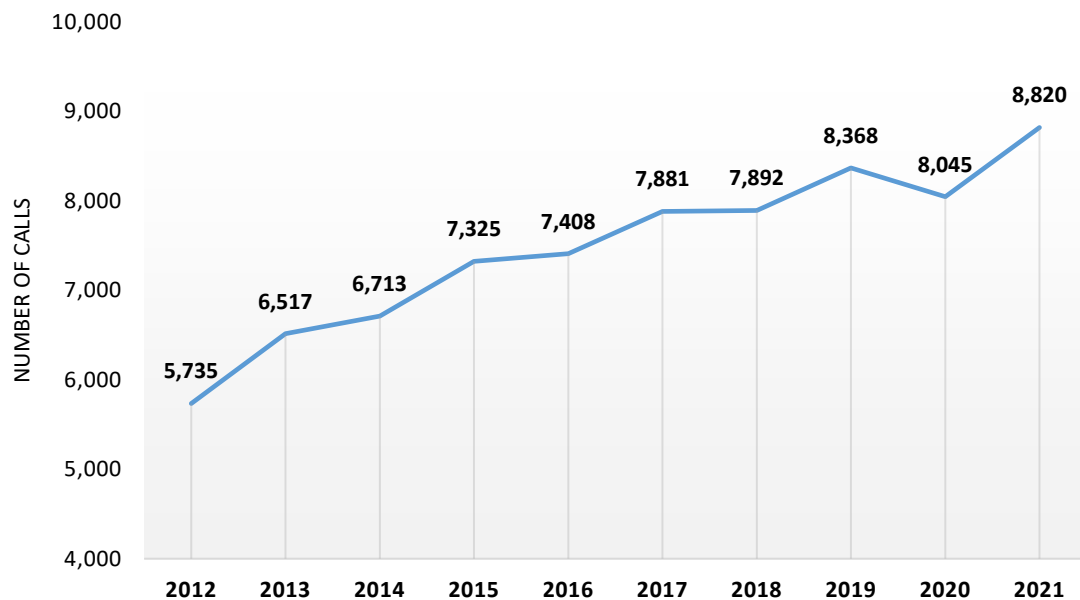
Operations Department

2022/23 Fiscal Year

| <i>Types of Emergent Incidents (Outputs)</i> | <i>2018 Actual</i> | <i>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> | <i>2022 Target</i> |
|--|------------------------|------------------------|------------------------|------------------------|------------------------|
| <i>Fire</i> | 236 | 232 | 276 | 326 | 325 |
| <i>Explosion (No Fire)</i> | 1 | 1 | 14 | 18 | 20 |
| <i>Emergent Rescue/Medical</i> | 3,417 | 3,339 | 1,817 | 1,943 | 2,040 |
| <i>Non-Emergent Rescue/Medical</i> | 894 | 1,324 | 2,692 | 3,294 | 3,459 |
| <i>Hazardous Condition (No Fire)</i> | 108 | 146 | 14,26 | 119 | 125 |
| <i>Motor Vehicle Collision</i> | 399 | 460 | 427 | 365 | 535 |
| <i>Severe Weather/Natural Disaster</i> | 3 | 4 | 1 | 2 | 5 |
| <i>Special Incident</i> | 10 | 6 | 2 | 8 | 10 |
| <i>Service Call</i> | 682 | 694 | 823 | 962 | 800 |
| <i>False Alarm / Other</i> | 214 | 262 | 236 | 235 | 250 |
| <i>Good Intent</i> | 1,928 | 1,900 | 1,615 | 1,548 | 1,692 |
| Total | 7,892 | 8,368 | 8,045 | 8,820 | 9,261 |

Response to dispatched incidents was down in 2020 due to the Covid-19 pandemic.

Incidents Over the Last 10 Calendar Years



These responses include all types of incidents where our citizens call 911 for help.

Operations Department

2022/23 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 3.25 percent per year over the past five years. In 2020 the District experienced a rarity in the reduction of calls during the onset of the Covid-19 pandemic.

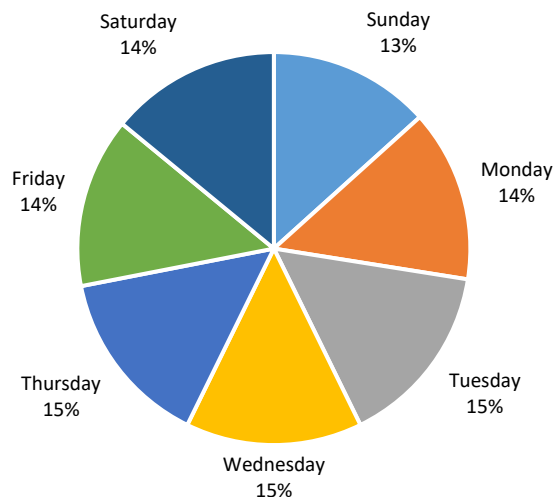
The following chart depicts where emergency incidents have occurred over the past four years based on the response area. Stations located in Central Point (Front Street and Scenic), Eagle Point, and White City respond with career engine companies and the other locations respond with volunteer engine companies. Career engine companies however may respond anywhere in the District based on call activity and strategic positioning of their engines.

| <i>Number of Incidents by Response Area (Outputs)</i> | <i>2018 Actual</i> | <i>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> |
|--|---------------------------|---------------------------|---------------------------|---------------------------|
| <i>Agate Lake</i> | 68 | 62 | 109 | 110 |
| <i>Central Point</i> | 2,927 | 3,303 | 3,184 | 3,384 |
| <i>Dodge Bridge</i> | 193 | 373 | 326 | 339 |
| <i>Eagle Point</i> | 1,426 | 1,370 | 1,216 | 1,357 |
| <i>Gold Hill</i> | 430 | 451 | 524 | 518 |
| <i>Sams Valley</i> | 279 | 274 | 264 | 316 |
| <i>White City</i> | 1,974 | 1,853 | 1,933 | 2,250 |
| <i>Mutual Aid Calls</i> | 595 | 682 | 489 | 546 |
| Total | 7,892 | 8,368 | 8,045 | 8,820 |

When Responses Occur

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

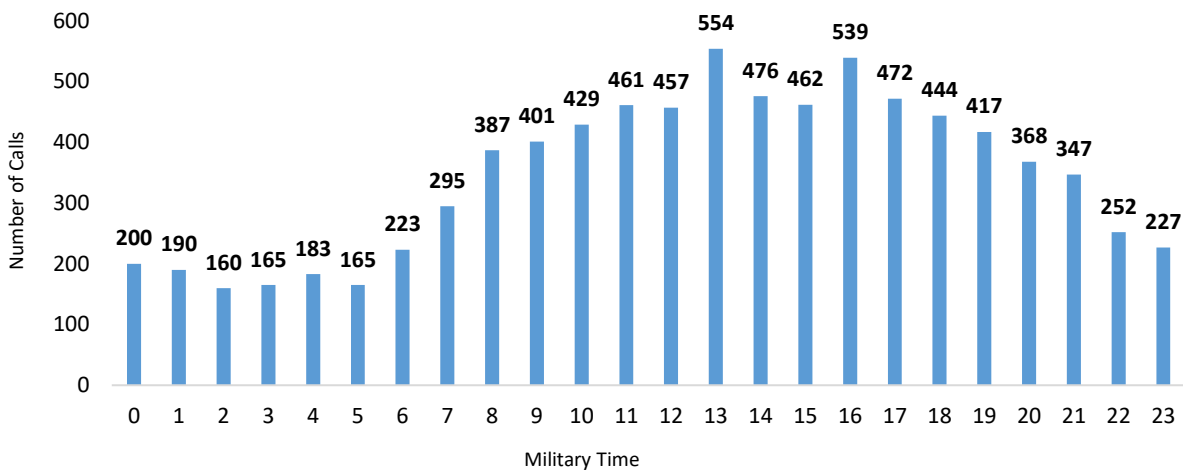
Daily Incident Volume 2021



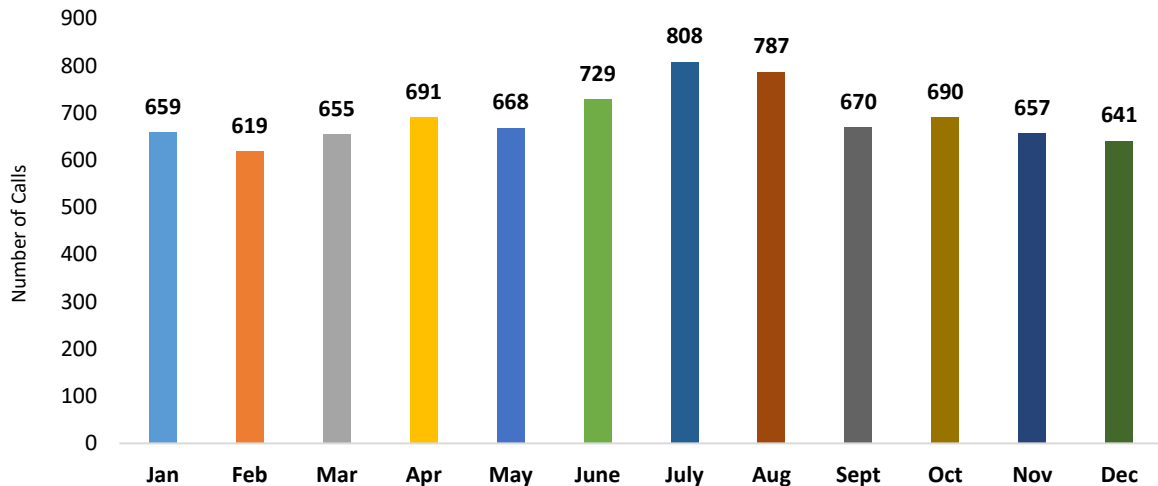
Operations Department

2022/23 Fiscal Year

Calls for Service by Hour 2021



Monthly Incident Volume 2021



The monthly responses depicted above only reflect those calls for service that occurred within the District’s geographical service boundary. The District responds mutual aid to neighboring agency partners, which those calls are included in the annual calls for service.

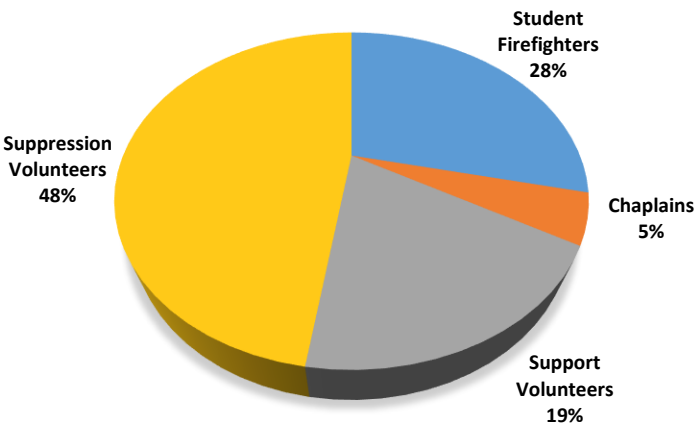
Operations Department

2022/23 Fiscal Year

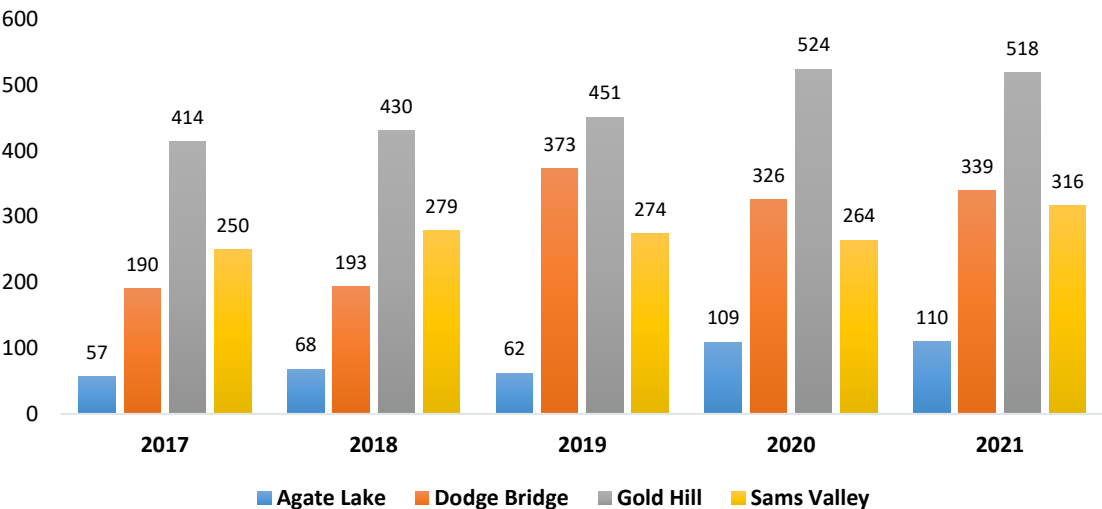
Volunteer Response Times

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 goal to have volunteer stations provide the initial response.

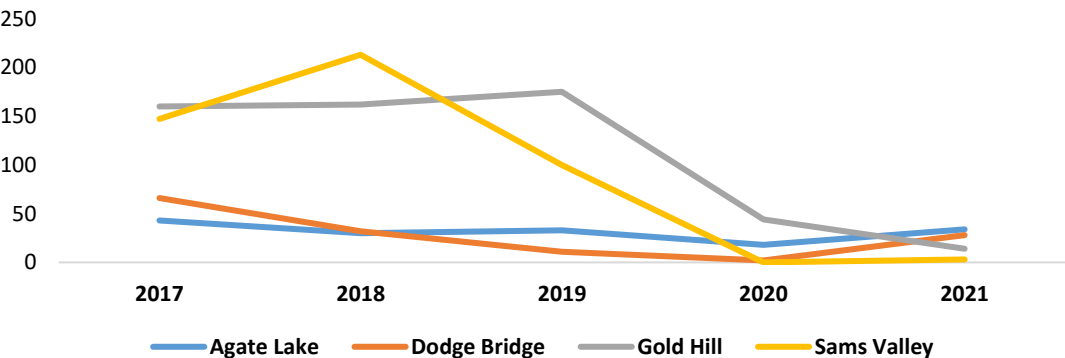
Volunteers by Position



Number of Incidents at Volunteer Stations



Response from Volunteer Stations



Operations Department

2022/23 Fiscal Year

2022/23 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.

| | | | |
|------------------|--|------------------------|---------------|
| Goal 1.1 | Increase focus on prevention activities | | |
| Objective | Evaluate Greenway fires and fire response | | |
| Task | Preplan Greenway access/control points | Completed Date: | November 2021 |
| Task | Evaluate creation of a separate FMZ for the Greenway | Completed Date: | November 2021 |

| | | | |
|------------------|---|--------------------------------|---------------|
| Objective | Focus on targeted areas to improve prevention | | |
| Task | Fully integrate FirstDue into daily engine company operations | Completed Date: | December 2021 |
| Task | Continue to build enhancements into FirstDue | Target Completion Date: | June 30, 2023 |

| | | | |
|------------------|---|------------------------|---------------|
| Objective | Evaluate wildland fire reduction and resiliency | | |
| Task | Research fuel reduction crews to develop resiliency in public areas | Completed Date: | December 2021 |

| | | | |
|------------------|---|--------------------------------|-------------------|
| Objective | Increase prevention in rural areas | | |
| Task | Integrate wildfire and resiliency messages as part of the daily engine company interaction with patrons | Target Completion Date: | December 31, 2022 |
| Task | Conduct wildfire safety zone and escape route preplanning (to include bridge assessments) | Target Completion Date: | December 31, 2022 |

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

| | | | |
|------------------|--|--------------------------------|---------------|
| Goal 1.2 | Understand and focus on non-fire emergency response | | |
| Objective | Evaluate non-emergency response and resource allocation | | |
| Task | Evaluate tiered response to various call types | Target Completion Date: | June 30, 2023 |

Operations Department

2022/23 Fiscal Year

Initiative 2

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

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

| | | | |
|------------------|--|------------------------|---------------|
| Objective | Evaluate the addition of more divisions to support the mission | | |
| Task | Evaluate opportunities for additional resources during fire season | Completed Date: | December 2021 |

| | | | |
|------------------|--|--------------------------------|---------------|
| Objective | Assess the “right-size” for crew response | | |
| Task | Conduct a review of the RVFSO and hazard zone critical task assessment | Target Completion Date: | June 30, 2023 |
| Task | Compare and contrast peak activity periods and resource availability | Target Completion Date: | June 30, 2023 |

| | | | |
|------------------|---|------------------------|---------------|
| Objective | Evaluate effectiveness of the community volunteer and volunteer firefighter programs | | |
| Task | Integrate the Recruitment Retention Coordinator position, supporting diversification in volunteer opportunities | Completed Date: | December 2021 |

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

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

| | | | |
|------------------|--|--------------------------------|-------------------|
| Objective | Evaluate additional revenue sources beyond tax dollars | | |
| Task | Evaluate wildfire response agreements | Target Completion Date: | December 31, 2023 |

Operations Department

2022/23 Fiscal Year

Initiative 3

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

| | | | |
|------------------|--|--------------------------------|-------------------|
| Goal 3.1 | Enhance employee development process | | |
| Objective | Establish mentor networks to break down silos | | |
| Task | Research effective mentoring models utilized in other fields or trades | Target Completion Date: | December 31, 2022 |

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

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

| | | | |
|------------------|---|--------------------------------|-------------------|
| Objective | Improve internal committee processes | | |
| Task | Conduct needs assessment for standing committees vs. task groups | Target Completion Date: | December 31, 2022 |
| Task | Recruit members and establish regular participation, support, and budgetary support | Target Completion Date: | December 31, 2022 |

Initiative 4

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 | | |
| Objective | Provide preparedness and prevention training | | |
| Task | Increase volunteer opportunities to broaden the reach of prevention activities | Target Completion Date: | June 30, 2023 |

| | | | |
|------------------|--|--------------------------------|---------------|
| Objective | Enhance public outreach and education opportunities | | |
| Task | Increase crew visibility and engagement in rural areas | Target Completion Date: | June 30, 2023 |

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

| | | | |
|------------------|--------------------------------------|--------------------------------|---------------|
| Objective | Offer community listening events | | |
| Task | Post event community sessions or AAR | Target Completion Date: | June 30, 2023 |

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

Operations Department

2022/23 Fiscal Year

Initiative 5

Develop and strengthen collaborative efforts and strategic partnerships.

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

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

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

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

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

| | | | |
|------------------|--|--------------------------------|---------------|
| Objective | Review collaboration of fire and medical services and improve effectiveness between agencies | | |
| Task | Implement improved apparatus numbering system | Completed Date: | December 2021 |
| Task | Implement fire based PRO QA | Target Completion Date: | June 30, 2023 |

Operations Department

2022/23 Fiscal Year

Initiative 6

Commit to excellence through innovation.

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

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

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

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

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

Operations Department

2022/23 Fiscal Year

| General Fund | <u>HISTORICAL</u> | | 2021/22 FY | <u>BUDGET FOR NEXT FISCAL YEAR</u> | | |
|--|-----------------------|-----------------------|---------------------|------------------------------------|---------------------|---------------------|
| | 2019/20 FY | 2020/21 FY | | 2022/2023 | | |
| | | | | Proposed By | Approved By | Adopted By |
| Description | Actual | Actual | Adopted Budget | Budget Officer | Budget Committee | Governing Body |
| Personnel Services | | | | | | |
| Salaries | 4,396,570.45 | 4,671,532.56 | 4,913,000 | 5,665,100 | 5,665,100 | 5,543,100 |
| Overtime | 477,257.87 | 567,296.80 | 641,000 | 645,000 | 645,000 | 645,000 |
| Incentives | 586,521.76 | 597,934.81 | 593,300 | 682,000 | 682,000 | 680,000 |
| Payouts | 6,098.00 | 136,579.12 | 57,000 | 57,500 | 57,500 | 57,500 |
| Retirement (PERS) | 1,149,340.51 | 1,215,848.36 | 1,295,000 | 1,460,000 | 1,460,000 | 1,430,000 |
| ER Deferred Comp Contrib | 124,004.87 | 155,527.48 | 166,700 | 182,000 | 182,000 | 182,000 |
| Health and Life Insurance | 1,003,785.29 | 1,042,117.33 | 1,150,000 | 1,325,000 | 1,325,000 | 1,325,000 |
| HRA-VEBA Contribution | 193,654.42 | 211,423.20 | 230,000 | 262,000 | 262,000 | 258,000 |
| FICA and Medicare PR Taxes | 409,373.02 | 439,328.64 | 475,000 | 540,000 | 540,000 | 530,000 |
| Workers' Comp Insurance | 94,802.80 | 90,589.08 | 95,000 | 125,000 | 125,000 | 125,000 |
| TOTAL PERSONNEL SERVICES | \$8,441,408.99 | \$9,128,177.38 | \$9,616,000 | \$10,943,600 | \$10,943,600 | \$10,775,600 |
| Materials and Services | | | | | | |
| Career Firefighter Group | | | | | | |
| Physicals and Vaccinations | 25,864.00 | 31,673.00 | 38,000 | 40,000 | 40,000 | 40,000 |
| Licenses and Fees | 1,502.00 | 6,980.15 | 2,500 | 10,000 | 10,000 | 10,000 |
| Supplies; Operations | 1,537.57 | 1,862.63 | 5,000 | 5,000 | 5,000 | 5,000 |
| Supplies; Special Projects | 5,583.19 | 737.42 | 14,000 | 27,000 | 27,000 | 27,000 |
| Fire Suppression Expenses | | | | | | |
| Personal Protective Equipment | 50,155.95 | 100,032.16 | 74,000 | 86,000 | 86,000 | 86,000 |
| Hose and Appliances | 21,146.06 | 20,747.20 | 20,000 | 17,000 | 17,000 | 17,000 |
| Apparatus Equipment and Supplies | 12,932.49 | 31,117.03 | 14,000 | 13,000 | 13,000 | 13,000 |
| Safety Equipment | 10,360.93 | 25,768.91 | 45,000 | 22,500 | 22,500 | 20,000 |
| Specialty Equipment | 3,519.87 | 6,876.29 | 22,500 | 15,000 | 15,000 | 22,500 |
| Technical Rescue Equipment | 6,801.50 | 2,763.11 | 5,000 | 6,000 | 6,000 | 6,000 |
| Rehabilitation and Consumables | 4,695.43 | 5,032.34 | 6,000 | 6,000 | 6,000 | 6,000 |
| Equipment for New Apparatus | 7,185.66 | 12,655.20 | 4,000 | 4,000 | 4,000 | 4,000 |
| M&R; Emergency Response Equip | 39,054.41 | 24,055.60 | 40,000 | 42,000 | 42,000 | 42,000 |
| Contractual/Professional Services | 10,857.20 | 9,594.83 | 14,000 | 15,500 | 15,500 | 15,500 |
| Membership Dues | 1,118.50 | 1,199.50 | 1,500 | 1,500 | 1,500 | 1,500 |
| Books and Subscriptions | 1,726.02 | 1,388.24 | 2,000 | 3,000 | 3,000 | 3,000 |
| Student Firefighter / Volunteer Group | | | | | | |
| Pre-Entrance Screenings, Backgrounds, Vaccinations | 3,033.00 | 3,621.00 | 4,000 | 4,000 | 4,000 | 4,000 |
| Personal Protective Equipment | 0.00 | 0.00 | 30,000 | 30,000 | 30,000 | 30,000 |
| Student Firefighter Tuition Program | 38,585.08 | 24,822.84 | 35,000 | 30,000 | 30,000 | 30,000 |
| Length of Service Award Program | 200.00 | 200.00 | 3,000 | 2,000 | 2,000 | 2,000 |
| Scholarship Donations | 1,000.00 | 1,000.00 | 1,000 | 1,000 | 1,000 | 1,000 |
| Advertising and Marketing | 0.00 | 0.00 | 5,000 | 5,000 | 5,000 | 5,000 |
| TOTAL MATERIALS and SERVICES | \$246,858.86 | \$312,127.45 | \$385,500 | \$385,500 | \$385,500 | \$390,500 |
| TOTAL OPERATIONS | \$8,688,267.85 | \$9,440,304.83 | \$10,001,500 | \$11,329,100 | \$11,329,100 | \$11,166,100 |

Operations Department

2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 2

| Account | Description | Account Total |
|---------------------------------|--|---|
| CAREER FIREFIGHTER GROUP | | |
| 58203-000 | Physicals and Vaccinations..... | \$ 40,000 |
| 60223-002 | Licenses and Fees..... Oregon ambulance licensing fees, CLIA, DEA, FCC, Motorola, Drone, EMT Licensing | \$ 10,000 |
| 60223-007 | Supplies; Operations..... Purchase of operational supplies, meeting refreshments, | \$ 5,000 |
| 60224-000 | Special Projects..... Standby events Emergency preparedness Verified Responder UAS Support | \$ 27,000 2,000 3,000 2,000 20,000 |
| 60225 | <u>Fire Suppression Expenses</u> | |
| 60225-001 | Personal Protective Equipment..... Routine purchase of structural and wildland personal protective equip Structural turnouts (4 year rotation cycle) | \$ 86,000 20,000 66,000 |
| 60225-002 | Hose and Appliances..... Routine purchase of structural and wildland hose Routine purchase of structural and wildland nozzles and adapters | \$ 17,000 12,000 5,000 |
| 60225-003 | Apparatus Equipment and Supplies..... Routine purchase of small tools, chainsaws, power equipment, foam, salvage and overhaul, lettering / decals, and mounting supplies Rapid Intervention Team (RIT) supplies | \$ 13,000 10,000 3,000 |
| 60225-004 | Safety Equipment..... Routine purchase of safety vests, flares, cones, warning tape, flashlights, passport identification, ladders, batteries, fire extinguishers, fire shelters and miscellaneous equipment Self-contained breathing apparatus (SCBA) masks and annual fit testing | \$ 20,000 12,500 7,500 |
| 60225-005 | Specialty Equipment..... Routine purchase of gas monitors, calibration, and testing equipment Routine purchase of extrication equipment PROJECT: 6 verified responder AED's | \$ 22,500 9,500 3,000 10,000 |
| 60225-006 | Technical Rescue Equipment..... Routine replacement of rescue equipment, ropes, harnesses, and swift water equipment | \$ 6,000 6,000 |
| 60225-007 | Rehabilitation and Consumables..... Purchase of incident rehabilitation supplies | \$ 6,000 |

Operations Department

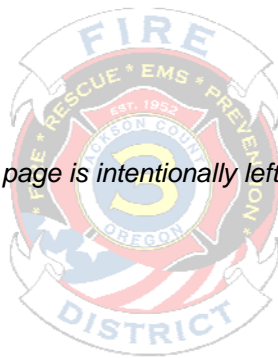
2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued*

General Fund 1, Department 2

| Account | Description | Account Total |
|--|--|-------------------|
| 60225-008 | Equipment for New Apparatus..... Loose equipment for the Battalion Chief vehicle | \$ 4,000 |
| 60254-000 | M&R; Emergency Response Equipment..... 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 20,000 | \$ 42,000 |
| 60270-000 | Contractual/Professional Services..... Hose and ladder testing contract 13,000 Defibrillator PM agreement 2,500 | \$ 15,500 |
| 60410-000 | Membership Dues..... 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 | Books and Subscriptions..... | \$ 3,000 |
| STUDENT FIREFIGHTER AND VOLUNTEER GROUP | | |
| 65001-000 | Pre-Entrance Screenings, Backgrounds, Vaccinations, Physicals..... | \$ 4,000 |
| 65003-000 | Personal Protective Equipment..... Uniforms 5,000 Structural and Wildland PPE, Gloves, Helmets 25,000 | \$ 30,000 |
| 65005-000 | Student Firefighter Program..... Associate's degree program for students (tuitions, books, and supplies) | \$ 30,000 |
| 65007-000 | Length of Service Award Program (LOSAP)..... Annual District contribution for volunteer length of service | \$ 2,000 |
| 65010-000 | Scholarship Donations..... Student scholarship program for Crater and Eagle Point High Schools | \$ 1,000 |
| 65011-000 | Advertising and Marketing..... Marketing of volunteer and student programs | \$ 5,000 |
| TOTAL MATERIALS AND SERVICES | | \$ 390,500 |

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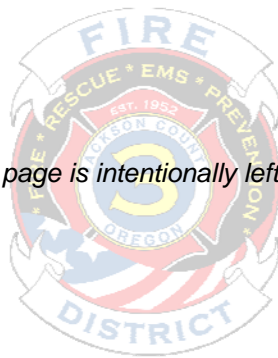
Fire & Life Safety

FIRE DISTRICT 3



2022/23 Fiscal Year Budget

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Fire and Life Safety Department

2022/23 Fiscal Year

DEPARTMENT DESCRIPTION

The Fire and Life Safety (FLS) team consists of the Fire Marshal and three 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.

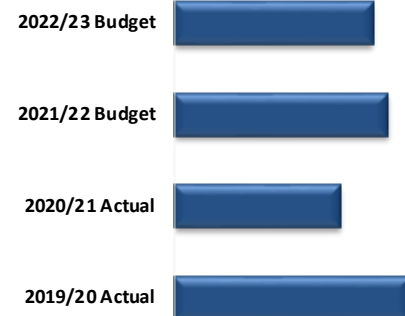
Each member of the team partners with assigned inspectable occupancies and the public to help them meet fire and life safety requirements imposed by State laws, fire codes, and other recognized national standards. Once new building construction is completed, fire and life safety construction maintenance 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 | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|------------------------|-------------------|-------------------|-------------------|-------------------|
| Personnel Services | \$848,919 | \$632,545 | \$801,400 | \$748,000 |
| Materials and Services | \$65,239 | \$13,968 | \$27,000 | \$25,000 |
| | \$914,158 | \$646,513 | \$828,400 | \$773,000 |

Budget Comparison



PERSONNEL SUMMARY

| Position | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|---|-------------------|-------------------|-------------------|-------------------|
| Fire Marshal | 1.00 | 1.00 | 1.00 | 1.00 |
| Deputy Fire Marshal 1 (<i>Represented Position</i>) | 0.00 | 0.00 | 2.00 | 2.00 |
| Deputy Fire Marshal 2 (<i>Represented Position</i>) | 0.00 | 0.00 | 0.00 | 0.00 |
| Deputy Fire Marshal 3 (<i>Represented Position</i>) | 2.00 | 2.00 | 2.00 | 1.00 |
| Fire and Life Safety Specialist (<i>Represented Position</i>) | 1.00 | 0.00 | 0.00 | 0.00 |
| Administrative Assistant | 1.00 | 0.00 | 0.00 | 0.00 |
| Total | 5.00 | 3.00 | 4.00 | 4.00 |

Fire and Life Safety Department

2022/23 Fiscal Year

NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to decrease 6.6 percent or \$53,400 over the prior fiscal year. Significant factors for the reduction of this classification is the result of reorganizing the structure of the Deputy Fire Marshal (DFM) position into three levels: DFM 1- Entry, DFM 2- Mid, and DFM 3- Advanced. The certification requirements and technical nature of these positions has created an industry shortage of advanced level applicants. Forecasting this shortage and working in concert with union leadership, the District developed a structure that allows for entry level hiring that provides on-the-job certification and training. The new DFM levels are correspondingly represented along a new salary scale. The 2021 retirement of a top-salary advanced-level DFM provided the District with the opportunity to hire two DFM's at the entry-level position, and at a reduced initial cost. This increase in staffing will help the department grow into the future with enhanced workload distribution and will allow expanded concentration within different areas of the communities served. 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 to decrease 7.4 percent or \$2,000. 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 2,213 inspections and calls for service.
- Two Deputy Fire Marshals hired and onboarded through a highly competitive process. Welcome Steve Darnell and Sara Miller.
- One Deputy Fire Marshal retirement after 40+ years serving the community in various positions. Thank you, Brian Murdock, for all you've done to improve life and protect property.
- Inspectable occupancy inventory increased; 1,150 (+2.8%) regular hazard, 375 (+10.5%) moderate hazard, and 401 (+4%) high hazard occupancies.
- 639 (+14%) fire safety system inspections were completed by third party contractors and uploaded to our tracking system.
- 94% compliance with overall fire safety system maintenance requirements.
- 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, 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. We continue to partner with the Jackson County, Eagle Point, and Central Point Land Development Departments. These partnerships help us ensure that newly planned subdivisions and industrial development meet fire code requirements for access and firefighting water supply. Couple those activities with fire safety system plan reviews and onsite construction inspections and we can rest assured that new development and new construction are built on a firm foundation of fire safety. We receive no operating revenue from these activities, outside sources or permit fees. The District continues to fully support our continued partnerships, knowing that the investment is worth the reward.

Tracking work completed grants us a landscape to view year-over-year with regards to workload and outputs, keeping in mind the numbers themselves don't provide apples to apples impact against each other across the categories. One low hazard inspection is not equal to one high hazard inspection, nor equal to a fire investigation. And one fire investigation is not necessarily equal to another. But all in all, we track outputs to measure trends, forecast needs, and prompt further questions.

Fire and Life Safety Department

2022/23 Fiscal Year

Total completed inspections for 2021 and overall calls for service trended slightly downward. The ongoing Covid-19 pandemic affected our boots on the ground activities as reflected most visibly in the *Expo and Special Event* inspection category. Also, several key changes were made at the beginning of the calendar year. Realizing DFM Brian Murdock was set to retire, we focused on fixing fire code issues “on-scene.” This allowed us to reduce the number in the *Re-Inspection* category from 257 in 2020 down to 48 in 2021. Another factor is the increase of high hazard inspections completed. These high hazards come with an increased level of complexity and extended time necessary to complete effectively. Inevitably, the lower complexity, lower risk tasks were deferred.

FIRE LIFE SAFETY INSPECTIONS

Statement of Measurement

- Inspect (1,150) regular hazard occupancies on a three-year rotation.
- Inspect (375) moderate hazard occupancies on a two-year rotation.
- Inspect (401) high hazard facilities and industries 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.

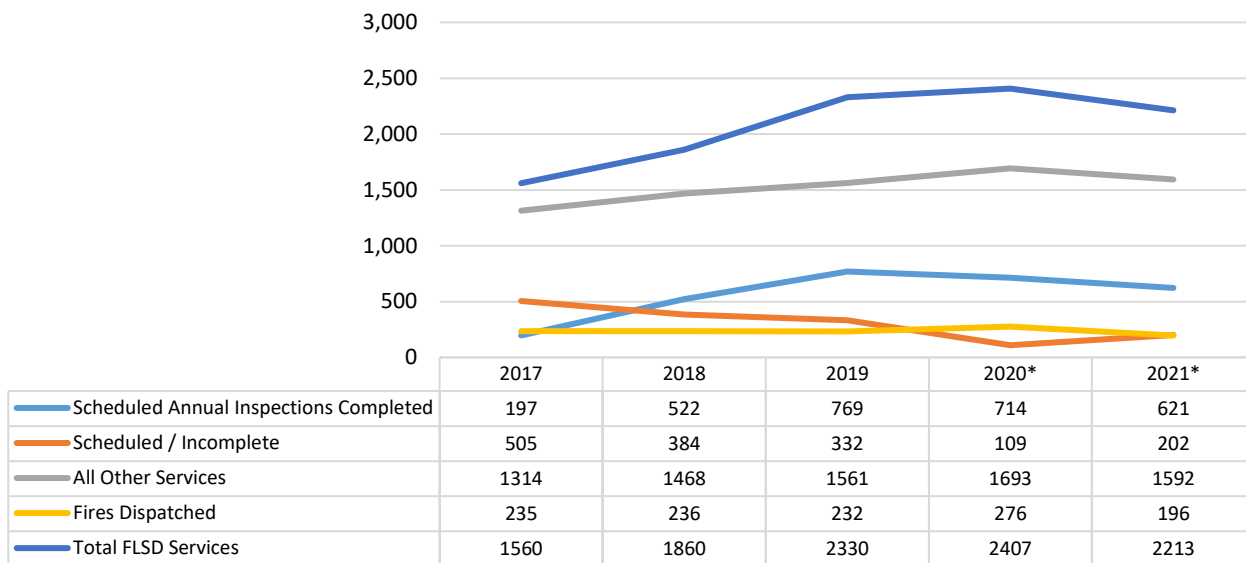
| <i>Services Provided (Outputs) and Effectiveness Measures</i> | <i>2018 Actual</i> | <i>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Targets</i> | <i>2021 Actual</i> | <i>2022 Targets</i> |
|---|--------------------|--------------------|--------------------|---------------------|--------------------|---------------------|
| <i>Low Hazard Inspections</i> | 222 | 483 | 409 | 389 | 158 | 383 |
| <i>Moderate Hazard Inspections</i> | 89 | 85 | 97 | 171 | 128 | 188 |
| <i>High Hazard Inspections</i> | 211 | 201 | 208 | 263 | 335 | 401 |
| <i>Re-Inspections</i> | 94 | 124 | 257 | 100% | 48 | 100% |
| <i>Consultations</i> | 210 | 191 | 219 | 100% | 272 | 100% |
| <i>Complaints</i> | 28 | 31 | 24 | 100% | 76 | 100% |
| <i>Fire District Annexation Requests</i> | 11 | 6 | 4 | 100% | 6 | 100% |
| <i>Land Development Consultations</i> | 60 | 57 | 73 | 100% | 40 | 100% |
| <i>Construction Plan Reviews</i> | 28 | 42 | 40 | 100% | 84 | 100% |
| <i>Construction Permit Inspections</i> | 100 | 72 | 64 | 100% | 114 | 100% |
| <i>Home Fire Safety Inspections</i> | 70 | 57 | 85 | 100% | 96 | 100% |
| <i>Wildland Urban Interface Fuels Reduction</i> | 70 | 63 | 81 | 100% | 77 | 100% |
| <i>Target Hazard Familiarization Tours</i> | 23 | 47 | 20 | 20 | 22 | 100% |
| <i>Expo and Special Events</i> | 123 | 118 | 39 | 100% | 33 | 100% |
| <i>State Fire Marshal Certifications</i> | 41 | 40 | 30 | 100% | 3 | 100% |
| <i>Referrals</i> | 19 | 40 | 18 | ** | ** | 100% |
| <i>FLSD Fire Investigations</i> | 44 | 49 | 45 | 45 | 40 | 100% |
| <i>Brycer & Fire Protection Systems</i> | 415 | 559 | 554 | 100% | 639 (94%) | 100% |
| <i>Firewise Property Assessments</i> | 2 | 65 | 37 | 100% | 42 | 100% |
| <i>Miscellaneous Fire Safety Assessments</i> | 0 | 0 | 103 | ** | ** | 100% |
| Totals | 1,860 | 2,330 | 2,407 | | 2,213 | |

** These numbers are being tracked in a different manner now.

Fire and Life Safety Department

2022/23 Fiscal Year

Outputs - Five Year Comparison



* Years impacted by the Covid-19 pandemic and associated restrictions.

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.

| <i>Services Provided (Outputs) and Effectiveness Measures</i> | <i>2018 Actual</i> | <i>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> | <i>2022 Target</i> |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| <i>Investigations Performed – FLS Staff</i> | 44 | 49 | 45 | 40 | 100% |
| <i>Investigations Performed – Operations Staff</i> | 236 | 232 | 276 | 196 | 100% |
| <i>Juvenile Fire Setter Intervention</i> | 2 | 2 | 4 | 2 | 100% |
| Totals | 282 | 283 | 325 | 238 | |

Fire and Life Safety Department

2022/23 Fiscal Year

COMMUNITY AND INDUSTRIAL DEVELOPMENT

Statement of Measurement

- Review all new construction and land 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>2018 Actual</i> | <i>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> | <i>2022 Target</i> |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|
| <i>Number of Plan Reviews</i> | 28 | 42 | 40 | 84 | 100% |
| <i>Plan Review Turn-around Time</i> | 5 Days | 5 Days | 5 Days | 5 Days | 5 Days |
| <i>Construction Permit Inspections</i> | 100 | 72 | 60 | 114 | 100% |
| <i>Development Consultations</i> | 210 | 191 | 173 | 40 | 100% |
| Totals | 338 | 305 | 273 | 238 | |



Fire and Life Safety Department

2022/23 Fiscal Year

2022/23 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.

| | | | |
|------------------|---|--------------------------------|---------------|
| Goal 1.1 | Increase focus on prevention activities | | |
| Objective | Evaluate Greenway fires and fire response | | |
| Task | 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 | Target Completion Date: | June 30, 2023 |
| Objective | Focus on targeted areas to improve prevention | | |
| Task | Define target areas and prevention programs selected for improvement | Completed Date: | June 2021 |
| Objective | Ensure adequate water supplies exist for fighting fires | | |
| Task | Remain poised to take advantage of emerging conditions that enhance rural water supply by continuing to allocate funds in each fiscal year | Target Completion Date: | June 30, 2023 |

Initiative 2

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

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

Fire and Life Safety Department

2022/23 Fiscal Year

| General Fund | <u>HISTORICAL</u> | | | <u>BUDGET FOR NEXT FISCAL YEAR</u> | | |
|-------------------------------------|---------------------|---------------------|------------------|------------------------------------|------------------------------|---------------------------|
| | 2019/20 FY | 2020/21 FY | 2021/22 FY | 2022/2023 | | |
| Description | Actual | Actual | Adopted Budget | Proposed By Budget Officer | Approved By Budget Committee | Adopted By Governing Body |
| Personnel Services | | | | | | |
| Salaries | 505,884.98 | 338,245.77 | 413,400 | 396,000 | 396,000 | 396,000 |
| Overtime | 2,804.54 | 11,299.53 | 10,000 | 10,000 | 10,000 | 10,000 |
| Incentives | 50,087.32 | 49,027.05 | 46,300 | 46,000 | 46,000 | 46,000 |
| Payouts | 9,147.00 | 12,683.84 | 50,000 | 15,000 | 15,000 | 15,000 |
| Retirement (PERS) | 110,234.46 | 102,350.53 | 119,800 | 105,000 | 105,000 | 105,000 |
| ER Deferred Comp Contrib | 8,967.99 | 10,595.82 | 16,000 | 15,500 | 15,500 | 15,500 |
| Health and Life Insurance | 98,269.88 | 65,366.99 | 89,500 | 106,000 | 106,000 | 106,000 |
| HRA-VEBA Contribution | 21,661.67 | 12,322.38 | 15,300 | 17,500 | 17,500 | 17,500 |
| FICA and Medicare PR Taxes | 41,424.21 | 30,334.32 | 40,100 | 36,000 | 36,000 | 36,000 |
| Workers' Comp Insurance | 437.30 | 319.03 | 1,000 | 1,000 | 1,000 | 1,000 |
| TOTAL PERSONNEL SERVICES | \$848,919.35 | \$632,545.26 | \$801,400 | \$748,000 | \$748,000 | \$748,000 |
| Materials and Services | | | | | | |
| Physicals and Vaccinations | 1,521.00 | 1,791.00 | 2,000 | 3,000 | 3,000 | 3,000 |
| Printing | 0.00 | 49.00 | 1,500 | 4,000 | 4,000 | 4,000 |
| Licenses and Fees | 115.00 | 140.00 | 1,000 | 2,000 | 2,000 | 2,000 |
| Supplies; Fire Life Safety | 5,336.22 | 5,429.65 | 10,000 | 10,000 | 10,000 | 10,000 |
| Supplies; Public Education Materia | 5,000.61 | 2,207.71 | 7000 | 0 | 0 | 0 |
| Community Risk Reduction | 37,275.81 | 0.00 | 0 | 0 | 0 | 0 |
| Contractual/Professional Services | 11,801.45 | 0.00 | 0 | 0 | 0 | 0 |
| Membership Dues | 600.00 | 1,030.00 | 2,000 | 2,500 | 2,500 | 2,500 |
| Books and Subscriptions | 2,888.50 | 3,320.45 | 3,500 | 3,500 | 3,500 | 3,500 |
| Advertising | 700.00 | 0.00 | 0 | 0 | 0 | 0 |
| TOTAL MATERIALS and SERVICES | \$65,238.59 | \$13,967.81 | \$27,000 | \$25,000 | \$25,000 | \$25,000 |
| TOTAL FIRE AND LIFE SAFETY | \$914,157.94 | \$646,513.07 | \$828,400 | \$773,000 | \$773,000 | \$773,000 |

Fire and Life Safety Department

2022/23 Fiscal Year

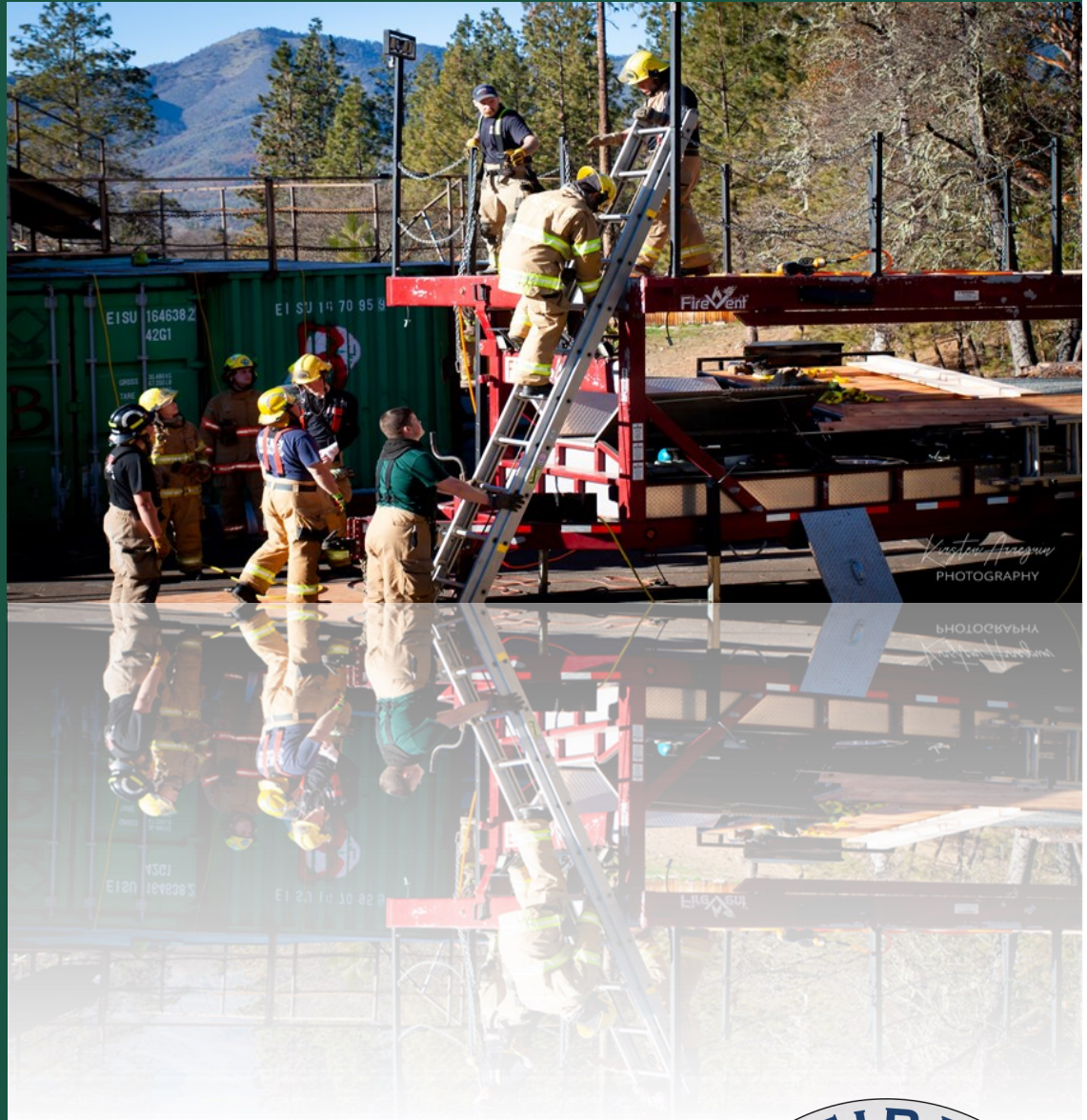
MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 3

| Account | Description | Account Total |
|------------------------------|--|------------------|
| 58203-000 | Physicals and Vaccinations..... | \$ 3,000 |
| 60220-000 | Printing..... | \$ 4,000 |
| 60223-002 | Licenses and Fees..... Code recertification's and certification renewals | \$ 2,000 |
| 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 |
| 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 | \$ 2,500 |
| 60412-000 | Books and Subscriptions..... NFPA online access, reference materials, code updates | \$ 3,500 |
| TOTAL MATERIALS AND SERVICES | | <u>\$ 25,000</u> |

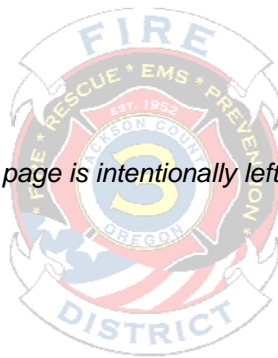
FIRE DISTRICT 3

Training



2022/23 Fiscal Year Budget

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Training Department

2022/23 Fiscal Year

DEPARTMENT DESCRIPTION

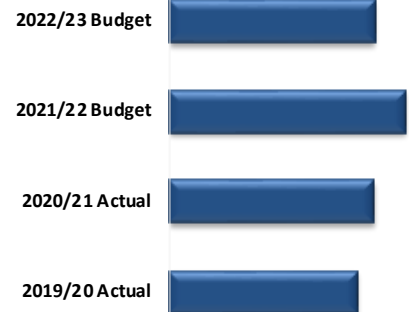
The Training Department is responsible for delivering a variety of training programs, developing proper safety techniques and procedures, maintaining accurate and complete training records, and fostering professional growth and development to all members of the organization. Safety and career development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

BUDGET SUMMARY

| Expenditures | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|---------------------------|-------------------|-------------------|-------------------|-------------------|
| Personnel Services | \$357,421 | \$391,706 | \$359,700 | \$285,000 |
| Materials and Services | \$88,728 | \$94,620 | \$201,800 | \$204,000 |
| | \$446,149 | \$486,326 | \$561,500 | \$489,000 |

Budget Comparison



PERSONNEL SUMMARY

| Position | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|---------------------------------------|-------------------|-------------------|-------------------|-------------------|
| Division Chief of Training and Safety | 1.00 | 1.00 | 1.00 | 0.00 |
| Battalion Chief - Training | 0.00 | 0.00 | 0.00 | 1.00 |
| Administrative Assistant | 1.00 | 1.00 | 0.50 | 0.00 |
| Total | 2.00 | 2.00 | 1.50 | 1.00 |

NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to decrease over 20 percent or \$74,700 over the prior fiscal year. Significant factors for this reduction include the reclassification of the Division Chief of Training and Safety down to rank of Battalion Chief and no longer budgeting for an Administrative Assistant position. Applicable salary and benefit adjustments due to cost of living have been adjusted for in the new salary scale, along with pension plan and insurance renewal increases.

The Materials and Services classification is budgeted to remain relatively flat over the current year with a one percent increase (\$2,200). Training accounts are comparable to the prior year and reflect continued development across the various disciplines. Outside training is picking up after the Covid-19 pandemic eliminated most opportunities for over a year. A new account 60455-005; *Training Risk Reduction* has been established to account for expenses related to furthering education towards risk reduction efforts.

Training Department

2022/23 Fiscal Year

PRIOR YEAR ACCOMPLISHMENTS

- Conducted a ten-week recruit academy to train seven new Firefighters.
- Hosted the National Fire Academy's Leadership in Supervision course.
- Assisted the Chief Examiner in conducting a successful entry level Firefighter exam and Captain promotional exam.
- Partnered with RITA to provide Advanced Cardiac Life Support (ACLS) and Pediatric Advanced Life Support (PALS) courses.
- The Safety Committee continued the commitment in providing a safe work environment for all District members.
- Implemented new software to assign, track, and complete performance task books and skill evaluations for all levels within the organization.
- Partnered with ETHOS to deliver leadership training to Chief Officers.
- Supported the pursuit of DPSST certifications for personnel.
- Conducted routine workplace safety inspections with 100 percent compliance within OR-OSHA requirements.



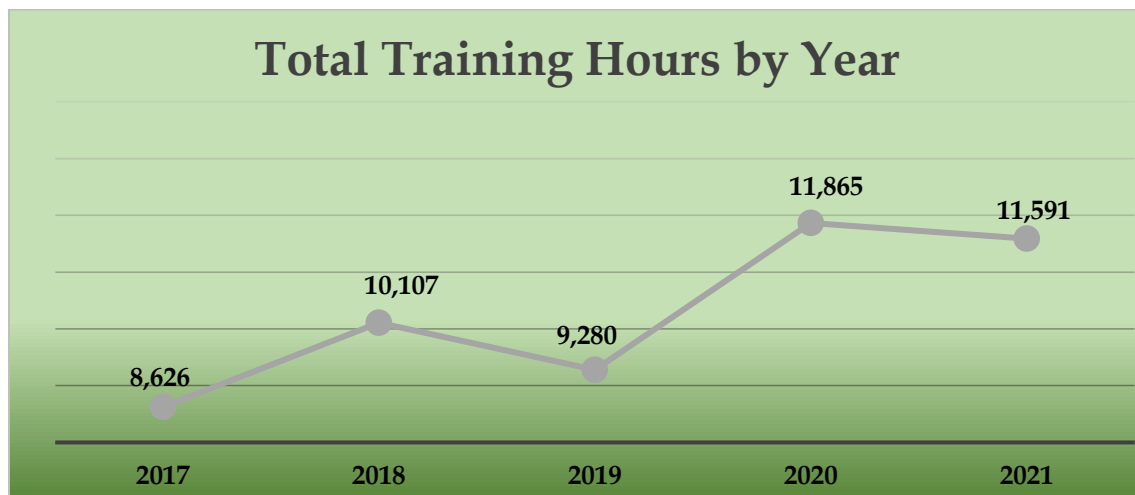
Training Department

2022/23 Fiscal Year

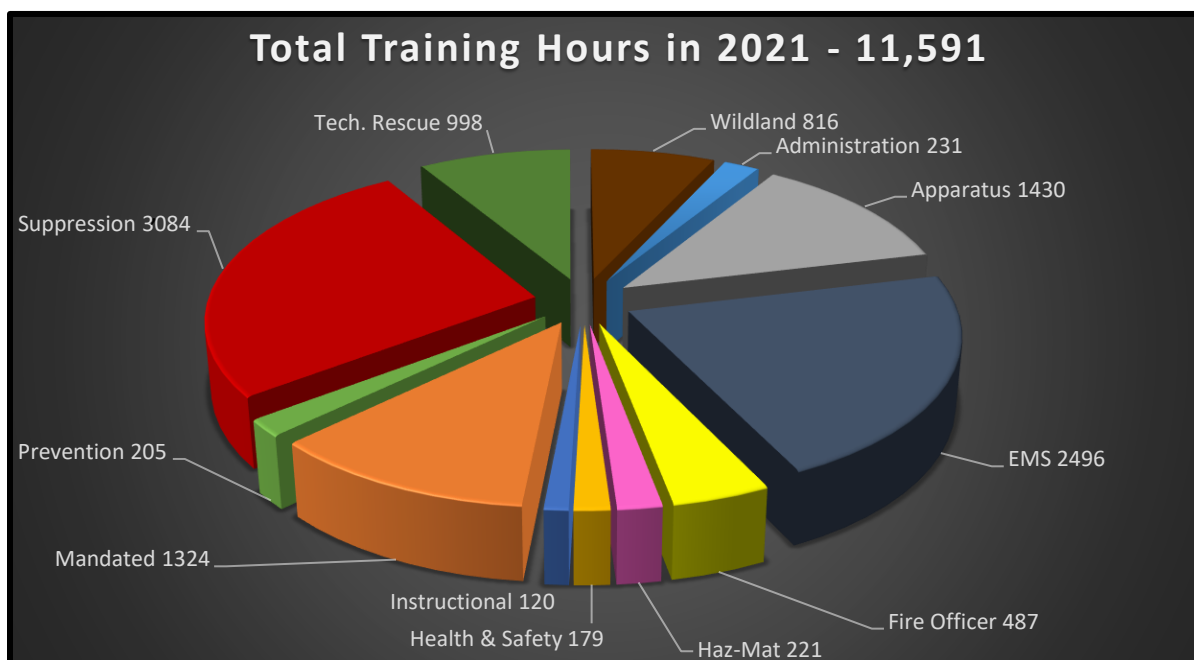
DEPARTMENT MEASUREMENTS AND TARGETS

Outputs

- The following categories illustrates how training was accomplished in 2022:
 - Lectures/conferences accounted for 1,324 hours
 - Online video/computer courses accounted for 1,894 hours
 - Practical drills accounted for 6,873 hours
 - Self-study accounted for 659 hours
 - Uncategorized training accounted for 841 hours























The annual training plan provides a framework for delivery of topics that reinforce skills, present new topics, or meet minimum requirements of recertification. The 11,591 hours are further categorized into the following topics:



Training Department

2022/23 Fiscal Year

| <i>Number of Training Hours (Outputs)</i> | <i>2017 Actual</i> | <i>2018 Actual</i> | <i>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> |
|--|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|
| <i>Administration</i> | 333 | 404 | 622 | 336 | 231 |
| <i>Apparatus</i> | 913 | 928 | 541 | 459 | 1,430 |
| <i>EMS</i> | 1,333 | 2,332 | 2,001 | 1,931 | 2,496 |
| <i>Fire Officer</i> | 1,481 | 1,605 | 1,173 | 737 | 487 |
| <i>Haz-Mat</i> | 53 | 145 | 134 | 79 | 221 |
| <i>Health and Safety</i> | 223 | 155 | 317 | 578 | 179 |
| <i>Instructional</i> | 34 | 104 | 23 | 54 | 120 |
| <i>Mandated</i> | 150 | 16 | 65 | 686 | 1,324 |
| <i>Prevention</i> | 467 | 505 | 555 | 408 | 205 |
| <i>Suppression</i> | 2,499 | 2,629 | 3,071 | 4,921 | 3,084 |
| <i>Technical Rescue</i> | 695 | 756 | 597 | 1,069 | 998 |
| <i>Wildland</i> | 442 | 528 | 180 | 607 | 816 |
| <i>Totals</i> | 8,626 | 10,107 | 9,280 | 11,865 | 11,591 |

| <i>Effectiveness Measures</i> | <i>2017 Actual</i> | <i>2018 Actual</i> | <i>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> |
|--|---|---|--|---|---|
| <i>Oregon-OSHA Compliance for Safe Working Environment</i> |  |  |  |  |  |
| <i>DPSST Annual Training Requirements</i> |  |  |  |  |  |
| <i>Oregon Health Authority Required EMT Training</i> |  |  |  |  |  |
| <i>Dept of Homeland Security NIMS Training</i> |  |  |  |  |  |

ADDITIONAL TARGETS for 2022/23

- Reinforce ETHOS Ethics and First Team training programs for all members of the District.
- Expand access to leadership training programs for supervisors within the District.
- Cultivate AIC Engineer development, producing candidates ready for promotional exam in Spring of 2023.
- Evaluate draft Performance Standards for individual, company, and multi-company tasks.
- Coordinate a multi-agency evacuation training event that focuses on communications and interagency interoperability.
- Assess interest and concepts of a county-wide EMS training plan.
- Revise the Firefighter Probationary manual, SPIEL book and expectations.
- Develop a Company Officers guide for probationary Firefighters.
- Ensure training meets recertification requirements.
 - OSHA - To ensure a safe and healthy work environment exists for all members of the District.
 - DPSST - Provides a voluntary standard training and certification process for all firefighters in the State of Oregon.
 - OHA - Ensure training requirements are met for EMT recertification Spring 2022.
 - Department of Homeland Security (DHS) – Provide Incident Command training for emergency responders under NIMS (National Incident Management System).

Training Department

2022/23 Fiscal Year

2022/23 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.

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

Initiative 3

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

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

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

| Objective | Promote physical and mental health and wellness | | |
|-----------|---|-------------------------|-------------------|
| Task | Evaluate effectiveness of current wellness programs | Target Completion Date: | June 30, 2023 |
| Task | Advocate and implement Rebound with SDAO | Target Completion Date: | December 31, 2022 |

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

Training Department

2022/23 Fiscal Year

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

| | | | |
|------------------|--|--------------------------------|-------------------|
| Objective | Improve internal committee process | | |
| Task | Evaluate the need for a training committee | Target Completion Date: | December 31, 2022 |

Initiative 5

Develop and strengthen collaborative efforts and strategic partnerships.

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

Initiative 6

Commit to excellence through innovation.

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

Training Department

2022/23 Fiscal Year

| General Fund | <u>HISTORICAL</u> | | | <u>BUDGET FOR NEXT FISCAL YEAR</u> | | |
|--|---------------------|---------------------|------------------|------------------------------------|------------------|------------------|
| | 2019/20 FY | 2020/21 FY | 2021/22 FY | <u>2022/2023</u> | | |
| | | | Adopted | Proposed By | Approved By | Adopted By |
| Description | Actual | Actual | Budget | Budget Officer | Budget Committee | Governing Body |
| Personnel Services | | | | | | |
| Salaries | 178,080.00 | 181,746.53 | 157,300 | 121,000 | 121,000 | 121,000 |
| Overtime * | 46,411.53 | 59,802.15 | 60,000 | 60,000 | 60,000 | 60,000 |
| Incentives | 11,856.00 | 12,064.00 | 11,100 | 11,000 | 11,000 | 11,000 |
| Payouts | 1,742.40 | 5,983.00 | 9,000 | 200 | 200 | 200 |
| Retirement (PERS) | 39,502.39 | 42,000.23 | 47,500 | 39,500 | 39,500 | 39,500 |
| ER Deferred Comp Contrib | 8,249.20 | 11,392.78 | 10,600 | 5,000 | 5,000 | 5,000 |
| Health and Life Insurance | 41,982.54 | 47,184.56 | 37,500 | 26,000 | 26,000 | 26,000 |
| HRA-VEBA Contribution | 9,419.81 | 10,067.77 | 6,300 | 4,300 | 4,300 | 4,300 |
| FICA and Medicare PR Taxes | 17,624.43 | 18,642.32 | 17,400 | 15,000 | 15,000 | 15,000 |
| Workers' Comp Insurance | 2,552.58 | 2,822.37 | 3,000 | 3,000 | 3,000 | 3,000 |
| TOTAL PERSONNEL SERVICES | \$357,420.88 | \$391,705.71 | \$359,700 | \$285,000 | \$285,000 | \$285,000 |
| Materials and Services | | | | | | |
| Physicals and Vaccinations | 308.00 | 544.00 | 1,000 | 1,000 | 1,000 | 1,000 |
| Licenses and Fees | 80.00 | 280.00 | 500 | 500 | 500 | 500 |
| Supplies; Training and Safety Equip | 6,449.79 | 16,260.22 | 15,000 | 15,000 | 15,000 | 15,000 |
| Training Props and Equipment | 3,041.47 | 5,810.17 | 7,800 | 8,000 | 8,000 | 8,000 |
| M&R; Training Equipment and Props | 600.00 | 245.99 | 2,000 | 2,000 | 2,000 | 2,000 |
| Health and Wellness | 5,264.23 | 2,696.91 | 5,000 | 5,000 | 5,000 | 5,000 |
| Contractual/Professional Services | 1,175.00 | 0.00 | 20,000 | 20,000 | 20,000 | 20,000 |
| Membership Dues | 635.00 | 615.00 | 1,000 | 1,000 | 1,000 | 1,000 |
| Books and Subscriptions | 7,116.63 | 7,937.30 | 9,000 | 9,000 | 9,000 | 9,000 |
| Meeting Travel Expenses | 3,993.20 | 0.00 | 8,000 | 10,000 | 10,000 | 10,000 |
| Trng & Conferences; Admin & Leadership | 39,195.59 | 54,514.57 | 69,000 | 69,000 | 69,000 | 69,000 |
| Trng & Conferences; Board | 1,649.68 | 0.00 | 2,500 | 2,500 | 2,500 | 2,500 |
| Trng & Conferences; Operations | 10,011.75 | 2,156.39 | 25,000 | 25,000 | 25,000 | 23,000 |
| Trng & Conferences; Fire Life Safety | 2,817.87 | 1,747.27 | 10,000 | 10,000 | 10,000 | 10,000 |
| Trng & Conferences; Risk Reduction | 0.00 | 0.00 | 0 | 0 | 0 | 2,000 |
| Trng & Conferences; Students & Vol's | 964.22 | 62.00 | 10,000 | 10,000 | 10,000 | 10,000 |
| Trng & Conferences; Tech and Data Analytic | 2,153.38 | 0.00 | 10,000 | 10,000 | 10,000 | 10,000 |
| Trng & Conferences; EMS | 3,272.18 | 1,750.00 | 6,000 | 6,000 | 6,000 | 6,000 |
| TOTAL MATERIALS and SERVICES | \$88,727.99 | \$94,619.82 | \$201,800 | \$204,000 | \$204,000 | \$204,000 |
| TOTAL TRAINING | \$446,148.87 | \$486,325.53 | \$561,500 | \$489,000 | \$489,000 | \$489,000 |

* Overtime in Training includes all extra hours worked by all personnel attending and/or coordinating training events.

Training Department

2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 4

| Account | Description | Account Total |
|-----------|--|---------------|
| 58203-000 | Physicals and Vaccinations..... | \$ 1,000 |
| 60223-002 | Licenses and Fees..... DPSST fingerprinting costs for certification process | \$ 500 |
| 60223-012 | Supplies; Training and Safety Equipment..... Consumable training supplies for props, equipment, materials for in-service training, towing service fees for extrication vehicles, and safety equipment | \$ 15,000 |
| 60223-014 | Training Props and Equipment..... Miscellaneous training props and equipment 2,000 PROJECT: QCPR manikins (laerdal family pack) 4,500 PROJECT: Simpad plus 3,500 | \$ 8,000 |
| 60254-000 | M&R; Training Equipment and Props..... Maintenance and repair of training equipment and props | \$ 2,000 |
| 60265-000 | Health and Wellness..... Fitness supplies, miscellaneous equipment purchases, and fitness equipment maintenance and/or repair | \$ 5,000 |
| 60270-000 | Contractual/Professional Services..... Personal services contracts for hiring instructors to teach District staff on site | \$ 20,000 |
| 60410-000 | Membership Dues..... 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 | Books and Subscriptions..... Professional periodicals, general reference and training materials, emergency medical continuing education resources, technical rescue training, TotalEvals, and Blue Card RMS | \$ 9,000 |
| 60449-000 | Meeting Travel Expenses..... 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 | \$ 10,000 |
| 60455-001 | Training and Conferences; Administrative and Leadership..... 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 |

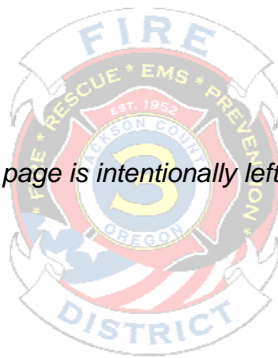
Training Department

2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued* General Fund 1, Department 4

| Account | Description | Account Total |
|-------------------------------------|---|-------------------|
| 60455-002 | Training and Conferences; Board..... Continued education for the Board of Directors such as the Special District's Association of Oregon conferences | \$ 2,500 |
| 60455-003 | Training and Conferences; Operations..... 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 | \$ 23,000 |
| 60455-004 | Training and Conferences; Fire and Life Safety..... 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 |
| 60455-005 | Training and Conferences; Risk Reduction..... Continued education and outreach training pertaining to risk reduction efforts | \$ 2,000 |
| 60455-006 | Training and Conferences; Students and Volunteers..... 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 | Training and Conferences; Technology and Data Analytics..... Continued technology training such as conferences, geographic information systems, data analysis, and other relevant conferences, training, and workshops | \$ 10,000 |
| 60455-008 | Training and Conferences; EMS..... 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 |
| TOTAL MATERIALS AND SERVICES | | \$ 204,000 |

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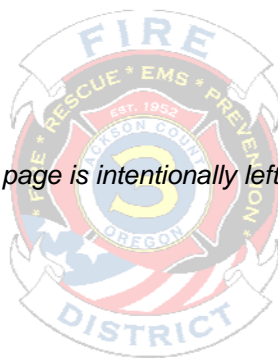
Strategic Services

FIRE DISTRICT 3



2022/23 Fiscal Year Budget

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Strategic Services Department

2022/23 Fiscal Year

DEPARTMENT DESCRIPTION

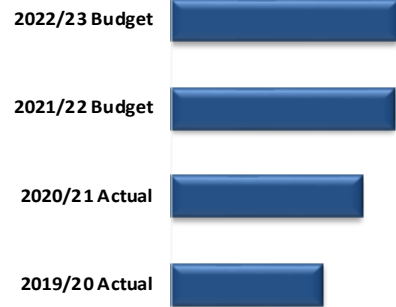
The Strategic Services Department is responsible for the coordination and oversight of the District's Community Risk Reduction efforts. Through our systems of analysis and data driven decision making, the Strategic Services Department is tasked with collaborating with other stakeholders in a community 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 | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|---------------------------|--------------------|--------------------|--------------------|--------------------|
| Personnel Services | \$386,204 | \$609,595 | \$710,500 | \$750,000 |
| Materials and Services | \$773,227 | \$854,177 | \$1,008,500 | \$1,073,000 |
| | \$1,159,430 | \$1,463,772 | \$1,719,000 | \$1,823,000 |

Budget Comparison



PERSONNEL SUMMARY

| Position | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|---|-------------------|-------------------|-------------------|-------------------|
| Deputy Chief of Strategic Services | 1.00 | 1.00 | 1.00 | 1.00 |
| Captain of Community Risk Reduction | 0.25 | 1.00 | 1.00 | 1.00 |
| Facilities/Logistics Manager | 0.25 | 0.00 | 0.00 | 0.00 |
| Facilities/Logistics Technician | 1.00 | 1.00 | 1.00 | 1.00 |
| Administrative Assistant | 0.00 | 1.00 | 1.00 | 1.00 |
| Logistics Support Technician (<i>part-time</i>) | 0.00 | 0.00 | 0.50 | 0.50 |
| Total | 2.50 | 4.00 | 4.50 | 4.50 |

NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase 5.56 percent or \$39,500 over the prior fiscal year. Factors impacting this classification include benefit additions for the part-time position, salary and benefit adjustments due to cost of living, and pension plan and insurance renewal increases.

Strategic Services Department

2022/23 Fiscal Year

The Materials and Services classification is budgeted to increase 6.4 percent or \$64,500. Significant factors include increased costs in apparatus maintenance, facility maintenance, and community risk reduction. 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 repairing the vehicular exhaust system at the Eagle Point Station, asphalt resealing at various stations, and upgrading the HVAC system at the Scenic Station.

PRIOR YEAR ACCOMPLISHMENTS

- Purchased, equipped, and placed into service two new staff vehicles for Deputy Fire Marshals.
- Integrated FirstDue preplanning and Community Connect programs into daily response workflow.
- Worked with Administration in the hiring of two new Community Care Providers to fill vacancies.
- Implemented a High Utilizer report for Community Care to proactively help high utilizers of the 911 system.
- Completed two community-wide chipper events to support residents in removing flammable vegetation.
- Continued to support a wildland fuels drop-off site at the Dodge Bridge Station.
- Coordinated the creation of a Hazardous Materials Emergency Plan for Jackson County.
- Implemented data analysis strategy to support the production of an Annual Report.
- Connected the RCC/FD3 Fire Science Center to the networked electronic door 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>Types of Transactions (Output Measures)</i> | <i>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> | <i>2022 Target</i> | <i>2023 Target</i> |
|--|------------------------|------------------------|------------------------|------------------------|------------------------|
| <u>Vehicles Maintained</u> | | | | | |
| <i>Fire Engines</i> | 11 | 11 | 11 | 11 | 11 |
| <i>Aerial Ladder Truck</i> | 1 | 1 | 1 | 1 | 1 |
| <i>Wildland Engines</i> | 8 | 8 | 8 | 8 | 8 |
| <i>Water Tenders</i> | 3 | 2 | 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 | 18 | 17 | 17 |
| <i>Total</i> | 45 | 44 | 45 | 44 | 44 |

Strategic Services Department

2022/23 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>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> | <i>2022 Target</i> | <i>2023 Target</i> |
|--|------------------------|------------------------|------------------------|------------------------|------------------------|
| <i>Facilities Maintained</i> | | | | | |
| <i>Fire Stations</i> | 8 | 8 | 8 | 8 | 8 |
| <i>Training Grounds</i> | 1 | 1 | 1 | 1 | 1 |
| <i>Training Classroom</i> | 1 | 1 | 1 | 1 | 1 |
| <i>Maintenance Shop</i> | 1 | 1 | 1 | 1 | 1 |
| <i>Administrative Building</i> | 1 | 1 | 1 | 1 | 1 |
| <i>Resident Volunteer Housing</i> | 4 | 4 | 4 | 4 | 4 |
| <i>Warehouse Facility/Grounds</i> | 1 | 1 | 2 | 2 | 2 |
| <i>Total</i> | 17 | 17 | 18 | 18 | 18 |

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>2019 Actual</i> | <i>2020 Actual</i> | <i>2021 Actual</i> | <i>2022 Target</i> | <i>2023 Target</i> |
|---|------------------------|------------------------|------------------------|------------------------|------------------------|
| <i>Smoke Alarms Installed</i> | 945 | 33 ^a | 525 | 600 | 600 |
| <i>Loads of Hazardous Wildland Fuel Removed</i> | | 32 | 4,650 | 6,000 | 6,000 |
| <i>PulsePoint Subscribers</i> | 5,979 | 16,049 ^b | 6,637 | 7,000 | 7,000 |

^a 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.

^b 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.

Strategic Services Department

2022/23 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.

| Services Provided (Outputs) and Effectiveness Measures | 2019 Actual | 2020 Actual | 2021 Actual | 2022 Target | 2023 Target |
|--|-------------|-------------|-------------|-------------|-------------|
| Engine Crew Referrals | n/a | 138 | 192 | 200 | 200 |
| Community Care Home Visits | n/a | 113 | 202 | 225 | 225 |
| 911 Calls Handled | n/a | 95 | 571 | 600 | 600 |

* 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

2022/23 Fiscal Year

2022/23 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.

| Goal 1.1 | Increase focus on prevention activities | | |
|-----------|--|-------------------------|---------------|
| Objective | Evaluate Greenway fires and fire response | | |
| Task | 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 | Target Completion Date: | June 30, 2022 |

| Objective | Focus on targeted areas to improve prevention | | |
|-----------|---|-------------------------|-------------------|
| Task | Identify areas at risk through a comprehensive risk analysis and implement a community risk reduction plan to reduce the risks in these areas | Target Completion Date: | December 31, 2022 |

| Objective | Evaluate wildland fire reduction and resiliency | | |
|-----------|---|-------------------------|---------------|
| Task | 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 | Target Completion Date: | June 30, 2023 |
| Task | Support the efforts of Jackson County in the implementation of the Rogue Valley Integrated Community Wildfire Protection Plan (RVCWPP) | Completed Date: | December 2021 |

| Objective | Increase prevention in rural areas | | |
|-----------|---|-----------------|---------------|
| Task | 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 | Completed Date: | December 2021 |

Strategic Services Department

2022/23 Fiscal Year

| | | | |
|------------------|--|--------------------------------|-------------------|
| Goal 1.2 | Understand and focus on non-fire emergency response | | |
| Objective | Evaluate non-emergency response and resource allocation | | |
| Task | Research and categorize totality of non-emergency response | Target Completion Date: | December 31, 2022 |
| Objective | Implement appropriate response to non-fire incidents (mental health, drug addiction) | | |
| Task | Enhance the deployment of the Community Care Program to respond to non-critical medical and social service incidents | Target Completion Date: | June 30, 2023 |
| Objective | Increase community delivered CPR training | | |
| Task | Develop a rapid deploy CPR class | Target Completion Date: | December 31, 2022 |
| Task | Implement and support community CPR classes with a goal of providing 6 classes per year | Target Completion Date: | December 31, 2022 |

Initiative 2

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

| | | | |
|------------------|--|--------------------------------|---------------|
| Goal 2.2 | Evolve service delivery models to better focus resources | | |
| Objective | Develop and enhance programs within the District (Community Care and Risk Reduction) | | |
| Task | Evaluate the use of current and emerging technologies to enhance current programs and response | Completed Date: | February 2022 |
| Objective | Offer alternative non-emergency transportation options to patients | | |
| Task | Develop and implement treat-in-place and alternate destination protocols | Target Completion Date: | June 30, 2023 |
| Goal 2.3 | Maintain fiscal responsibility | | |
| Objective | Evaluate sustainable practices | | |
| Task | Evaluate and develop a plan to utilize solar energy to reduce facility energy costs | Target Completion Date: | June 30, 2023 |
| Task | Evaluate the use of electric or hybrid technology for non-emergency response vehicles | Completed Date: | February 2022 |

Initiative 5

Develop and strengthen collaborative efforts and strategic partnerships.

| | | | |
|------------------|---|------------------------|---------------|
| Goal 5.1 | Maintain and enhance partnerships to improve regional preparedness and response to emergency events | | |
| Objective | Encourage the development of a Rogue Valley Disaster Response Plan | | |
| Task | Support the development of the Jackson County Hazardous Materials Emergency Plan by participating in the Jackson County Local Emergency Planning Committee (LEPC) | Completed Date: | December 2021 |

Strategic Services Department

2022/23 Fiscal Year

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

| | | | |
|------------------|--|--------------------------------|---------------|
| Objective | Work effectively with partner agencies for access to resources for elderly and at-risk patrons to affect broader changes | | |
| Task | 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 | Target Completion Date: | June 30, 2023 |

Initiative 6

Commit to excellence through innovation.

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

| | | | |
|------------------|--|--------------------------------|-------------------|
| Goal 6.2 | Build organizational capacity and excellence | | |
| Objective | Provide excellent customer and public service | | |
| Task | Conduct internal customer service satisfaction survey for facility, logistics, and technology services | Target Completion Date: | December 31, 2022 |

Strategic Services Department

2022/23 Fiscal Year

| General Fund | HISTORICAL | | | BUDGET FOR NEXT FISCAL YEAR | | |
|---|-----------------------|-----------------------|--------------------|-----------------------------|------------------------------|---------------------------|
| | 2019/20 FY | 2020/21 FY | 2021/22 FY | 2022/2023 | | |
| | Actual | Actual | Adopted Budget | Proposed By Budget Officer | Approved By Budget Committee | Adopted By Governing Body |
| Personnel Services | | | | | | |
| Salaries | \$241,370.59 | \$355,086.42 | \$386,500 | \$401,600 | \$401,600 | \$401,600 |
| Overtime | 0.00 | 2,626.20 | 5,000 | 5,000 | 5,000 | 5,000 |
| Incentives | 13,680.68 | 23,434.00 | 34,000 | 38,500 | 38,500 | 38,500 |
| Payouts | 4,878.40 | 8,503.98 | 12,000 | 17,500 | 17,500 | 17,500 |
| Retirement (PERS) | 43,707.29 | 75,333.96 | 93,000 | 97,000 | 97,000 | 97,000 |
| ER Deferred Comp Contrib | 472.41 | 4,742.99 | 14,000 | 15,000 | 15,000 | 15,000 |
| Health and Life Insurance | 53,280.19 | 94,293.17 | 113,000 | 120,000 | 120,000 | 120,000 |
| HRA-VEBA Contribution | 8,969.80 | 16,301.15 | 19,000 | 19,400 | 19,400 | 19,400 |
| FICA and Medicare PR Taxes | 19,585.96 | 28,957.06 | 33,000 | 35,000 | 35,000 | 35,000 |
| Workers' Comp Insurance | 258.49 | 316.35 | 1,000 | 1,000 | 1,000 | 1,000 |
| TOTAL PERSONNEL SERVICES | \$386,203.81 | \$609,595.28 | \$710,500 | \$750,000 | \$750,000 | \$750,000 |
| Materials and Services | | | | | | |
| Uniforms | \$26,902.07 | \$23,557.70 | \$56,300 | \$55,000 | \$55,000 | \$55,000 |
| Janitorial Supplies and Laundry Service | 31,614.89 | 56,382.17 | 35,000 | 35,000 | 35,000 | 35,000 |
| Supplies/Equipment; Medical | 66,886.82 | 71,796.23 | 80,000 | 80,000 | 80,000 | 80,000 |
| Supplies; Logistics and Facility Maint | 0.00 | 2,110.56 | 5,000 | 5,000 | 5,000 | 5,000 |
| Supplies; Miscellaneous Logistics | 0.00 | 0.00 | 0 | 2,000 | 2,000 | 2,000 |
| Supplies; Station Consumables | 1,900.10 | 1,857.22 | 6,000 | 6,000 | 6,000 | 6,000 |
| Supplies; Furnishings and Appliances | 30,628.96 | 17,775.55 | 17,000 | 17,000 | 17,000 | 17,000 |
| Supplies; Facilities | 4,464.50 | 3,198.81 | 13,000 | 13,000 | 13,000 | 13,000 |
| Fuel and Lubricants | 52,086.99 | 53,162.70 | 80,000 | 80,000 | 80,000 | 100,000 |
| M&R of Vehicles and Apparatus | 216,924.60 | 281,690.99 | 225,000 | 250,000 | 250,000 | 250,000 |
| Bldgs & Grounds - WC Station | 12,742.60 | 16,445.52 | 24,200 | 12,000 | 12,000 | 23,000 |
| Bldgs & Grounds - CP Station | 48,076.59 | 7,084.22 | 32,400 | 10,000 | 10,000 | 33,000 |
| Bldgs & Grounds - DB Station | 936.99 | 1,258.57 | 5,000 | 5,000 | 5,000 | 5,000 |
| Bldgs & Grounds - SV Station | 6,408.26 | 8,291.86 | 5,000 | 6,000 | 6,000 | 6,000 |
| Bldgs & Grounds - GH Station | 14,061.09 | 16,580.38 | 6,000 | 5,000 | 5,000 | 5,000 |
| Bldgs & Grounds - AL Station | 2,848.92 | 9,763.19 | 10,000 | 15,000 | 15,000 | 15,000 |
| Bldgs & Grounds - EP Station | 35,791.35 | 10,618.54 | 10,000 | 30,000 | 30,000 | 30,000 |
| Bldgs & Grounds - TR Station | 3,971.64 | 6,042.41 | 3,000 | 3,000 | 3,000 | 3,000 |
| Bldgs & Grounds - SNC Station | 5,453.77 | 10,189.38 | 5,000 | 13,000 | 13,000 | 13,000 |
| Bldgs & Grounds - TRNG Center | 4,752.43 | 4,998.81 | 23,000 | 15,000 | 15,000 | 32,000 |
| Bldgs & Grounds - ADM Bldg | 19,923.80 | 35,949.57 | 42,600 | 15,000 | 15,000 | 25,000 |
| Bldgs & Grounds - LOG Warehouse | 785.03 | 1,371.80 | 2,000 | 2,000 | 2,000 | 2,000 |
| Bldgs & Grounds - Fire Science Center | 4,395.91 | 2,989.49 | 12,000 | 2,000 | 2,000 | 2,000 |
| M&R; District Equipment | 2,169.85 | 990.66 | 10,000 | 10,000 | 10,000 | 10,000 |
| M&R; Appliances and Furnishings | 914.14 | 238.67 | 5,000 | 5,000 | 5,000 | 5,000 |
| Community Risk Reduction | 0.00 | 18,295.60 | 55,000 | 60,000 | 60,000 | 60,000 |
| Community Care Program | 0.00 | 0 | 13,500 | 13,500 | 13,500 | 13,500 |
| Contractual/Professional Services | 5,306.55 | 6,872.75 | 8,000 | 8,000 | 8,000 | 8,000 |
| Membership and Certifications | 370.00 | 370.00 | 1,000 | 1,000 | 1,000 | 1,000 |
| Subscriptions | 0.00 | 0.00 | 500 | 500 | 500 | 500 |
| Utilities; WC | 30,107.80 | 29,907.63 | 35,000 | 35,000 | 35,000 | 35,000 |
| Utilities; CP | 20,111.75 | 21,835.09 | 23,000 | 23,000 | 23,000 | 23,000 |
| Utilities; DB | 8,167.52 | 7,815.62 | 14,000 | 14,000 | 14,000 | 14,000 |
| Utilities; SV | 6,318.17 | 10,164.07 | 14,000 | 14,000 | 14,000 | 14,000 |
| Utilities; GH | 11,000.70 | 8,758.13 | 14,000 | 14,000 | 14,000 | 14,000 |
| Utilities; AL | 6,823.00 | 6,397.42 | 10,000 | 10,000 | 10,000 | 10,000 |
| Utilities; EP | 21,067.89 | 21,014.16 | 23,000 | 23,000 | 23,000 | 23,000 |
| Utilities; TR | 10,622.67 | 3,047.10 | 5,000 | 5,000 | 5,000 | 5,000 |
| Utilities; SNC | 2,820.08 | 19,351.52 | 23,000 | 23,000 | 23,000 | 23,000 |
| Utilities; TC | 15,422.31 | 16,353.71 | 15,000 | 15,000 | 15,000 | 15,000 |
| Utilities; AB | 36,848.54 | 35,059.88 | 37,000 | 37,000 | 37,000 | 37,000 |
| Utilities; FSC | 3,598.35 | 4,589.17 | 5,000 | 5,000 | 5,000 | 5,000 |
| TOTAL MATERIALS and SERVICES | \$773,226.63 | \$854,176.85 | \$1,008,500 | \$992,000 | \$992,000 | \$1,073,000 |
| TOTAL STRATEGIC SERVICES | \$1,159,430.44 | \$1,463,772.13 | \$1,719,000 | \$1,742,000 | \$1,742,000 | \$1,823,000 |

Strategic Services Department

2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 5

| Account | Description | Account Total |
|-----------|--|-------------------------------|
| 58213-000 | Uniforms..... Attire for all uniformed positions in all departments including shirts, pants, duty boots, accessories, badges, belts, sweatshirts, and alterations | \$ 55,000 |
| 60221-000 | Janitorial Supplies and Laundry Services..... Janitorial and cleaning supplies for all District facilities; truck towel and floor mat laundry | \$ 35,000 |
| 60223-003 | Supplies/Equipment; Medical..... Medical equipment and supplies, pharmaceuticals, automatic external defibrillators (AED's) bio-waste disposal, medical oxygen cylinders, and personal protective equipment | \$ 80,000 |
| 60223-006 | Supplies; Logistics and Facility Maintenance..... Tools, supplies, and equipment for the performance of logistics and facility maintenance activities | \$ 5,000 |
| 60223-007 | Supplies; Miscellaneous Logistics..... | \$ 2,000 |
| 60223-008 | Supplies; Consumables..... Coffee and consumable supplies for all District facilities | \$ 6,000 |
| 60223-015 | Supplies; Furnishings and Appliances..... General facility furnishings and appliances including televisions | \$ 17,000 |
| 60223-016 | Supplies; Facilities..... Supplies for all facilities including but not limited to lightbulbs, extension cords, garden supplies, mattress covers, kitchen and cookware items | \$ 13,000 |
| 60230-000 | Fuel and Lubricants..... | \$ 100,000 |
| 60250-000 | M&R of Vehicles and Apparatus..... | \$ 250,000 |
| 60251- | <u>Buildings and Grounds</u> 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 | |
| 110- | White City Station..... General maintenance and repair PROJECT: Asphalt sealing | \$ 23,000 12,000 11,000 |

Strategic Services Department

2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT -Continued

General Fund 1, Department 5

| Account | Description | Account Total |
|---|--|---------------|
| 111- Central Point Station..... | | \$ 33,000 |
| | General maintenance and repair | 10,000 |
| | PROJECT: Asphalt sealing | 23,000 |
| 112- Dodge Bridge Station..... | | \$ 5,000 |
| | General maintenance and repair | |
| 113- Sam's Valley Station..... | | \$ 6,000 |
| | General maintenance and repair | |
| 114- Gold Hill Station..... | | \$ 5,000 |
| | General maintenance and repair | |
| 115- Agate Lake Station..... | | \$ 15,000 |
| | General maintenance and repair | |
| 116- Eagle Point Station..... | | \$ 30,000 |
| | General maintenance and repair | 10,000 |
| | PROJECT: Apparatus Bay Exhaust System | 20,000 |
| 117- Table Rock Station..... | | \$ 3,000 |
| | General maintenance and repair | |
| 118- Scenic Station..... | | \$ 13,000 |
| | General maintenance and repair | 5,000 |
| | PROJECT: Workout Room HVAC | 8,000 |
| 120- Training Center/Storage/Offices..... | | \$ 32,000 |
| | General maintenance and repair | 10,000 |
| | PROJECT: Asphalt sealing | 17,000 |
| | PROJECT: Community Care Office Break Room Remodel | 5,000 |
| 121- Administrative Building..... | | \$ 25,000 |
| | General maintenance and repair | 15,000 |
| | PROJECT: Asphalt sealing | 10,000 |
| 122- Logistics Warehouse..... | | \$ 2,000 |
| | General maintenance and repair | |
| 123- Fire Science Center..... | | \$ 2,000 |
| | General maintenance and repair | |
| 60254-000 M&R; District Equipment..... | | \$ 10,000 |
| | Includes but is not limited to breathing air compressors, forklift, ATV, flatbed trailer, scissor lift, blowers, sprayer, and fuel tanks | |
| 60255-000 M&R; Station Appliances and Furnishings..... | | \$ 5,000 |
| | Includes but is not limited to interior appliances, ice machines, dishwashers, refrigerators, and cook stoves | |

Strategic Services Department

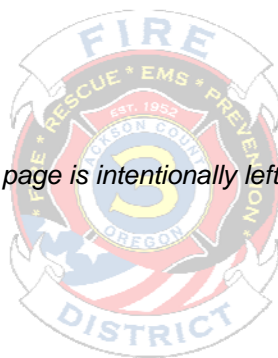
2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued*

General Fund 1, Department 5

| Account | Description | Account Total |
|-------------------------------------|---|---------------------|
| 60265-000 | Community Risk Reduction 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 | \$ 60,000 |
| 60267-000 | Community Care Program Support for the Community Care Program such as specialized medical and diagnostic equipment, supplies, etc. | \$ 13,500 |
| 60270-000 | Contractual/Professional Services Includes annual fire alarm monitoring, fire sprinkler testing | \$ 8,000 |
| 60410-000 | Membership and Certifications | \$ 1,000 |
| 60412-000 | Subscriptions | \$ 500 |
| 60500- | Utilities; Stations and Facilities Includes electricity, natural gas, propane, water, garbage, sewer, telephone, internet, and cable or satellite television services | \$ 218,000 |
| 110- | White City Station | 35,000 |
| 111- | Central Point Station | 23,000 |
| 112- | Dodge Bridge Station | 14,000 |
| 113- | Sams Valley Station | 14,000 |
| 114- | Gold Hill Station | 14,000 |
| 115- | Agate Lake Station | 10,000 |
| 116- | Eagle Point Station | 23,000 |
| 117- | Table Rock Station | 5,000 |
| 118- | Scenic Station | 23,000 |
| 120- | Training Center/Storage/Offices | 15,000 |
| 121- | Administrative Building | 37,000 |
| 123- | Fire Science Center | 5,000 |
| TOTAL MATERIALS AND SERVICES | | \$ 1,073,000 |

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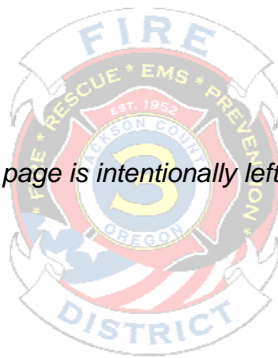
Technology

FIRE DISTRICT 3



2022/23 Fiscal Year Budget

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Technology Department

2022/23 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 oversees the security and backup of all District information systems and 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.

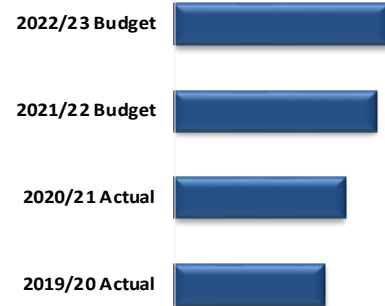
IT maintains proper licensing and maintenance contracts for District owned software and hardware. The department partners with all divisions to evaluate technology requirements and helps determine the best solutions to meet both immediate and long-term needs.

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 (ECISO), for computer aided dispatch programming and support.

BUDGET SUMMARY

| Expenditures | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|---------------------------|-------------------|-------------------|-------------------|-------------------|
| Personnel Services | \$146,736 | \$152,199 | \$162,000 | \$169,400 |
| Materials and Services | \$198,111 | \$238,671 | \$302,000 | \$323,800 |
| | \$344,847 | \$390,870 | \$464,000 | \$493,200 |

Budget Comparison



PERSONNEL SUMMARY

| Position | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|--------------------------------------|-------------------|-------------------|-------------------|-------------------|
| Information Technology Administrator | 1.00 | 1.00 | 1.00 | 1.00 |
| Total | 1.00 | 1.00 | 1.00 | 1.00 |

NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase 4.57 percent or \$7,400 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 7.22 percent or \$21,800. 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 \$16,000 due to replacing mobile computer hardware, cyber security enhancements, and implementing a wildfire detection camera in partnership with local affiliates. Communication services has increased \$5,000 to accommodate more devices requiring data usage.

Technology Department

2022/23 Fiscal Year

PRIOR YEAR ACCOMPLISHMENTS

- Implemented a new digital information dashboard at all career worksite locations.
- Deployed FirstDue preplanning system to Operations and Fire & Life Safety staff.
- Integrated the burn permit process into Community Connect for more efficient work flow.
- Implemented a cloud-based data backup system along with other network security measures.
- 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.
- Implemented new hardware and software solutions to support new employees and positions.
- 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>2018/19 Actual</i> | <i>2019/20 Actual</i> | <i>2020/21 Actual</i> | <i>2021/22 Target</i> | <i>2022/23 Target</i> |
|--|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| <i>Maintain Computer Workstations</i> | 50 | 60 | 70 | 70 | 75 |
| <i>Mobile Display Computers and Tablets</i> | 15 | 18 | 20 | 20 | 21 |
| <i>Network Servers</i> | 4 | 8 | 15 | 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 Microsoft Teams collaboration software District-wide.
- 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. Trained and deployed GIS capability to Community Risk Reduction personnel.

Technology Department

2022/23 Fiscal Year

2022/23 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.

| Goal 2.2 | | Evolve service delivery models to better focus resources | |
|-----------|--|--|----------------|
| Objective | | Utilize data to drive all service delivery models | |
| Task | Develop and enhance a data dashboard with connection to applicable data resources | Completed Date: | June 2021 |
| Task | Provide an informational dashboard in responder work locations to enhance service delivery | Completed Date: | September 2021 |

| Objective | | Keep up with technology to support communities | |
|-----------|---|--|---------------|
| Task | Evaluate and integrate technology solutions that enhance and support service to communities within the District | Target Completion Date: | June 30, 2023 |

| Goal 2.3 | | Maintain fiscal responsibility | |
|-----------|--|---|---------------|
| Objective | | Assess capital needs and plan accordingly | |
| Task | Develop a formalized technology related capital resources plan | Target Completion Date: | June 30, 2023 |

Initiative 3

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

| Goal 3.1 | | Enhance employee development process | |
|-----------|--|---|---------------|
| Objective | | Expand cross-training in functional areas | |
| Task | Provide personnel the opportunities to grow and understand the District's technology needs | Target Completion Date: | June 30, 2023 |

Technology Department

2022/23 Fiscal Year

Initiative 6

Commit to excellence through innovation.

| | | | |
|------------------|--|--------------------------------|---------------|
| Goal 6.1 | Focus on innovation to improve service delivery | | |
| Objective | Continue to improve options of service delivery using technology | | |
| Task | Evaluate the use of current and emerging technologies to enhance current programs and response | Target Completion Date: | June 30, 2023 |

| | | | |
|------------------|---|--------------------------------|---------------|
| Objective | Embrace innovation to better support the service delivery models | | |
| Task | Explore opportunities to test and evaluate technologies to enhance service delivery | Target Completion Date: | June 30, 2023 |

Technology Department

2022/23 Fiscal Year

| General Fund | | <u>HISTORICAL</u> | | <u>BUDGET FOR NEXT FISCAL YEAR</u> | | |
|-------------------------------------|---------------------|---------------------|------------------|------------------------------------|------------------------------|---------------------------|
| | 2019/20 FY | 2020/21 FY | 2021/22 FY | 2022/2023 | | |
| Description | Actual | Actual | Adopted Budget | Proposed By Budget Officer | Approved By Budget Committee | Adopted By Governing Body |
| Personnel Services | | | | | | |
| Salaries | 99,351.02 | 100,361.80 | 102,500 | 106,000 | 106,000 | 106,000 |
| Incentives | 4,661.85 | 4,732.30 | 6,100 | 7,400 | 7,400 | 7,400 |
| Payouts | 0.00 | 2,881.20 | 4,000 | 5,000 | 5,000 | 5,000 |
| Retirement (PERS) | 13,126.42 | 13,262.86 | 16,000 | 16,500 | 16,500 | 16,500 |
| ER Deferred Comp Contrib | 4,416.00 | 5,496.00 | 5,500 | 5,700 | 5,700 | 5,700 |
| Health & Life Insurance | 13,176.60 | 13,128.17 | 14,700 | 15,000 | 15,000 | 15,000 |
| HRA-VEBA Contribution | 4,063.92 | 4,125.60 | 4,200 | 4,300 | 4,300 | 4,300 |
| FICA and Medicare PR Taxes | 7,916.04 | 8,208.43 | 8,500 | 9,000 | 9,000 | 9,000 |
| Workers' Comp Insurance | 24.63 | 3.09 | 500 | 500 | 500 | 500 |
| TOTAL PERSONNEL SERVICES | \$146,736.48 | \$152,199.45 | \$162,000 | \$169,400 | \$169,400 | \$169,400 |
| Materials and Services | | | | | | |
| Supplies; Computers and Tech | 51,724.71 | 29,863.71 | 55,000 | 71,000 | 71,000 | 71,000 |
| Supplies; Communication Devices | 15,913.05 | 18,454.35 | 20,000 | 20,000 | 20,000 | 20,000 |
| Licenses and Subscriptions | 94,737.06 | 131,993.56 | 165,000 | 167,300 | 167,300 | 167,300 |
| Technical Support | 4,505.25 | 24,330.02 | 18,000 | 13,000 | 13,000 | 13,000 |
| M&R; Office and Tech Equip | 5,822.81 | 5,040.73 | 7,000 | 7,500 | 7,500 | 7,500 |
| M&R; Communication Devices | 3,659.84 | 1,996.06 | 7,000 | 10,000 | 10,000 | 10,000 |
| Communication Services | 21,747.80 | 26,992.38 | 30,000 | 35,000 | 35,000 | 35,000 |
| TOTAL MATERIALS and SERVICES | \$198,110.52 | \$238,670.81 | \$302,000 | \$323,800 | \$323,800 | \$323,800 |
| TOTAL TECHNOLOGY | \$344,847.00 | \$390,870.26 | \$464,000 | \$493,200 | \$493,200 | \$493,200 |

Technology Department

2022/23 Fiscal Year

MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 7

| Account | Description | Account Total |
|-------------------------------------|---|-------------------|
| 60223-011 | Supplies; Computers and Technology Equipment..... | \$ 71,000 |
| | Technology related equipment and supplies including computers, laptops, tablets, monitors, printers, keyboards, speakers, software, routers, cables, connectors, switches, and general supply items | 37,500 |
| | PROJECT: AlertWildfire Camera | 20,000 |
| | PROJECT: Sonicwall | 10,000 |
| | PROJECT: Mobile Computers for BC's | 3,500 |
| 60223-013 | Supplies; Communication Devices..... | \$ 20,000 |
| | Radio equipment, communication devices, and batteries for pagers | |
| 60240-000 | Licenses and Subscriptions..... | \$ 167,300 |
| | Image Trend annual subscription (records management system) | 26,000 |
| | Vector Solutions (staffing, training, logistics software platform) | 21,000 |
| | First Due (preplanning software) | 20,000 |
| | Springbrook (financial, HR, employee self-service software) | 15,000 |
| | Office 365 | 15,000 |
| | 911 Eye (911 over video) | 10,000 |
| | First Watch annual subscription for CAD and ImageTrend surveillance | 8,000 |
| | Datto Network Cloud Backup | 6,800 |
| | Sierra Wireless for WiFi engine routers | 4,800 |
| | Website hosting | 4,100 |
| | ArcMail service (Email backup) | 4,000 |
| | Radio over LTE Interface (Tango Tango) | 4,000 |
| | Mitel annual license and limited support (phone system) | 3,600 |
| | First Arriving dashboard subscriptions | 2,800 |
| | Pulse Point Verified Responder | 2,500 |
| | SonicWall (server firewall), Experts Exchange, Adobe Products | 2,500 |
| | Zoom video conferencing | 2,500 |
| | Trend security (antivirus) | 2,400 |
| | Archive social media records retention | 2,400 |
| | Emergency Reporting (records management system) | 2,000 |
| | Cisco smartnet subscription for firmware updates | 1,800 |
| | Photocopier lease payment | 1,700 |
| | GIS software | 1,500 |
| | Appraver secure spam filter (Email) | 1,200 |
| | DNS hosting and Active 911 | 700 |
| | IBM support (backup server and Shortel phone server) | 500 |
| | 3E online safety data sheet management | 500 |
| 60241-000 | Technical Support and Contracts..... | \$ 13,000 |
| | Data analytics support | 5,000 |
| | Core Business Solutions updates and monitoring support | 4,000 |
| | GIS support, RMS support, other hardware/software support | 4,000 |
| 60252-000 | M&R; Office and Tech Equipment..... | \$ 7,500 |
| 60253-000 | M&R; Emergency Response Communication Devices..... | \$ 10,000 |
| | Reprogramming and repair of pagers, radios, tablets, mobile computers | |
| 60290-000 | Communication Services..... | \$ 35,000 |
| | Monthly expenses for mobile phone plans, WiFi cards for mobile devices | |
| TOTAL MATERIALS AND SERVICES | | \$ 323,800 |

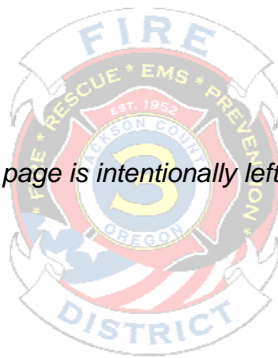
Capital Projects Fund

FIRE DISTRICT 3



2022/23 Fiscal Year Budget

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Capital Projects Fund

2022/23 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.

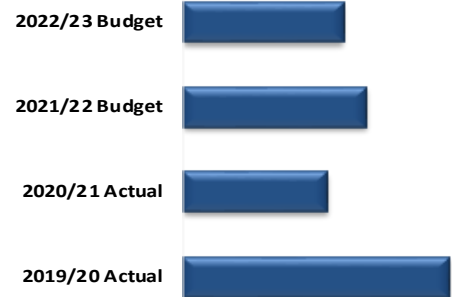
Transfers from the General Fund provide funding for the budgeted requirements. The Capital Replacement Schedule identifies a committed minimum transfer amount each fiscal year in order to meet targeted expenditures. A higher transfer amount will be made in fiscal years where the General Fund supports 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

| Expenditures | 2019/20 Actual | 2020/21 Actual | 2021/22 Budget | 2022/23 Budget |
|--|-------------------|-------------------|-------------------|-------------------|
| Capital Expenditures | \$5,134,291 | \$282,743 | \$1,417,000 | \$1,196,000 |
| Contingency | \$0 | \$0 | \$119,000 | \$121,600 |
| Reserve for Future/Ending Fund Balance | \$3,838,044 | \$4,573,001 | \$4,626,400 | \$3,878,400 |
| | \$8,972,335 | \$4,855,744 | \$6,162,400 | \$5,196,000 |

Budget Comparison



Capital Projects Fund

2022/23 Fiscal Year

NEW BUDGETARY SIGNIFICANT CHANGES

Identified in the Capital Replacement Schedule and budgeted for this fiscal year is the purchase of three wildland engines. These units will replace the first-generation wildland engines purchased in 1997. The units will be on a Ford 550 extended cab chassis with an ability to carry 400 gallons of water. Originally scheduled to replace two units in 2022/23 fiscal year and then another unit in 2023/24, the District is now seeking budget support for three this year due to the estimated build time of 18 months. The Apparatus Schedule has been updated to reflect this change. The District has budgeted \$605,000 for these units.

Three staff vehicles are budgeted to be replaced in accordance with the Capital Replacement Schedule and are considered purchases routine in nature. Ford 150 pickup trucks are spec'd and will be outfitted with response ready equipment for a total budgeted cost of \$205,000. These units were budgeted for and ordered in the 2021/22 fiscal year, but due to new car manufacturing delays plaguing the Nation, these units will not be received and paid for until this fiscal year. All three units will replace older staff vehicles that will transition to reserve carpool.

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 350 chassis was purchased from the vendor; this budget recognizes \$145,000 for the completion of the unit which includes the manufacturing of the custom box, radios, electronics, and emergency lighting. Due to the Covid-19 pandemic and manufacturing issues at the plant where this unit is being built, this project will roll once again into the 2022/23 fiscal year. This unit is to go into assembly May of 2022 with an anticipated delivery in December of 2022. The existing unit will go into reserve status.

This budget has identified \$50,000 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 project was also budgeted in the 2021/22 fiscal year, but due to the Covid-19 pandemic and supply issues, the District was not able to secure an order due to lack of inventory. Therefore, this project is rolling into the 2022/23 fiscal year.

This budget has \$10,000 allocated for a large format printer/plotter/scanner needed for use by all departments. The printer/plotter function will allow us to print large scale maps, aerial photos, public safety message banners, and construction plans, all up to 36" wide. This will also allow us to print large scale maps on demand during large incidents. The scanner function will allow us to scan large documents and building plans for digital storage inside our occupancy software programs. This will free up physical space and make locating needed information fast and efficient.

This budget has identified \$180,000 towards installing a solar outdoor carport at the Administration Building. A Strategic Plan objective is to evaluate sustainable practices and solar energy is one approach that accomplishes this. Also, due to the rise in energy costs over this past year, an innovative approach to help reduce those costs is prudent. Our experience with solar power generation at the Scenic Fire Station has proven to provide significant cost savings for power at that facility. The carport concept will reside on the south side of the Administrative campus and allow for covered staff parking while generating solar back into the grid, thereby offsetting a portion of our power costs.

Capital Projects Fund

2022/23 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 | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
|-------------------------------|----------------|----------|----------|----------|----------|----------|----------|----------|----------|--------|---------|
| | | 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 | 31/32 |
| Structural Engine | 10/20/25 years | | | 2 | | | | 2 | | | |
| Interface Engine | 20/30 years | | | | | | | | 1 | | |
| Wildland Engine | 20/30 years | 3 | | | 2 | | | 1 | | | |
| Tactical Tender | 20/30 years | | | | | | | | | | |
| 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 | 3 | | | | | 3 | | | | 3 |
| Service Vehicle | 20 years | | | | | | | | | | |
| Suppression Equipment | | | | | | | | | | | |
| Breathing Apparatus | 15 years | | | | | | | | | | |
| Defibrillators/AED's | 10 years | | | 6 | | | | | | | |
| Extrication Equipment | 10 years | | 2 | | | | | | | | |
| Thermal Imagers | 7 years | | | | | | 5 | | | | |
| Radio's - Portable and Mobile | 15 years | | | | | | | | | | |
| Technology | | | | | | | | | | | |
| 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

2022/23 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. Historically, the District has based this schedule on a 2.5 to three percent inflationary factor, but due to the escalated inflationary rise experienced this past year, and current estimates received for targeted purchases, the inflationary factor used in this schedule as been increased to four percent per year from today's replacement cost value.

| SCHEDULED - Apparatus and Vehicles | Current Cost | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Year 7 | Year 8 | Year 9 | Year 10 |
|--|--------------|--------------|-----------|--------------|------------|--------------|------------|--------------|------------|------------|------------|
| | | 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 | 31/32 |
| Structural Engine | \$630,000 | - | - | 1,417,329 | - | - | - | 1,658,074 | - | - | - |
| Interface Engine | \$385,000 | - | - | - | - | - | - | - | 526,899 | - | - |
| Wildland Engine | \$195,000 | 605,000 | - | - | 456,245 | - | - | 256,607 | - | - | - |
| Tactical Tender | \$390,000 | - | - | - | - | - | - | - | - | - | - |
| Aerial Ladder Truck | \$1,000,000 | - | - | - | - | 1,216,653 | - | - | - | - | - |
| Rescue/Ambulance | \$160,000 | - | - | - | - | - | - | - | - | - | - |
| Battalion Chief Command Unit | \$144,000 | 145,000 | - | - | 168,460 | - | - | - | - | 204,957 | - |
| Technical Rescue Truck | \$90,000 | - | - | - | - | - | - | - | - | - | - |
| Staff Vehicle | \$69,000 | 205,000 | - | - | - | - | 261,921 | - | - | - | 306,411 |
| Service Vehicle | \$75,000 | - | - | - | - | - | - | - | - | - | - |
| | | \$ 955,000 | \$ - | \$ 1,417,329 | \$ 624,704 | \$ 1,216,653 | \$ 261,921 | \$ 1,914,681 | \$ 526,899 | \$ 204,957 | \$ 306,411 |
| | | | | | | | | | | | |
| SCHEDULED - Suppression | | | | | | | | | | | |
| | | | | | | | | | | | |
| Breathing Apparatus | \$450,000 | - | - | - | - | - | - | - | - | - | - |
| Defibrillators/AED's | \$30,000 | - | - | 196,691 | - | - | - | - | - | - | - |
| Extrication Equipment | \$28,500 | - | 60,585 | - | - | - | - | - | - | - | - |
| Thermal Imagers | \$7,000 | - | - | - | - | - | 41,792 | - | - | - | - |
| Radio's - Portable and Mobile | \$4,800 | - | - | - | - | - | - | - | - | - | - |
| | | \$ - | \$ 60,585 | \$ 196,691 | \$ - | \$ - | \$ 41,792 | \$ - | \$ - | \$ - | \$ - |
| | | | | | | | | | | | |
| SCHEDULED - Technology | | | | | | | | | | | |
| | | | | | | | | | | | |
| Computer Main Server | \$15,000 | - | - | 16,391 | - | - | 17,911 | - | - | 19,572 | - |
| | | \$ - | \$ - | \$ 16,391 | \$ - | \$ - | \$ 17,911 | \$ - | \$ - | \$ 19,572 | \$ - |
| | | | | | | | | | | | |
| Other Proposed Projects (non-routine in nature) | | | | | | | | | | | |
| | | | | | | | | | | | |
| Fire Station Site Development and Construction | | 1,000 | - | - | - | - | - | - | - | - | - |
| Printer/Plotter/Scanner | | 10,000 | - | - | - | - | - | - | - | - | - |
| Logistics Van | | 50,000 | - | - | - | - | - | - | - | - | - |
| Outdoor Solar Carport | | 180,000 | - | - | - | - | - | - | - | - | - |
| | | \$ 241,000 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| | | | | | | | | | | | |
| Total Project Costs | | \$ 1,196,000 | \$ 60,585 | \$ 1,630,410 | \$ 624,704 | \$ 1,216,653 | \$ 321,624 | \$ 1,914,681 | \$ 526,899 | \$ 224,528 | \$ 306,411 |

Capital Projects Fund

2022/23 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.

| | Year 1 22/23 FY | Year 2 23/24 FY | Year 3 24/25 FY | Year 4 25/26 FY | Year 5 26/27 FY | Year 6 27/28 FY | Year 7 28/29 FY | Year 8 29/30 FY | Year 9 30/31 | Year 10 31/32 |
|----------------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|-----------------|------------------|
| Beginning Fund Balance | \$ 5,137,000 | \$ 4,000,000 | \$ 4,239,415 | \$ 2,909,004 | \$ 2,584,300 | \$ 1,667,647 | \$ 1,646,023 | \$ 31,343 | \$ (195,557) | \$ (120,085) |
| Transfers in from General Fund * | 55,000 | 300,000 | 300,000 | 300,000 | 300,000 | 300,000 | 300,000 | 300,000 | 300,000 | 300,000 |
| Other Revenue ** | 4,000 | - | - | - | - | - | - | - | - | - |
| Expenditures | 1,196,000 | 60,585 | 1,630,410 | 624,704 | 1,216,653 | 321,624 | 1,914,681 | 526,899 | 224,528 | 306,411 |
| Ending Fund Balance *** | \$ 4,000,000 | \$ 4,239,415 | \$ 2,909,004 | \$ 2,584,300 | \$ 1,667,647 | \$ 1,646,023 | \$ 31,343 | \$ (195,557) | \$ (120,085) | \$ (126,496) |

* 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 reflects 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

2022/23 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 then other funding sources may need to be pursued, such as grants or debt acquisition.

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 |
|--|---------------|--|
| <u>Apparatus and Vehicles</u> | | |
| Wildland Engines (3) | \$605,000 | The impact of these units on the operating budget is anticipated to be \$8,000 each in fuel and operating costs. Some of these costs will be offset though by their replacement of three 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 for the first three years. In year's four to seven, operating costs are projected to increase an additional 20 percent per unit, per year due to age, wear, and tear. |
| Staff Vehicles (3) | \$205,000 | The impact of these new staff vehicles on the operating budget is anticipated to be an additional \$10,000 in fuel and operating costs. These vehicles will be under warranty, so maintenance costs are expected to be minimal in the first three years. These vehicles are spec'd as Ford F150 pickups that will be assigned to Chief Officers as replacement units. Existing units will go into reserve carpool. 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 | \$145,000 | The impact of this unit on the operating budget is anticipated to be an additional \$10,000 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 will 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 and the frequency of use this vehicle receives. |
| Van for Logistics | \$50,000 | 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. This van will not be used in a constant state like other staff vehicles are used. |
| <u>Building Construction/Improvements</u> | | |
| Solar Carport | \$180,000 | Long-term, the solar project is intended to provide an energy cost savings through the sell back of power to the grid resulting in a reduction on the District's energy bill. It is expected that the District could see up to a 20 percent monthly savings or \$3,600 annually. |

Capital Projects Fund

2022/23 Fiscal Year

APPARATUS AND VEHICLE LIFESPAN

| | FD3 No. | Unit No. | VIN | Make | Model | Status | Mfg Year | Year to Replace |
|--|---------|-----------|-------------------|-----------|-------------|--------------|----------|-----------------|
| STRUCTURAL ENGINES - LIFESPAN: 10 - Front Line Career (4) / 20 - Primary Reserve (2) / 25 - Volunteer (4) | | | | | | | | |
| 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 |
| AERIAL - LIFESPAN: 25 Years | | | | | | | | |
| 7722 | 10 | LT 01-01 | 4P1CT02S21A001320 | PIERCE | AERIAL | Career | 2001 | 2026 |
| TENDER - LIFESPAN: 20 - Tactical (2) / 30 - 3000+ (3) | | | | | | | | |
| 7741 | 54 | TN 17-01 | 1FVACYBS4DHB2663 | PIERCE | TENDER | Tactical | 2017 | 2037 |
| 7744 | 12 | TN 91-01 | 1FDYU90T2MVA08708 | FORD | TENDER | 3000+ | 1991 | 2021 |
| 7747 | 11 | TN 94-01 | 1FTYY95R3RVA32738 | 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 |
| WILDLAND ENGINES - LIFESPAN: 20 - Career / 30 - Volunteer | | | | | | | | |
| 7766 | 19 | WL 00-01 | 1FDXF47F8YEC47548 | FORD | F450 | Career | 2000 | 2020 |
| 7768 | 25 | WL 03-01 | 1FDXF47P93EC03351 | FORD | F450 | Career | 2003 | 2023 |
| 7762 | 26 | WL 04-01 | 1FDXF47P94EB87539 | FORD | F450 | Career | 2004 | 2024 |
| 7761 | 29 | WL 08-02 | 3D6WD66A18G119694 | 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 |
| AMBULANCE - LIFESPAN: 25 YEARS | | | | | | | | |
| 7732 | 17 | AM 07-01 | 1FDWE35P67DA11974 | FORD | AMB | Career | 2007 | 2032 |
| 7731 | 18 | AM 10-01 | 1FDWE3FP9ADA40990 | FORD | AMB | Career | 2010 | 2035 |
| TECHNICAL RESCUE TEAM - LIFESPAN: Truck - 25 Years | | | | | | | | |
| 7792 | 23 | TRT 08-01 | 1FDXW47RX8EA56742 | FORD | F450 | WC | 2008 | 2033 |
| | | TRT 1996 | 1WC200D18T4025539 | WELCA | TRAILER | WC | | |
| BATTALION CHIEF - LIFESPAN - 5 for front line, 10 for reserve | | | | | | | | |
| BAT3 | 50 | SV 15-01 | 1FD8X3FT9FEA35502 | FORD | F350 | 7753 | 2015 | 2020 |
| RBAT3 | 33 | SV 08-01 | 3D7MX39AX8G213884 | DODGE | 3500 PU | Reserve BC | 2008 | 2018 |
| STAFF - Duty Officer and FLS - 10 Years, Service Truck - 20 years | | | | | | | | |
| 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 |
| POOL - 15-20 Years | | | | | | | | |
| | 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 | 1GCDT13E298135095 | CHEVY | COLORADO | FLS | 2009 | |
| | 41 | SV 09-02 | 1GCDT13EX98124992 | CHEVY | COLORADO | FLS | 2009 | |
| MISCELLANEOUS | | | | | | | | |
| 7779 | | SV 38-01 | BF3846L1022 | LAFL | ANTIQUE | 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

2022/23 Fiscal Year

Revenues and Expenditures by Account

| 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 | 3,705,434.78 | 3,838,043.81 | 4,570,200 | 5,120,000 | 5,120,000 | 5,137,000 |
| Sale of Capital Equip & Vehicles | 0.00 | 21,500.00 | 500 | 1,000 | 1,000 | 1,000 |
| Grants; Local, State, Federal | 0.00 | 0.00 | 100 | 1,000 | 1,000 | 1,000 |
| Donations | 0.00 | 0.00 | 100 | 1,000 | 1,000 | 1,000 |
| Transfer from General Fund | 1,266,200.00 | 996,200.00 | 1,591,400 | 265,000 | 265,000 | 91,000 |
| Loan Proceeds | 4,000,700.00 | 0.00 | 100 | 1,000 | 1,000 | 1,000 |
| | 8,972,334.78 | 4,855,743.81 | \$6,162,400 | \$5,389,000 | \$5,389,000 | \$5,232,000 |
| | | | | | | |
| Department Equipment | 725,693.69 | 160,279.27 | 217,000 | 10,000 | 10,000 | 10,000 |
| Apparatus and Vehicles | 107,220.19 | 114,973.71 | 1,100,000 | 1,000,000 | 1,000,000 | 1,005,000 |
| Land and Improvements | 152,906.11 | 7,490.30 | 40,000 | 1,000 | 1,000 | 1,000 |
| Building Construction & Improvements | 4,148,470.98 | 0.00 | 60,000 | 205,000 | 205,000 | 180,000 |
| Contingency | 0.00 | 0.00 | 119,000 | 121,600 | 121,600 | 121,600 |
| Reserve for Future Exp & End Fund Bal | 0.00 | 0.00 | 4,626,400 | 4,051,400 | 4,051,400 | 3,914,400 |
| | 5,134,290.97 | 282,743.28 | \$6,162,400 | \$5,389,000 | \$5,389,000 | \$5,232,000 |
| | | | | | | |
| Ending Fund Balance | \$3,838,044 | \$4,573,001 | \$0 | \$0 | \$0 | \$0 |

Detail by Account

| Account | Description | Account Total |
|-----------------------------------|--|---------------------|
| 70530-000 | Department Equipment..... | \$ 10,000 |
| | Printer/Plotter/Scanner | 10,000 |
| 70531-000 | Apparatus and Vehicles..... | \$ 1,005,000 |
| | Wildland Engines (3) | 605,000 |
| | Staff vehicle (3 Ford F150 pickups) (rollover from 21/22 FY) | 205,000 |
| | BC command vehicle (rollover from 21/22 FY) | 145,000 |
| | Van for logistics (rollover from 21/22 FY) | 50,000 |
| 70532-000 | Land and Improvements..... | \$ 1,000 |
| 70533-000 | Building Construction/Improvements..... | \$ 180,000 |
| | Outdoor solar carport | 180,000 |
| TOTAL CAPITAL EXPENDITURES | | \$ 1,196,000 |

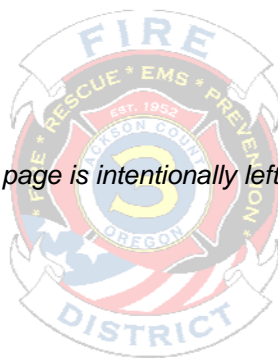
Supplemental Information

FIRE DISTRICT 3



2022/23 Fiscal Year Budget

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2022/23 Fiscal Year

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

| | | | | | 2011 | | |
|---|------------------------|------|----------------------------|----------------------|-----------------|----------------------------|----------------------|
| | | | | | | | |
| | | | Taxable Assessed Valuation | Tax Paid to District | | Taxable Assessed Valuation | Tax Paid to District |
| Top Taxpayers | Type of Business | Rank | | | Rank | | |
| Pacificorp | Electric Utilities | 1 | \$ 76,109,000 | \$ 237,414 | 3 | \$ 39,104,000 | \$ 121,981 |
| Boise Cascade Wood Products | Wood Manufacturer | 2 | \$ 68,907,452 | \$ 214,950 | 4 | \$ 32,468,118 | \$ 101,281 |
| Avista Corp | Natural Gas Utilities | 3 | \$ 57,163,000 | \$ 178,314 | 11 | \$ 16,885,600 | \$ 52,673 |
| Linde LLC | Industrial Gases | 4 | \$ 52,588,220 | \$ 164,044 | 8 | \$ 18,388,350 | \$ 57,361 |
| Amy's Kitchen | Organic Food Mfg | 5 | \$ 50,527,950 | \$ 157,617 | 9 | \$ 18,282,600 | \$ 57,031 |
| Carestream Health Inc | Medical Mfg Plan | 6 | \$ 47,060,130 | \$ 146,799 | 1 | \$ 71,299,770 | \$ 222,413 |
| Costco Wholesale Corp | Wholesale Retail | 7 | \$ 27,265,750 | \$ 85,053 | | | |
| Lumen Technologies Inc | Telecommunications | 8 | \$ 22,027,000 | \$ 68,711 | | | |
| Smith Crossing LLC | Property Holdings | 9 | \$ 18,292,040 | \$ 57,060 | | | |
| Plycem USA Inc | Wood Siding Plant | 10 | \$ 17,540,310 | \$ 54,715 | | | |
| Ron Deluca Trustee | Property Holdings | 11 | \$ 12,923,550 | \$ 40,314 | | | |
| Table Rock Group LLC | Real Estate Developers | 12 | \$ 12,678,710 | \$ 39,550 | 5 | \$ 24,590,678 | \$ 76,708 |
| Wal-Mart | Retail | 13 | \$ 12,454,070 | \$ 38,849 | 14 | \$ 8,446,310 | \$ 26,347 |
| Murphy Company | Wood Products Mill | 14 | \$ 11,810,730 | \$ 36,842 | | | |
| Space LLC | Property Holdings | 15 | \$ 11,695,380 | \$ 36,483 | 13 | \$ 9,459,800 | \$ 29,509 |
| Charter Communications | Cable Comm Provider | 16 | \$ 11,307,000 | \$ 35,271 | | | |
| USF Reddaway Inc | Trucking | 17 | \$ 9,745,780 | \$ 30,401 | 17 | \$ 7,183,030 | \$ 22,407 |
| PC Central Point LLC | Property Holdings | 18 | \$ 9,368,410 | \$ 29,224 | | | |
| Tomchi Oregon LLC | Investments | 19 | \$ 9,154,250 | \$ 28,556 | | | |
| Travel Center Develop LLC | Truck Stop | 20 | \$ 6,953,520 | \$ 21,691 | | | |
| | | | \$ 545,572,252 | \$ 1,701,858 | | | |
| Total District assessed value certified by Jackson County Treasurer | | | \$5,130,186,355 | | \$3,654,905,277 | | |
| Percent of top twenty taxpayers to total District assessed value | | | 10.635% | | 6.734% | | |
| Total property tax revenue received for year ending June 30th as stated on the governmental fund financial statements | | | | \$ 15,403,616 | \$ 11,132,544 | | |
| Percent of top twenty taxpayers to total District property tax revenue received | | | | 11.048% | 6.896% | | |

Summary of Assessed Values

2022/23 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

| 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 |
|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| \$2,192,594,013 | \$2,263,221,391 | \$2,340,508,449 | \$2,466,173,066 | \$2,554,351,321 | \$2,666,376,219 | \$2,768,536,637 |
| | 3.22% | 3.41% | 5.37% | 3.58% | 4.39% | 3.83% |

City of Gold Hill

| 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| \$71,355,116 | \$73,155,754 | \$75,354,098 | \$80,446,032 | \$83,752,472 | \$88,069,402 | \$92,011,725 |
| | 2.52% | 3.01% | 6.76% | 4.11% | 5.15% | 4.48% |

City of Central Point

| 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 |
|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| \$1,131,372,600 | \$1,173,815,611 | \$1,226,268,279 | \$1,299,855,035 | \$1,343,235,803 | \$1,400,692,822 | \$1,450,597,207 |
| | 3.75% | 4.47% | 6.00% | 3.34% | 4.28% | 3.56% |

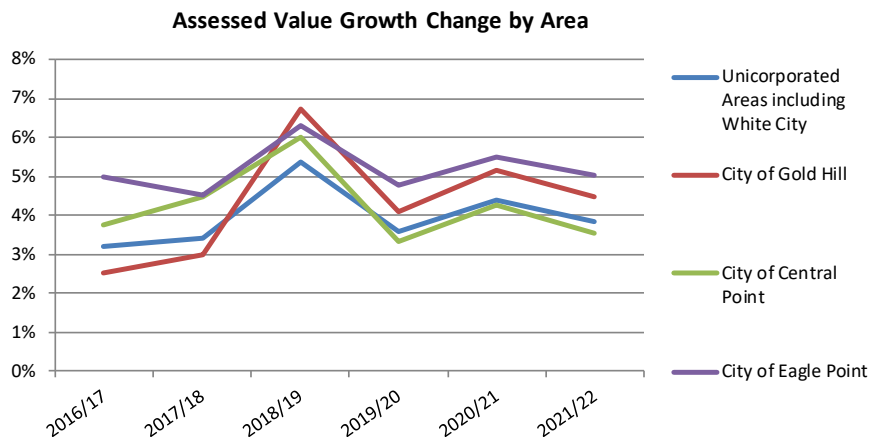
City of Eagle Point

| 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 |
|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| \$604,425,784 | \$634,616,194 | \$663,251,693 | \$705,232,847 | \$738,930,152 | \$779,613,103 | \$819,040,786 |
| | 4.99% | 4.51% | 6.33% | 4.78% | 5.51% | 5.06% |

Total Assessed Valuation for all Areas Combined

| 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 |
|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| \$3,999,747,513 | \$4,144,808,950 | \$4,305,382,519 | \$4,551,706,980 | \$4,720,269,748 | \$4,934,751,546 | \$5,130,186,355 |
| | 3.63% | 3.87% | 5.72% | 3.70% | 4.54% | 3.96% |

AVERAGE 4.2383%



Market and Assessed Value of Taxable Property

2022/23 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 | | |
| 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 |
| 2021 | 6,787,439,555 | 4,560,126,908 | 198,023,094 | 185,888,838 | 188,769,380 | 188,735,800 | 7,174,232,029 | 4,934,751,546 | 68.78% | 3.12 |
| 2022 | 7,815,422,996 | 4,760,962,301 | 188,481,594 | 175,359,554 | 193,929,478 | 193,864,500 | 8,197,834,068 | 5,130,186,355 | 62.58% | 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 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 of market value. Accordingly since that date, there is a difference between market value and assessed value.

Acronyms

2022/23 Fiscal Year

| TERM | STANDS FOR |
|-------|--|
| ACFR | Annual Comprehensive Financial Report |
| ADM | Administrative |
| AED | Automated External Defibrillator |
| 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 |
| CAO | Chief Administrative Officer |
| CCP | Community Care Program |
| CEC | Community Engagement Coordinator |
| 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 |
| DEA | Drug Enforcement Agency |
| DFM | Deputy Fire Marshal |
| DPSST | Department of Public Safety Standards and Training |
| ECSSO | Emergency Communications of Southern Oregon |
| EKG | Electrocardiogram |
| EMS | Emergency Medical Services |
| EMT | Emergency Medical Technician |
| EP | Eagle Point Station |
| FC | Fire Chief |
| FCC | Federal Communications Commission |
| FF | Firefighter |
| FLS | Fire and Life Safety |
| FLSA | Fair Labor Standards Act |
| 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 Station |
| GIS | Geographical Information System |
| HIPPA | Health Insurance Portability and Privacy Act |

| TERM | STANDS FOR |
|----------|---|
| HRA VEBA | Health Reimbursement Arrangement Voluntary Employees' Beneficiary Association |
| I&M | Inspection and Maintenance |
| IAAI | International Association of Arson Investigators |
| IAFF | International Association of Firefighters |
| IFC | International Fire Code |
| IFCA | International Fire Chiefs Association |
| IFSTA | International Fire Service Training Association |
| ITA | Information Technology Administrator |
| JC | Jackson County |
| LEPC | Local Emergency Planning Committee |
| LGIP | Local Government Investment Pool |
| LGPI | Local Government Personnel Institute |
| LTD | Long Term Disability |
| MDC | 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 |
| OFSSA | Oregon Fire Service Office Administrators |
| OPSRP | Oregon Public Service Retirement Plan |
| OR | Oregon |
| OR-OSHA | Oregon Occupational Safety and Health Administration |
| PERS | Public Employee Retirement System |
| PPE | Personal Protective Equipment |
| PSA | People Services Administrator |
| RCC | Rogue Community College |
| RIT | Rapid Intervention Team |
| RITA | Rogue Interagency Training Association |
| RRC | Recruitment and Retention Coordinator |
| RVFCA | Rogue Valley Fire Chiefs Association |
| RVPFF | Rogue Valley Prof Firefighters Local 1817 |
| 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

2022/23 Fiscal Year

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

2022/23 Fiscal Year

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

2022/23 Fiscal Year

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.

Glossary of Terms and Acronyms

2022/23 Fiscal Year

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 COUNTY FIRE DISTRICT 3

RESOLUTION 22-05

RESOLUTION ADOPTING THE BUDGET FOR THE 2022/2023 FISCAL YEAR

BE IT RESOLVED, that the Board of Directors of Jackson County Fire District 3 hereby adopts the budget for fiscal year 2022/2023 for a total of \$27,590,000. 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, 2022, and for the purposes shown below are hereby appropriated:

GENERAL FUND

Appropriations - Allocated to Organizational Programs

| | | |
|----------------------|----|------------|
| Administration | \$ | 1,946,000 |
| Operations | \$ | 11,166,100 |
| Fire and Life Safety | \$ | 773,000 |
| Training | \$ | 489,000 |
| Strategic Services | \$ | 1,823,000 |
| Technology | \$ | 493,200 |

Not Allocated to Organizational Programs

| | | |
|--------------|-----------|-------------------|
| Debt Service | \$ | 448,700 |
| Transfers | \$ | 55,000 |
| Contingency | \$ | 975,000 |
| Total | \$ | 18,169,000 |

CAPITAL PROJECTS FUND

Capital Outlay Allocated to Organizational Programs

| | | |
|--------------------|----|---------|
| Administration | \$ | 10,000 |
| Operations | \$ | 750,000 |
| Strategic Services | \$ | 255,000 |

Not Allocated to Organizational Programs

| | | |
|-----------------------|-----------|------------------|
| Land and Improvements | \$ | 1,000 |
| Building Construction | \$ | 180,000 |
| Contingency | \$ | 121,600 |
| Total | \$ | 1,317,600 |

Total Appropriations - All Funds **\$ 19,486,600**

Total Unappropriated and Reserve Amounts - All Funds **\$ 8,103,400**

TOTAL ADOPTED BUDGET **\$ 27,590,000**

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 2022/2023 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 16th day of June, 2022.


Board of Directors


Board of Directors

JACKSON COUNTY FIRE DISTRICT 3



RESOLUTION NO. 22-03

IN THE MATTER OF AUTHORIZING THE SALARY AND BENEFITS SCHEDULE FOR FISCAL YEAR 2022-2023 (IAFF Local 1817 - Firefighter Bargaining Unit Personnel)

WHEREAS, it is the duty and responsibility of the Board of Directors of Jackson County Fire District 3 to annually establish salaries of personnel who are members of the Bargaining Unit; and

WHEREAS, the Board also approves the number of positions to be staffed each year; and

WHEREAS, the salaries and benefits were determined through a labor-management collective bargaining process for a three-year period starting July 1, 2020 through June 30, 2023; and

WHEREAS, the cost of living adjustment (COLA) effective July 1, 2022 is a 3% increase for all identified positions; and

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of Jackson County Fire District 3 does hereby adopt this resolution recognizing benefits herein and within the labor agreement and establishing salary schedules effective July 1, 2022, through June 30, 2023, as follows:

| POSITION | | FTE | A | B | C | D | E |
|----------------------------------|-------|-----|-------|-------|-------|-------|-------|
| Battalion Chief - Shift | 56-Hr | 03 | 8,155 | 8,562 | 8,990 | 9,440 | 9,912 |
| Battalion Chief - Administrative | 40-Hr | 02 | 8,155 | 8,562 | 8,990 | 9,440 | 9,912 |
| Fire Captain | 56-Hr | 13 | 7,556 | 7,934 | 8,331 | 8,747 | 9,184 |
| Fire Engineer | 56-Hr | 12 | 6,567 | 6,896 | 7,240 | 7,602 | 7,983 |
| Firefighter | 56-Hr | 21 | 5,945 | 6,242 | 6,555 | 6,882 | 7,226 |
| Deputy Fire Marshal 3 | 40-Hr | 01 | 7,556 | 7,934 | 8,331 | 8,747 | 9,184 |
| Deputy Fire Marshal 2 | 40-Hr | 0 | 6,567 | 6,896 | 7,240 | 7,602 | 7,983 |
| Deputy Fire Marshal 1 | 40-Hr | 02 | 5,945 | 6,242 | 6,555 | 6,882 | 7,226 |
| Community Care Paramedic | 40-Hr | 02 | 4,739 | 4,976 | 5,225 | 5,486 | 5,760 |
| Community Care EMT | 40-Hr | 02 | 3,716 | 3,902 | 4,097 | 4,302 | 4,517 |

Date adopted: June 16, 2022


BOARD OF DIRECTORS


BOARD OF DIRECTORS

JACKSON COUNTY FIRE DISTRICT 3



RESOLUTION NO. 22-02

IN THE MATTER OF AUTHORIZING THE SALARY AND BENEFITS SCHEDULE FOR NON-BARGAINING PERSONNEL FISCAL YEAR 2022-2023

WHEREAS, it is the duty and responsibility of the Board of Directors of Jackson County Fire District 3 to annually establish the number of positions, salaries, and benefits for administrative and clerical personnel in the non-bargaining group; and

WHEREAS, employees generally receive time-in-grade pay increases following 12 months of service across each step; and

WHEREAS, the District recognizes administrative working hours to be a four (4) day, ten (10) hour day work week that includes a one (1) hour compensable lunch; and

WHEREAS, salaries for the 2022-2023 fiscal year represent a 3% cost of living adjustment.

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of Jackson County Fire District 3 does hereby adopt this resolution establishing the salary schedules and benefits as identified to become effective July 1, 2022, through June 30, 2023, as follows for full-time equivalent employees:

| POSITION | FTE | A | B | C | D | E |
|------------------------------------|-----|-------|--------|--------|--------|--------|
| Deputy Chief of Operations | 1 | 9,823 | 10,314 | 10,830 | 11,371 | 11,940 |
| Deputy Chief of Strategic Services | 1 | 9,823 | 10,314 | 10,830 | 11,371 | 11,940 |
| Chief Administrative Officer | 1 | 9,412 | 9,883 | 10,377 | 10,896 | 11,441 |
| Fire Marshal | 1 | 8,964 | 9,412 | 9,883 | 10,377 | 10,896 |
| People Services Administrator | 1 | 7,196 | 7,555 | 7,933 | 8,330 | 8,746 |
| Information Tech Administrator | 1 | 7,196 | 7,555 | 7,933 | 8,330 | 8,746 |
| Community Engagement Coordinator | 1 | 4,913 | 5,159 | 5,417 | 5,688 | 5,972 |
| Executive Assistant | 1 | 4,609 | 4,840 | 5,082 | 5,336 | 5,603 |
| Finance Assistant | 1 | 4,471 | 4,695 | 4,930 | 5,176 | 5,435 |
| Facilities/Logistics Technician | 1 | 4,471 | 4,695 | 4,930 | 5,176 | 5,435 |
| Administrative Assistant | 2 | 4,064 | 4,268 | 4,481 | 4,705 | 4,940 |

RETIREMENT: The District shall pay the employer's contribution for employees who are eligible to participate in the Oregon Public Employees Retirement System (PERS). Employees pay their 6% contribution pre-tax.

SICK LEAVE: Full-time employees shall accrue 138 hours of sick leave annually and it shall be accumulative.

Jackson County Fire District 3 - RESOLUTION NO. 22-02

DEATH OF A FAMILY MEMBER: Full-time employees shall be granted leave with pay in accordance with the District personnel policy on bereavement leave.

DEATH IN THE LINE OF DUTY: In the event an employee is killed in the line of duty, or dies as a result of injury or illness acquired in the line of duty, the District shall pay the full cost of health, dental, and vision insurance for a surviving spouse and children for three (3) years after the employee's death, or until remarriage or until the child reaches age 21, whichever occurs first.

LIABILITY UMBRELLA: The District shall reimburse a maximum of \$150 annually for a personal liability umbrella for the positions of Deputy Chief and Fire Marshal.

LONGEVITY: Full-time employees hired before July 1, 2010 are entitled to longevity pay in accordance with the following schedule, paid annually in June:

| Years of Employment | Percentage of Base Salary |
|---------------------|---------------------------|
| 9 -13 Years | 1.25% |
| 14 -18 Years | 2.50% |
| 19 + Years | 3.75% |

HOLIDAYS: Full-time employees are provided seven (7) paid holidays or 70 hours per year. Authorized holidays are as follows:

| | | |
|----------------|------------------|---------------|
| New Year's Day | Labor Day | Christmas Day |
| Memorial Day | Veterans Day | |
| Fourth of July | Thanksgiving Day | |

PERSONAL LEAVE DAYS: The District provides 30 hours of personal leave to full-time employees to provide flexibility for personal business and Federal holidays not recognized by the District. These hours will be posted annually on July 1st to the employee's personal leave accrual. Hours must be utilized by June 30th or they will be forfeited. Hours will be pro-rated for employees starting mid-year. Hours not used, will not be paid out if the employee separates mid-year.

VACATION: Full-time employees shall accrue vacation as follows:

| Years Employed | 0-2 years | 3-4 years | 5-9 years | 10-15 years | 16-20 years | 21+ Years |
|-----------------------------|--------------|--------------|--------------|----------------|----------------|--------------|
| Annual Accrual (40 Hour) | 72 | 120 | 152 | 188 | 224 | 256 |
| Annual Accrual (56 Hour) | 96 | 168 | 216 | 264 | 312 | 360 |

For those employees hired prior to July 1, 2008, the maximum vacation accrual is three (3) years (3 x the annual accrual). Accruals exceeding the maximum will be forfeited.

For those employees hired after July 1, 2008, the maximum vacation accrual is two (2) years (2 x the annual accrual). Accruals exceeding the maximum will be forfeited.

Probationary employees can utilize accrued vacation no earlier than six (6) months of employment unless earlier use is approved by the Fire Chief at time of hiring.

Jackson County Fire District 3 - RESOLUTION NO. 22-02

VACATION SELL BACK: The District will allow full-time employees to sell back accrued vacation leave in accordance with the following parameters, so long as the employee has at least 50% of their maximum accrual on the books at the time of the sell back request. Requests for sell back can be made only during the month of November and will be paid out on the first regular (non-overtime) payroll in December of that year.

| Years of Service | Minimum Sell Back Hours | Maximum Sell Back Hours |
|----------------------|-------------------------|-------------------------|
| 5-9 years | 20 | 48 |
| 10-15 years | 20 | 96 |
| 16 years and greater | 20 | 120 |

COMPENSATORY TIME: Compensatory time will be allowed in lieu of overtime for hours worked in excess of 40 during the regular work week for the positions of Executive Assistant, Finance Assistant, Administrative Assistant, and Facilities/Logistics Technician. For purposes of determining hours worked in excess of 40, accrued leave hours will be considered as hours worked. Compensatory time will be calculated at 1.5 hours for each hour worked, with 60 hours being the maximum allowable to accrue (equal to 40 overtime hours worked). All compensatory time must be pre-approved and may not be converted to a cash payment, unless the employment terminates with the District.

INSURANCE: The District will offer two insurance plans for employees to elect from. The primary plan will be a \$500/\$1,000 deductible plan with a \$20 co-pay for primary care/specialist visits. The secondary plan will be a \$3,000/\$6,000 deductible plan with a \$40 co-pay for primary care/specialist visits. Under both plans, the District will pay 95% of the monthly premium for medical, dental, vision, and prescription coverage for full-time employees and their eligible dependents. The employee shall pay 5% of the monthly premium.

If the employee elects the secondary insurance plan, then the District will contribute an additional amount into their HRA-VEBA as follows: Single tier an additional monthly contribution of \$82; Single tier with child dependents an additional monthly contribution of \$135; Married tier with no child dependents an additional monthly contribution of \$173; and Married tier with child dependents an additional monthly contribution of \$247.

The District shall provide long-term disability (LTD) insurance and life insurance for full-time positions in the amount of \$50,000.

HRA-VEBA: The District will make a monthly contribution into a District sanctioned HRA-VEBA account for each employee of 5% per month, based on the "E" step firefighter wage (\$7,226). The monthly amount equates to \$361 and will be paid semi-monthly.

EDUCATION INCENTIVE: The District shall establish an educational incentive of 3.5% for an Associate's Degree and 5% for a Bachelor's Degree of base salary for all positions.

EMS INCENTIVE: The District will pay Chief Officers an EMS Incentive of 5% for an intermediate or paramedic certification based on the "E" Step Firefighter range (\$361/month).

TECHNOLOGY STIPEND: The District will provide an \$85 per month technology stipend for use of a personal cellular device to conduct required District business for the positions of Deputy Chief, Chief Administrative Officer, Fire Marshal, People Services Administrator, Information Technology Administrator, and Facilities/Logistics Technician.

PHYSICAL FITNESS: The District will offer 40-hour employees paid time, 30 minutes per day; 3 days per week for the purpose of maintaining fitness conducted on District premises.

Jackson County Fire District 3 - RESOLUTION NO. 22-02

STAFF CHIEF'S OVERTIME: Staff Chiefs qualified to work as a shift battalion chief will be eligible to work the duty shift battalion position outside of their normal work hours and shall be compensated at the "E" step shift BC hourly rate times 1.5.

Staff Chiefs working on an Incident Management Team shall receive overtime at their base rate times 1.5 for hours that are reimbursable by the Team's administrator. Approval to participate must be obtained from the Fire Chief.

DUTY OFFICER/FIRE INVESTIGATOR/FIRE DEFENSE BOARD ACCRUAL: Staff Chiefs will receive ten hours of accrued time for each week they serve as the District Duty Officer, Fire Investigator, or Fire Defense Board Chief. Such leave will be posted to the employee's DO accrual bank. Hours not utilized in time off during the fiscal year will be paid out to the employee on the last payroll in June at the employee's regular hourly rate. Hours are not permitted to carry forward into the ensuing fiscal year.

DEFERRED COMPENSATION: The District will make a contribution into a sanctioned 401(a) Deferred Compensation Plan based on position and years of service, so long as the employee is also contributing at least the same amount under both benefits, commencing after the employee's probationary period (one year of service):

| Position Based Contribution | Percentage of Base Salary |
|--|---------------------------|
| Deputy Chief Chief Administrative Officer Fire Marshal | 4% |
| People Services Administrator Information Technology Administrator Community Engagement Coordinator Recruitment Retention Coordinator | 2.5% |
| Executive Assistant Finance Assistant Facilities/Logistics Technician Administrative Assistant | 1% |

| Years of Employment Based Contribution | Percentage of Base Salary |
|--|---------------------------|
| 1-4 Years | 1% |
| 5-9 Years | 2% |
| 10-15 Years | 3% |
| 16-20 Years | 4% |
| 21+ Years | 5% |

CONVERSION OF SICK LEAVE TO DEFERRED COMPENSATION: Employees who are members in PERS OPSRP may elect to convert a portion of their sick leave accrual to a District contribution into their 401a deferred compensation account. Sick leave hours above 400 are eligible for conversion up to a maximum of 50 hours total. Finance will distribute a sick leave election form to those employees who have more than 400 hours as of the first payroll of March. The District will deduct the elected hours from the employee's sick leave accrual balance when the contribution is made on the second payroll in July. The value of the contribution is calculated on the number of hours elected times the employee's base hourly rate at the time of payment.

Jackson County Fire District 3 - RESOLUTION NO. 22-02

PART-TIME POSITIONS: The District recognizes the following positions as part-time with benefits as identified herein. Part-time is defined as 30 hours or less per week.

| POSITION | A | B | C | D | E |
|-----------------------------------|--------|-------|-------|-------|-------|
| | Hourly | | | | |
| Recruitment Retention Coordinator | 28.35 | 29.77 | 31.26 | 32.82 | 34.46 |
| Logistics Support Technician | 15.45 | 16.23 | 17.04 | 17.89 | 18.78 |

SICK LEAVE: Part-time employees shall accrue 2.69 hours of sick leave for each pay period worked or 70 hours per year and it shall be accumulative.

HOLIDAYS: Part-time employees are provided five (5) hours of paid time off for each of the seven (7) recognized District holidays:

| | | |
|----------------|------------------|---------------|
| New Year's Day | Labor Day | Christmas Day |
| Memorial Day | Veterans Day | |
| Fourth of July | Thanksgiving Day | |

PERSONAL LEAVE DAYS: Part-time employees shall receive 15 hours of personal leave to provide flexibility for personal business and Federal holidays not recognized by the District. These hours will be posted annually on July 1st to the employee's personal leave accrual. Hours must be utilized by June 30th or they will be forfeited. Hours will be pro-rated for employees starting mid-year. Hours not used, will not be paid out if the employee separates mid-year.

VACATION: Part-time employees shall accrue vacation as follows:

| Years Employed | 0-2 years | 3-4 years | 5-9 years | 10-15 years | 16-20 years | 21+ Years |
|-------------------|--------------|--------------|--------------|----------------|----------------|--------------|
| Annual Accrual | 36 | 60 | 76 | 94 | 112 | 128 |
| Bi-Weekly Accrual | 1.38 | 2.30 | 2.92 | 3.61 | 4.30 | 4.92 |

The maximum accrual is (2) years (2 x the annual accrual). Accruals exceeding the maximum will be forfeited.

COMPENSATORY TIME: Part-time employees are not eligible to receive compensatory time in lieu of overtime as their schedule will not provide for hours worked over 40. Hours are paid for all hours worked.

INSURANCE: Part-time employees are eligible to receive health insurance benefits. The District will offer two insurance plans for employees to elect from. The primary plan will be a \$500/\$1,000 deductible plan with a \$20 co-pay for primary care/specialist visits. The secondary plan will be a \$3,000/\$6,000 deductible plan with a \$40 co-pay for primary care/specialist visits. Under both plans, the District will pay 50% of the monthly premium for medical, dental, vision, and prescription coverage with the employee contributing 50%.

If the employee elects the secondary insurance plan, then the District will contribute an additional amount into their HRA-VEBA as follows: Single tier an additional monthly contribution of \$82; Single tier with child dependents an additional monthly contribution of \$135; Married tier with no child dependents an additional monthly contribution of \$173; and Married tier with child dependents an additional monthly contribution of \$247.

The District shall provide long-term disability (LTD) insurance and life insurance in the amount of \$50,000. If the employee opts out of health coverage benefits then LTD and life insurance is not provided.

Jackson County Fire District 3 - RESOLUTION NO. 22-02

HRA-VEBA: The District will make a monthly contribution into a District sanctioned HRA-VEBA account of 2.5% per month, based on the "E" step firefighter wage (\$7,226). The monthly amount equates to **\$181** and will be paid semi-monthly.

RETIREMENT: Part-time employees working greater than 600 hours per year are required to be a participating member of PERS. The District shall pay the employer's contribution and employees shall pay their 6% contribution pre-tax.

EDUCATION INCENTIVE: Part-time employees are eligible to receive an educational incentive of 3.5% of base salary for an Associate's Degree and 5% for a Bachelor's Degree.

DEFERRED COMPENSATION: Part-time employees are eligible to receive a District contribution into a sanctioned 401(a) Deferred Compensation Plan based on position and years of service, so long as the employee is also contributing at least the same amount under both benefits, commencing after the employee's probationary period (one year of service). Contribution amounts are identified within the chart on Page 4 of this Resolution. Contribution amount is based on 20 hours per week and is not adjusted up nor down should hours vary.

Date Adopted: May 19, 2022



BOARD OF DIRECTORS



BOARD OF DIRECTORS