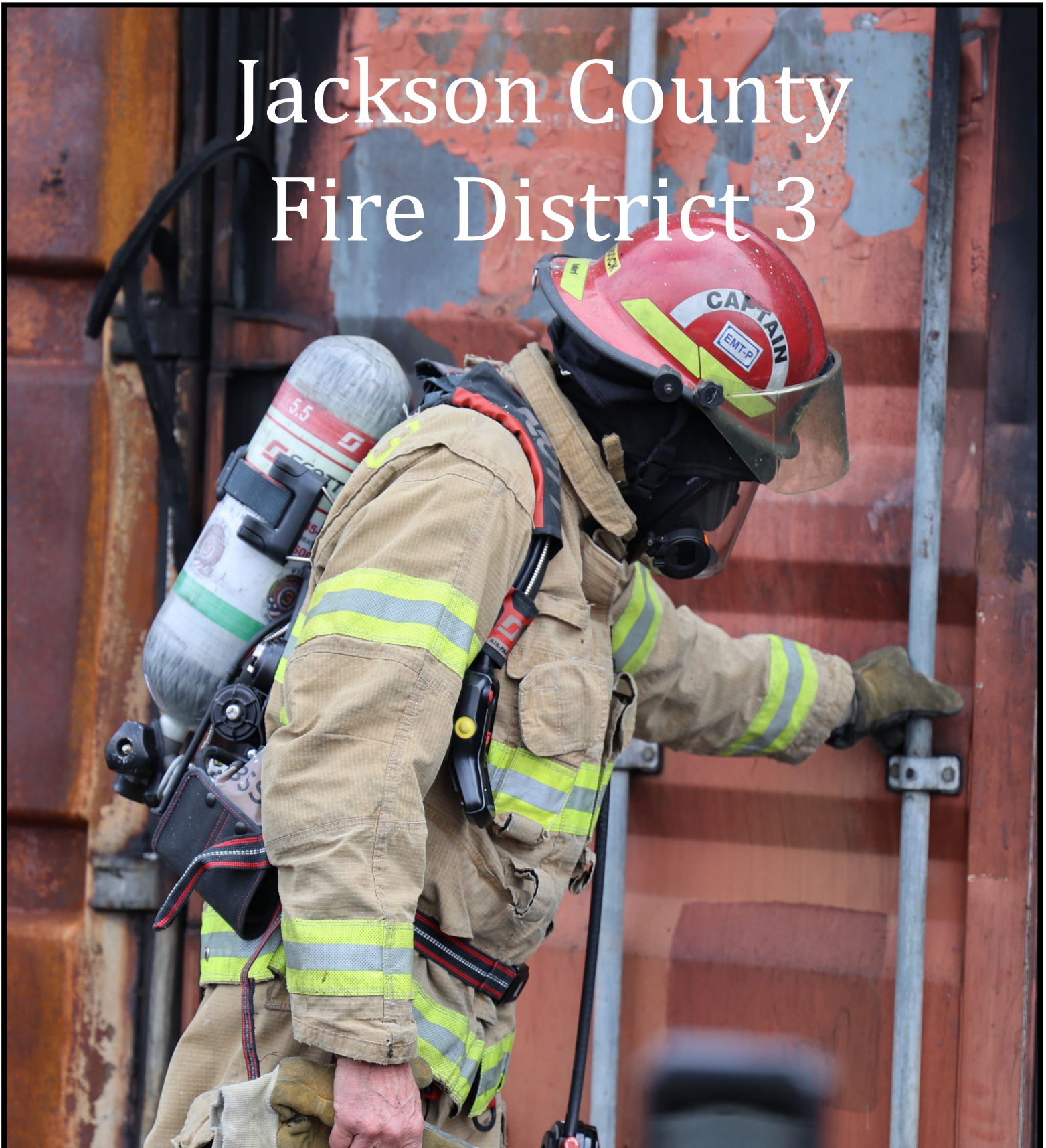


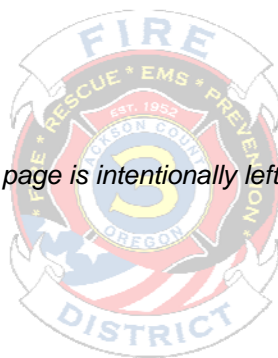
# Jackson County Fire District 3



## Annual Budget

Fiscal Year 2023/2024

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# 2023/2024 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

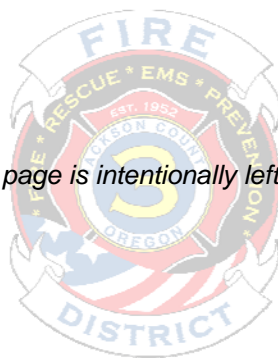
## **Jackson County Fire District 3**

8383 Agate Road, White City, Oregon 97503

541-826-7100

[www.jcfd3.com](http://www.jcfd3.com)

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# Distinguished Budget Award

2023/24 Fiscal Year

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GOVERNMENT FINANCE OFFICERS ASSOCIATION

## *Distinguished Budget Presentation Award*

PRESENTED TO

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

For the Fiscal Year Beginning

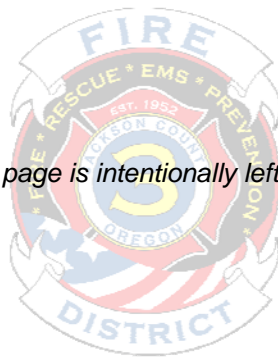
**July 01, 2022**

*Christopher P. Morill*

**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, 2022. 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

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

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June 15, 2023

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 2023/2024 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 several goals identified to achieve our desired outcomes. Objectives are established for each goal, which defines what needs to be accomplished 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

2023/24 Fiscal Year

## 2022 Year in Review

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

- Formed a three agency Alliance for the purpose of researching, analyzing, advising, and formally recommending operational and administrative cooperative agreements for current and future service needs of the communities each party serves.
- Continued implementation and enhancements of District data collection and analysis programs by redistributing workloads and integrating a Data Systems Specialist Position.
- Transitioned a new Chief Executive Officer and alignment of the Executive Team.
- Completed ISO Public Property Classification rating achieving a rating of 3/10.
- Participated in two impromptu OSHA onsite workplace and industrial practices inspections. The inspections resulted in a single recommendation and numerous compliments from OSHA staff on the vigilance and commitment our personnel maintain towards safe working practices and documentation.
- Assessed planned capital expenditures and replacement schedules to better position for inflationary factors within the industry.
- Staff remained integral in shaping legislation and rulemaking through their various levels of engagement.

## INCIDENT STATS

325

FIRE RELATED INCIDENTS

RESCUE & MEDICAL EVENTS 5,655

1,715

GOOD INTENT CALLS

SERVICE CALLS

863

139

HAZARDOUS CONDITIONS

FALSE ALARMS

261

8,958

ALL RESPONSES

## 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 5.5 percent assessed valuation growth for the 2023/24 fiscal year. Growth in the Rogue Valley and within the District's taxing base has been strong over the past five years with an average growth of 4.78 percent. Residential and commercial construction continues to be strong and competitive with majority of growth occurring in the cities of Central Point, Eagle Point, and industrial area of White City.
- The unemployment rate for Jackson County in February 2023 was 5.2 percent compared to 4.4 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 the hospitality, private health care, and social assistance sectors, however a shortage in the labor market will continue to put pressure on these industries.
- Call volume for the District increased 1.6 percent in 2022 compared to 9.6 percent in 2021. The ten-year average reflects an overall 4.7 percent increase for all incidents. The White City fire management zone (FMZ) is our busiest service area with approximately 24 percent of the volume of incidents occurring in that area followed by the Central Point FMZ with 23 percent.

# Budget Message

2023/24 Fiscal Year

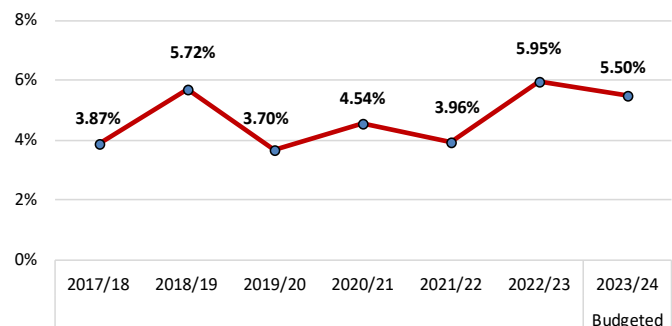
- The establishment of the Central Point Urban Renewal District in 2012 will continue to cause a loss in revenue for the District over the next 20 years. The urban renewal district was scheduled to sunset in 2032, however the program was recently extended an additional 10 years. Completion of the newly added projects will provide some increase in assessed valuation once the urban renewal district is dissolved.
- 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 5.95 percent for the 2022/23 fiscal year in comparison to 3.96 percent in the prior year. The District’s financial forecast for the 2023/24 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 5.50 percent increase.

Assessed Value Growth Change

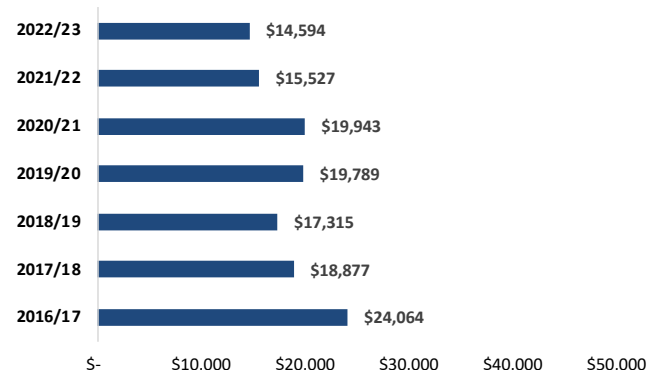


## URBAN RENEWAL: The City of Central Point’s Urban

Renewal District, which encompasses a portion of the District, will be in its 10th year. Under Oregon statute the total assessed value of the urban renewal is frozen and all future assessed valuation growth within the plan area is transferred to the urban renewal district until all identified projects are sufficiently funded. The District had \$196,204 in tax revenue diverted for fiscal year 2022/23 with \$834,328 since inception. This loss will continue to have an impact on the District, however the plan promises to provide some increases in future assessed valuation that would not otherwise have been possible.

**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

Loss Due to Compression



# Budget Message

2023/24 Fiscal Year

repressed real market values (RMV) coupled with the current combined tax rates of \$10.79. 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

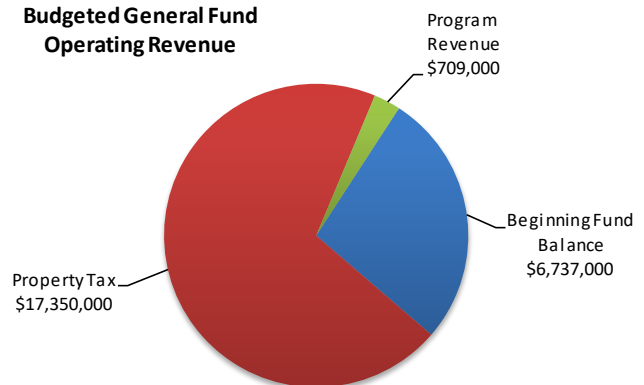
This budget year reflects some organizational restructuring within our departments. The Operations Department has been renamed to Response Services, which better describes the mission of suppression, rescue, and EMS response. Fire and Life Safety has been renamed to Risk Reduction. This change brings the transfer of some positions focusing on risk reduction and all corresponding expenditures. Strategic Services has been renamed to Support Services and will now focus specifically on maintenance of facilities and apparatus, utilities, and logistical supplies.

### General Fund Revenue

This adopted budget reflects \$17,350,000 in property tax revenue, a 6.8 percent increase or \$1,100,000 over the 2022/23 fiscal year 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. Of this amount \$17,000,000 is estimated in current year taxes and \$350,000 is estimated in prior year taxes.

Property taxes 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 \$18,059,000. Overall General Fund revenue is budgeted at \$24,796,000, an 10.7 percent increase over the 2022/23 fiscal year budget or \$2,402,000.

**Budgeted General Fund  
Operating Revenue**



### Personnel Services

This adopted budget reflects an overall increase in Personnel Services of 4.9 percent or \$638,000 over the prior year. Within personnel services, this budget reflects a three percent cost of living adjustment across all departments for both represented and non-represented employees. The District will enter into the last 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 providers.

**PERSONNEL:** This budget reflects permanently increasing the number of firefighter positions to 24 full-time equivalents (FTE) from the adopted 21 FTE count. In the previous fiscal year, the budget committee approved funding for 25 positions allowing for an over-hire status to accommodate future retirements and the staffing of our new Wildland-Urban Interface Response Unit (WUIRU) during fire season. Throughout this past year the FTE count has dropped down to 22 FTE's. Staffing 24 permanent FTE's will allow the District to maintain depth across the battalions while capitalizing on providing special assignments, programs, and educational opportunities, along with providing stability for leave absences, thus reducing overtime costs. A mid-level firefighter position has a budgetary impact of \$155,000. The over-hire status this past year coupled with the proposed initiatives for this new budget results in a lower budgetary impact from a year-to-year comparison standpoint.

This budget reflects the addition of some other new positions that will also be instrumental in helping us achieve our mission while also meeting long-term projected needs and growth in the future. Within our community care program, a supervisor position is budgeted to oversee the community care providers, offer support and training, and help manage EMS needs. The budgetary impact for this position is \$138,000.

# Budget Message

2023/24 Fiscal Year

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Budgeted within the Training Department is reclassing the former battalion chief of training up to a division chief level and developing a new training assistant position. The focus of this position will be to provide support to the division chief in building out new programs and initiatives. The budgetary impact of this position is \$163,000.

**PERS:** For this new budget year the District will 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, 2023 through June 30, 2025 is from years 2020-2021 (the December 31, 2021 valuation).

The rate for all members in the tier one and tier two groups (those employees that have established membership prior to 2003) is 25.94 percent of payroll, up from 24.17 percent. Rates for firefighters in the tier three (OPSRP) group (those employees that have established membership after August 29, 2003) is 21.10 percent of payroll, up from 18.82 percent and the rate for general service members in the OPSRP group is 16.31 percent of payroll, up from 14.46 percent. The total budgeted PERS expense is \$2,005,500, an increase of \$180,500 from fiscal year 2022/23. Of total personnel, 32 percent are in the Tiers 1 and 2 group, 48 percent are in the OPSRP firefighter group, and 20 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. Composite rates at renewal for all levels effective July 1, 2023 to June 30, 2024 represent an overall increase of 6.35 percent. The total budgeted health insurance expense is \$1,781,500. From a budgetary standpoint the increase is \$66,000, the result of total budgeted personnel numbers in comparison to this current 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 \$372 per month for a total annualized expense of \$342,500.

Total Personnel Services is budgeted at \$14,582,000 and is 80.7 percent 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 6.9 percent or \$238,700 from the current 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 \$3,165,000 which is 17.5 percent of operating revenue.

## Debt Service

This adopted budget represents \$449,000 towards principal and interest payments through a Series 2019 Full Faith and Credit Obligation with JP Morgan Chase Bank.

## Contingency

The District has a policy that Operating Contingency will be six percent of budgeted property tax revenue. This budget has allocated \$1,041,000 in contingency.

# Budget Message

2023/24 Fiscal Year

## Ending Fund Balance

The District has a policy that Unappropriated Ending Fund Balance (UEFB) will be 24 percent of budgeted property tax revenue. Ensuring adequate levels of minimum ending fund balance ensures fiscal sustainability to meet operating requirements before receipt of property taxes. This budget has allocated \$4,164,000 in ending fund balance.

## Capital Projects Fund

This fund has a budgeted transfer of \$1,395,000 coming from the General Fund. With this contribution and after all budgeted expenditures, the fund is projected to have an ending balance of \$4,836,200, an increase of \$957,800 from the current fiscal year.

Capital expenditures are budgeted at \$1,289,000 and reflect projects in accordance with our Capital Replacement Plan. Some significant projects include:

- Three wildland engines ordered in this current budget year will be rolled over into 2023/24 due to production timelines. These units will continue to replace/upgrade the existing fleet and are budgeted at \$575,000. Equipment needed to outfit these units for service has been added to the original budget.
- Two new sets of extrication equipment for a total budget of \$85,000.
- A tethered drone for the battalion chief unit to be used on various responses for a total budget of \$43,000.
- A placeholder for various options in the growth of our future administrative office space for a budget of \$450,000.

## Budget Summary

The 2023/24 fiscal year budget is organized into six departments within the General Fund. Each department supports the District's mission and the Strategic Plan and reflects budgeted personnel services and materials and services.

- Administration
- Response Services
- Risk Reduction
- Training
- Support Services
- Technology

<b>Appropriations: General Fund</b>	<b>2022/23 FY Budget</b>	<b>2023/24 FY Budget</b>	<b>Increase/ (Decrease)</b>
Administration	\$ 2,166,000	\$ 2,208,000	1.94%
Response Services	\$ 11,126,100	\$ 11,722,000	5.36%
Risk Reduction	\$ 773,000	\$ 1,441,500	86.48%
Training	\$ 489,000	\$ 666,500	36.30%
Support Services	\$ 1,823,000	\$ 1,162,000	-36.26%
Technology	\$ 493,200	\$ 547,000	10.91%
Non-Departmental	\$ 5,523,700	\$ 7,049,000	27.61%
	<b>\$ 22,394,000</b>	<b>\$ 24,796,000</b>	10.73%
<b>Capital Projects Fund</b>	\$ 5,196,000	\$ 6,265,000	20.57%
<b>Total Appropriated Budget</b>	<b>\$ 27,590,000</b>	<b>\$ 31,061,000</b>	12.58%

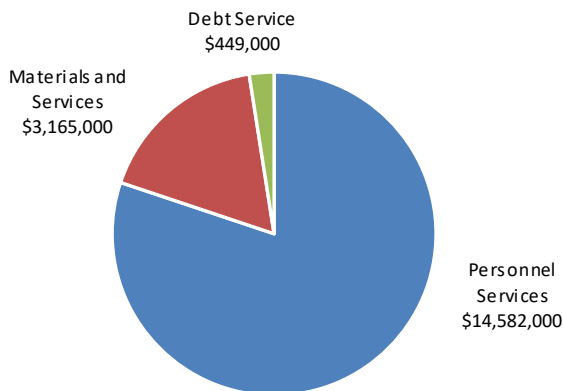
# Budget Message

2023/24 Fiscal Year

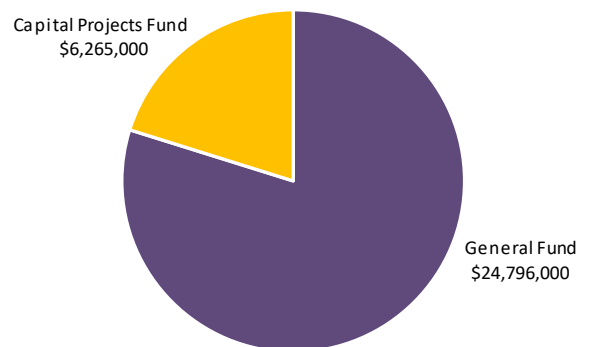
The District has prepared this budget for all funds subject to the budget requirements of state law, including the legal requirement for a balanced budget, meaning that total beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, contingency, 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 \$18,196,000, an increase of \$877,000 over the current 2022/23 fiscal year or five 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 \$31,061,000, an increase of \$3,471,000 or 12.6 percent over the prior 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,

*Michael C. Hussey*

Michael C. Hussey  
Jackson County Fire District 3  
Fire Chief/CEO

## Budget Summary - All Funds

Appropriations	2022/23 FY Budget	2023/24 FY Budget	Increase/ (Decrease)
Personnel Services	\$ 13,944,000	\$ 14,582,000	\$ 638,000
Materials and Services	\$ 2,926,300	\$ 3,165,000	\$ 238,700
Capital Outlay	\$ 1,196,000	\$ 1,289,000	\$ 93,000
Debt Service	\$ 448,700	\$ 449,000	\$ 300
Operating Transfers Out	\$ 55,000	\$ 1,395,000	\$ 1,340,000
Operating Contingency	\$ 916,600	\$ 1,180,800	\$ 264,200
Ending Fund Balance	\$ 8,103,400	\$ 9,000,200	\$ 896,800
Total Appropriations	\$ 27,590,000	\$ 31,061,000	\$ 3,471,000

# District Overview

2023/24 Fiscal Year

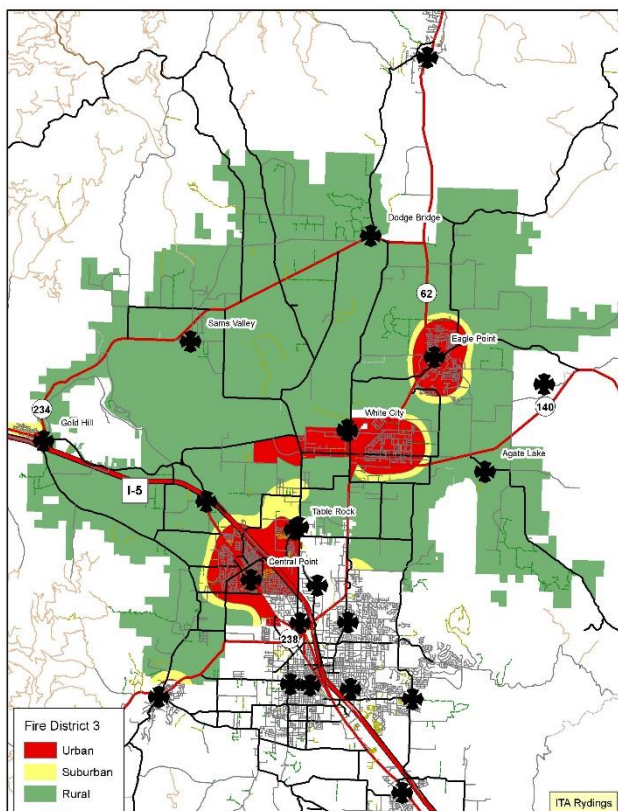
**Jackson County Fire District 3** is a special district operating under Oregon Revised Statutes (ORS) Chapter 478 as a separate municipal corporation. A Board of Directors is elected by District citizens and is comprised of a President and four Directors, who include a Vice-President and Secretary-Treasurer.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

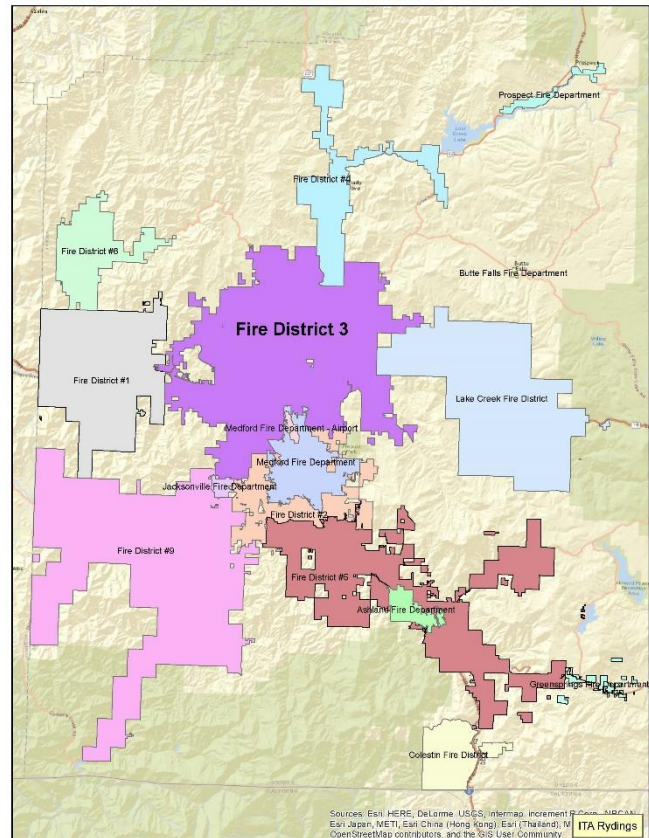
The District’s administrative offices are adjacent to the White City fire station, located in an unincorporated industrial area of Jackson County known as White City. A regional training facility is also at this location, which includes a training tower, burn simulation props, water drafting pits, fire 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 56 response ready employees, 24 are certified advanced life support (ALS) Paramedics and 8 are certified as Intermediate Technicians. Under the guidance of our supervising physician, emergency medical service personnel maintain a highly certified skill level through several specialized programs and training.

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



## Assessed and Real Market Value

The District's assessed valuation increased from \$5,130,186,355 in the 2021/22 fiscal year to \$5,435,426,720 for the 2022/23 fiscal year, a 5.95 percent increase. This is up from the prior year's growth of 3.96 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 new commercial construction and affordable residential housing starts remain strong.

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. One stipulation of BM 50 is if a residential property's real market value declines below the property's assessed value, then the property taxes are calculated on the lower of the two figures. The District experienced loss in value based on this requirement during the economic 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.

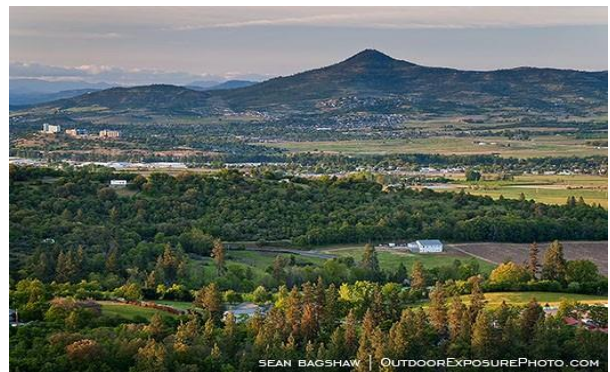


The Rogue Valley is home of the legendary Rogue River where you'll find jet boating, rafting, and fishing, mountains for snow skiing, biking, and hiking, and green valleys that produce award-winning wines. It's also home to North America's deepest lake and Oregon's only National Park, Crater Lake, which 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 19<sup>th</sup> Century gold rush, an era preserved within the boundaries of Jacksonville, a National Historic Landmark town. The Pear Blossom Festival held in April each year celebrates the famous pear harvest.

In addition to the scenery and activities, Jackson County offers a progressive economic base, moderate climate, Southern Oregon University, an international airport, and cultural attractions that all add to the incomparable quality of life. Within the District service area is home to many prominent and internationally recognized companies such as CareStream Health Imaging, Boise Cascade Wood Products, Amy's Kitchen, Costco, Erikson Air Crane, and Highway Products.



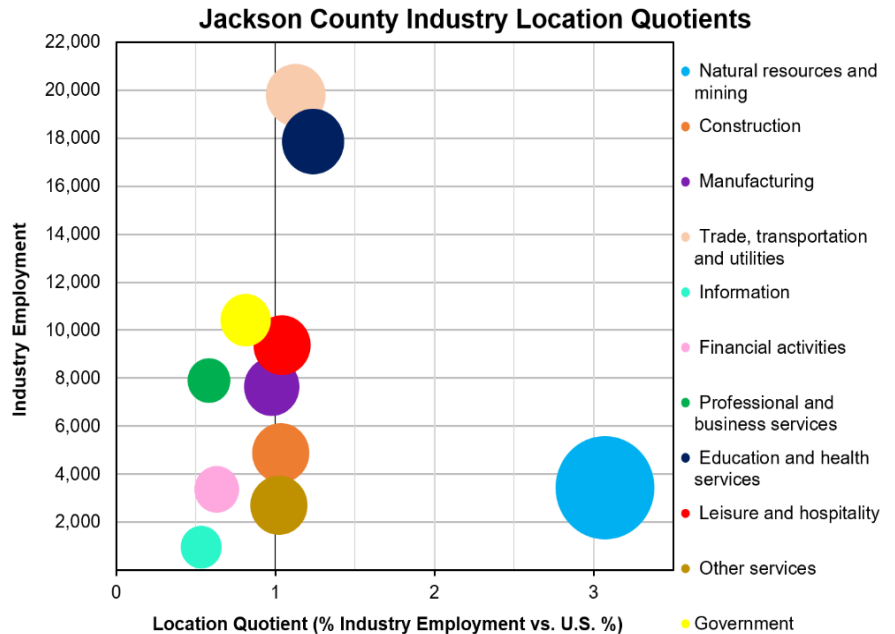
## District Overview

### 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, health care services, and tourism sectors have formed a regional hub attracting customers and visitors from neighboring counties and beyond. Once heavily dependent on the wood products manufacturing industry, it is now supplemented by the growing wine industry and specialty agriculture products.

Jackson County's unemployment rate as of January 2023 was 5.1 percent compared to the State of Oregon's unemployment rate of 4.8 percent. This is up slightly from a year ago when unemployment in Jackson County was 4.6 percent. As with other areas of the Nation, the Rogue Valley is experiencing a robust job market with demand for workers coupled with the difficulty in attracting applicants. The sectors experiencing demand and robust hiring are in the areas of hospitality, healthcare, construction, heavy equipment operators, tractor-trailer truck drivers, and restaurant cooks.

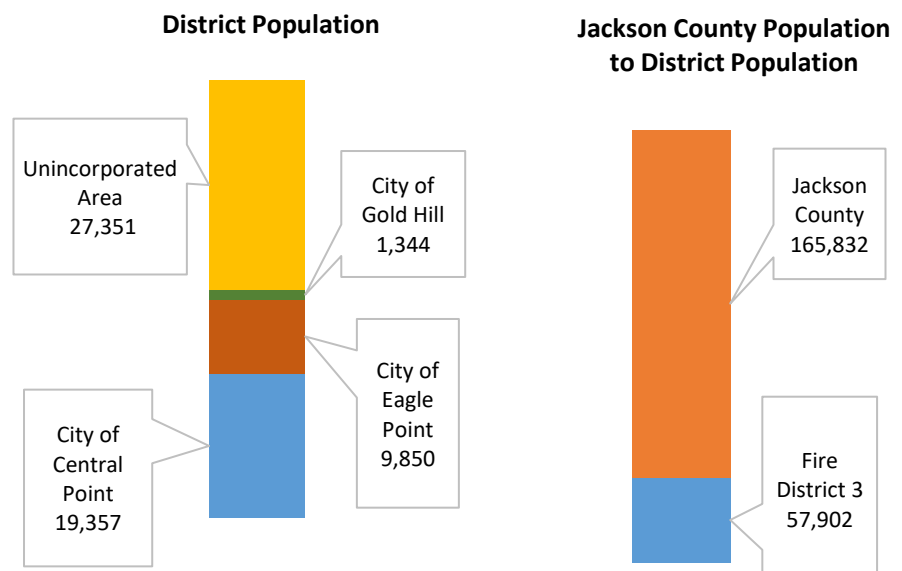
In looking ahead towards the future, the next ten years employment is expected to grow by 13,410 jobs (*Oregon Employment Department*) across all major industry sectors excluding information. Private health care services and education will add the most jobs, followed by leisure and hospitality.



### Population

In 2021 Jackson County's population gained 1,890 new residents for a total population of 223,734 with the District encompassing approximately 57,902 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.

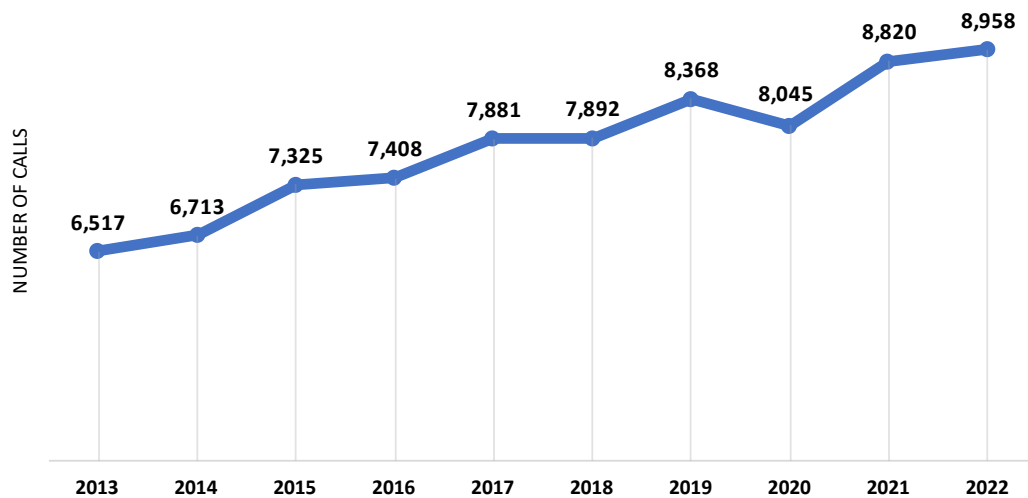
The District's population is expected to continue to moderately increase over the next 10 years. Staff will continue to work proactively with other governments and regional planning groups to ensure continued ability to serve this future population. This includes working across jurisdictional boundaries 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 4.68 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 2022, 59 percent of total incidents were classified as rescue/medical followed by good intent (19%). Fire related incidents accounted for only 3.32 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, Response Services, Risk Reduction, Training, Support Services, and Technology. Budgetary control is within the object classifications in each department and fund.

# Introduction of Members

2023/24 Fiscal Year

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## **BOARD OF DIRECTORS**

As of July 2023

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

### Term Expires

June 30, 2027  
June 30, 2027  
June 30, 2027  
June 30, 2025  
June 30, 2025

## **BUDGET COMMITTEE**

As of July 2023

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

Ken Cummings  
Tom Rambo  
Mark Hefley  
Rob Hernandez  
Steven Weber

### Term Expires

December 31, 2023  
December 31, 2023  
December 31, 2024  
December 31, 2025  
December 31, 2025

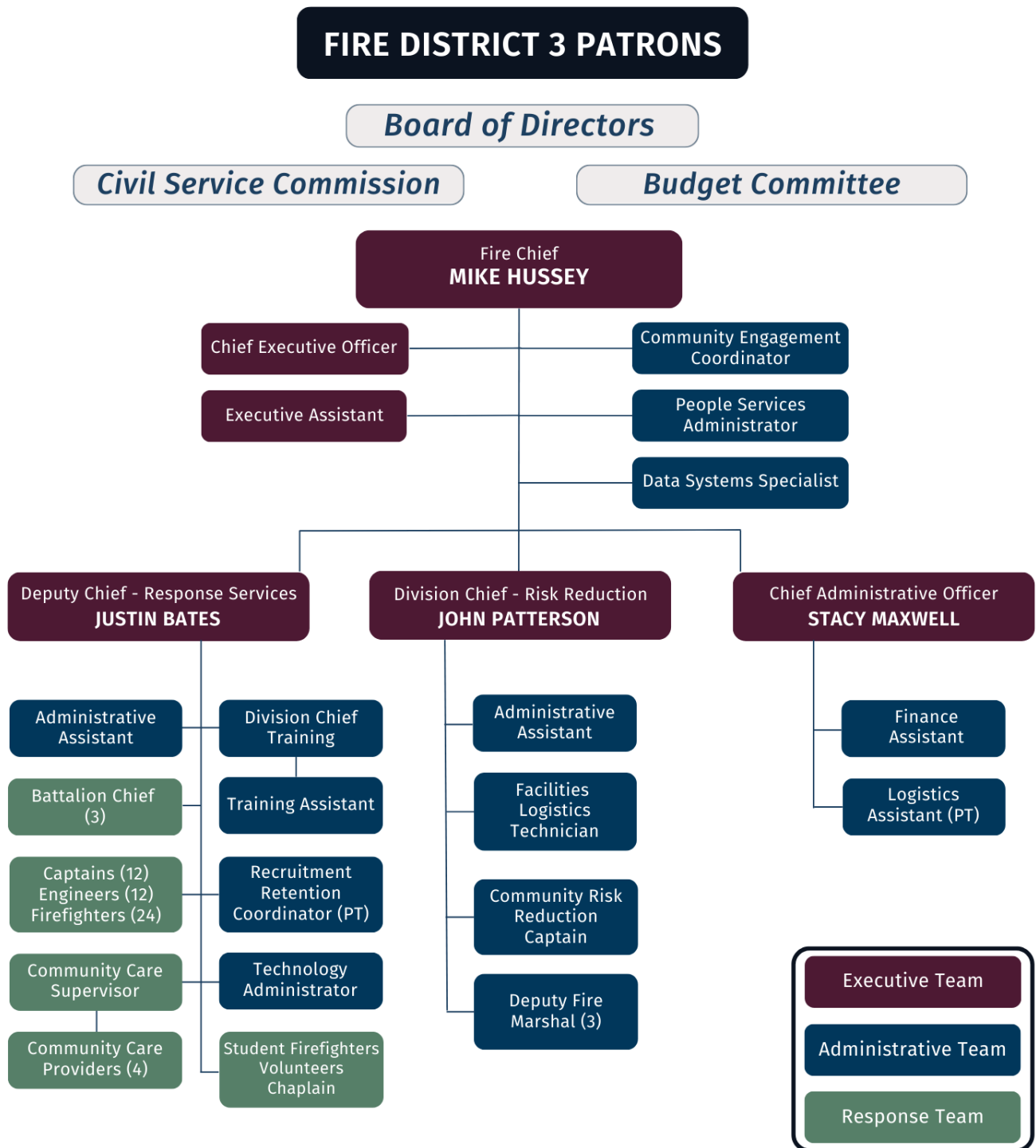
## **DISTRICT EXECUTIVE STAFF**

Mike Hussey, Fire Chief  
Stacy Maxwell, Chief Administrative Officer  
Justin Bates, Deputy Chief  
John Patterson, Division Chief  
Margie Calvert, Executive Assistant

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

# Organization Chart

2023/24 Fiscal Year



# Budget Process

2023/24 Fiscal Year

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

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

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

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

**The Budget in Relationship to Strategic Planning.** The District supports strategic planning and the incorporation of the strategic plan in the budget document. The District has adopted a three-year Strategic Plan that identifies the overarching strategic goals and the strategies to address those goals. Desired outcomes are also identified. These provide a 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.

## 2023/24 Fiscal Year

## BUDGET CALENDAR

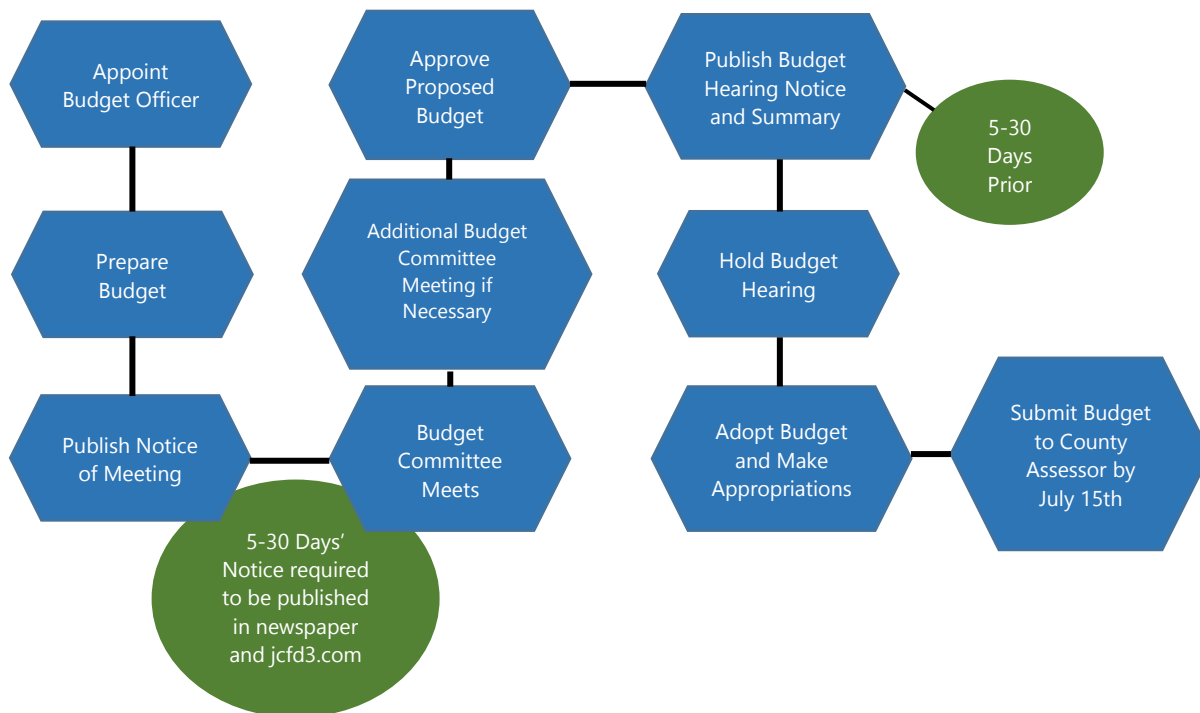
<p><b><u>January</u></b></p>	<p><b><u>Strategic Plan</u></b> Review the Strategic Plan’s identified goals and objectives under each initiative, ensuring priorities are in place that will drive the budget development.</p> <p><b><u>Budget Development</u></b></p> <ul style="list-style-type: none"> <li>• Budget worksheets distributed</li> <li>• Support assignee’s start preparing their respective budget requests</li> <li>• Meetings are scheduled with support assignees to review requests</li> <li>• Chief Officers develop their internal timelines with due dates for budget requests to be submitted by</li> <li>• Chief Officers start preliminary review of performance measures and departmental objectives</li> </ul>
<p><b><u>February</u></b></p>	<p><b><u>Budget Development Continues</u></b></p> <ul style="list-style-type: none"> <li>• Meetings are held between support assignees and Chief Officers</li> <li>• Direction is communicated to support assignees regarding approval/modification/denial</li> </ul> <p>Finance develops the overarching components of the budget document Preliminary revenue estimates are projected; financial forecast updated</p>
<p><b><u>February - March</u></b></p> <p>02/22/23</p> <p>02/22/23</p> <p>02/23/23 – 03/29/22</p> <p>03/29/23</p>	<p>First draft of budget detail sheets completed by Chief Officers</p> <p>Review departmental budget requests – Chief Officers (Executive Team)</p> <p>Chief Officers work on any amendments to their first draft of respective budget</p> <ul style="list-style-type: none"> <li>• Review performance measurements, objectives, and departmental narratives</li> <li>• Budget revisions due back to Finance</li> <li>• Departmental narrative sections and performance measurements due back to Finance</li> </ul> <p><b><u>Executive Team Meeting</u></b></p> <ul style="list-style-type: none"> <li>• Chief Officers review and finalize departmental budget sections</li> <li>• Set initial direction on budget presentations for April 21<sup>st</sup> meeting</li> </ul>

# Budget Process

2023/24 Fiscal Year

<b><u>April</u></b> 04/01/23 – 04/18/23  04/11/23 04/11/23 – 05/04/23	Budget document compilation, final touches, and assembly  Publish notice of budget committee meetings in Mail Tribune Post notice of budget meetings on District website
<b>04/20/23</b>	<b><u>Budget Committee Meeting</u></b> <ul style="list-style-type: none"> <li>Budget document delivered and budget message presented</li> </ul>
<b><u>May</u></b> 05/04/23	<b><u>Budget Committee Meeting</u></b> <ul style="list-style-type: none"> <li>Chief Officers present their respective departmental budget requests and programs to Committee. Budget deliberation occurs and public comment is heard and considered. Budget Committee decides if they want to approve the proposed budget or schedule more meetings for further deliberation.</li> </ul>
<b><u>June</u></b> 06/06/23	Publish budget hearing notice and budget summary
<b>06/15/23</b>	<b><u>Public Hearing and Adoption of 2023/2024 Fiscal Year Budget</u></b>
<b><u>July</u></b> No later than 07/15/23	Submit Local Budget (LB) Form 50 to Jackson County Assessor with two copies of District Resolution adopting the 2023/24 Fiscal Year Budget

## BUDGET PROCESS TIMELINE



# Budget and Financial Policies

2023/24 Fiscal Year

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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 **2023/24 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 with an understanding of all 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

2023/24 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%
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## General Fund

Source of funds	Use of funds
<ul style="list-style-type: none"><li>Property taxes</li><li>Interest on investment</li><li>Program fees</li><li>Miscellaneous and other revenues</li><li>Contract revenue</li><li>Grant revenue</li></ul>	<ul style="list-style-type: none"><li>Administration and finance</li><li>Response services (EMS and suppression)</li><li>Fire prevention programs</li><li>Risk reduction</li><li>Training</li><li>Support services and logistics</li><li>Technology</li><li>Transfer to other funds</li><li>Debt service payments</li></ul>

## Capital Projects Fund

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

## Basis of Accounting and Budgeting

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

This budget is prepared using the modified accrual basis of accounting and budgeting for all governmental fund types in accordance with generally accepted accounting principles. The basis of accounting and basis of budgeting are the same under the District's practices and policy. Under the modified accrual basis, expenditures are recorded when the goods or services are actually received, rather than when the invoices are paid. The exception to this general rule is interest on general long-term debt, which is recognized when due. Revenues are recorded in the accounting period in which they

# Budget and Financial Policies

2023/24 Fiscal Year

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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 5.5 percent for the 2023/24 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 2023/24 fiscal year is \$5,734,554,289.

## **Ending Fund Balances**

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 in the second week of November.

As a policy, the District will provide for an ending fund balance in the General Fund (budgeted as unappropriated ending fund balance) of 24 percent of budgeted property tax revenue to ensure fiscal sustainability in meeting operating requirements before the receipt of property taxes. 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.

Over the past three fiscal years, the District temporarily increased this commitment to 26 percent to ensure an adequate ending fund balance was available to meet cashflow commitments during times of growth in personnel and programs. This budget represents \$4,164,000 for the 2023/24 fiscal year, a decrease of \$61,000 over the prior year.

## **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 \$1,041,000. 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

2023/24 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 2022 was \$10,359,594,984 up from \$8,478,586,935 in 2021. Jackson County Fire District 3's current legal debt limit is approximately \$129,494,937.

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 2023/24 fiscal year budget identifies \$394,000 in principal payments and \$54,591 in interest payments. At fiscal year end June 30, 2024 outstanding debt principal on this holding will be \$2,316,000.

## 2019 Series Full Faith and Credit Obligations

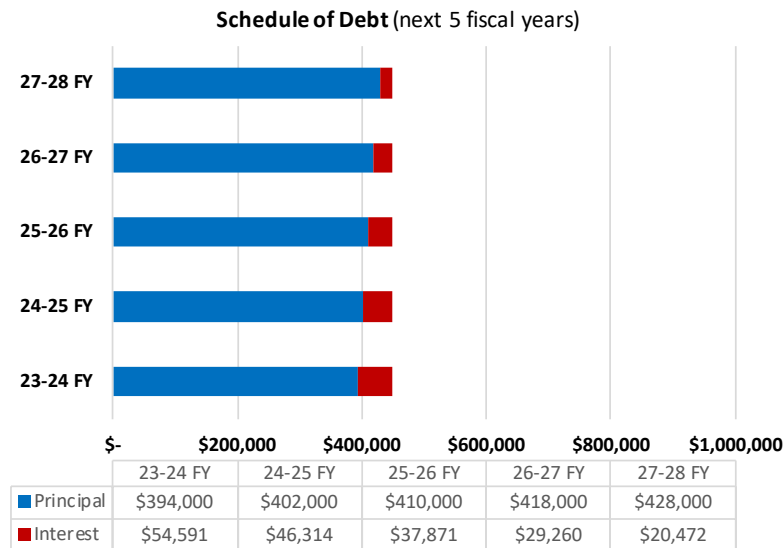
JP Morgan Chase Bank

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

	Debt Payments	Principal	Interest	Total	Annual Debt Service
<b>FY 19-20</b>	01/01/20	\$ 184,000.00	\$ 40,221.82	\$ 224,221.82	\$ 224,221.82
<b>FY 20-21</b>	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
<b>FY 21-22</b>	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
<b>FY 22-23</b>	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
<b>FY 23-24</b>	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
<b>FY 24-25</b>	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
<b>FY 25-26</b>	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
<b>FY 26-27</b>	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
<b>FY 27-28</b>	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
<b>FY 28-29</b>	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
<b>FY 29-30</b>	07/01/29	\$ 222,000.00	\$ 2,319.90	\$ 224,319.90	
					\$ 224,319.90
<b>Total Principal Paid:</b>	\$	<b>4,028,000.00</b>			
<b>Total Interest Paid:</b>			\$ <b>454,292.62</b>		
<b>Total Debt Service:</b>					\$ <b>4,482,292.62</b>

# Budget and Financial Policies

2023/24 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 has a goal of transferring at least \$500,000 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

2023/24 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 2023/24 fiscal year budget identifies \$1,289,000 in total capital expenditures.

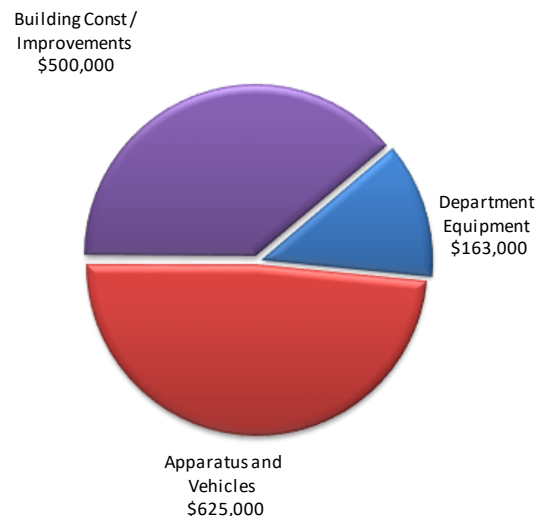
## **Relationship of Capital Budget to Annual Operating Budget**

When a capital project is developed, the new operating or maintenance costs associated with that new project are determined. 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.

## **2023/24 Capital Expenditures**



# Budget and Financial Policies

2023/24 Fiscal Year

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## SUMMARY OF POLICIES

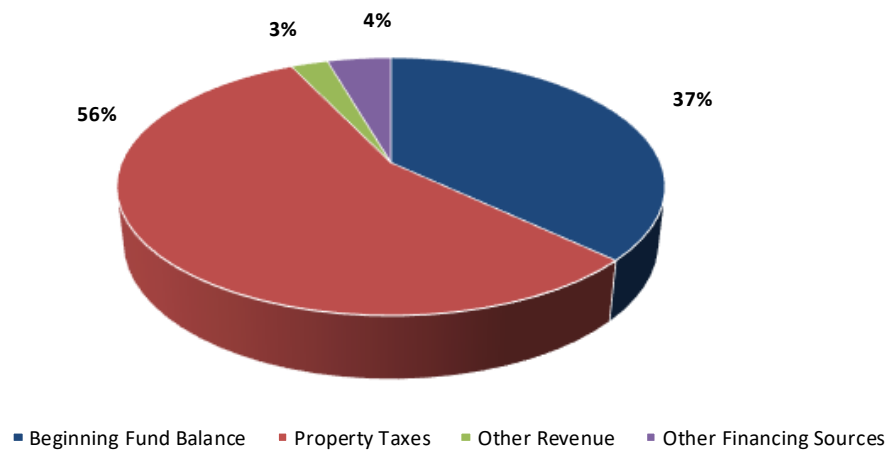
1. The District will adopt and maintain a **balanced budget** in which total resources of beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, and ending fund balance. The District will use one-time revenues to fund one-time expenditures in order to prevent potential shortfalls.
2. The District will avoid adopting budgetary procedures that result in balancing current operational costs at the expense of future years' operations.
3. The District will maintain a **budgetary control system** to ensure compliance with the adopted budget, State of Oregon Budget Law, and generally accepted accounting principles. Management and the Board of Directors will receive monthly "budget to actual" financial statements comparing actual revenues and expenditures to budgeted amounts on all funds and programs.
4. The District will **budget revenues** based on historical trends, economic and demographic conditions, inflation, and projections that are realistic.
5. The District will pursue **revenue diversification** by actively pursuing Local, State, and Federal grants and/or partnerships with other agencies and jurisdictions to improve funding opportunities and promote cost effectiveness.
6. The District will budget **Unappropriated Ending Fund Balance** at 24 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

2023/24 Fiscal Year

## Summary of Budgeted Resources

Resources	Beginning Fund Balance	Property Taxes	Other Revenue	Other Financing Sources	2023/24 Budget
Major Funds					
General	\$6,737,000	\$17,350,000	\$709,000		\$24,796,000
Capital Projects	\$4,767,000		\$103,000	\$1,395,000	\$6,265,000
<b>Total Budgeted Resources</b>	<b>\$11,504,000</b>	<b>\$17,350,000</b>	<b>\$812,000</b>	<b>\$1,395,000</b>	<b>\$31,061,000</b>



Fiscal Year Ended	Total Tax Levy	Current Tax Collections	Percent of Levy Collected	Delinquent Tax Collections	Total Tax Collections	Percent of Total Tax Collections to Tax Levy
2022	\$ 16,028,243	\$ 15,294,618	95.42	\$ 287,493	\$ 15,582,111	97.22%
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%

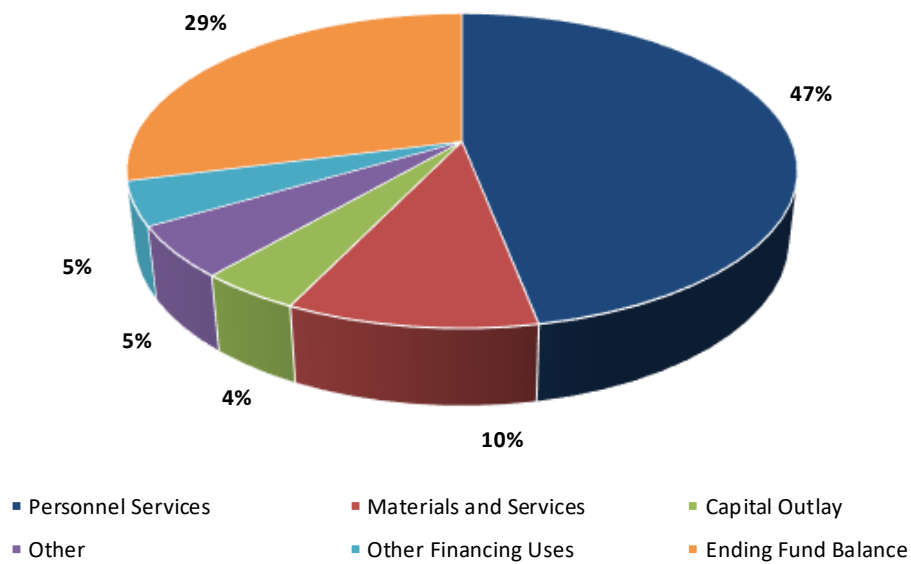
# Financial Overview

2023/24 Fiscal Year

## Summary of Budgeted Requirements

Requirements	Personnel Services	Materials and Services	Capital Outlay	Other	Other Financing Uses	Ending Fund Balance	2023/24 Budget
Major Funds							
General	\$14,582,000	\$3,165,000		\$1,490,000	\$1,395,000	\$4,164,000	\$24,796,000
Capital Projects			\$1,289,000	\$139,800		\$4,836,200	\$6,265,000
Total Budgeted Requirements	\$14,582,000	\$3,165,000	\$1,289,000	\$1,629,800	\$1,395,000	\$9,000,200	\$31,061,000

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



# Financial Overview

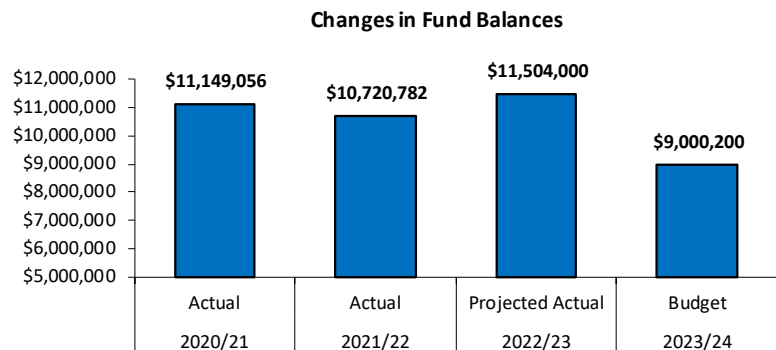
2023/24 Fiscal Year

The following schedule depicts **changes in fund balance** for all funds combined; the **General Fund** and the **Capital Projects Fund**.

	Fiscal Year			2023/24 Budget
	2020/21 Actual	2021/22 Actual	2022/23 Projected Actual	
<b>Revenues</b>				
Property Taxes	\$ 15,403,617	\$ 15,582,111	\$ 16,290,000	\$ 17,350,000
Earnings on Investments	101,243	68,656	370,000	300,000
Grants	271,734	169,132	465,000	151,000
Lease Income	58,194	59,939	61,600	65,000
Donations	1,360	5,508	6,000	6,000
Contracts	-	-	10,000	70,000
Miscellaneous	391,045	234,130	253,700	117,000
	<b>\$ 16,227,193</b>	<b>\$ 16,119,476</b>	<b>\$ 17,456,300</b>	<b>\$ 18,059,000</b>
Other Revenue Sources:				
Proceeds from Sale of Equip	\$ 23,497	\$ 8,204	\$ 20,000	\$ 101,000
Loan Proceeds	-	-	-	2,000
Transfers to and from	996,200	1,591,400	55,000	1,395,000
<b>Total Revenue</b>	<b>\$ 17,246,890</b>	<b>\$ 17,719,080</b>	<b>\$ 17,531,300</b>	<b>\$ 19,557,000</b>
<b>Expenditures</b>				
Personnel Services	\$ 11,653,352	\$ 12,359,186	\$ 13,147,500	\$ 14,582,000
Materials and Services	2,226,753	2,590,631	2,651,800	3,165,000
Capital Outlay	282,743	1,027,360	445,000	1,289,000
Debt Service	710,242	578,778	448,700	449,000
Operating Contingency	-	-	-	1,180,800
<b>Total Expenditures</b>	<b>\$ 14,873,090</b>	<b>\$ 16,555,955</b>	<b>\$ 16,693,000</b>	<b>\$ 20,665,800</b>
<b>Excess or Deficiency</b>	<b>\$ 2,373,799</b>	<b>\$ 1,163,125</b>	<b>\$ 838,300</b>	<b>\$ (1,108,800)</b>
<b>Changes in Fund Balance</b> <i>(The cash available at the end of the fiscal year)</i>				
Beginning Fund Balance	\$ 9,771,457	\$ 11,149,056	\$ 10,720,700	\$ 11,504,000
Excess Revenues over Expenditures	2,373,799	1,163,125	838,300	(1,108,800)
Interfund Transfers	(996,200)	(1,591,400)	(55,000)	(1,395,000)
<b>Ending Fund Balance</b>	<b>\$ 11,149,056</b>	<b>\$ 10,720,782</b>	<b>\$ 11,504,000</b>	<b>\$ 9,000,200</b>
Increase or Decrease in Fund Balance		-3.84%	7.31%	-21.76%

The decrease in total fund balance of negative (3.84) percent at fiscal year end June 30, 2022 was the result of actual spending to budget in comparison to the prior year and lower tax revenue than budgeted.

The projected increase in fund balance of \$783,218 at fiscal year end June 30, 2023 is the result of increased revenue in both property taxes and earnings on investment coupled with expenditures trending lower than budget due to some mid-year program and staffing changes.



# Financial Overview

2023/24 Fiscal Year

Total fund balance reflected at fiscal year end June 30, 2024 is \$9,000,200 or a decrease of 22 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 2023/24 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			2023/24 Budget
	2020/21 Actual	2021/22 Actual	2022/23 Projected Actual	
<b>Revenue/Expenditures</b>				
Revenue	\$ 16,229,190	\$ 16,127,680	\$ 17,456,300	\$ 18,059,000
Expenditures	14,590,347	15,528,595	16,248,000	19,237,000
Excess or Deficiency	<b>\$ 1,638,842</b>	<b>\$ 599,085</b>	<b>\$ 1,208,300</b>	<b>\$ (1,178,000)</b>
<b>Changes in Fund Balance</b>				
Beginning Fund Balance	\$ 5,933,413	\$ 6,576,055	\$ 5,583,700	\$ 6,737,000
Excess Revenues over Expenditures	1,638,842	599,085	1,208,300	(1,178,000)
Interfund Transfers Out	(996,200)	(1,591,400)	(55,000)	(1,395,000)
Ending Fund Balances	<b>\$ 6,576,055</b>	<b>\$ 5,583,741</b>	<b>\$ 6,737,000</b>	<b>\$ 4,164,000</b>
Increase or Decrease		-15.09%	20.65%	-38.19%

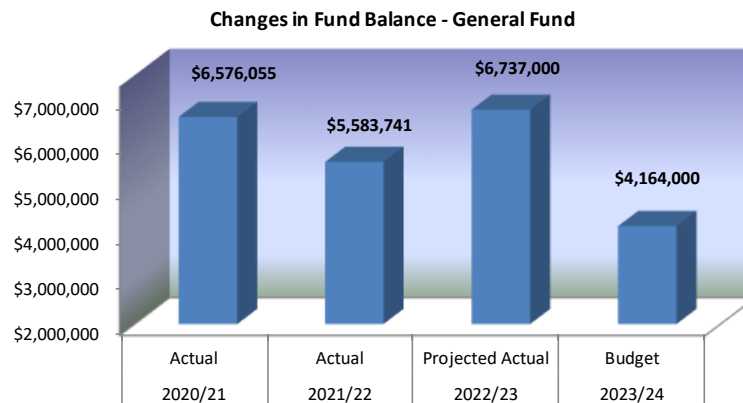
CAPITAL PROJECTS FUND	Fiscal Year			2023/24 Budget
	2020/21 Actual	2021/22 Actual	2022/23 Projected Actual	
<b>Revenue/Expenditures</b>				
Revenue	\$ 21,500	\$ -	\$ 20,000	\$ 103,000
Expenditures	282,743	1,027,360	445,000	1,428,800
Excess or Deficiency	<b>\$ (261,243)</b>	<b>\$ (1,027,360)</b>	<b>\$ (425,000)</b>	<b>\$ (1,325,800)</b>
<b>Changes in Fund Balance</b>				
Beginning Fund Balance	\$ 3,838,044	\$ 4,573,001	\$ 5,137,000	\$ 4,767,000
Excess Revenues over Expenditures	(261,243)	(1,027,360)	(425,000)	(1,325,800)
Interfund Transfers In	996,200	1,591,400	55,000	1,395,000
Ending Fund Balances	<b>\$ 4,573,001</b>	<b>\$ 5,137,040</b>	<b>\$ 4,767,000</b>	<b>\$ 4,836,200</b>
Increase or Decrease		12.33%	-7.20%	1.45%

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.

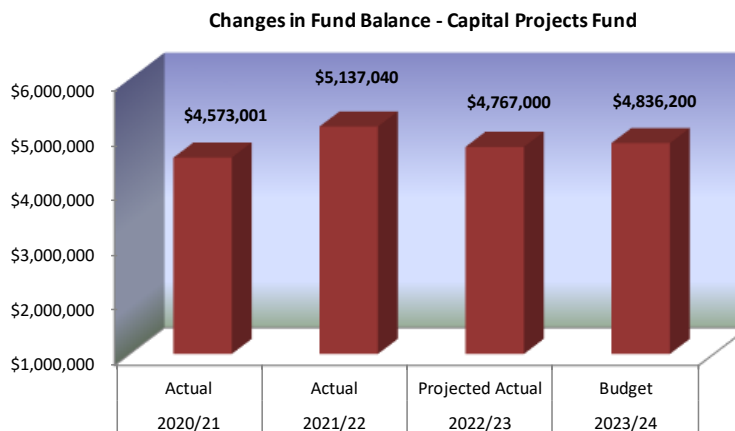
# Financial Overview

2023/24 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, 2024, as established by policy.



- ➔ Fund balance in the **General Fund** decreased at fiscal year end June 30, 2022 by 15 percent, the result of actual spending to budget in comparison to the prior year and lower property tax revenue than budgeted.
- ➔ Fund balance is projected to increase at fiscal year end June 30, 2023 by 20.6 percent, the result of an increase in property tax revenue and earnings on investment related to budget coupled with reduced spending across various programs.
- ➔ Fund balance at fiscal year end June 30, 2024 reflects only the UEFB or \$4,164,000. The UEFB is based on 24 percent of budgeted property tax revenue. This represents the minimum amount the District would have on hand if all accounts and contingency were spent in their entirety.



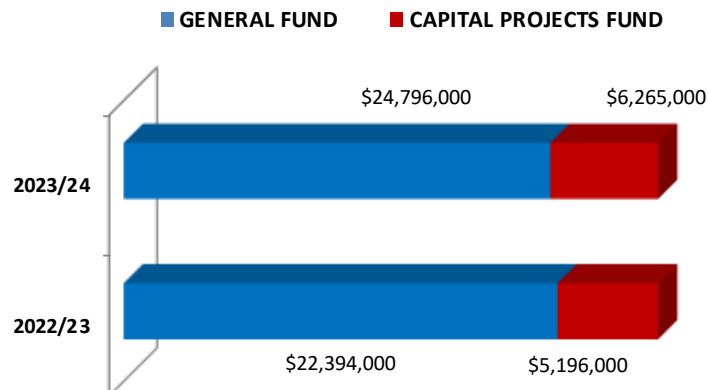
- ➔ Changes in fund balance in the **Capital Projects Fund** are the result of General Fund transfers that sustain the fund and the corresponding budgeted expenditures as identified and planned for in the Capital Replacement Schedule. The District's strategic priority is to allocate all additional funds outside of General Fund policy commitments and Budget Committee approved programs to the Capital Fund for future projects.
- ➔ Fund balance increased at fiscal year end June 30, 2022 by 12.3 percent, the result of revenue through a transfer from the General Fund compared to the budgeted expenditures.
- ➔ Fund balance is projected to decrease 7.2 percent at fiscal year end June 30, 2023, the result of a significant reduction in revenue from the General Fund transfer compared to budgeted expenditures.
- ➔ Fund balance at fiscal year end June 30, 2024 represents an increase of 1.5 percent, the result of budgeted expenditures in relation to the amount of the transfer from the General Fund.

# Financial Overview

2023/24 Fiscal Year

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

	Fiscal Year			
	2023/24 Budget	2022/23 Budget	Variance	Change
<b>GENERAL FUND</b>				
Personnel Services	\$ 14,582,000	\$ 13,944,000	\$ 638,000	4.58%
Materials and Services	3,165,000	2,926,300	238,700	8.16%
Operating Contingency	1,041,000	795,000	246,000	30.94%
Debt Service	449,000	448,700	300	0.07%
Transfer to Capital Projects Fund	1,395,000	55,000	1,340,000	2436.36%
Unappropriated Ending Fund Balance	4,164,000	4,225,000	(61,000)	-1.44%
	<b>\$ 24,796,000</b>	<b>\$ 22,394,000</b>	<b>\$ 2,402,000</b>	<b>10.73%</b>
<b>CAPITAL PROJECTS FUND</b>				
Department Equipment	\$ 163,000	\$ 10,000	\$ 153,000	1530.00%
Apparatus and Vehicles	625,000	1,005,000	(380,000)	-37.81%
Land and Improvements	1,000	1,000	-	0.00%
Building Construction/Improvements	500,000	180,000	320,000	177.78%
Contingency	139,800	121,600	18,200	14.97%
Reserve for Future/Ending Fund Balance	\$ 4,836,200	\$ 3,878,400	\$ 957,800	24.70%
	<b>\$6,265,000</b>	<b>\$5,196,000</b>	<b>\$1,069,000</b>	<b>20.57%</b>
<b>TOTAL BUDGET</b>	<b>\$ 31,061,000</b>	<b>\$ 27,590,000</b>	<b>\$ 3,471,000</b>	<b>12.58%</b>

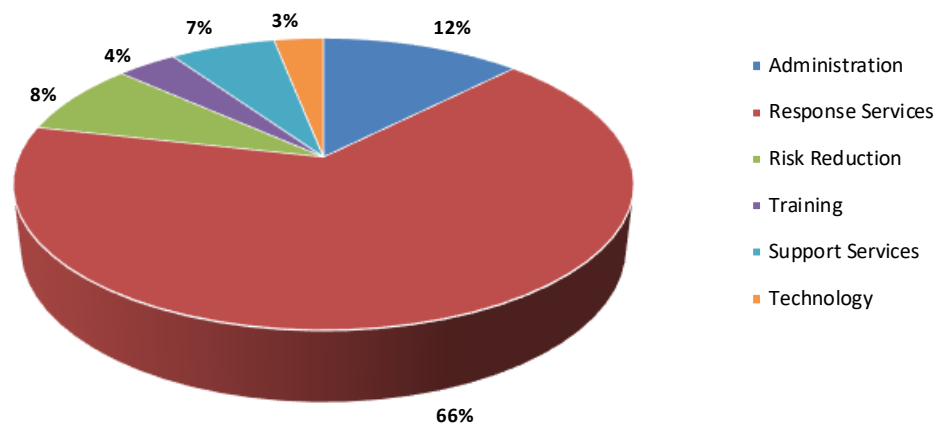


# Financial Overview

2023/24 Fiscal Year

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

GENERAL FUND	Fiscal Year			
	2023/24 Budget	2022/23 Budget	Variance	Change
<b>Department 01</b>				
<b>Administration</b>				
Personnel Services	\$ 1,258,000	\$ 1,256,000	\$ 2,000	0.16%
Materials and Services	950,000	910,000	40,000	4.40%
	<b>\$ 2,208,000</b>	<b>\$ 2,166,000</b>	<b>\$ 42,000</b>	<b>1.94%</b>
<b>Department 02</b>				
<b>Response Services</b>				
Personnel Services	\$ 11,195,000	\$ 10,735,600	\$ 459,400	4.28%
Materials and Services	527,000	390,500	136,500	34.96%
	<b>\$ 11,722,000</b>	<b>\$ 11,126,100</b>	<b>\$ 595,900</b>	<b>5.36%</b>
<b>Department 03</b>				
<b>Risk Reduction</b>				
Personnel Services	\$ 1,321,000	\$ 748,000	\$ 573,000	76.60%
Materials and Services	120,500	25,000	95,500	382.00%
	<b>\$ 1,441,500</b>	<b>\$ 773,000</b>	<b>\$ 668,500</b>	<b>86.48%</b>
<b>Department 04</b>				
<b>Training</b>				
Personnel Services	\$ 451,000	\$ 285,000	\$ 166,000	58.25%
Materials and Services	215,500	204,000	11,500	5.64%
	<b>\$ 666,500</b>	<b>\$ 489,000</b>	<b>\$ 177,500</b>	<b>36.30%</b>
<b>Department 05</b>				
<b>Support Services</b>				
Personnel Services	\$ 177,000	\$ 750,000	\$ (573,000)	-76.40%
Materials and Services	985,000	1,073,000	(88,000)	-8.20%
	<b>\$ 1,162,000</b>	<b>\$ 1,823,000</b>	<b>\$ (661,000)</b>	<b>-36.26%</b>
<b>Department 07</b>				
<b>Technology</b>				
Personnel Services	\$ 180,000	\$ 169,400	\$ 10,600	6.26%
Materials and Services	367,000	323,800	43,200	13.34%
	<b>\$ 547,000</b>	<b>\$ 493,200</b>	<b>\$ 53,800</b>	<b>10.91%</b>
<b>TOTAL</b>	<b>\$ 17,747,000</b>	<b>\$ 16,870,300</b>	<b>\$ 876,700</b>	<b>5.20%</b>



# Financial Forecast

2023/24 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 received 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 5.95 percent for 2022. Projections for the ensuing seven fiscal years are estimated to average 4.73 percent. The average assessed valuation growth for the previous seven years was 4.48 percent. Based on future industry growth projections and accelerated commercial construction we believe growth will be slightly greater than experienced on recent average, even in this higher inflationary economic climate. We will, however, continue to evaluate and adjust as necessary, erring on the side of a moderately conservative approach in the development of future long-term financial forecasts to ensure fiscal sustainability.

This forecast depicts all programs fully staffed across all divisions. Also factored in is the Public Employees Retirement System pension rate increases effective 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 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	FY 32-33
<b>TOTAL REVENUE</b>	\$ 24,796,000	\$ 25,062,550	\$ 26,231,812	\$ 27,377,608	\$ 28,467,257	\$ 29,536,969	\$ 30,507,745	\$ 31,646,270	\$ 33,004,695	\$ 34,357,220
<b>TOTAL EXPENDITURES</b>	\$ 19,591,000	\$ 19,551,000	\$ 20,447,819	\$ 21,387,982	\$ 22,375,614	\$ 23,408,944	\$ 24,270,309	\$ 25,183,262	\$ 26,375,776	\$ 27,626,250
<b>Net Available for Policy Commitments</b>	\$ 5,205,000	\$ 5,511,550	\$ 5,783,993	\$ 5,989,626	\$ 6,091,642	\$ 6,128,024	\$ 6,237,436	\$ 6,463,007	\$ 6,628,918	\$ 6,730,970
Policy Commitments *										
Operating Contingency	\$ 1,041,000	\$ 1,092,630	\$ 1,143,679	\$ 1,195,347	\$ 1,247,636	\$ 1,304,925	\$ 1,360,195	\$ 1,421,127	\$ 1,488,262	\$ 1,558,600
Unappropriated Ending Fund Balance	\$ 4,164,000	\$ 4,370,520	\$ 4,574,716	\$ 4,781,389	\$ 4,990,543	\$ 5,219,699	\$ 5,440,780	\$ 5,684,509	\$ 5,953,049	\$ 6,234,401
<b>Total Policy Commitments</b>	\$ 5,205,000	\$ 5,463,150	\$ 5,718,395	\$ 5,976,736	\$ 6,238,178	\$ 6,524,624	\$ 6,800,975	\$ 7,105,637	\$ 7,441,311	\$ 7,793,001
Budget surplus/(shortfall)	\$ -	\$ 48,400	\$ 65,598	\$ 12,890	\$ (146,536)	\$ (396,599)	\$ (563,540)	\$ (642,630)	\$ (812,393)	\$ (1,062,031)
Amount available for appropriation or amount needed to reduce the budget by in order to meet policy commitments										

\* UEFB is 24% 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

2023/24 Fiscal Year

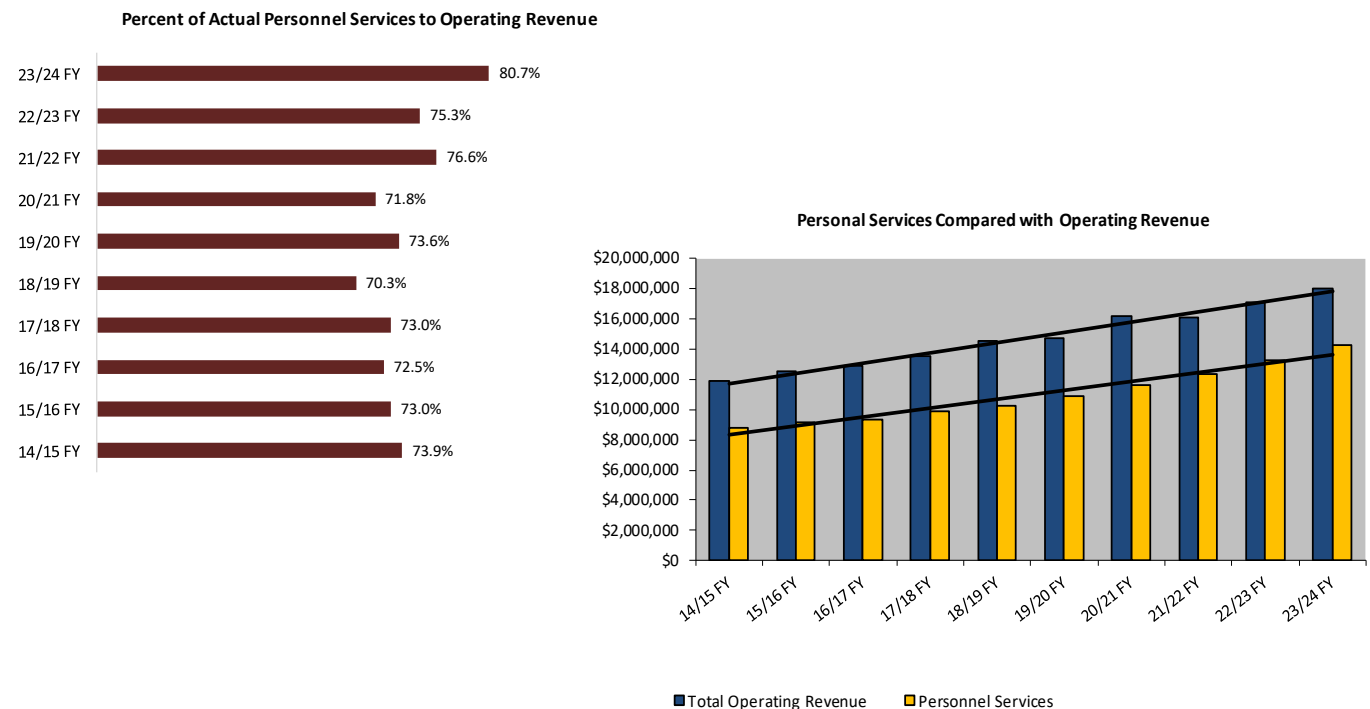
## Financial Forecast Summary for Capital Projects Fund

	Budget	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
CAPITAL PROJECTS FUND	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	FY 32-33
<b>TOTAL REVENUE</b>	\$ 6,265,000	\$ 5,579,000	\$ 4,098,662	\$ 1,402,544	\$ 1,938,862	\$ 1,652,190	\$ (354,885)	\$ (330,783)	\$ 22,107	\$ 270,316
<b>TOTAL EXPENDITURES</b>	\$ 1,289,000	\$ 2,083,338	\$ 3,299,118	\$ 66,682	\$ 889,672	\$ 2,610,075	\$ 578,898	\$ 250,110	\$ 354,791	\$ -
<b>Net Available for Policy Commitments</b>	<b>\$ 4,976,000</b>	<b>\$ 3,495,662</b>	<b>\$ 799,544</b>	<b>\$ 1,335,862</b>	<b>\$ 1,049,190</b>	<b>\$ (957,885)</b>	<b>\$ (933,783)</b>	<b>\$ (580,893)</b>	<b>\$ (332,684)</b>	<b>\$ 270,316</b>
Ending Fund Policy Commitments										
Operating Contingency	\$ 139,800	\$ 208,334	\$ 329,912	\$ 6,668	\$ 88,967	\$ 261,008	\$ 57,890	\$ 25,011	\$ 35,479	\$ -
Reserve for Future Capital Expenditures	\$ 4,836,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Policy Commitments	\$ 4,976,000	\$ 208,334	\$ 329,912	\$ 6,668	\$ 88,967	\$ 261,008	\$ 57,890	\$ 25,011	\$ 35,479	\$ -
Budget surplus/(shortfall)	\$ -	\$ 3,287,328	\$ 469,632	\$ 1,329,194	\$ 960,223	\$ (1,218,893)	\$ (991,673)	\$ (605,904)	\$ (368,163)	\$ 270,316

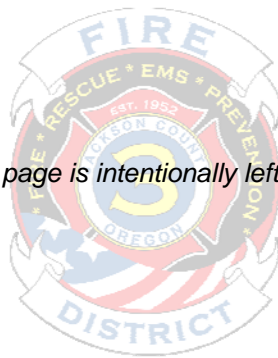
In the above Capital Fund forecast, the budget surplus depicts the amount available in ending fund balance for years 2025 and out, which would be appropriated under reserve for future. The current year reflects a balanced budget and thus nets to zero. Years where negative balances are reflective provide management with a depiction of fund sustainability and the need to either reevaluate expenditures and/or seek other funding sources to maintain fund solvency.

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

2023/24 Fiscal Year

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

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

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

## **Our Mission**

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

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

## **Our Vision**

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

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

## **Organizational Vision Statements**

- Prevention activities that are reducing risks from fire, rescue and medical events.
- Members who are engaged with the community, sharing a sense of destiny with District patrons.
- Exceptional people with quality equipment who are arriving on the emergency scene at the right time.
- Leadership from the Board of Directors and the Management Team that is clear and concise.
- Members who are enthusiastic, motivated, and empowered.
- An organization that is fiscally stable and prepared for the future.

# Strategic Plan

2023/24 Fiscal Year

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## **Our Values and Guiding Principles**

Values are beliefs that are shared among the members of an organization. Values drive the culture and priorities and provide a framework in which decisions are made. These values are shared throughout the District and provide a foundation for all personnel.

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

## **Strategic Initiatives**

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

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

# Strategic Plan

2023/24 Fiscal Year

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## **Initiative One:**

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

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

#### **Objectives:**

- Evaluate Greenway fires and fire response
- Focus on targeted areas to improve prevention
- Evaluate wildland fire reduction and resiliency
- Increase prevention in rural areas

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

#### **Objectives:**

- Evaluate non-emergency response and resource allocation
- Understand needs of industry, business, landowners, 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
- Understand and respond to a changing community
- 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

2023/24 Fiscal Year

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## **Initiative Three:**

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

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

#### **Objectives:**

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

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

#### **Objective:**

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

## **Initiative Four:**

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

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

#### **Objectives:**

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

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

#### **Objectives:**

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

# Strategic Plan

2023/24 Fiscal Year

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## **Initiative Five:**

Develop and strengthen collaborative efforts and strategic partnerships.

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

**Objectives:**

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

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

**Objectives:**

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

## **Initiative Six:**

Commit to excellence through innovation.

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

**Objectives:**

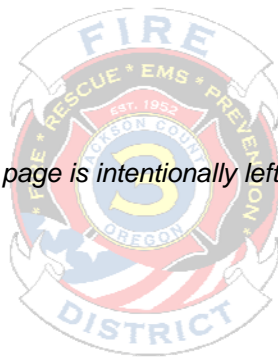
- Explore treatment-in-place for patient care
- Continue to improve options of service delivery using technology
- Embrace innovation to better support the service delivery models

**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

2023/24 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	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Personnel Services	\$ 11,653,352	\$ 12,359,186	\$ 13,944,000	\$ 14,582,000
Materials and Services	2,226,753	2,590,631	2,926,300	3,165,000
Operating Transfers Out	996,200	1,591,400	55,000	1,395,000
Operating Contingency	-	-	795,000	1,041,000
Debt Service	710,242	578,778	448,700	449,000
Ending Fund Balance	-	-	4,225,000	4,164,000
<b>Total Requirements</b>	<b>\$ 15,586,547</b>	<b>\$ 17,119,995</b>	<b>\$ 22,394,000</b>	<b>\$ 24,796,000</b>

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

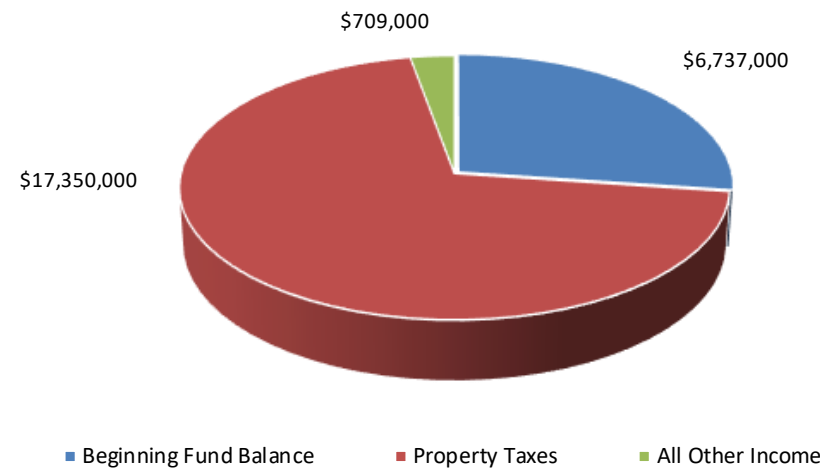
Revenue Appropriations	2023/24					
	2020/21 Actual	2021/22 Actual	2022/23 Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Beginning Fund Balance	\$ 5,933,412.80	\$ 6,576,055.27	\$ 5,681,000	\$ 6,175,000	\$ 6,175,000	\$ 6,737,000
Taxes; Current	14,588,632.54	15,294,618.24	15,900,000	17,000,000	17,000,000	17,000,000
Taxes; Prior	814,984.48	287,493.04	350,000	350,000	350,000	350,000
Interest Earnings	101,243.07	68,655.63	120,000	300,000	300,000	300,000
Workers' Comp Refund & Reimb	12,594.12	9,865.36	10,000	5,000	5,000	5,000
Sale of Equipment	1,997.00	8,204.20	1,000	1,000	1,000	1,000
OSFM Conflagrations	319,535.03	51,917.14	1,000	1,000	1,000	1,000
Fees for Service; Suppression/EMS	0.00	10,650.00	10,000	10,000	10,000	10,000
Fees for Service; Facilities	1,640.00	1,695.00	1,000	1,000	1,000	1,000
Grants; Local, State, Federal	271,733.74	169,131.71	150,000	150,000	150,000	150,000
Contract; General Services	0.00	52,059.08	1,000	70,000	70,000	70,000
Lease Income	7,651.20	160,002.06	12,000	10,000	10,000	10,000
Lease Income; RCC	50,542.80	5,508.04	55,000	55,000	55,000	55,000
Miscellaneous	57,275.58	0.00	100,000	100,000	100,000	100,000
Donations	1,360.00	5,508.04	1,000	5,000	5,000	5,000
Loan Proceeds	0.00	0.00	1,000	1,000	1,000	1,000
<b>TOTAL</b>	<b>\$ 22,162,602.36</b>	<b>\$ 22,701,362.81</b>	<b>\$ 22,394,000</b>	<b>\$ 24,234,000</b>	<b>\$ 24,234,000</b>	<b>\$ 24,796,000</b>

# General Fund

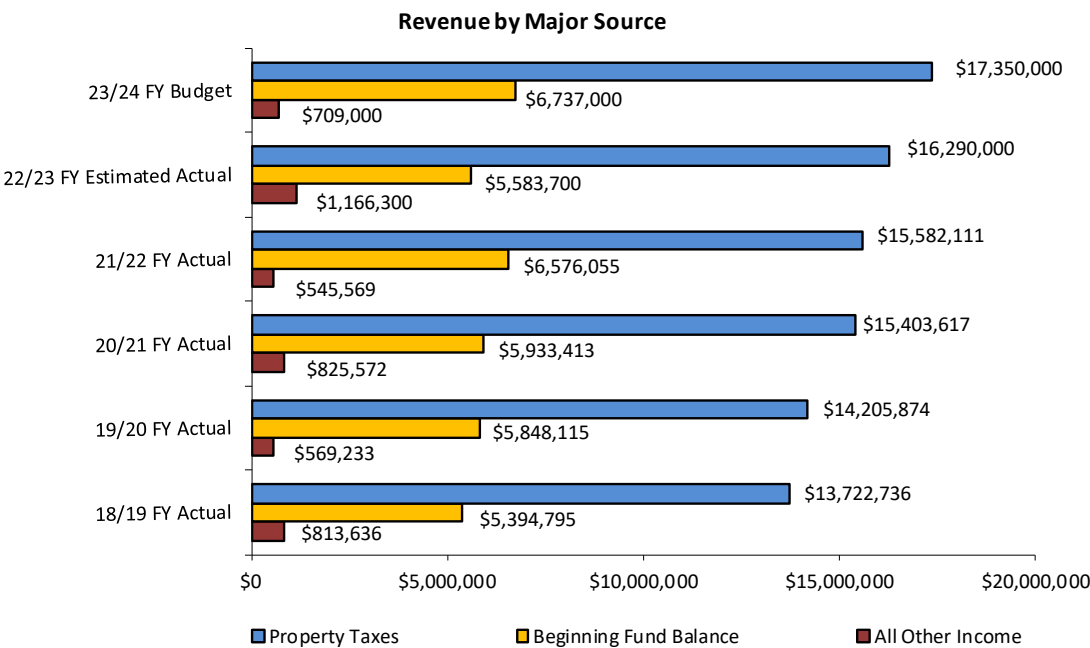
2023/24 Fiscal Year

## REVENUE RESOURCES

2023/24 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.



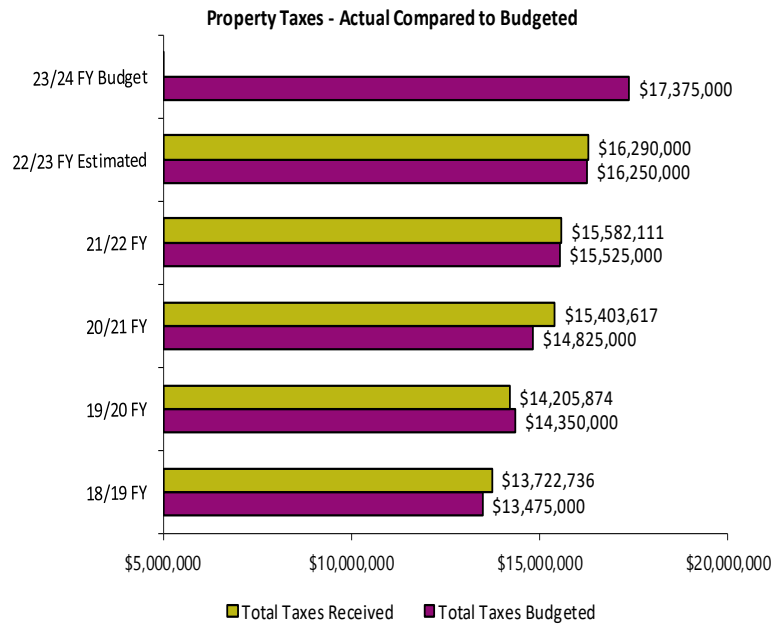
# General Fund

2023/24 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.

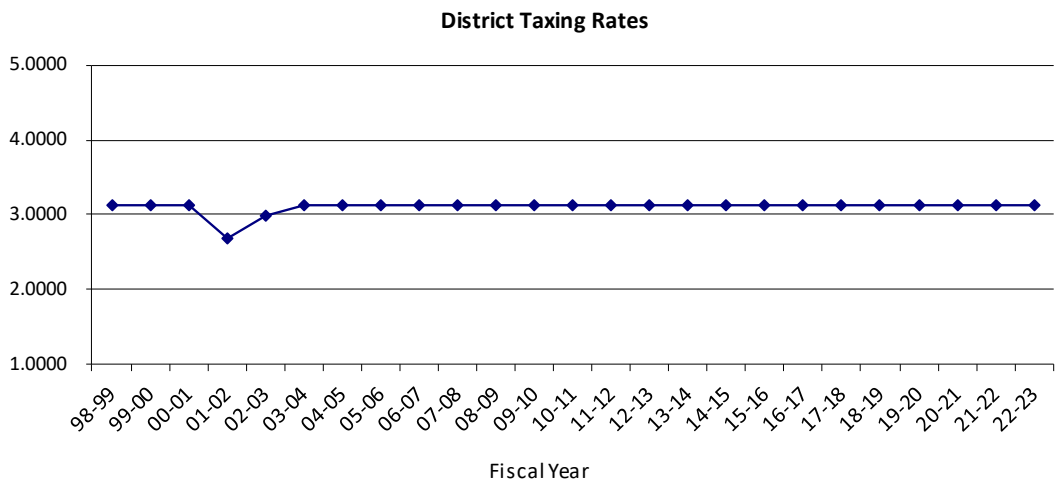
## Property Taxes

Property taxes account for both the current year levy and prior years. Current taxes for the 2023/24 fiscal year are budgeted based on assessed valuation growth projections of 5.5 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 15<sup>th</sup> upon assessment in October. If taxes are paid two-thirds by November 15<sup>th</sup> then a two percent discount would apply with the final one-third due by May 15<sup>th</sup>. If taxes are paid only one-third by November 15<sup>th</sup> then no discount would apply and the second one-third payment would be due by February 15<sup>th</sup> with the final payment due by May 15<sup>th</sup>.



Prior year taxes for the 2023/24 fiscal year are budgeted at two percent of the 2022/23 Jackson County Assessor's certification of \$16,989,554 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 15<sup>th</sup>. Foreclosure proceedings on real property begin when taxes have been delinquent for three years.

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



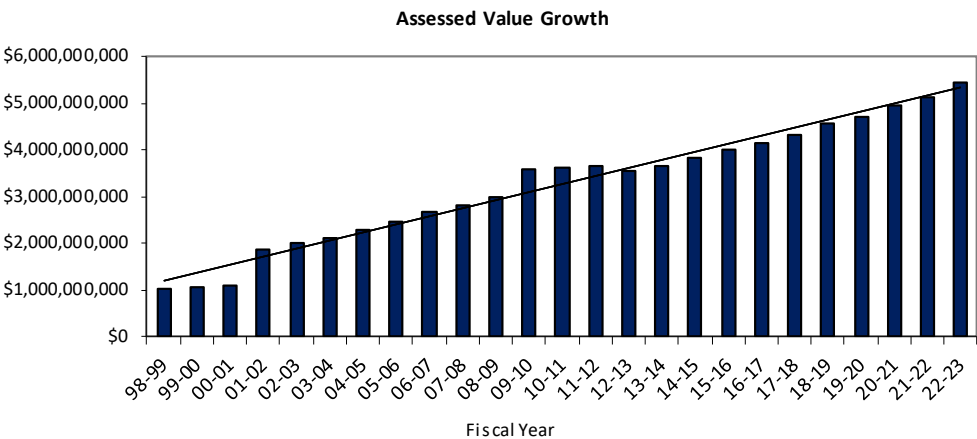
# General Fund

2023/24 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.

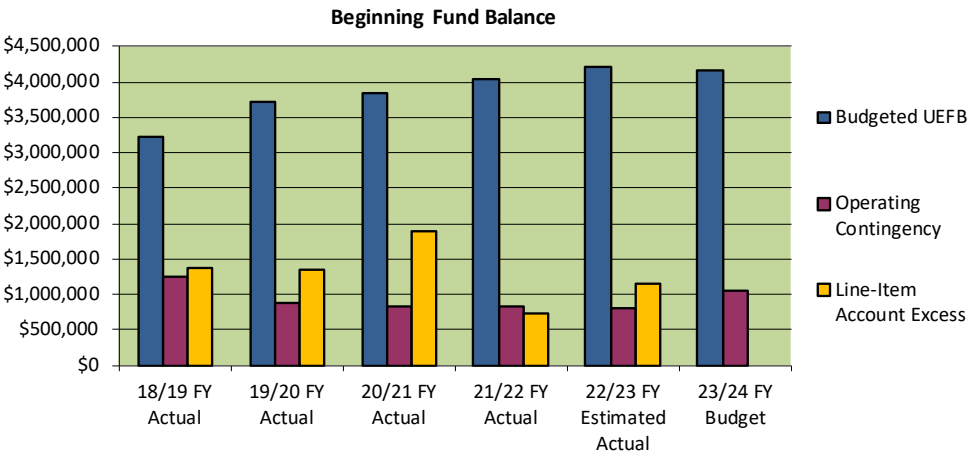
In 2009 the White City Urban Renewal tax increment financing ended, thus resulting in another increase in assessed valuation of \$470,000,000. Tax revenue generated from the frozen assessed value had been diverted to the Urban Renewal Agency since 1996. As of 2013 the City of Central Point has had an established urban renewal district, which diverts tax revenue from the District to fund designated projects within their 30-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.

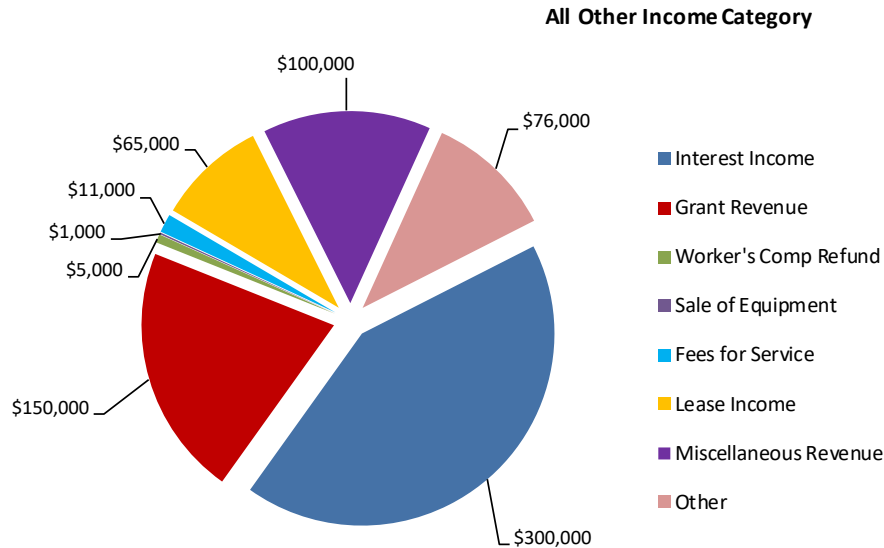


# General Fund

2023/24 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. \$10,000 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

2023/24 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 \$24,234,000.

Requirements	2023/24 Budget	Percent of Budget
Personnel Services	\$ 14,582,000	58.81%
Materials and Services	3,165,000	12.76%
Operating Transfers Out	1,395,000	5.63%
Operating Contingency	1,041,000	4.20%
Debt Service	449,000	1.81%
Ending Fund Balance	4,164,000	16.79%
<b>Total Requirements</b>	<b>\$ 24,796,000</b>	<b>100.00%</b>

Requirements	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24		
				Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Personnel Services	\$ 11,653,352	\$ 12,359,186	\$ 13,944,000	\$ 14,227,000	\$ 14,227,000	\$ 14,582,000
Materials and Services	2,226,753	2,590,631	2,926,300	3,130,000	3,130,000	3,165,000
Transfers Out	996,200	1,591,400	55,000	1,223,000	1,223,000	1,395,000
Operating Contingency	-	-	795,000	1,041,000	1,041,000	1,041,000
Debt Service	710,242	578,778	448,700	449,000	449,000	449,000
Ending Fund Balance	6,576,055	5,583,741	4,225,000	4,164,000	4,164,000	4,164,000
<b>Total Requirements</b>	<b>\$ 22,162,602</b>	<b>\$ 22,703,735</b>	<b>\$ 22,394,000</b>	<b>\$ 24,234,000</b>	<b>\$ 24,234,000</b>	<b>\$ 24,796,000</b>

# General Fund

2023/24Fiscal Year

## SUMMARY OF REQUIREMENTS

2020/21 Actual	2021/22 Actual	2022/23 Budgeted		2023/24 Proposed	2023/24 Approved	2023/24 Adopted	Inc / Dec from Prior Year
<b>Personnel Services</b>							
\$ 6,085,967	\$ 6,451,041	\$ 7,191,900	Salaries	\$ 7,309,000	\$ 7,309,000	\$ 7,563,000	5.16%
641,025	711,556	721,000	Overtime	794,000	794,000	794,000	10.12%
52,379	60,620	75,000	Out of Class	75,000	75,000	75,000	0.00%
511,017	532,986	592,900	Incentives*	577,000	577,000	594,000	0.19%
125,191	112,309	114,000	Holiday Pay	97,000	97,000	97,000	-14.91%
191,053	178,873	135,200	Payouts	107,000	107,000	107,000	-20.86%
35,233	47,468	65,300	Fringe Benefits**	40,000	40,000	50,000	-23.43%
1,536,304	1,623,897	1,825,000	Retirement (PERS)	1,986,500	1,986,500	2,005,500	9.89%
219,856	218,110	270,200	Deferred Comp	279,000	279,000	274,000	1.41%
1,328,495	1,441,240	1,715,500	Insurances	1,751,500	1,751,500	1,781,500	3.85%
272,462	298,236	426,500	VEBA	338,500	338,500	342,500	-19.70%
0.00	0.00	0	Paid Leave Oregon	30,000	30,000	30,000	100.00%
560,028	598,444	680,000	FICA/Medicare	690,500	690,500	690,500	1.54%
94,344	84,405	131,500	Workers Comp	152,000	152,000	178,000	35.36%
\$ 11,653,352	\$ 12,359,186	\$ 13,944,000		\$ 14,227,000	\$ 14,227,000	\$ 14,582,000	4.58%
Percent to Operating Revenue							80.75%
<b>Materials and Services</b>							
\$ 2,226,753	\$ 2,590,631	\$ 2,926,300		\$ 3,130,000	\$ 3,130,000	\$ 3,165,000	8.16%
Percent to Operating Revenue							17.53%
<b>Non-Departmental</b>							
996,200	1,591,400	55,000	Transfer to Capital	1,223,000	1,223,000	1,395,000	2436.36%
0	0	795,000	Contingency	1,041,000	1,041,000	1,041,000	30.94%
710,242	578,778	448,700	Debt Service	449,000	449,000	449,000	0.07%
6,576,055	5,583,741	4,225,000	UEFB	4,164,000	4,164,000	4,164,000	-1.44%
\$ 8,282,497	\$ 7,753,919	\$ 5,523,700		\$ 6,877,000	\$ 6,877,000	\$ 7,049,000	27.61%
<b>\$ 22,162,602</b>	<b>\$ 22,703,735</b>	<b>\$ 22,394,000</b>	<b>Total General Fund Budget</b>	<b>\$ 24,234,000</b>	<b>\$ 24,234,000</b>	<b>\$ 24,796,000</b>	10.73%

\* 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 10.7 percent over the 2022/23 fiscal year or \$2,402,000. With the increase in revenue offset by appropriations, Personnel Services represents an increase of \$638,000 with significant drivers being a three percent cost of living adjustment anticipated for all positions, PERS rate changes, and some new positions (community care supervisor and training assistant) offset by a reduction of some positions within the Response Services Department. Also added is \$200,000 allocated towards a new hazardous fuels mitigation team. This program and the personnel associated with it will be developed within the first six months of this fiscal year.

Materials and services are budgeted to increase 8.2 percent or \$238,700 with focus on updating equipment, technology, risk reduction, and outreach efforts.

The transfer to the Capital Fund is budgeted to increase by \$1,340,000. Debt Service is budgeted in accordance with the payment schedule and Operating Contingency and Unappropriated Ending Fund Balance (UEFB) are budgeted based on policy commitments.

# General Fund

2023/24 Fiscal Year

## PERSONNEL AND STAFFING CHANGES

### **2022/23 Fiscal Year in Review**

During this past fiscal year, organizational changes occurred with respect to the Fire Chief resigning and transitioning into a temporary Chief Executive Officer role while the District promoted the Deputy Chief of Operations to Fire Chief. This overlap provided mentoring during the transition period.

The District decided not to fill the administrative battalion chief position budgeted under Operations/Response Services due to a shift in focus within the department.

The training battalion chief vacancy was promoted from within to fill a vacancy that occurred in early 2022. The position became vacant again in April of 2023. The District has re-evaluated this position and will be reclassifying it back up to a Division Chief level moving forward into the new fiscal year.

In concert with the new Fire Chief's evaluation of the organization, a new position, Data Services Specialist, was developed mid-year to provide GIS, mapping, and data analytics for the District. A supplemental budget process in January of 2023 established and funded this position for the remainder of the fiscal year (six months).

The District administered a shift and administrative battalion chief promotional exam in August of 2022 resulting in the promotion of one captain to shift battalion. A firefighter entrance exam in November of 2022 was administered under the Civil Service rules which resulted in a register of 33 qualified candidates. This register is valid for 12 months. In May of 2023, the District will administer an internal engineer promotional exam for an updated register to be valid for 24 months.

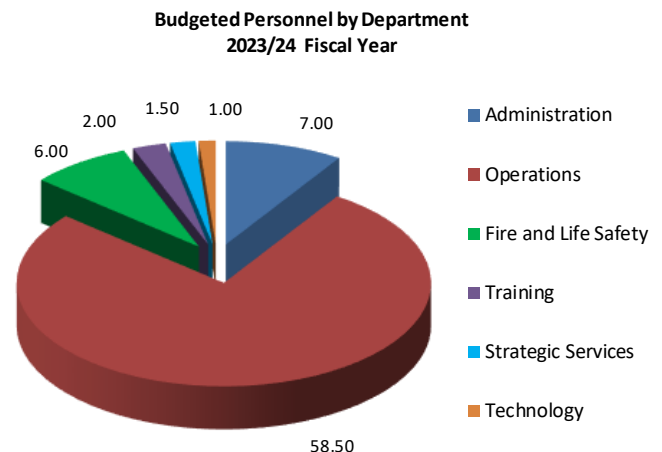
### **2023/24 Fiscal Year**

The District will be introducing two new positions this fiscal year. Under Response Services, a community care supervisor will be implemented to provide oversight for that team and help in building out that growing program. Under Training, a training assistant position will be implemented to support the division chief and the buildout of that program. This position will also help support maintenance of the training grounds and external contracts.

Under Administration, Risk Reduction, Support Services, and Technology no new positions are being introduced that are in addition to, or different from, the reorganization that occurred in early 2023. All departments remain focused and committed to the mission and support budgeted programs with respective personnel.

In November of 2023 the District will administer another firefighter entrance exam and in May of 2024 the District will administer a captain 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.

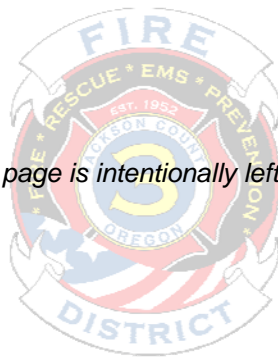


# General Fund

2023/24 Fiscal Year

PERSONNEL ALLOCATION	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
<b>Administration</b>				
Fire Chief	1.00	1.00	1.00	1.00
Chief Executive Officer	0.00	0.00	0.50	0.00
Chief Administrative Officer	1.00	1.00	1.00	1.00
People Services Administrator	0.00	0.50	1.00	1.00
Data Services Specialist	0.00	0.00	0.50	1.00
Community Engagement Coordinator	0.50	1.00	1.00	1.00
Executive Assistant	1.00	1.00	1.00	1.00
Finance Assistant	1.00	1.00	1.00	1.00
<b>Total</b>	<b>4.50</b>	<b>5.50</b>	<b>7.00</b>	<b>7.00</b>
<b>Reponse Services</b>				
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	1.00	0.00
Fire Captain	12.00	12.00	12.00	12.00
Fire Engineer	12.00	12.00	12.00	12.00
Firefighter	20.00	21.00	25.00	24.00
Community EMT	2.00	2.00	2.00	2.00
Community Paramedic	2.00	2.00	2.00	2.00
Community Care Supervisor	0.00	0.00	0.00	1.00
Administrative Assistant	1.00	1.00	1.00	1.00
Recruitment and Retention Coordinator	0.15	0.50	0.50	0.50
<b>Total</b>	<b>53.15</b>	<b>54.50</b>	<b>59.50</b>	<b>58.50</b>
<b>Risk Reduction</b>				
Division Chief / Fire Marshal	1.00	1.00	1.00	1.00
Deputy Fire Marshal 1	0.00	2.00	2.00	1.00
Deputy Fire Marshal 2	0.00	0.00	0.00	1.00
Deputy Fire Marshal 3	2.00	2.00	1.00	1.00
Risk Reduction Captain	0.00	0.00	0.00	1.00
Administrative Assistant	0.00	0.00	0.00	1.00
<b>Total</b>	<b>3.00</b>	<b>5.00</b>	<b>4.00</b>	<b>6.00</b>
<b>Training</b>				
Division Chief of Training	1.00	1.00	0.00	1.00
Battalion Chief of Training	0.00	0.00	1.00	0.00
Training Assistant	0.00	0.00	0.00	1.00
Administrative Assistant	1.00	0.50	0.00	0.00
<b>Total</b>	<b>2.00</b>	<b>1.50</b>	<b>1.00</b>	<b>2.00</b>
<b>Support Services</b>				
Deputy Chief	1.00	1.00	1.00	0.00
Risk Reduction Captain	1.00	1.00	1.00	0.00
Facilities Technician	1.00	1.00	1.00	1.00
Administrative Assistant	1.00	1.00	1.00	0.00
Logistics Support Technician	0.00	0.50	0.50	0.50
<b>Total</b>	<b>4.00</b>	<b>4.50</b>	<b>4.50</b>	<b>1.50</b>
<b>Technology</b>				
Information Technology Administrator	1.00	1.00	1.00	1.00
<b>Total</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>
<b>Organizational Total</b>	<b>67.65</b>	<b>72.00</b>	<b>77.00</b>	<b>76.00</b>

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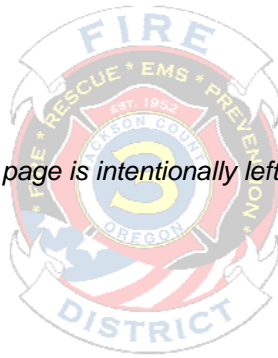
# Administration

## FIRE DISTRICT 3



2023/24  
Fiscal Year Budget

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# Administration Department

2023/24 Fiscal Year

## DEPARTMENT DESCRIPTION

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

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

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

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

## BUDGET SUMMARY

Expenditures	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Personnel Services	\$739,129	\$862,358	\$1,256,000	\$1,258,000
Materials and Services	\$713,190	\$764,294	\$910,000	\$950,000
	<b>\$1,452,320</b>	<b>\$1,626,651</b>	<b>\$2,166,000</b>	<b>\$2,208,000</b>

### Budget Comparison

2023/24 Budget



2022/23 Budget



2021/22 Actual



2020/21 Actual



## PERSONNEL SUMMARY

Position	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Fire Chief	1.00	1.00	1.00	1.00
Chief Executive Officer	0.00	0.00	0.50	0.00
Chief Administrative Officer	1.00	1.00	1.00	1.00
People Services Administrator	0.00	0.50	1.00	1.00
Data Services Specialist	0.00	0.00	0.50	1.00
Community Engagement Coordinator	0.50	1.00	1.00	1.00
Executive Assistant	1.00	1.00	1.00	1.00
Finance Assistant	1.00	1.00	1.00	1.00
<b>Total</b>	<b>4.50</b>	<b>5.50</b>	<b>7.00</b>	<b>7.00</b>

# Administration Department

2023/24 Fiscal Year

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase slightly by 0.2 percent or \$2,000 over the prior fiscal year. During the 2022/23 fiscal year, organizational changes occurred at the Fire Chief level resulting in this individual transitioning to more of a Chief Executive Officer (CEO) position for three months. With the resignation of the Fire Chief, some benefit accounts were adjusted to reflect corresponding payouts. A new Fire Chief was promoted from within the organization. In addition, a data services specialist (DSS) position was developed and filled internally to focus on external and internal reporting, GIS, and data analytics.

With the offset of no longer budgeting for the CEO position, coupled with the full-year impact of the DSS position, cost of living adjustments, pension plan rate changes, and increases in health insurance, the net difference results in a slight increase across the Personnel Services classification.

The overall Materials and Services classification is budgeted to increase 4.4 percent or \$40,000. Significant factors include increases across accounts *60270-000; Contractual Services, 60370-000; Property and Casualty Insurance, and 60490-000; Hiring Processes*, offset by some small reductions across other accounts. This budget year also has identified \$75,000 in pass-through funds to the 911 dispatch center for a fire quality assurance software program.

## 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).
- Navigated through the new state mandated Paid Leave Oregon passed by the Oregon Legislature; applied and was granted approval by the state for operating an equivalent plan which provides paid leave benefits to employees experiencing long-term medical issues.
- Promoted from within the District's ninth fire chief, Mike Hussey.
- Administered a Civil Service battalion chief promotional process and an entry level firefighter testing process.
- Recruited and hired two administrative assistants to support the risk reduction team and the response services.
- Evaluated the organizational structure of the District and developed and implemented a new organizational chart. Established and hired for a new position, Data Services Specialist.
- Administered a hiring process and the subsequent onboarding of three new firefighters to fill vacancies.
- Distributed an annual newsletter to over 18,500 District households.

## DEPARTMENT MEASUREMENTS AND TARGETS

<i>Types of Transactions (Output Measures)</i>	<i>2019/20 Actual</i>	<i>2020/21 Actual</i>	<i>2021/22 Actual</i>	<i>2022/23 Estimated</i>	<i>2023/24 Projected</i>
<i>Accounts Payable Transactions</i>	1,457	1,357	1,416	1,200	1,300
<i>Payroll Disbursements (includes ACH)</i>	1,628	1,685	1,876	1,900	2,000
<i>Purchase Orders Issued</i>	1,126	1,082	997	1,000	1,000
<i>Cash Receipts Processed</i>	102	103	117	100	100

# Administration Department

2023/24 Fiscal Year

<i>Effectiveness Measures</i>	<i>2019/20 Actual</i>	<i>2020/21 Actual</i>	<i>2021/22 Actual</i>	<i>2022/23 Projected</i>	<i>2023/24 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 24 percent of operating revenue to be set aside as unappropriated ending fund balance; percent of operating expenditures to operating revenue remains below 100 percent. Personnel Services remains below maximum threshold of 80 percent of operating revenue.
- Ensure contingency levels are in compliance with financial policy.  
Measured By: Continued budgeting of no less than six percent of annual operating revenue into contingency; during budget years of lower assessed valuation growth, increase levels to nine percent.
- Continue to prepare award winning budget documents and 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>2019/20 Actual</i>	<i>2020/21 Actual</i>	<i>2021/22 Actual</i>	<i>2022/23 Projected</i>	<i>2023/24 Projected</i>
<b><i>Financial Reporting</i></b>					
<i>Provide accurate financial reports on a monthly basis at Board Meetings</i>	100%	100%	100%	100%	100%
<b><i>Sound Audit Findings</i></b>					
<i>Number of audit findings</i>	None	None	None	None	None
<b><i>Investing</i></b>					
<i>Invest District surplus funds in secure holdings at all times</i>	100% in LGIP	100% in LGIP	100% in LGIP	100% in LGIP	100% in LGIP
<b><i>Workers' Compensation</i></b>					
<i>Encourage safe work practices to maintain an "Experience Modifier" of below 1.0</i>	.69	.69	.63	.83	.85

# Administration Department

2023/24 Fiscal Year

## 2023/24 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	Ongoing	December 31, 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 are necessary	Ongoing	June 30, 2023
Goal 2.2		Evolve service delivery models to better focus resources	
Objective		Keep up with technology to support communities	
Task	Explore new ways in which to enhance services through the use of the District website and the Community Connect technology platform	Ongoing	December 31, 2023

# Administration Department

2023/24 Fiscal Year

<b>Goal 2.3</b>	<b>Maintain fiscal responsibility</b>		
<b>Objective</b>	Assess capital needs and plan accordingly		
<b>Task</b>	Maintain a 10-year capital improvement plan that reflects targeted capital replacement, funding mechanisms, and financial sustainability modeling	Ongoing	June 30, 2023
<b>Objective</b>	Evaluate additional revenue sources beyond tax dollars		
<b>Task</b>	Evaluate expanding revenue sources like fees for service and capitalize on federal and state grant opportunities	Ongoing	December 31, 2023
<b>Objective</b>	Ensure appropriateness of compensation packages		
<b>Task</b>	Conduct non-bargaining wage and benefit comparisons with like agencies to determine scale and scope; ensure bargaining wages are within comparables during years of labor negotiations	Ongoing	December 31, 2023

## Initiative 3

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

<b>Goal 3.2</b>	<b>Enhance internal communication</b>		
<b>Objective</b>	Improve the effectiveness of internal communication opportunities		
<b>Task</b>	Collaborate on effective communication strategies and delivery methods that will promote interest and engagement	Ongoing	December 31, 2023
<b>Task</b>	Set organizational direction through clear, direct communication that is specific and appropriate throughout the workforce	Ongoing	December 31, 2023
<b>Objective</b>	Increase the exposure of leadership to internal teams and line staff		
<b>Task</b>	Establish productive methods and opportunities for collaboration and feedback through engagement of workforce on a targeted basis	Completed Date:	December 2022
<b>Objective</b>	Enhance team dynamics among all functional areas		
<b>Task</b>	Engage in teambuilding exercises and encourage collaborative interaction	Ongoing	December 31, 2023
<b>Task</b>	Restore in-person activities, trainings, and recognition ceremonies	Completed Date:	June 2021
<b>Objective</b>	Create opportunities for line staff to engage with management		
<b>Task</b>	Continue holding labor/management breakfast meetings	Ongoing	June 30, 2023
<b>Task</b>	Analyze implementing theme-based meeting sessions with executive leadership	Ongoing	June 30, 2023

## Initiative 4

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

<b>Goal 4.1</b>	<b>Increase the ways in which we engage with the communities we serve</b>		
<b>Objective</b>	Enhance public outreach and education opportunities		
<b>Task</b>	Re-engage with local media, invite them to training events, and demonstrate what we are doing through local media outlets	Ongoing	December 31, 2023

# Administration Department

2023/24 Fiscal Year

<b>Goal 4.2</b>	<b>Increase effectiveness of virtual presence</b>		
<b>Objective</b>	Expand the use of social media platforms to include public education		
<b>Task</b>	Develop a public education page on District website	Ongoing	December 31, 2023
<b>Task</b>	Develop public education releases utilizing Twitter and Facebook	Completed Date:	December 2021
<b>Objective</b>	Offer more web-based information to the public		
<b>Task</b>	Enhance District website to include a resources and informational page	Ongoing	December 31, 2023
<b>Objective</b>	Increase District brand recognition within the community		
<b>Task</b>	Evaluate methods of advertising and marketing the services the District provides to the community	Ongoing	December 31, 2023
<b>Task</b>	Develop a formal communications plan (internal and external)	Ongoing	December 31, 2023

## Initiative 5

Develop and strengthen collaborative efforts and strategic partnerships.

<b>Goal 5.1</b>	<b>Maintain and enhance partnerships to improve regional preparedness and response to emergency events</b>		
<b>Objective</b>	Develop and enhance collaboration with other partners		
<b>Task</b>	Be open and receptive to opportunities that allow for collaboration with partner agencies that will increase efficiencies and reduce redundancies	Ongoing	December 31, 2023
<b>Goal 5.2</b>	<b>Maintain and enhance partnerships to improve service delivery and organizational effectiveness</b>		
<b>Objective</b>	Conduct shared strategic planning		
<b>Task</b>	Look for opportunities to participate in neighboring partners strategic planning processes; continue to invite partners to participate in District planning processes	Ongoing	December 31, 2023

## Initiative 6

Commit to excellence through innovation.

<b>Goal 6.2</b>	<b>Build organizational capacity and excellence</b>		
<b>Objective</b>	Continue to recruit and retain outstanding staff		
<b>Task</b>	Evaluate recruitment and hiring processes in light of pandemic and generational changes and adjust processes accordingly	Completed Date:	March 2022
<b>Task</b>	Evaluate diversity and inclusion methods in the hiring process	Ongoing	December 31, 2023
<b>Task</b>	Participate in career fairs, mentoring, and career marketing	Ongoing	December 31, 2023
<b>Objective</b>	Increase accountability at all levels		
<b>Task</b>	Establish clear expectations and develop accountability measurements for all positions	Target Completion Date:	December 31, 2023
<b>Objective</b>	Define and embrace norms of the culture throughout the organization		
<b>Task</b>	Conduct a cultural awareness study and encourage cultural diversity	Target Completion Date:	June 30, 2023

# Administration Department

2023/24 Fiscal Year

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2020/21 FY	2021/22 FY	2022/23 FY	2023/2024		
			Adopted	Proposed By	Approved By	Adopted By
Description	Actual	Actual	Budget	Budget Officer	Budget Committee	Governing Body
<b>Personnel Services</b>						
Salaries	\$438,994.00	\$519,550.26	\$664,200	\$689,000	\$689,000	\$691,000
Overtime	0.00	0.00	1,000	1,000	1,000	1,000
Incentives	36,627.26	41,066.15	49,300	49,000	49,000	48,000
Payouts	24,421.44	19,004.30	40,000	28,000	28,000	28,000
Retirement (PERS)	87,507.66	99,596.37	137,000	155,000	155,000	155,000
Unemployment Insurance	0.00	4,381.91	15,000	1,000	1,000	1,000
ER Deferred Comp Contrib	32,101.00	31,920.00	47,000	49,000	49,000	50,000
Health and Life Insurance	66,404.81	83,029.20	123,500	150,000	150,000	160,000
Paid Leave Oregon Tax	0.00	0.00	0	30,000	30,000	30,000
HRA-VEBA Contribution	18,221.40	22,451.20	123,000	31,000	31,000	31,000
FICA and Medicare PR Taxes	34,557.30	41,161.93	55,000	59,000	59,000	59,000
Workers' Comp Insurance	294.44	196.40	1,000	4,000	4,000	4,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$739,129.31</b>	<b>\$862,357.72</b>	<b>\$1,256,000</b>	<b>\$1,246,000</b>	<b>\$1,246,000</b>	<b>\$1,258,000</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	\$597.00	\$582.00	\$1,000	\$1,000	\$1,000	\$1,000
Printing	11,454.65	11,837.57	18,000	18,000	18,000	18,000
Supplies; Office	6,315.16	4,828.40	10,000	10,000	10,000	10,000
Supplies; Administrative	21,848.56	26,588.25	40,000	32,000	32,000	32,000
Licenses and Fees	8,375.44	5,633.42	10,000	8,000	8,000	8,000
Contractual/Professional Services	520,522.29	561,163.47	660,000	690,000	690,000	696,000
Property and Casualty Insurance	0.00	0.00	10,000	10,000	10,000	10,000
Community Engagement	102,016.00	101,330.00	106,000	115,000	115,000	115,000
Mileage Reimbursements	625.48	642.48	1,000	1,000	1,000	1,000
Membership Dues	9,144.00	9,311.00	10,000	10,000	10,000	10,000
Books and Subscriptions	2,954.51	2,988.29	2,000	2,000	2,000	2,000
Advertising	2,493.70	2,993.03	12,000	12,000	12,000	12,000
Hiring Processes, CS, Backgrounds	18,371.81	31,767.50	20,000	25,000	25,000	25,000
Postage and Shipping	8,471.69	4,628.12	10,000	10,000	10,000	10,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$713,190.29</b>	<b>\$764,293.53</b>	<b>\$910,000</b>	<b>\$944,000</b>	<b>\$944,000</b>	<b>\$950,000</b>
<b>TOTAL ADMINISTRATION</b>	<b>\$1,452,319.60</b>	<b>\$1,626,651.25</b>	<b>\$2,166,000</b>	<b>\$2,190,000</b>	<b>\$2,190,000</b>	<b>\$2,208,000</b>

# Administration Department

2023/24 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 Years of service awards and annual banquet Miscellaneous office equipment, historical preservation, photo board	\$ 32,000 15,000 12,000 5,000
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	\$ 8,000
60270-000	Contractual/Professional Services..... 911 dispatch services contract to ECSO Fire Pro QA program for ECSO ( <i>pass-through expenditure</i> ) General legal counsel Financial audit and filing expenses Lobbyist EMS physician supervisor contract Employee assistance programs Consultation services Civil Service Chief Examiner	\$ 696,000 461,000 75,000 25,000 15,000 12,000 10,000 33,000 60,000 5,000
60280-000	Community Engagement..... Expenses related to community engagement and public education	\$ 10,000
60370-000	Property and Casualty Insurance.....	\$ 115,000
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

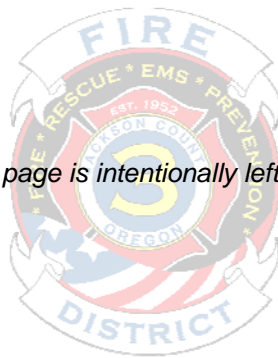
# Administration Department

2023/24 Fiscal Year

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

Account	Description	Account Total
60430-001	<b>Advertising.....</b> Advertising for Board meetings, budget hearings, community events and engagement, public service announcements, and outreach through the Chamber of Commerce and Expo Center	\$ 12,000
60490-000	<b>Hiring Processes, Civil Service, Backgrounds.....</b> Includes entry level hiring processes and promotional exams, expenses for Civil Service meetings, and all expenses related to pre-employment background evaluations	\$ 25,000
60491-000	<b>Postage and Shipping.....</b>	\$ 10,000
TOTAL MATERIALS AND SERVICES		<u>\$ 950,000</u>

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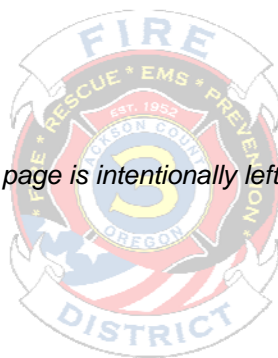
# Response Services

## FIRE DISTRICT 3



2023/24  
Fiscal Year Budget

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# Response Services Department

2023/24 Fiscal Year

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## **DEPARTMENT DESCRIPTION**

This department formally called “Operations” has been renamed this fiscal year to “Response Services” to better represent all the emergent types of calls for services. The mission, however, remains the same which is to protect life and property through emergency response. The 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 full-time students 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 associate 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.

# Response Services Department

2023/24 Fiscal Year

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## **DISTRICT STATIONS**

### **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 2,147 requests for service in the Central Point station in 2022.



### **Scenic (SS) Station 21 – Career Staffed**

The Scenic station is located at 1909 Scenic Avenue and houses Engine Company 21. There were 1,415 requests for service in the Scenic station in 2022.



### **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 2,213 requests for service in the White City FMZ in 2022.



### **Eagle Point (EP) Station 23 – Career Staffed**

The Eagle Point station is located at 213 Loto Street and houses Engine Company 23. There were 1,319 requests for service in the Eagle Point FMZ in 2022.



### **Agate Lake (AL) Station 24 – Volunteer Staffed**

The Agate Lake station is located at 880 East Antelope Road. Career personnel from White City and/or the Eagle Point stations may respond to supplement volunteer resident response. There were 125 requests for service in the Agate Lake FMZ in 2022.



### **Dodge Bridge (DB) Station 25 – Volunteer Staffed**

The Dodge Bridge station is located at 60 Rogue River Drive. Career personnel from the White City and/or Eagle Point stations may respond to supplement volunteer resident response. There were 296 requests for service in the Dodge Bridge FMZ in 2022.



# Response Services Department

2023/24 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 313 requests for service in the Sams Valley FMZ in 2022.



## Gold Hill (GH) Station 27 – Volunteer Staffed

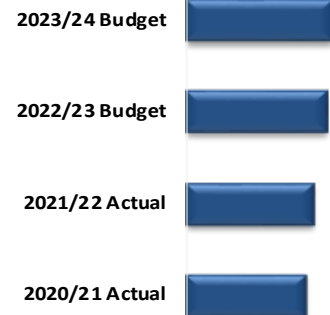
The Gold Hill station is located at 299 Access Road. Career personnel from the Central Point station may respond to supplement volunteer resident response. There were 518 requests for service in the Gold Hill FMZ in 2022.



## BUDGET SUMMARY

Expenditures	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Personnel Services	\$9,128,177	\$9,615,468	\$10,735,600	\$11,195,000
Materials and Services	\$312,127	\$367,951	\$390,500	\$527,000
	<b>\$9,440,305</b>	<b>\$9,983,419</b>	<b>\$11,126,100</b>	<b>\$11,722,000</b>

## Budget Comparison



## PERSONNEL SUMMARY

Position	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Deputy Chief	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	1.00	0.00
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	21.00	25.00	24.00
Community EMT (IAFF Local 1817)	2.00	2.00	2.00	2.00
Community Paramedic (IAFF Local 1817)	2.00	2.00	2.00	2.00
Community Care Supervisor (IAFF Local 1817)	0.00	0.00	0.00	1.00
Administrative Assistant	1.00	1.00	1.00	1.00
Recruitment and Retention Coordinator	0.15	0.50	0.50	0.50
<b>Total</b>	<b>53.15</b>	<b>54.50</b>	<b>59.50</b>	<b>58.50</b>

# Response Services Department

2023/24 Fiscal Year

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## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 4.3 percent or \$459,400 over the prior fiscal year. A significant factor impacting this classification is the hiring of an additional firefighter position to bring the permanent firefighter FTE count to 24 from 21. The District has been operating this past fiscal year with two extra firefighter positions, or 23 FTE's. Adding this capacity on a permanent basis strengthens the District's ability to staff urban interface response engines during the summer months, helps to reduce overtime costs, and provides depth when retirements occur and new recruits are in training. A mid-level firefighter position has a budget impact on average of \$155,000. Another significant factor is a new supervisory position to oversee and manage the community care program. The budget impact for this new position is \$138,000.

The District changed focus mid-fiscal year in 2022 and decided not to hire and staff the administrative battalion chief position. This was budgeted as a new position at the time, however organizational changes led to rethinking the functions and responsibilities of this position.

Other factors impacting Personnel Services are salary and benefit adjustments due to cost of living, pension plan rate changes, and increases in health insurance.

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 35 percent or \$136,500. One factor for the increase is updating all structural nozzles and fire hose. This budget also supports the routine expenditures and supplies needed to maintain safe operations and program initiatives factoring in inflationary increases. Some other specialty programs identified include the routine purchase of structural turnouts (PPE) and fire hydrant and hose testing maintenance equipment.

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 the bid, purchasing, and pre-construction sequences for three new Type 6 wildland engines.
- Received new Battalion Chief vehicle and placed in service.
- Launched a pilot program during the months of fire season by staffing a dedicated Wildland-Urban Interface Response Unit.
- Purchased and placed in service six additional automatic external defibrillators to expand the program's capabilities.
- Focused recruiting and training efforts related to increasing our volunteer firefighter capacity.
- Purchased and deployed a comprehensive pediatric resuscitation system compatible with regional cooperators.
- Continued to provide reliable and efficient emergency response services to District patrons.

# Response Services Department

2023/24 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.

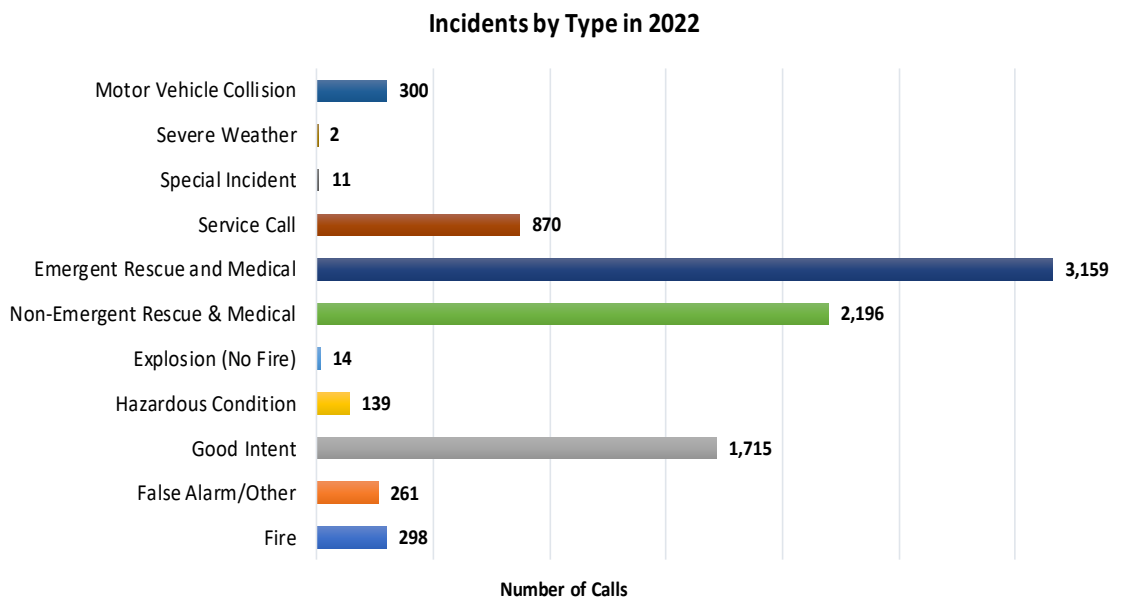
**Non-Emergent Rescue/Medical:** An incident where seconds will not significantly impact the outcome of the call. Crews will normally respond "Code 1" to these calls, meaning no lights and sirens and regular speed limit.

**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.



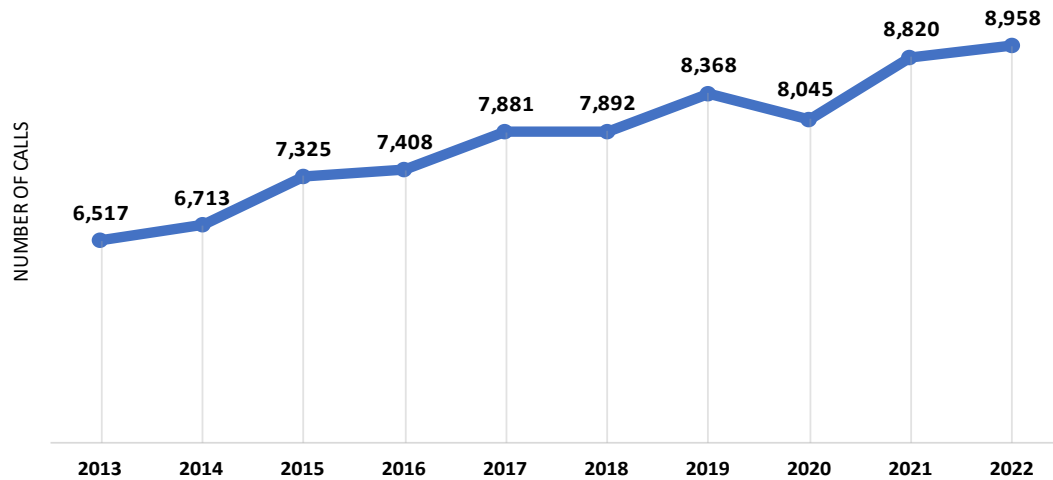
# Response Services Department

2023/24 Fiscal Year

<i>Types of Emergent Incidents (Outputs)</i>	<i>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Actual</i>	<i>2022 Actual</i>	<i>2023 Target</i>
<i>Fire</i>	232	276	326	298	312
<i>Explosion (No Fire)</i>	1	14	18	14	15
<i>Emergent Rescue/Medical</i>	3,339	1,817	1,943	3,159	3,307
<i>Non-Emergent Rescue/Medical</i>	1,324	2,692	3,294	2,196	2,299
<i>Hazardous Condition (No Fire)</i>	146	14,26	119	139	146
<i>Motor Vehicle Collision</i>	460	427	365	300	314
<i>Severe Weather/Natural Disaster</i>	4	1	2	2	2
<i>Special Incident</i>	6	2	8	11	12
<i>Service Call</i>	694	823	962	870	911
<i>False Alarm / Other</i>	262	236	235	261	273
<i>Good Intent</i>	1,900	1,615	1,548	1,715	1,795
<b>Total</b>	<b>8,368</b>	<b>8,045</b>	<b>8,820</b>	<b>8,965</b>	<b>9,386</b>

Response to dispatched incidents was down in 2020 due to the Covid-19 pandemic.  
Target based on average 10-year growth of 4.68% of all responses.

## Incidents Over the Last 10 Calendar Years



These responses include all types of incidents where our citizens call 911 for help, including mutual aid calls to other agencies.

# Response Services Department

2023/24 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 to increase firefighter staffing or where to build future fire stations, are two examples of how the District uses trends relating to increases in incident activity to plan for future growth and development. The number of incidents has been increasing on average 4.68 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.

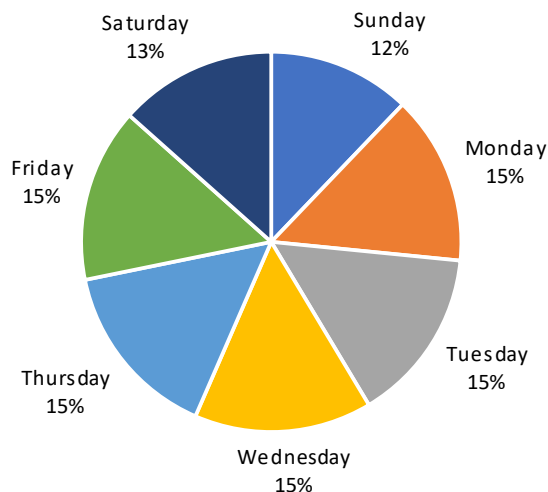
The following chart depicts where emergency incidents have occurred over the past four years based on the response area. Stations located in Central Point (Front Street and Scenic), Eagle Point, and White City respond with career engine companies and the other locations respond with volunteer engine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

<i><b>Number of Incidents by Response Area (Outputs)</b></i>	<i><b>2019 Actual</b></i>	<i><b>2020 Actual</b></i>	<i><b>2021 Actual</b></i>	<i><b>2022 Actual</b></i>
<i>Agate Lake</i>	62	109	110	125
<i>Central Point</i>	3,303	3,184	3,384	2,147
<i>Dodge Bridge</i>	373	326	339	296
<i>Eagle Point</i>	1,370	1,216	1,357	1,319
<i>Gold Hill</i>	451	524	518	518
<i>Sams Valley</i>	274	264	316	313
<i>Scenic</i>	0	0	0	1,415
<i>White City</i>	1,853	1,933	2,250	2,213
<i>Mutual Aid Calls</i>	682	489	546	612
<b>Total</b>	<b>8,368</b>	<b>8,045</b>	<b>8,820</b>	<b>8,958</b>

## 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.

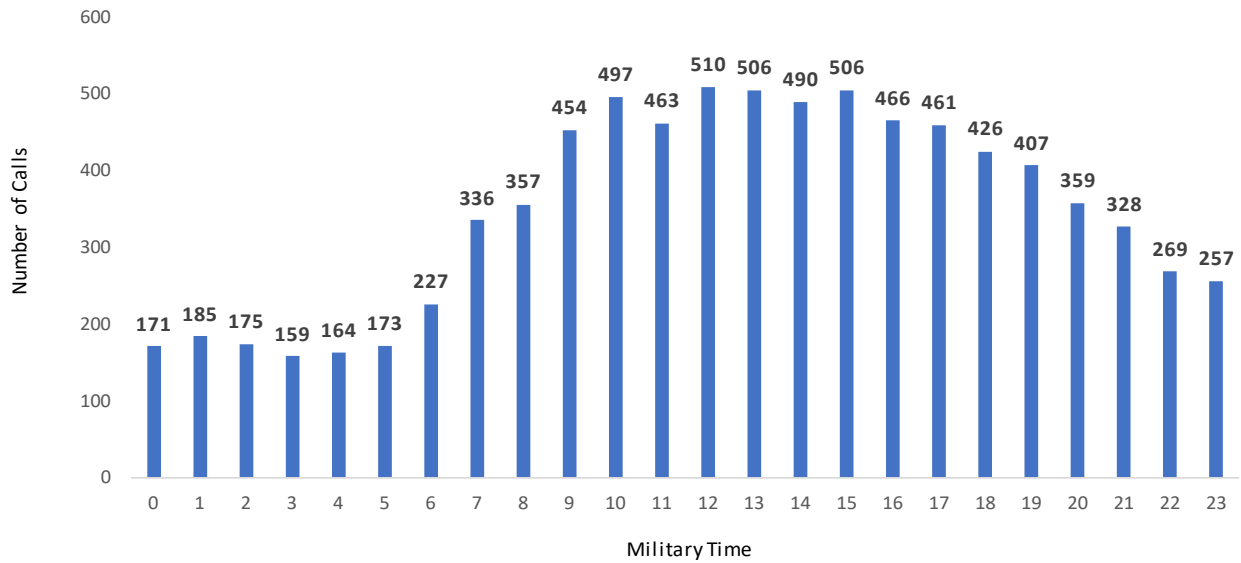
**Daily Incident Volume 2022**



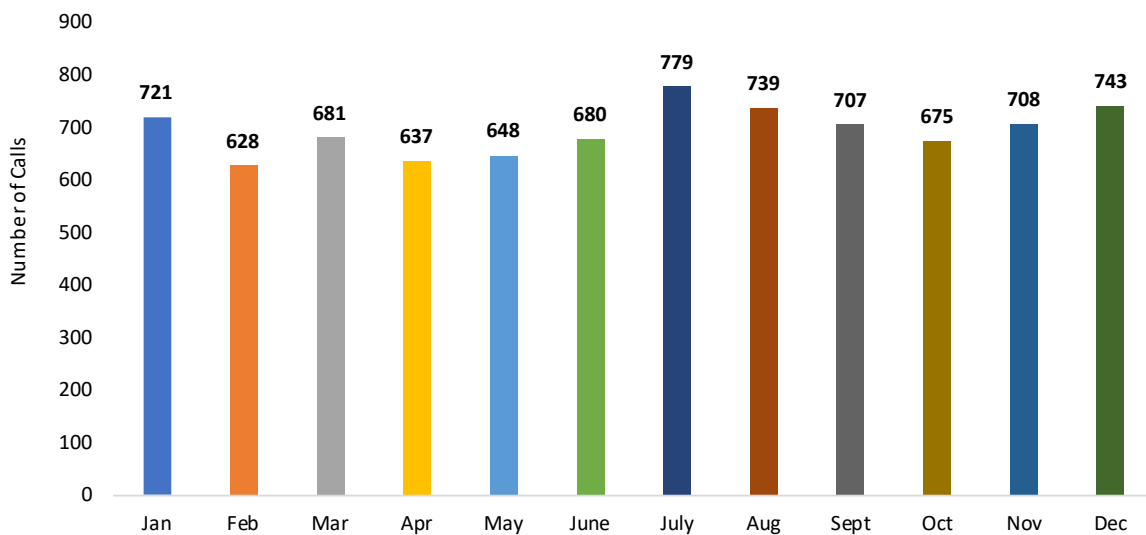
# Response Services Department

2023/24 Fiscal Year

**Calls for Service by Hour 2022**



**Monthly Incident Volume 2022**



*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.*

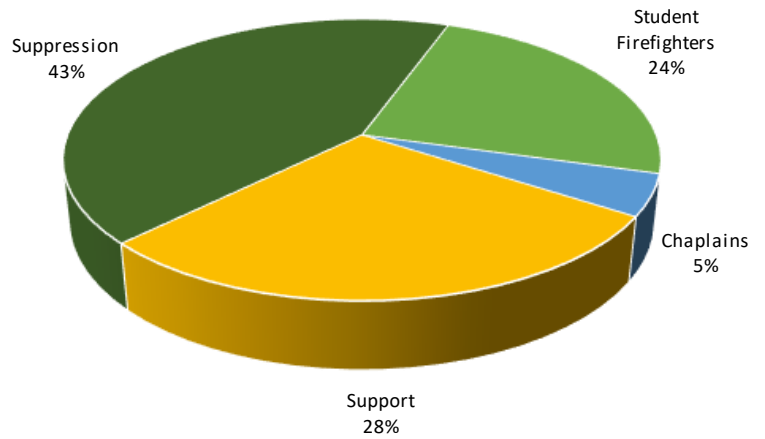
# Response Services Department

2023/24 Fiscal Year

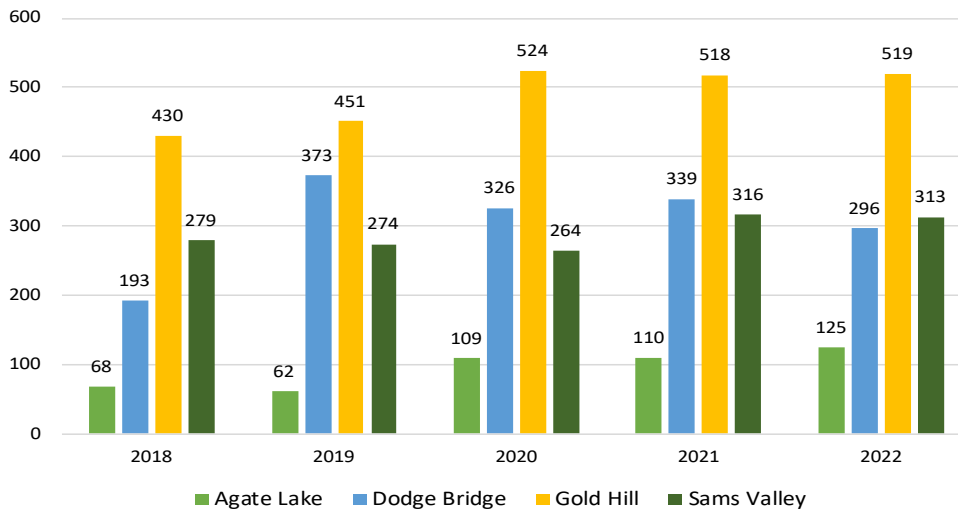
## Volunteer Response Times

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 identify 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.

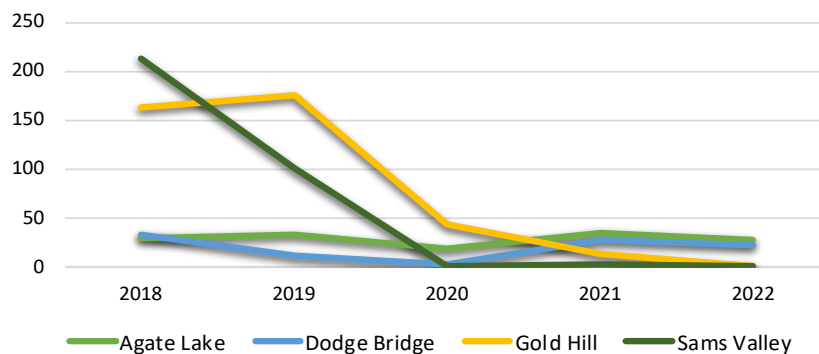
Volunteers by Position



Number of Incidents at Volunteer Stations



Response from Volunteer Stations



# Response Services Department

2023/24 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.
- Increase the number of PulsePoint users within the District.

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2020 Actual</i>	<i>2021 Actual</i>	<i>2022 Actual</i>	<i>2023 Target</i>
<i>Engine Crew Referrals</i>	138	192	404	450
<i>Community Care Home Visits</i>	113	202	213	250
<i>911 Calls Handled</i>	95	571	353	375
<i>PulsePoint Users</i>	16,049 <sup>a</sup>	6,637	7,469	7,500

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



# Response Services Department

2023/24 Fiscal Year

## 2023/24 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 Response 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	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

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	Ongoing	December 31, 2023
Task	Conduct wildfire safety zone and escape route preplanning (to include bridge assessments)	Ongoing	December 31, 2023
Task	Conduct annual fixed water storage inspections, adding enhancements or automation where possible	Ongoing	December 31, 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	Completed Date:	December 2022

# Response Services Department

2023/24 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		
<b>Objective</b>	Align resources with needs		
<b>Task</b>	Continued evaluation of fleet specifications and suitability in advance of scheduled replacement	<b>Target Completion Date:</b>	December 31, 2023

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

<b>Objective</b>	Assess the “right-size” for crew response		
<b>Task</b>	Conduct a review of the RVFSO and hazard zone critical task assessment	<b>Ongoing</b>	December 31, 2023
<b>Task</b>	Compare and contrast peak activity periods and resource availability	<b>Ongoing</b>	December 31, 2023

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

Goal 2.2	Evolve service delivery models to better focus resources		
<b>Objective</b>	Utilize data to drive all service delivery models		
<b>Task</b>	Integrate data at the Battalion Chief level to inform performance measures	<b>Ongoing</b>	December 31, 2023

<b>Objective</b>	Offer alternative non-emergency transportation options to patients		
<b>Task</b>	Develop and implement treat-in-place and alternate destination protocols	<b>Ongoing</b>	December 31, 2023

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

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

# Response Services Department

2023/24 Fiscal Year

## Initiative 3

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

<b>Goal 3.1</b>	<b>Enhance employee development process</b>		
<b>Objective</b>	Establish mentor networks to break down silos		
<b>Task</b>	Research effective mentoring models utilized in other fields or trades	Ongoing	December 31, 2023

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

<b>Goal 3.2</b>	<b>Enhance internal communication</b>		
<b>Objective</b>	Improve the effectiveness of internal communication opportunities		
<b>Task</b>	Ensure all members have access to timely information	Ongoing	December 31, 2023

<b>Objective</b>	Improve internal committee processes		
<b>Task</b>	Conduct needs assessment for standing committees vs. task groups	Ongoing	December 31, 2023
<b>Task</b>	Recruit members and establish regular participation, support, and budgetary support	Ongoing	December 31, 2023

## Initiative 4

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

<b>Goal 4.1</b>	<b>Increase the ways in which we engage with the communities we serve</b>		
<b>Objective</b>	Provide preparedness and prevention training		
<b>Task</b>	Increase volunteer opportunities to broaden the reach of prevention activities	Ongoing	December 31, 2023

<b>Objective</b>	Enhance public outreach and education opportunities		
<b>Task</b>	Increase crew visibility and engagement in rural areas	Ongoing	December 31, 2023

<b>Objective</b>	Encourage increased community engagement at events		
<b>Task</b>	Participate in local school events, endorse their image in local response areas	Ongoing	December 31, 2023

<b>Objective</b>	Offer community listening events		
<b>Task</b>	Post event community sessions or AAR	Ongoing	December 31, 2023

<b>Goal 4.2</b>	<b>Increase effectiveness of virtual presence</b>		
<b>Objective</b>	Offer more web-based information to the public		
<b>Task</b>	Improve volunteer recruitment efforts on media platforms	<b>Target Completion Date:</b>	December 31, 2023

# Response Services Department

2023/24 Fiscal Year

## Initiative 5

Develop and strengthen collaborative efforts and strategic partnerships.

<b>Goal 5.1</b>	<b>Maintain and enhance partnerships to improve regional preparedness and response to emergency events</b>		
<b>Objective</b>	Develop and enhance collaboration with other partners		
<b>Task</b>	Invest in marketing of volunteerism in the fire service	<b>Target Completion Date:</b>	December 31, 2023

<b>Objective</b>	Enhance communication among police/fire to improve effectiveness during incident response		
<b>Task</b>	Actively participate in joint event planning and training	Ongoing	December 31, 2023
<b>Task</b>	Seek opportunities to develop cross-discipline joint policies and response procedures	Ongoing	December 31, 2023
<b>Task</b>	Improve joint radio communications and establish common operating frequencies	Ongoing	December 31, 2023

<b>Objective</b>	Participate in integrated training opportunities		
<b>Task</b>	Memorialize the Rogue Valley Fire Rescue Standing Orders	<b>Target Completion Date:</b>	December 31, 2023

<b>Objective</b>	Encourage the development of a Rogue Valley Disaster Response Plan		
<b>Task</b>	Influence synthesized evacuation and wildfire plans that do not unduly burden neighboring communities or jurisdictions	Ongoing	December 31, 2023
<b>Task</b>	Actively participate in statewide planning and policy efforts	Ongoing	December 31, 2023

<b>Goal 5.2</b>	<b>Maintain and enhance partnerships to improve service delivery and organizational effectiveness</b>		
<b>Objective</b>	Explore shared services among agencies		
<b>Task</b>	Increase allocating of response resources	Ongoing	December 31, 2023

<b>Objective</b>	Work effectively with partner agencies for access to resources for elderly and at-risk patrons to affect broader changes		
<b>Task</b>	Introduce alternatives to fire-based lift assists in care facilities	Ongoing	December 31, 2023

<b>Objective</b>	Review collaboration of fire and medical services and improve effectiveness between agencies		
<b>Task</b>	Implement improved apparatus numbering system	<b>Completed Date:</b>	December 2021
<b>Task</b>	Implement fire based PRO QA	<b>Target Completion Date:</b>	December 31, 2023

# Response Services Department

2023/24 Fiscal Year

## Initiative 6

Commit to excellence through innovation.

Goal 6.1	Focus on innovation to improve service delivery		
<b>Objective</b>	Explore treatment-in-place for patient care		
<b>Task</b>	Develop and implement treat-in-place and alternate destination protocols	Ongoing	December 31, 2023

Goal 6.1	Focus on innovation to improve service delivery		
<b>Objective</b>	Continue to improve options of service delivery using technology		
<b>Task</b>	Fully integrate First Due into daily engine company operations	Ongoing	December 31, 2023
<b>Task</b>	Increase use of telemedicine in EMS response	<b>Target Completion Date:</b>	December 31, 2023
<b>Task</b>	Increase availability of real-time video for responders and incident managers	<b>Target Completion Date:</b>	December 31, 2023

<b>Objective</b>	Embrace innovation to better support the service delivery models		
<b>Task</b>	Increase availability and capability of UAS program	Ongoing	December 31, 2023
<b>Task</b>	Adjust to encryption and priority data in conjunction with FirstNet and radio project development	Ongoing	December 31, 2023

Goal 6.2	Build organizational capacity and excellence		
<b>Objective</b>	Continue to recruit and retain outstanding staff		
<b>Task</b>	Participate in career fairs, mentoring, and career marketing	Ongoing	December 31, 2023
<b>Task</b>	Actively support the RCC student program	Ongoing	December 31, 2023

<b>Objective</b>	Provide excellent customer and public service		
<b>Task</b>	Encourage public feedback, praise or critique of response services	Ongoing	December 31, 2023

<b>Objective</b>	Define and embrace norms of the culture through the organization		
<b>Task</b>	Establish performance expectations of volunteer personnel	Ongoing	December 31, 2023



# Response Services Department

2023/24 Fiscal Year

General Fund	<u>HISTORICAL</u>		2022/23 FY	<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2020/21 FY	2021/22 FY		2023/2024		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	\$4,671,532.56	\$4,949,185.63	\$5,543,100	\$5,624,000	\$5,624,000	\$5,669,000
Overtime	567,296.80	646,377.85	645,000	716,000	716,000	716,000
Incentives	597,934.81	608,906.55	680,000	640,000	640,000	658,000
Payouts	136,579.12	74,027.54	57,500	58,000	58,000	58,000
Retirement (PERS)	1,215,848.36	1,280,056.22	1,430,000	1,575,000	1,575,000	1,590,000
ER Deferred Comp Contrib	155,527.48	154,432.24	182,000	191,000	191,000	185,000
Health and Life Insurance	1,042,117.33	1,120,224.40	1,325,000	1,330,000	1,330,000	1,350,000
HRA-VEBA Contribution	211,423.20	231,905.88	258,000	261,000	261,000	265,000
FICA and Medicare PR Taxes	439,328.64	468,118.94	530,000	540,000	540,000	540,000
Workers' Comp Insurance	90,589.08	82,232.48	125,000	140,000	140,000	164,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$9,128,177.38</b>	<b>\$9,615,467.73</b>	<b>\$10,775,600</b>	<b>\$11,075,000</b>	<b>\$11,075,000</b>	<b>\$11,195,000</b>
<b>Materials and Services</b>						
<b>Career Firefighter Group</b>						
Physicals and Vaccinations	\$31,673.00	\$29,665.00	\$40,000	\$40,000	\$40,000	\$40,000
Licenses and Fees	6,980.15	1,405.00	10,000	3,000	3,000	3,000
Medical Supplies and Equipment	0.00	0.00	0	80,000	80,000	80,000
Operational General Supplies	1,862.63	5,132.88	5,000	5,000	5,000	5,000
Special Projects	737.42	1,006.35	27,000	12,000	12,000	12,000
<b>Fire Suppression Expenses</b>						
Personal Protective Equipment	100,032.16	79,439.81	86,000	70,000	70,000	70,000
Hose and Appliances	20,747.20	27,847.90	17,000	60,500	60,500	60,500
Apparatus Equipment and Supplies	31,117.03	19,092.77	13,000	12,000	12,000	12,000
Safety Equipment	25,768.91	56,511.12	20,000	29,500	29,500	29,500
Specialty Equipment	6,876.29	17,539.69	22,500	25,000	25,000	34,000
Technical Rescue Equipment	2,763.11	5,208.42	6,000	6,000	6,000	6,000
Rehabilitation and Consumables	5,032.34	5,189.15	6,000	7,000	7,000	7,000
Equipment for New Apparatus	12,655.20	0.00	4,000	18,000	18,000	18,000
M&R; Emergency Response Equip	24,055.60	25,908.59	42,000	47,000	47,000	47,000
Community Care Program	0.00	0.00	0	10,000	10,000	10,000
Contractual/Professional Services	9,594.83	10,963.54	15,500	17,500	17,500	17,500
Membership Dues	1,199.50	1,199.50	1,500	1,500	1,500	1,500
Books and Subscriptions	1,388.24	2,722.43	3,000	3,000	3,000	3,000
<b>Student Firefighter / Volunteer Group</b>						
Pre-Entrance Screenings, Backgrounds,						
Vaccinations	3,621.00	4,685.80	4,000	4,000	4,000	4,000
Personal Protective Equipment	0.00	43,538.98	30,000	15,000	15,000	15,000
Student Firefighter Tuition Program	24,822.84	28,553.98	30,000	47,000	47,000	47,000
Length of Service Award Program (LOSAP)	200.00	200.00	2,000	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	1,140.00	5,000	2,000	2,000	2,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$312,127.45</b>	<b>\$367,950.91</b>	<b>\$390,500</b>	<b>\$518,000</b>	<b>\$518,000</b>	<b>\$527,000</b>
<b>TOTAL OPERATIONS</b>	<b>\$9,440,304.83</b>	<b>\$9,983,418.64</b>	<b>\$11,166,100</b>	<b>\$11,593,000</b>	<b>\$11,593,000</b>	<b>\$11,722,000</b>

# Response Services Department

2023/24 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

### General Fund 1, Department 2

Account	Description	Account Total
<b>CAREER FIREFIGHTER GROUP</b>		
58203-000	Physicals and Vaccinations.....	\$ 40,000
60223-002	Licenses and Fees..... Oregon ambulance licensing fees, CLIA, DEA, FCC, Motorola, Drone, EMT Licensing	\$ 3,000
60223-003	Medical Supplies and Equipment Medical equipment and supplies, pharmaceuticals, automatic external defibrillators (AED's), bio-waste disposal, oxygen cylinders, and medical personal protective equipment like latex gloves	\$ 80,000
60223-007	Operational General Supplies..... Purchase of operational supplies, meeting refreshments	\$ 5,000
60224-000	Special Projects..... Standby events Emergency preparedness Verified responder UAS support	\$ 12,000 2,000 3,000 2,000 5,000
<u>60225</u>	<u>Emergency Response Expenses</u>	
60225-001	Personal Protective Equipment..... Routine purchase of structural and wildland personal protective equip Structural turnouts (4 year rotation cycle)	\$ 70,000 20,000 50,000
60225-002	Hose and Appliances..... Routine purchase of structural and wildland hose/nozzles Project: Update structural nozzles and hose Project: Hydrant/hose testing and maintenance equipment	\$ 60,500 20,000 30,000 10,500
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	\$ 12,000 10,000 2,000
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	\$ 29,500 22,000 7,500
60225-005	Specialty Equipment..... Routine purchase of gas monitors, calibration, and testing equipment Routine purchase of extrication equipment PROJECT: Automatic external defibrillators (AED) PROJECT: Ladder truck equipment	\$ 34,000 3,000 9,000 9,000 13,000
60225-006	Technical Rescue Equipment..... Routine replacement of rescue equipment, ropes, harnesses, and swift water equipment	\$ 6,000 6,000

# Response Services Department

2023/24 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT - *Continued* General Fund 1, Department 2

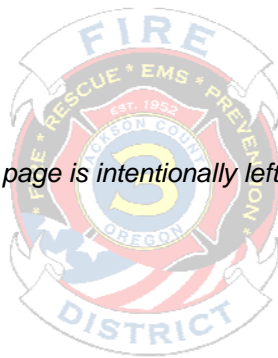
Account	Description	Account Total
60225-007	<b>Rehabilitation and Consumables.....</b> Purchase of incident rehabilitation supplies	\$ 7,000
60225-008	<b>Equipment for New Apparatus.....</b> Loose equipment for the new tactical tenders	\$ 18,000
60254-000	<b>M&amp;R; Emergency Response Equipment.....</b> Repair of medical, fire suppression, and extrication equipment (includes defibrillators, gurneys, hose, ladders, chainsaws, small tools, positive pressure ventilation (PPV) fans, extinguishers, nozzles, and appliances) SCBA equipment maintenance Extrication equipment maintenance Defibrillators PPE inspection and repair	\$ 47,000 7,500 2,000 9,500 8,000 20,000
60267-000	<b>Community Care Program.....</b> General supplies and for supporting patron safety needs	\$ 10,000
60270-000	<b>Contractual/Professional Services.....</b> Hose and ladder testing contract Defibrillator PM agreement	\$ 17,500 15,000 2,500
60410-000	<b>Membership Dues.....</b> International Association of Fire Chief's, Oregon Fire Chief's Association, Rogue Valley Fire Chief's Association, Federation of Chaplains, Oregon Volunteer Firefighters Association	\$ 1,500
60412-000	<b>Books and Subscriptions.....</b>	\$ 3,000
<b>STUDENT FIREFIGHTER AND VOLUNTEER GROUP</b>		
65001-000	<b>Pre-Entrance Screenings, Backgrounds, Vaccinations, Physicals.....</b>	\$ 4,000
65003-000	<b>Personal Protective Equipment.....</b> Uniforms, structural and wildland PPE, gloves, helmets	\$ 15,000
65005-000	<b>Student Firefighter Program.....</b> Associate's degree program for students (tuitions, books, and supplies)	\$ 47,000
65007-000	<b>Length of Service Award Program (LOSAP).....</b> Annual District contribution for volunteer length of service	\$ 2,000
65010-000	<b>Scholarship Donations.....</b> Student scholarship program for Crater and Eagle Point High Schools	\$ 1,000
65011-000	<b>Advertising and Marketing.....</b> Marketing of volunteer and student programs	\$ 2,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 527,000</b>

# Risk Reduction



2023/24  
Fiscal Year Budget

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# Risk Reduction Department

2023/24 Fiscal Year

## DEPARTMENT DESCRIPTION

Key aspects from the Strategic Services Department have been combined with the Fire and Life Safety Division to comprise what is now known as the Risk Reduction Department. We are excited to make this change to most accurately reflect the services delivered in our risk reduction efforts. The risk reduction team is tasked with fire prevention activities, hazardous risk identification, and mitigation planning, as well as finding new ways to incentivize property owners' safety. The newly implemented Oregon State Fire Marshal Defensible Space Code requirements will make it incumbent on homeowners to provide a wildfire safety buffer around structures. Risk Reduction implements programs and develops avenues to help property owners meet these obligations. Through these programs and customer success initiatives, homeowners have support in creating defensible space.

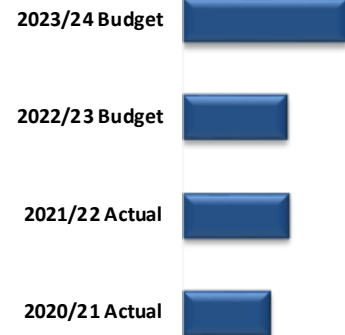
Each deputy fire marshal partners with assigned inspectable occupancies and the public to help them meet fire and life safety requirements imposed by State laws, fire codes, and other recognized national standards. Once new building construction is completed, fire and life safety construction maintenance 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 investigation team provides on-duty standby 24 hours a day, seven days a week.

Among many other duties, the risk reduction captain leads efforts in the wildfire home assessment program. Through the home assessments, other risk reduction services may be brought in to help overcome barriers. The District offers a fuels mitigation trailer program that can be employed where homeowners have no means to transport hazardous vegetation off their property. The chipper program is used when the size of the material or size of the piles dictate the need for a more efficient system. These programs can be utilized instead of pile burning. When burning is the prominent choice, the District will conduct on-site inspections for special burn permits in conjunction with collaboration between the Oregon Department of Forestry and the Department of Environmental Quality.

## BUDGET SUMMARY

Expenditures	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Personnel Services	\$632,545	\$762,904	\$748,000	\$1,321,000
Materials and Services	\$13,968	\$15,077	\$25,000	\$120,500
	<b>\$646,513</b>	<b>\$777,981</b>	<b>\$773,000</b>	<b>\$1,441,500</b>

## Budget Comparison



## PERSONNEL SUMMARY

Position	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Division Chief/Fire Marshal	1.00	1.00	1.00	1.00
Deputy Fire Marshal 1 ( <i>Represented Position</i> )	0.00	2.00	2.00	1.00
Deputy Fire Marshal 2 ( <i>Represented Position</i> )	0.00	0.00	0.00	1.00
Deputy Fire Marshal 3 ( <i>Represented Position</i> )	2.00	2.00	1.00	1.00
Risk Reduction Captain ( <i>Represented Position</i> )	0.00	0.00	0.00	1.00
Administrative Assistant	0.00	0.00	0.00	1.00
<b>Total</b>	<b>3.00</b>	<b>5.00</b>	<b>4.00</b>	<b>6.00</b>

# Risk Reduction Department

2023/24 Fiscal Year

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## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 76.6 percent or \$573,000 over the prior fiscal year. A significant factor for this increase is the reallocation of personnel from the Strategic (Support) Services Department, the result of an organizational restructure. The risk reduction captain and administrative assistant position have transferred over resulting in \$301,000. In addition, \$200,000 is allocated towards a hazardous fuels reduction team. This program and team will be developed during the first few months of the fiscal year. Other factors impacting this classification are salary and benefit adjustments due to cost of living, pension plan rate changes, and increases in health insurance.

The overall Materials and Services classification is budgeted to increase 382 percent or \$95,500. This is the result of programs and expenditures being reallocated from the Strategic (Support) Services Department, specifically for risk reduction efforts. Other programs and initiatives will remain comparable to prior years with emphasis on fire investigations, fire safety, inspections, code enforcement, construction plan reviews, and public education.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Completed 2,716 inspections and calls for service.
- Two Deputy Fire Marshals trained and successfully passed their probationary year requirements.
- Inspectable occupancy inventory increased; 1,207 (+5%) regular hazard, 375 (+30%) moderate hazard, and 401 (-15%) high hazard occupancies.
- 656 (+3.5%) fire safety system inspections were completed by third party contractors and uploaded to our tracking system.
- 96 percent 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 Marshals Association.
- Completed three 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.
- Participated with the Oregon State Fire Marshals office regarding home defensible space laws.
- Awarded additional fuels reduction program trailer from the Oregon State Fire Marshals office.
- Participated in Gold Hill clean-up day.
- Assisted Oregon Department of Forestry to obtain a \$350,000 grant towards wildland defensible space initiatives and fuels reduction around homes in the Agate Lake area.
- Assisted Northwest Youth Corps program with a fuels reduction program around homes in the Gold Hill area.

## **DEPARTMENT SERVICE MEASUREMENTS AND TARGETS**

Risk Reduction activities achieve success through the direct removal of identified hazards and indirect educational and motivational effects on the people responsible for facilities, properties, and processes. Partnerships continue with the Jackson County, Eagle Point, and Central Point Land Development Departments to ensure that new developments meet fire code requirements for access and firefighting water supply. Couple those activities with fire safety system plan reviews and onsite construction inspections to ensure that new development and new construction are built on a firm foundation of fire safety. The District receives 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.

By tracking work completed, the District can evaluate year-over-year workload and outputs, bearing in mind though that the numbers themselves don't provide apples to apples impact against each other across the various 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. However, tracking outputs provide measurement trends, forecasts needs, and can prompt further questions.

# Risk Reduction Department

2023/24 Fiscal Year

Total completed inspections for 2022 and overall calls for service saw a significant increase. We expect this trend to continue as we implement new programs for low-hazard occupancy self-inspections while increasing our presence in the wildland interface for defensible space initiatives.

## RISK REDUCTION TARGETS

### 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.
- Conduct home fire safety inspections when requested by citizens or partner agencies.
- Conduct wildland urban interface fuels reduction inspections when requested by citizens or partner agencies.
- Review third party inspection and testing reports for installed fire safety equipment.

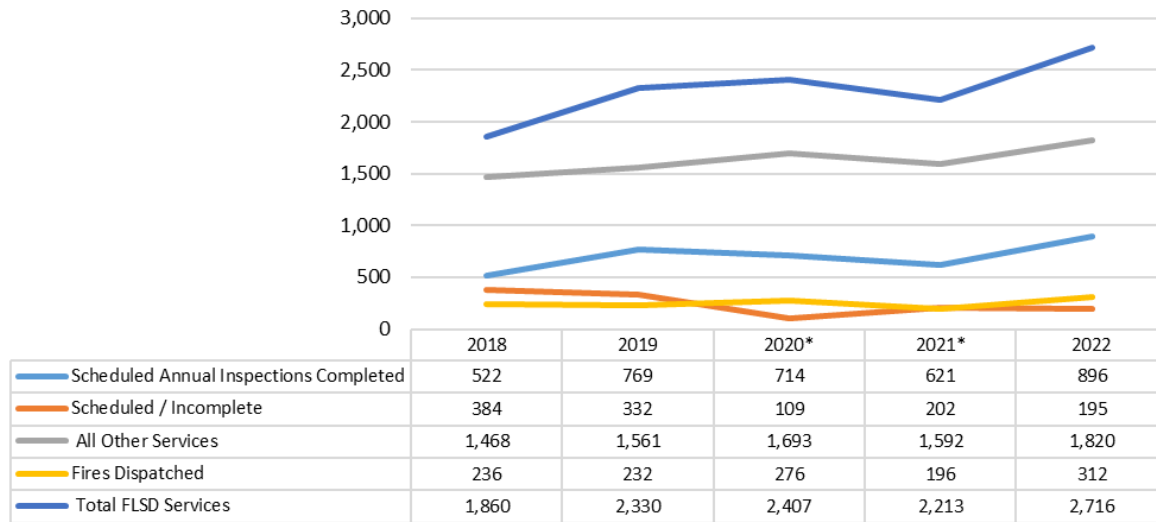
<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Actual</i>	<i>2022 Targets</i>	<i>2022 Actual</i>	<i>2023 Targets</i>
<i>Low Hazard Inspections</i>	483	409	158	383	502	383
<i>Moderate Hazard Inspections</i>	85	97	128	188	114	188
<i>High Hazard Inspections</i>	201	208	335	401	280	401
<i>Re-Inspections</i>	124	257	48	100%	93	100%
<i>Consultations</i>	191	219	272	100%	252	100%
<i>Complaints</i>	31	24	76	100%	62	100%
<i>Fire District Annexation Requests</i>	6	4	6	100%	7	100%
<i>Land Development Consultations</i>	57	73	40	100%	49	100%
<i>Construction Plan Reviews</i>	42	40	84	100%	200	100%
<i>Construction Permit Inspections</i>	72	64	114	100%	122	100%
<i>Home Fire Safety Inspections</i>	57	85	96	100%	54	100%
<i>Wildland Urban Interface Fuels Break Reduction</i>	63	81	77	100%	64	100%
<i>Target Hazard Familiarization Tours</i>	47	20	22	100%	18	100%
<i>Expo and Special Events</i>	118	39	33	100%	118	100%
<i>State Fire Marshal Certifications</i>	40	30	3	100%	16	100%
<i>Referrals</i>	40	18	**	100%	**	100%
<i>FLSD Fire Investigations</i>	49	45	40	100%	54	100%
<i>Brycer &amp; Fire Protection Systems</i>	559	554	639	100%	656	100%
<i>Firewise Property Assessments</i>	65	37	42	100%	120	100%
<i>Miscellaneous Fire Safety Assessments</i>	0	103	**	100%	**	100%
<b>Totals</b>	<b>2,330</b>	<b>2,407</b>	<b>2,407</b>		<b>2,716</b>	

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

# Risk Reduction Department

2023/24 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>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Actual</i>	<i>2022 Actual</i>	<i>2023 Target</i>
<i>Investigations Performed</i>	49	45	40	54	100%
<i>Investigations Performed (by engine companies)</i>	232	276	196	312	100%
<i>Juvenile Fire Setter Intervention</i>	2	4	2	6	100%
<b>Totals</b>	<b>283</b>	<b>325</b>	<b>238</b>	<b>372</b>	



# Risk Reduction Department

2023/24 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>2019 Actual</i>	<i>2020 Actual</i>	<i>2021 Actual</i>	<i>2022 Actual</i>	<i>2023 Target</i>
<i>Number of Plan Reviews</i>	42	40	84	200	100%
<i>Plan Review Turn-around Time</i>	5 Days	5 Days	5 Days	5 Days	5 Days
<i>Construction Permit Inspections</i>	72	60	114	122	100%
<i>Development Consultations</i>	191	173	40	49	100%
<b>Totals</b>	<b>305</b>	<b>273</b>	<b>238</b>	<b>371</b>	

## COMMUNITY RISK REDUCTION

### Statement of Measurement

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

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2020 Actual</i>	<i>2021 Actual</i>	<i>2022 Actual</i>	<i>2023 Target</i>	<i>2024 Target</i>
<i>Smoke Alarms Installed</i>	33 <sup>a</sup>	525	438	600	600
<i>Service Calls to Households with Fuels Reduction Trailer</i>	32	65	84	100	100
<i>Home Assessments Completed</i>	n/a	n/a	120	300	300
<i>Community Wide Chipper Events</i>	n/a	n/a	3	5	5

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



# Risk Reduction Department

2023/24 Fiscal Year

## 2023/24 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 Risk Reduction 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.	Ongoing	June 30, 2023
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	Completed Date:	December 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	June 30, 2023
Task	Define target areas and prevention programs selected for improvement	Completed Date:	June 2021

Objective	Evaluate wildland fuels 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	Ongoing	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:	February 2022
Task	Conduct needs analysis to specifically define the prevention program that will be increased.	Completed Date:	December 2022
Task	Remain poised to take advantage of emerging conditions that enhance rural water supply by continuing to allocate funds in each fiscal year	Ongoing	June 30, 2023

# Risk Reduction Department

2022/23 Fiscal Year

<b>Goal 1.2</b>	<b>Understand and focus on non-fire emergency response</b>		
<b>Objective</b>	Evaluate non-emergency response and resource allocation		
<b>Task</b>	Research and categorize totality of non-emergency response	Ongoing	December 31, 2023

## Initiative 2

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

<b>Goal 2.1</b>	<b>Evaluate organizational and staffing models</b>		
<b>Objective</b>	Align resources with needs		
<b>Task</b>	Evaluate correct resource allocation for Risk Reduction workload	Completed Date:	December 2022

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

<b>Objective</b>	Develop and enhance programs within the District (Community Care and Risk Reduction)		
<b>Task</b>	Implement and evaluate a Community Risk Reduction (CRR) volunteer program	Ongoing	December 31, 2023

<b>Goal 2.3</b>	<b>Maintain fiscal responsibility</b>		
<b>Objective</b>	Evaluate sustainable practices		
<b>Task</b>	Evaluate and develop a plan to utilize solar energy to reduce facility energy costs	Ongoing	December 31, 2023

## Initiative 3

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

<b>Goal 3.1</b>	<b>Enhance employee development process</b>		
<b>Objective</b>	Establish mentor networks to break down silos		
<b>Task</b>	Encourage dedicated Special Assignment opportunities to line personnel	Ongoing	December 31, 2023

# Risk Reduction Department

2023/24 Fiscal Year

General Fund	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2020/21 FY	2021/22 FY	2022/23 FY	2023/2024		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	\$338,245.77	\$390,095.26	\$396,000	\$590,000	\$590,000	\$789,000
Overtime	11,299.53	12,706.15	10,000	10,000	10,000	10,000
Incentives	49,027.05	50,432.28	46,000	69,000	69,000	79,000
Payouts	12,683.84	51,740.33	15,000	13,000	13,000	13,000
Retirement (PERS)	102,350.53	108,739.39	105,000	163,000	163,000	165,000
ER Deferred Comp Contrib	10,595.82	11,823.75	15,500	23,000	23,000	23,000
Health and Life Insurance	65,366.99	85,691.34	106,000	160,000	160,000	160,000
HRA-VEBA Contribution	12,322.38	15,271.31	17,500	27,000	27,000	27,000
FICA and Medicare PR Taxes	30,334.32	36,157.19	36,000	52,000	52,000	52,000
Workers' Comp Insurance	319.03	246.88	1,000	1,000	1,000	3,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$632,545.26</b>	<b>\$762,903.88</b>	<b>\$748,000</b>	<b>\$1,108,000</b>	<b>\$1,108,000</b>	<b>\$1,321,000</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	\$ 1,791.00	\$ 2,797.00	\$3,000	\$3,000	\$3,000	\$3,000
Printing	49.00	0.00	4,000	4,000	4,000	4,000
Licenses and Fees	140.00	0.00	2,000	2,000	2,000	2,000
Supplies	5,429.65	6,593.36	10,000	10,000	10,000	10,000
Supplies; Public Education Materials	2,207.71	692.65	0	0	0	0
Community Risk Reduction	0.00	0.00	0	60,000	60,000	85,000
Contractual/Professional Services	0.00	0.00	0	10,000	10,000	10,000
Membership Dues	1,030.00	1,620.00	2,500	3,000	3,000	3,000
Books and Subscriptions	3,320.45	3,374.31	3,500	3,500	3,500	3,500
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$ 13,967.81</b>	<b>\$ 15,077.32</b>	<b>\$25,000</b>	<b>\$95,500</b>	<b>\$95,500</b>	<b>\$120,500</b>
<b>TOTAL RISK REDUCTION</b>	<b>\$646,513.07</b>	<b>\$777,981.20</b>	<b>\$773,000</b>	<b>\$1,203,500</b>	<b>\$1,203,500</b>	<b>\$1,441,500</b>

# Risk Reduction Department

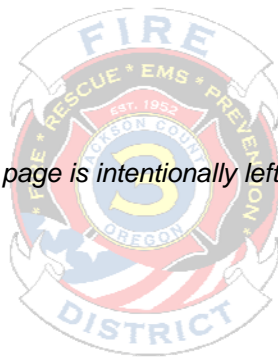
2023/24 Fiscal Year

## 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..... Supplies for meetings, address signs and reflective numbers, customer service kits, fire investigation tools and personal protective equipment	\$ 10,000
60265-000	Community Risk Reduction..... Fuels mitigation work, supplies related to risk reduction, informational signs, and expenses related to hazardous vegetation drop sites. Includes work pertaining to Oregon State Fire Marshals risk reduction grant.	\$ 85,000
60270-000	Contractual/Professional Services.....	\$ 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	\$ 3,000
60412-000	Books and Subscriptions..... NFPA online access, reference materials, code updates	\$ 3,500
TOTAL MATERIALS AND SERVICES		<u>\$ 120,500</u>

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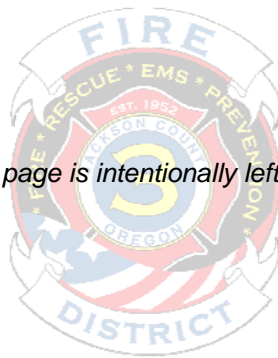


# Training



2023/24  
Fiscal Year Budget

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# Training Department

2023/24 Fiscal Year

## DEPARTMENT DESCRIPTION

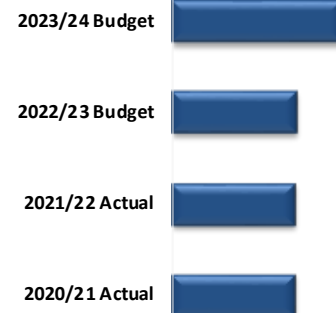
The Training Department is responsible for delivering a variety of training programs, developing proper safety techniques and procedures, maintaining accurate and complete training records, and fostering professional growth and development to all members of the organization. Safety and career development 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 events. 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	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Personnel Services	\$391,706	\$290,472	\$285,000	\$451,000
Materials and Services	\$94,620	\$193,558	\$204,000	\$215,500
	<b>\$486,326</b>	<b>\$484,030</b>	<b>\$489,000</b>	<b>\$666,500</b>

### Budget Comparison



## PERSONNEL SUMMARY

Position	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Division Chief of Training	1.00	1.00	0.00	1.00
Battalion Chief of Training	0.00	0.00	1.00	0.00
Training Assistant	0.00	0.00	0.00	1.00
Administrative Assistant	1.00	.50	0.00	0.00
<b>Total</b>	<b>2.00</b>	<b>1.50</b>	<b>1.00</b>	<b>2.00</b>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase over 58 percent or \$166,000 over the prior fiscal year. Significant factors impacting this increase include reclassing the battalion chief of training back up to a division chief level and the addition of a new training assistant/coordinator position. This new position has a budgetary impact of \$163,000. Other factors include salary and benefit adjustments due to cost of living, pension plan rate changes, and increases in health insurance.

The Materials and Services classification is budgeted to increase 5.6 percent or \$11,500. Leadership training has decreased slightly while response focused training has increased. All other accounts are comparable to the prior year and reflect continued development across the various disciplines.

# Training Department

2023/24 Fiscal Year

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## **PRIOR YEAR ACCOMPLISHMENTS**

- Implemented Acting in Capacity (AIC) programs for the engineer and captain positions.
- Conducted a ten-week recruit academy to train seven new firefighters and facilitated their success through the probationary year.
- 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.
- Supported the pursuit of DPSST certifications for personnel.
- Conducted routine workplace safety inspections with 100 percent compliance within OR-OSHA requirements.



# Training Department

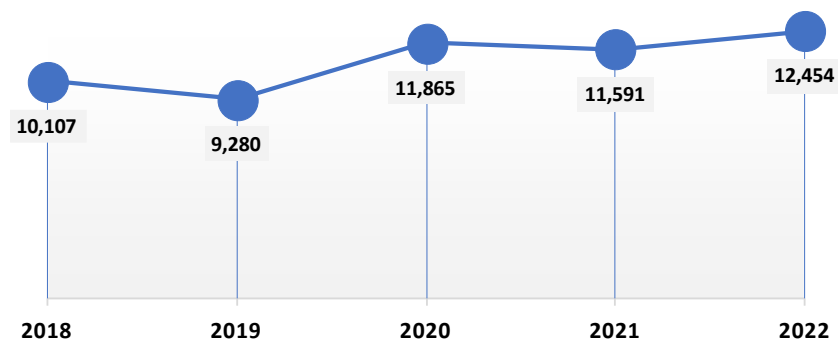
2023/24 Fiscal Year

## DEPARTMENT MEASUREMENTS AND TARGETS

### Outputs

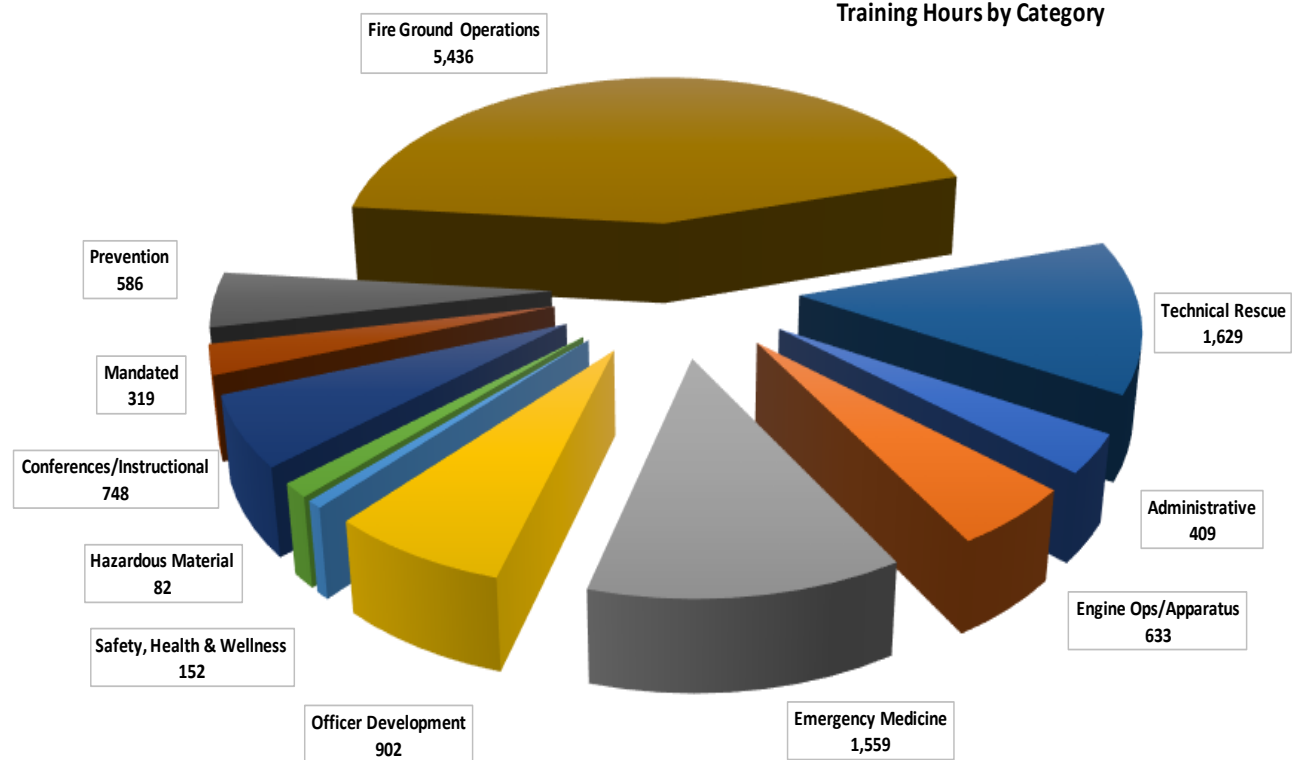
- The following categories illustrates how training was accomplished in 2022:
  - Fire ground operational training accounted for 5,436 hours
  - Officer development accounted for 902 hours
  - Emergency medicine training accounted for 1,559 hours
  - Educational opportunities from conferences accounted for 748 hours
  - Technical rescue training accounted for 1,629 hours

Total Training Hours by Year



The annual training plan provides a framework for delivery of topics that reinforce skills, present new topics, or meet minimum requirements of recertification. The 12,454 hours are further categorized into the following topics:





















Training Hours by Category



# Training Department

2023/24 Fiscal Year

<i><b>Number of Training Hours (Outputs)</b></i>	<i><b>2019 Actual</b></i>	<i><b>2020 Actual</b></i>	<i><b>2021 Actual</b></i>	<i><b>2022 Actual</b></i>	<i><b>2023 Target</b></i>
<i>Administration</i>	622	336	231	409	500
<i>Engine Ops/Apparatus</i>	541	459	1,430	633	1,000
<i>EMS</i>	2,001	1,931	2,496	1,559	1,800
<i>Officer Development</i>	1,173	737	487	902	500
<i>Haz-Mat</i>	134	79	221	82	100
<i>Health and Safety</i>	317	578	179	152	200
<i>Conferences/Instructional</i>	23	54	120	748	500
<i>Mandated</i>	65	686	1,324	319	500
<i>Prevention</i>	555	408	205	586	400
<i>Fire Ground Operations</i>	3,251	5,528	3,900	5,436	5,000
<i>Technical Rescue</i>	597	1,069	998	1,628	1,500
<b>Totals</b>	<b>9,280</b>	<b>11,865</b>	<b>11,591</b>	<b>12,454</b>	<b>12,000</b>

<i><b>Effectiveness Measures</b></i>	<i><b>2019 Actual</b></i>	<i><b>2020 Actual</b></i>	<i><b>2021 Actual</b></i>	<i><b>2022 Actual</b></i>	<i><b>2023 Target</b></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 2023/24

- 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.
- 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.
- 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 2024.
  - Department of Homeland Security (DHS) – Provide Incident Command training for emergency responders under National Incident Management System (NIMS).

# Training Department

2023/24 Fiscal Year

## 2023/24 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 1

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

Goal 1.2	Understand and focus on non-fire emergency response		
Objective	Increase community delivered CPR training		
Task	Explore and implement strategies to provide CPR instructor capacity for in-service District and community CPR training	Ongoing	December 31, 2023
Task	Implement and support community CPR classes with a goal of providing 12 classes per 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 2.1	Evaluate organizational and staffing models		
Objective	Evaluate effectiveness of the community volunteer and volunteer firefighter programs		
Task	Evaluate the impacts of volunteer training requirements	Target Completion Date:	December 31, 2023
Task	Evaluate non-traditional training for volunteer firefighters	Target Completion Date:	December 31, 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:	December 31, 2023
Task	Develop, implement, and update appropriate Acting in Capacity programs	Ongoing	June 30, 2023
Task	Update the District's current Development Plan	Target Completion Date:	December 31, 2023
Objective	Establish mentor networks to break down silos		
Task	Encourage ride along programs with other agencies	Ongoing	December 31, 2023
Task	Encourage dedicated Special Assignment opportunities to line personnel	Ongoing	December 31, 2023

# Training Department

2023/24 Fiscal Year

<b>Objective</b>	Promote physical and mental health and wellness		
<b>Task</b>	Evaluate effectiveness of current wellness programs	Ongoing	December 31, 2023
<b>Task</b>	Promote current local, regional, and national programs	<b>Target Completion Date:</b>	December 31, 2022

<b>Objective</b>	Evaluate career paths/succession planning beyond Battalion Chief		
<b>Task</b>	Provide leadership training to members of management	Ongoing	December 31, 2023

<b>Goal 3.2</b>	<b>Enhance internal communication</b>		
<b>Objective</b>	Create opportunities for line staff to engage with management		
<b>Task</b>	Encourage management to participate in crew training events	Ongoing	December 31, 2023

<b>Objective</b>	Improve internal committee process		
<b>Task</b>	Evaluate the need for a training committee	Ongoing	December 31, 2023

## Initiative 4

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

<b>Goal 4.1</b>	<b>Increase the ways in which we engage with the communities we serve</b>		
<b>Objective</b>	Enhance public outreach and education opportunities		
<b>Task</b>	Re-engage with local media, invite them to training events, and demonstrate what we are doing through local media outlets	Ongoing	December 31, 2023
<b>Task</b>	Develop and implement an Incident Command training manual	<b>Target Completion Date:</b>	June 30, 2023

## Initiative 5

Develop and strengthen collaborative efforts and strategic partnerships.

<b>Goal 5.1</b>	<b>Maintain and enhance partnerships to improve regional preparedness and response to emergency events</b>		
<b>Objective</b>	Participate in integrated training opportunities		
<b>Task</b>	Provide multi-company training with partner agencies and industry	Ongoing	December 31, 2023
<b>Task</b>	Memorialize the Rogue Valley Fire Rescue Standing Orders	<b>Target Completion Date:</b>	December 31, 2023
<b>Task</b>	Develop and implement an Incident Command training manual	Ongoing	December 31, 2023

## Initiative 6

Commit to excellence through innovation.

<b>Goal 6.2</b>	<b>Build organizational capacity and excellence</b>		
<b>Objective</b>	Increase accountability at all levels		
<b>Task</b>	Develop and implement performance standards for individual, company, and multi-company tasks	<b>Target Completion Date:</b>	December 31, 2023

# Training Department

2023/24 Fiscal Year

General Fund	<u>HISTORICAL</u>		2022/23 FY Adopted Budget	<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2020/21 FY	2021/22 FY		2023/2024		
	Actual	Actual		Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	\$181,746.53	\$118,942.11	\$121,000	\$211,000	\$211,000	\$211,000
Overtime *	59,802.15	48,723.62	60,000	62,000	62,000	62,000
Incentives	12,064.00	8,535.00	11,000	19,000	19,000	19,000
Payouts	5,983.00	16,803.09	200	1,000	1,000	1,000
Retirement (PERS)	42,000.23	32,546.79	39,500	60,500	60,500	60,500
ER Deferred Comp Contrib	11,392.78	8,538.23	5,000	4,500	4,500	4,500
Health and Life Insurance	47,184.56	33,391.28	26,000	56,000	56,000	56,000
HRA-VEBA Contribution	10,067.77	6,773.41	4,300	9,000	9,000	9,000
FICA and Medicare PR Taxes	18,642.32	14,586.74	15,000	23,000	23,000	23,000
Workers' Comp Insurance	2,822.37	1,631.59	3,000	5,000	5,000	5,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$391,705.71</b>	<b>\$290,471.86</b>	<b>\$285,000</b>	<b>\$451,000</b>	<b>\$451,000</b>	<b>\$451,000</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	\$544.00	\$625.00	\$1,000	\$1,000	\$1,000	\$1,000
Licenses and Fees	280.00	370.00	500	500	500	500
Supplies; Training and Safety Equip	16,260.22	24,338.51	15,000	17,500	17,500	17,500
Training Props and Equipment	5,810.17	6,379.19	8,000	5,000	5,000	5,000
M&R; Training Props and Equipment	245.99	1,086.95	2,000	2,000	2,000	2,000
Health and Wellness	2,696.91	1,818.59	5,000	14,000	14,000	14,000
Contractual/Professional Services	0.00	2,850.00	20,000	20,000	20,000	20,000
Membership Dues	615.00	802.00	1,000	1,000	1,000	1,000
Books and Subscriptions	7,937.30	4,926.57	9,000	9,000	9,000	9,000
Meeting Travel Expenses	0.00	4,240.34	10,000	10,000	10,000	10,000
Trng & Conferences; Admin & Leadership	54,514.57	80,877.16	69,000	50,000	50,000	50,000
Trng & Conferences; Board	0.00	0.00	2,500	2,500	2,500	2,500
Trng & Conferences; Response	2,156.39	41,148.02	23,000	50,000	50,000	50,000
Trng & Conferences; Fire Life Safety	1,747.27	13,169.31	10,000	10,000	10,000	10,000
Trng & Conferences; Risk Reduction	0.00	0.00	2,000	2,000	2,000	2,000
Trng & Conferences; Students & Vol's	62.00	4,313.95	10,000	5,000	5,000	5,000
Trng & Conferences; Tech and Data Analytics	0.00	725.92	10,000	10,000	10,000	10,000
Trng & Conferences; EMS	1,750.00	5,886.89	6,000	6,000	6,000	6,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$94,619.82</b>	<b>\$193,558.40</b>	<b>\$204,000</b>	<b>\$215,500</b>	<b>\$215,500</b>	<b>\$215,500</b>
<b>TOTAL TRAINING</b>	<b>\$486,325.53</b>	<b>\$484,030.26</b>	<b>\$489,000</b>	<b>\$666,500</b>	<b>\$666,500</b>	<b>\$666,500</b>

# Training Department

2023/24 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	\$ 17,500
60223-014	Training Props and Equipment..... Miscellaneous training props and equipment	\$ 5,000
60254-000	M&R; Training Props and Equipment..... 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	\$ 14,000
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	\$ 50,000

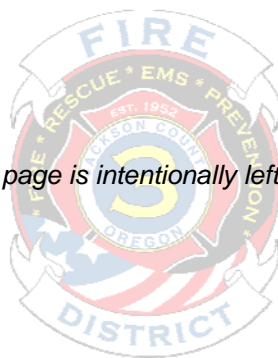
# Training Department

2023/24 Fiscal Year

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

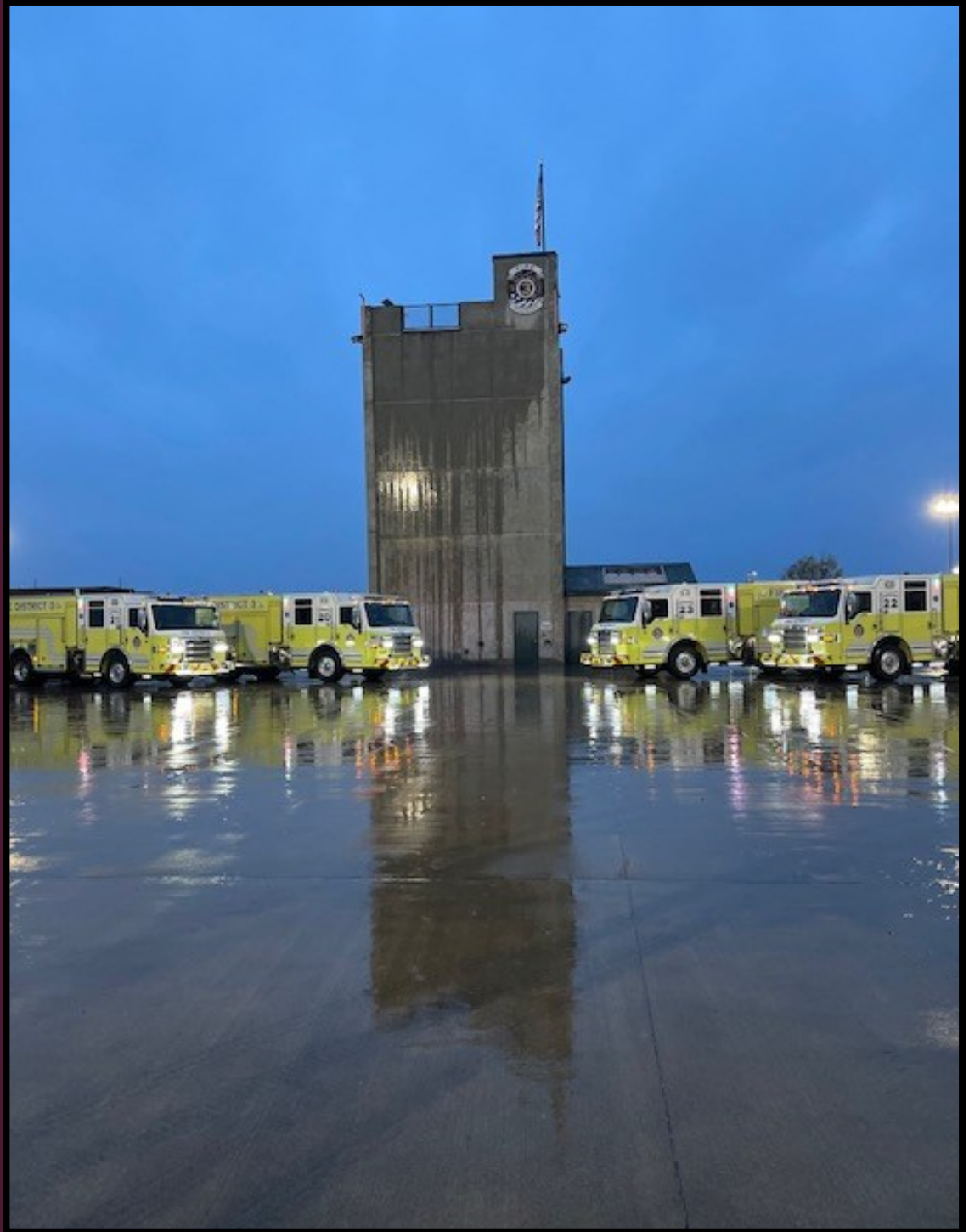
Account	Description	Account Total
60455-002	<b>Training and Conferences; Board.....</b> Continued education for the Board of Directors such as the Special District's Association of Oregon conferences	\$ 2,500
60455-003	<b>Training and Conferences; Response.....</b> Continued education and certification for fire suppression and technical rescue, professional development, safety and committee functions, Fire Department Instructors Conference (FDIC), Firemanship Conference, ETHOS training, and other relevant training, conferences, and workshops	\$ 50,000
60455-004	<b>Training and Conferences; Fire and Life Safety.....</b> Continued education through the Oregon Fire Marshal's Association, local and state Int'l Association of Arson Investigators, Fire Marshal's Roundtable, fire code training, and other relevant conferences, training, and workshops	\$ 10,000
60455-005	<b>Training and Conferences; Risk Reduction.....</b> Continued education and outreach training pertaining to risk reduction efforts	\$ 2,000
60455-006	<b>Training and Conferences; Students and Volunteers.....</b> Continued education and training for all students and volunteer firefighters; includes EMS skills training and attendance at the Oregon Volunteer Firefighters Conference, Int'l Association of Fire Chaplains, and other relevant conferences, training, and workshops	\$ 5,000
60455-007	<b>Training and Conferences; Technology and Data Analytics.....</b> Continued technology training such as conferences, geographic information systems, data analysis, and other relevant conferences, training, and workshops	\$ 10,000
60455-008	<b>Training and Conferences; EMS.....</b> EMS-focused continuing education for all EMS personnel including ACLS, PALS, ICLS, RCC workshops, State of Jefferson EMS conference, Oregon EMS conference, CPR refresher and certification, EMS skills workshops, and other professional development opportunities	\$ 6,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 215,500</b>

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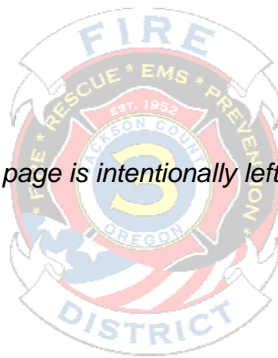
# Support Services

## FIRE DISTRICT 3



2023/24  
Fiscal Year Budget

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# Support Services Department

2023/24 Fiscal Year

## DEPARTMENT DESCRIPTION

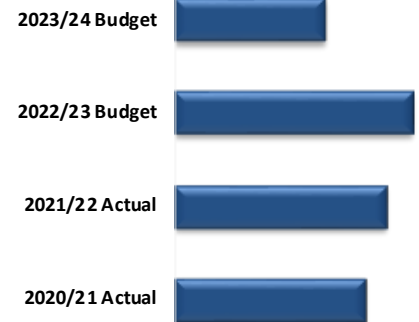
Originally Strategic Services, this department has been renamed to Support Services, which better represents the new focus and mission for what this department is now tasked with. Support Services is responsible for the coordination of all preventative and routine maintenance activities for the District's eight stations, training facility, classrooms, resident volunteer housing, and administrative building totaling over 102,000 square feet with an estimated value of over \$35 million dollars. The department also maintains over 30 acres of property that includes asphalt and gravel driveways, parking lots, and open fields. In addition, the department supports on average 48 rolling stock of fire apparatus and vehicles.

The department also oversees the District's logistics program such as supply ordering, receiving, cataloging, and distributing. Logistic 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	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Personnel Services	\$609,595	\$667,501	\$750,000	\$177,000
Materials and Services	\$854,177	\$958,941	\$1,073,000	\$985,000
	<b>\$1,463,772</b>	<b>\$1,626,441</b>	<b>\$1,823,000</b>	<b>\$1,162,000</b>

### Budget Comparison



## PERSONNEL SUMMARY

Position	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Deputy Chief	1.00	1.00	1.00	0.00
Risk Reduction Captain	1.00	1.00	1.00	0.00
Facilities Technician	1.00	1.00	1.00	1.00
Administrative Assistant	1.00	1.00	1.00	0.00
Logistics Support Technician ( <i>part-time</i> )	0.00	0.50	0.50	0.50
<b>Total</b>	<b>4.00</b>	<b>4.50</b>	<b>4.50</b>	<b>1.50</b>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to decrease over 76 percent or \$573,000 over the prior fiscal year due to organizational restructuring that resulted in shifting the focus of this department. As a result, Support Services saw the transfer out of all salaries and benefits for the deputy chief, risk reduction captain, and the administrative assistant position. This department now only recognizes the salaries and benefits for the facilities technician and the part-time logistics support technician. Those positions recognize salary and benefit adjustments due to cost of living, pension plan rate changes, and increases in health insurance.

# Support Services Department

2023/24 Fiscal Year

The Materials and Services classification is budgeted to decrease 8.2 percent or \$88,000. Significant factors include the transfer out of all expenditures related to community risk reduction, which relocated to the new Risk Reduction Department. Areas of continued budgetary support include apparatus and facility maintenance, fuel and lubricants, janitorial and station supplies, furnishings, and uniform attire for all personnel. Some notable projects across facilities this next year include generator installations, overhead door upgrading, and painting at Sams Valley, Gold Hill, and Eagle Point stations.

## PRIOR YEAR ACCOMPLISHMENTS

- Equipped and placed into service three new Ford F150 staff vehicles.
- Surplused two 1990's era water tenders that will be replaced by two new tactical tenders slated for delivery in May of 2023.
- Streamlined facilities maintenance request process improving communication and task tracking.
- Completed an asphalt resealing and restriping project at the Central Point station and the White City campus including the administration and training parking lots.
- Redesigned the Eagle Point station apparatus bay exhaust system.
- Completed the emergency generator installation at the Sams Valley station.
- Installed a new HVAC system for the Scenic station workout facility.
- Worked with the vendor on the malfunction of the SCBA compressor system and was successful in receiving a new system under warranty.

## DEPARTMENT MEASUREMENTS AND TARGETS

### FLEET

#### Statement of Measurement

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

<i><b>Types of Transactions (Output Measures)</b></i>	<i><b>2020 Actual</b></i>	<i><b>2021 Actual</b></i>	<i><b>2022 Actual</b></i>	<i><b>2023 Target</b></i>	<i><b>2024 Target</b></i>
<i><b><u>Vehicles Maintained</u></b></i>					
<i>Fire Engines</i>	11	11	11	11	11
<i>Aerial Ladder Truck</i>	1	1	1	1	1
<i>Wildland Engines</i>	8	8	8	8	8
<i>Water Tenders</i>	2	2	2	2	0
<i>Tactical Tenders</i>	3	3	3	3	5
<i>Rescue Equipment</i>	2	2	2	2	2
<i>Support Vehicles</i>	17	18	18	22	22
<i><b>Total</b></i>	<b>44</b>	<b>45</b>	<b>45</b>	<b>49</b>	<b>49</b>

# Support Services Department

2023/24 Fiscal Year

## FACILITIES / LOGISTICS

### 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>2020 Actual</i>	<i>2021 Actual</i>	<i>2022 Actual</i>	<i>2023 Target</i>	<i>2024 Target</i>
<b><i>Facilities Maintained</i></b>					
Fire Stations	8	8	8	8	8
Training Grounds	1	1	1	1	1
Fire Science Classroom	1	1	1	1	1
Maintenance/Logistics Warehouse	1	1	1	1	1
Administrative Building	1	1	1	1	1
Resident Volunteer Housing	4	4	4	5	5
<b>Total</b>	<b>16</b>	<b>16</b>	<b>16</b>	<b>17</b>	<b>17</b>

<i>Effectiveness Measures</i>	<i>2020<sup>a</sup> Actual</i>	<i>2021<sup>a</sup> Actual</i>	<i>2022<sup>a</sup> Actual</i>	<i>2023 Target</i>	<i>2024 Target</i>
Maintenance Request Tickets Completed	n/a	n/a	n/a	50	50
Supply Order Tickets Processed	n/a	n/a	n/a	208	208

<sup>a</sup> These are new measurements that have been implemented effective 2023.



# Support Services Department

2023/24 Fiscal Year

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## **2023/24 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 Support Services Department and link back to one of the six organizational strategic initiatives.

### **Initiative 2**

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

<b>Goal 2.1</b>	<b>Evaluate organizational and staffing models</b>		
<b>Objective</b>	Align resources with needs		
<b>Task</b>	Continued evaluation of fleet specifications and suitability in advance of scheduled replacement	Ongoing	December 31, 2023

<b>Goal 2.3</b>	<b>Maintain fiscal responsibility</b>		
<b>Objective</b>	Evaluate sustainable practices		
<b>Task</b>	Evaluate and develop a plan to utilize solar energy to reduce facility energy costs	Ongoing	December 31, 2023
<b>Task</b>	Evaluate the use of electronic or hybrid technology for non-emergency response vehicles.	Completed Date:	January 2022

# Support Services Department

2023/24 Fiscal Year

General Fund	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2020/21 FY	2021/22 FY	2022/23 FY	2023/2024		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	\$355,086.42	\$370,858.12	\$401,600	\$86,000	\$86,000	\$94,000
Overtime	2,626.20	3,748.23	5,000	5,000	5,000	5,000
Incentives	23,434.00	33,953.21	38,500	3,000	3,000	3,000
Payouts	8,503.98	13,378.00	17,500	2,000	2,000	2,000
Retirement (PERS)	75,333.96	87,240.15	97,000	15,000	15,000	17,000
ER Deferred Comp Contrib	4,742.99	5,803.78	15,000	2,000	2,000	2,000
Health and Life Insurance	94,293.17	104,841.29	120,000	39,000	39,000	39,000
HRA-VEBA Contribution	16,301.15	17,625.00	19,400	6,500	6,500	6,500
FICA and Medicare PR Taxes	28,957.06	29,871.73	35,000	7,500	7,500	7,500
Workers' Comp Insurance	316.35	182.08	1,000	1,000	1,000	1,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$609,595.28</b>	<b>\$667,501.59</b>	<b>\$750,000</b>	<b>\$167,000</b>	<b>\$167,000</b>	<b>\$177,000</b>
<b>Materials and Services</b>						
Uniforms	\$23,557.70	\$61,613.53	\$55,000	\$60,000	\$60,000	\$60,000
Janitorial Supplies and Laundry Services	56,382.17	38,822.59	35,000	35,000	35,000	35,000
Medical Supplies and Equipment	71,796.23	84,718.89	80,000	0	0	0
Facility Maintenance Supplies	2,110.56	4,904.66	5,000	5,000	5,000	5,000
Miscellaneous Logistical Supplies	0.00	0.00	2,000	2,000	2,000	2,000
Station Consumables	1,857.22	2,244.31	6,000	6,000	6,000	6,000
Furnishings and Appliances	17,775.55	12,409.82	17,000	20,000	20,000	20,000
Facility Supplies	3,198.81	4,147.85	13,000	13,000	13,000	13,000
Fuel and Lubricants	53,162.70	93,768.05	100,000	150,000	150,000	150,000
M&R of Vehicles and Apparatus	281,690.99	262,862.90	250,000	300,000	300,000	300,000
Bldgs & Grounds - WC Station	16,445.52	12,767.90	23,000	15,000	15,000	15,000
Bldgs & Grounds - CP Station	7,084.22	20,528.15	33,000	47,000	47,000	47,000
Bldgs & Grounds - DB Station	1,258.57	673.29	5,000	5,000	5,000	5,000
Bldgs & Grounds - SV Station	8,291.86	1,722.97	6,000	19,000	19,000	14,000
Bldgs & Grounds - GH Station	16,580.38	4,487.24	5,000	16,000	16,000	16,000
Bldgs & Grounds - AL Station	9,763.19	6,429.70	15,000	11,000	11,000	11,000
Bldgs & Grounds - EP Station	10,618.54	4,502.26	30,000	14,000	14,000	14,000
Bldgs & Grounds - TR Station	6,042.41	338.48	3,000	3,000	3,000	3,000
Bldgs & Grounds - SNC Station	10,189.38	9,792.90	13,000	7,000	7,000	7,000
Bldgs & Grounds - TRNG Center	4,998.81	1,924.69	32,000	10,000	10,000	10,000
Bldgs & Grounds - ADM Bldg	35,949.57	38,865.07	25,000	17,000	17,000	17,000
Bldgs & Grounds - LOG Warehouse	1,371.80	1,305.21	2,000	0	0	0
Bldgs & Grounds - Fire Science Center	2,989.49	10,736.64	2,000	2,000	2,000	2,000
M&R; District Equipment	990.66	1,944.14	10,000	10,000	10,000	10,000
M&R; Appliances and Furnishings	238.67	898.65	5,000	5,000	5,000	5,000
Community Risk Reduction	18,295.60	59,557.12	60,000	0	0	0
Community Care Program	0.00	5,910.21	13,500	0	0	0
Contractual/Professional Services	6,872.75	7,296.30	8,000	0	0	0
Membership and Certifications	370.00	370.00	1,000	0	0	0
Subscriptions	0.00	274.00	500	0	0	0
Utilities; WC	29,907.63	33,601.68	35,000	35,000	35,000	35,000
Utilities; CP	21,835.09	23,772.66	23,000	23,000	23,000	23,000
Utilities; DB	7,815.62	10,930.79	14,000	14,000	14,000	14,000
Utilities; SV	10,164.07	9,011.49	14,000	14,000	14,000	14,000
Utilities; GH	8,758.13	10,123.02	14,000	14,000	14,000	14,000
Utilities; AL	6,397.42	8,609.68	10,000	10,000	10,000	10,000
Utilities; EP	21,014.16	22,473.44	23,000	23,000	23,000	23,000
Utilities; TR	3,047.10	3,567.45	5,000	5,000	5,000	5,000
Utilities; SNC	19,351.52	20,414.51	23,000	23,000	23,000	23,000
Utilities; TC	16,353.71	19,345.40	15,000	15,000	15,000	15,000
Utilities; AB	35,059.88	36,766.68	37,000	37,000	37,000	37,000
Utilities; FSC	4,589.17	4,506.32	5,000	5,000	5,000	5,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$854,176.85</b>	<b>\$958,940.64</b>	<b>\$1,073,000</b>	<b>\$990,000</b>	<b>\$990,000</b>	<b>\$985,000</b>
<b>TOTAL STRATEGIC SERVICES</b>	<b>\$1,463,772.13</b>	<b>\$1,626,442.23</b>	<b>\$1,823,000</b>	<b>\$1,157,000</b>	<b>\$1,157,000</b>	<b>\$1,162,000</b>

# Support Services Department

2023/24 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT General Fund 1, Department 5

Account	Description	Account Total
<b>58213-000</b>	<b>Uniforms.....</b>	\$ 60,000
	Attire for all uniformed positions in all departments including shirts, pants, duty boots, accessories, badges, belts, sweatshirts, and alterations	
<b>60221-000</b>	<b>Janitorial Supplies and Laundry Services.....</b>	\$ 35,000
	Janitorial and cleaning supplies for all District facilities; truck towel and floor mat laundry	
<b>60223-006</b>	<b>Facility Maintenance Supplies.....</b>	\$ 5,000
	Shop tools, supplies, and equipment for the performance of facility maintenance activities	
<b>60223-007</b>	<b>Miscellaneous Logistical Supplies.....</b>	\$ 2,000
<b>60223-008</b>	<b>Station Consumables.....</b>	\$ 6,000
	Coffee and consumable supplies for all District facilities	
<b>60223-015</b>	<b>Furnishings and Appliances.....</b>	\$ 20,000
	General facility furnishings and appliances including televisions	
<b>60223-016</b>	<b>Facility Supplies.....</b>	\$ 13,000
	Supplies for all facilities including but not limited to lightbulbs, extension cords, garden supplies, mattress covers, small kitchen and cookware items	
<b>60230-000</b>	<b>Fuel and Lubricants.....</b>	\$ 150,000
<b>60250-000</b>	<b>M&amp;R of Vehicles and Apparatus.....</b>	\$ 300,000
<b>60251-</b>	<b><u>Buildings and Grounds</u></b>	
	Includes: generator service and testing, fire sprinkler testing, fire alarm monitoring, HVAC service and repair, pest control, landscape services, weed abatement, carpet and upholstery cleaning, apparatus bay door maintenance, plumbing, electrical, and lot sweeping. Fiscal year specific projects will be listed as separate line items under respective stations	
<b>110- White City Station.....</b>		\$ 15,000
	General maintenance and repair	15,000
<b>111- Central Point Station.....</b>		\$ 47,000
	General maintenance and repair	12,000
	Overhead door control upgrade	35,000

# Support Services Department

2023/24 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT -Continued

### General Fund 1, Department 5

Account	Description	Account Total
<b>112- Dodge Bridge Station.....</b>		\$ 5,000
	General maintenance and repair	
<b>113- Sams Valley Station.....</b>		\$ 14,000
	General maintenance and repair	6,000
	PROJECT: Exterior painting	8,000
<b>114- Gold Hill Station.....</b>		\$ 16,000
	General maintenance and repair	6,000
	PROJECT: Exterior painting	10,000
<b>115- Agate Lake Station.....</b>		\$ 11,000
	General maintenance and repair	6,000
	PROJECT: Generator installation	5,000
<b>116- Eagle Point Station.....</b>		\$ 14,000
	General maintenance and repair	10,000
	PROJECT: Interior painting	4,000
<b>117- Table Rock Station.....</b>		\$ 3,000
	General maintenance and repair	3,000
<b>118- Scenic Station.....</b>		\$ 7,000
	General maintenance and repair	7,000
<b>120- Training Center/Warehouse/Offices.....</b>		\$ 10,000
	General maintenance and repair	10,000
<b>121- Administrative Building.....</b>		\$ 17,000
	General maintenance and repair	17,000
<b>123- Fire Science Center.....</b>		\$ 2,000
	General maintenance and repair	2,000
<b>60254-000 M&amp;R; District Equipment.....</b>		\$ 10,000
	Includes but is not limited to breathing air compressors, forklift, ATV, flatbed trailer, scissor lift, blowers, sprayer, and fuel tanks	
<b>60255-000 M&amp;R; Station Appliances and Furnishings.....</b>		\$ 5,000
	Includes but is not limited to interior appliances, ice machines, dishwashers, refrigerators, and cook stoves	

# Support Services Department

2023/24 Fiscal Year

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

### General Fund 1, Department 5

Account	Description	Account Total
60500-	<b>Utilities; Stations and Facilities</b> ..... Includes electricity, natural gas, propane, water, garbage, sewer, telephone, internet, and cable or satellite television services	\$ 218,000
	110- 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/Warehouse/Offices	15,000
	121- Administrative Building	37,000
	123- Fire Science Center	5,000
	<b>TOTAL MATERIALS AND SERVICES</b>	<b>\$ 985,000</b>

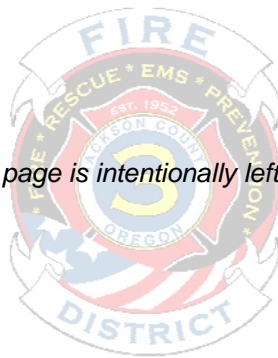
# FIRE DISTRICT 3

## Technology



2023/24  
Fiscal Year Budget

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# Technology Department

2023/24 Fiscal Year

## DEPARTMENT DESCRIPTION

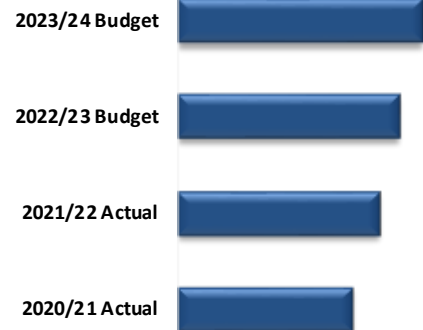
The Technology Department (IT) is responsible for supporting the District's data management and computing infrastructure that connects all District facilities, including the local area network, wide area network, and wireless network. IT oversees the security and backup of all District information systems and manages the District's computer workstations, 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. In addition, IT works with the 911 Dispatch Center, Emergency Communications of Southern Oregon (ECSO), for computer aided dispatch programming and support.

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.

## BUDGET SUMMARY

Expenditures	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Personnel Services	\$152,199	\$160,484	\$169,400	\$180,000
Materials and Services	\$238,671	\$290,810	\$323,800	\$367,000
	<b>\$390,870</b>	<b>\$451,294</b>	<b>\$493,200</b>	<b>\$547,000</b>

## Budget Comparison



## PERSONNEL SUMMARY

Position	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Information Technology Administrator	1.00	1.00	1.00	1.00
<b>Total</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted to increase 6.2 percent or \$10,600 over the prior fiscal year. Factors impacting this classification include salary and benefit adjustments due to cost of living, pension plan rate changes, and increases in health insurance.

The Materials and Services classification is budgeted to increase 13.3 percent or \$43,200. 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 \$19,500 due to replacing mobile computer hardware, iPads, and cyber security enhancements. Communication services has increased \$5,000 to accommodate more devices requiring data usage.

# Technology Department

2023/24 Fiscal Year

## PRIOR YEAR ACCOMPLISHMENTS

- Implemented FirstNet (First Responder Network) within the District's technology ecosystem.
- Continued to enhance FirstDue preplanning system to response and risk reduction staff.
- Developed and implemented a plan to transfer the records management system to the State of Oregon system.
- Maintained a cloud-based data backup system along with other network security measures.
- 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 the 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>2019/20 Actual</i>	<i>2020/21 Actual</i>	<i>2021/22 Actual</i>	<i>2022/23 Actual</i>	<i>2023/24 Target</i>
<i>Maintain Computer Workstations</i>	60	70	70	75	75
<i>Mobile Display Computers and Tablets</i>	18	20	20	21	30
<i>Network Servers</i>	8	15	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.
- Manage the security of District data and communications networks to provide security to District data and ensure continuity of business services.  
Measured By: Successfully able to manage data security so that no viruses, malware, or data breaches negatively affect District technology systems.  
➡ Successfully able to deploy data and communications security strategies that protected District technology systems from any negative effects due to data breaches or intrusions.

# Technology Department

2023/24 Fiscal Year

## 2023/24 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	Ongoing	December 31, 2023
Task	Provide an informational dashboard in responder work locations to enhance service delivery	Ongoing	December 31, 2023

Objective	Develop and enhance programs within the District		
Task	Evaluate the use of current and emerging technologies to enhance current programs and response	Ongoing	December 31, 2023

Objective	Keep up with technology to support communities		
Task	Evaluate and integrate technology solutions that enhance and support service to communities within the District	Ongoing	December 31, 2023

Goal 2.3	Maintain fiscal responsibility		
Objective	Assess capital needs and plan accordingly		
Task	Develop a formalized technology related capital resources plan	Ongoing	December 31, 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	Ongoing	December 31, 2023

### Initiative 6

**Commit to excellence through innovation.**

Goal 6.1	Focus on innovation to improve service delivery		
Objective	Embrace innovation to better support the service delivery models		
Task	Explore opportunities to test and evaluate technologies to enhance service delivery	Ongoing	December 31, 2023

# Technology Department

2023/24 Fiscal Year

General Fund	<u>HISTORICAL</u>		2022/23 FY Adopted Budget	<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2020/21 FY	2021/22 FY		2023/2024		
	Actual	Actual		Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	\$100,361.80	\$102,410.00	\$106,000	\$109,000	\$109,000	\$109,000
Incentives	4,732.30	6,109.30	7,400	8,000	8,000	8,000
Payouts	2,881.20	3,920.00	5,000	5,000	5,000	5,000
Retirement (PERS)	13,262.86	15,718.35	16,500	18,000	18,000	18,000
ER Deferred Comp Contrib	5,496.00	5,592.00	5,700	9,500	9,500	9,500
Health & Life Insurance	13,128.17	14,062.08	15,000	16,500	16,500	16,500
HRA-VEBA Contribution	4,125.60	4,209.60	4,300	4,000	4,000	4,000
FICA and Medicare PR Taxes	8,208.43	8,547.46	9,000	9,000	9,000	9,000
Workers' Comp Insurance	3.09	(84.76)	500	1,000	1,000	1,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$152,199.45</b>	<b>\$160,484.03</b>	<b>\$169,400</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$180,000</b>
<b>Materials and Services</b>						
Supplies; Computers and Tech	\$29,863.71	\$55,709.79	\$71,000	\$90,500	\$90,500	\$90,500
Supplies; Communication Devices	18,454.35	18,596.91	20,000	20,000	20,000	20,000
Licenses and Subscriptions	131,993.56	162,019.01	167,300	189,000	189,000	189,000
Technical Support	24,330.02	7,639.99	13,000	10,000	10,000	10,000
M&R; Office and Tech Equip	5,040.73	5,292.83	7,500	7,500	7,500	7,500
M&R; Communication Devices	1,996.06	10,983.05	10,000	10,000	10,000	10,000
Communication Services	26,992.38	30,568.32	35,000	40,000	40,000	40,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$238,670.81</b>	<b>\$290,809.90</b>	<b>\$323,800</b>	<b>\$367,000</b>	<b>\$367,000</b>	<b>\$367,000</b>
<b>TOTAL TECHNOLOGY</b>	<b>\$390,870.26</b>	<b>\$451,293.93</b>	<b>\$493,200</b>	<b>\$547,000</b>	<b>\$547,000</b>	<b>\$547,000</b>

# Technology Department

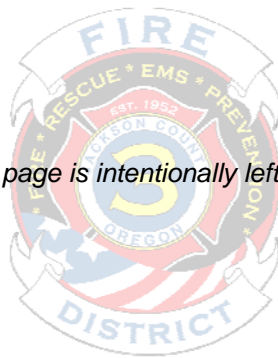
2023/24 Fiscal Year

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

### General Fund 1, Department 7

Account	Description	Account Total
<b>60223-011</b>	<b>Computers and Technology Supplies and Equipment.....</b>	<b>\$ 90,500</b>
	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: iPads (to replace majority of MDC's)	18,000
	PROJECT: MDC's (2 )	10,000
	PROJECT: CAD Interface for Tablet Command	25,000
<b>60223-013</b>	<b>Communication Devices.....</b>	<b>\$ 20,000</b>
	Radio equipment, communication devices, and batteries for pagers	
<b>60240-000</b>	<b>Licenses and Subscriptions.....</b>	<b>\$ 189,000</b>
	Image Trend annual subscription (records management system)	26,000
	Tablet Command	25,000
	Vector Solutions (staffing, training, logistics software platform)	23,000
	First Due (preplanning software)	22,000
	Office 365	16,000
	Springbrook (financial, HR, employee self-service software)	15,500
	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
	ArcMail service (email backup)	4,500
	Website hosting	4,100
	Radio over LTE Interface (Tango Tango)	4,000
	Mitel annual license and support (phone system)	3,600
	GIS software	3,500
	First Arriving dashboard subscriptions	2,800
	Pulse Point Verified Responder	2,500
	PSTRAX inventory tracker	3,500
	SonicWall (server firewall), Experts Exchange, Adobe Products	2,500
	Archive social media records retention	2,400
	Cisco smartnet subscription for firmware updates	2,100
	Trend security (antivirus)	2,000
	Photocopier lease payment	1,700
	Appraver secure spam filter (Email)	1,400
	IBM support (backup server and Shortel phone server)	500
	3E online safety data sheet management	500
	Zoom video conferencing	200
	DNS hosting and Active 911	100
<b>60241-000</b>	<b>Technical Support and Contracts.....</b>	<b>\$ 10,000</b>
	Data analytics support	3,000
	Core Business Solutions updates and monitoring support	5,000
	GIS support, RMS support, other hardware/software support	2,000
<b>60252-000</b>	<b>M&amp;R; Office and Tech Equipment.....</b>	<b>\$ 7,500</b>
<b>60253-000</b>	<b>M&amp;R; Emergency Response Communication Devices.....</b>	<b>\$ 10,000</b>
	Reprogramming and repair of pagers, radios, tablets, mobile computers	
<b>60290-000</b>	<b>Communication Services.....</b>	<b>\$ 40,000</b>
	Monthly expenses for mobile phone plans, WiFi cards for mobile devices	
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 367,000</b>

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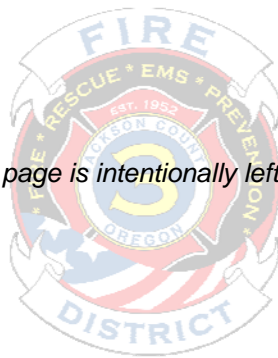
# Capital Projects Fund

## FIRE DISTRICT 3



2023/24  
Fiscal Year Budget

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# Capital Projects Fund

2023/24 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.

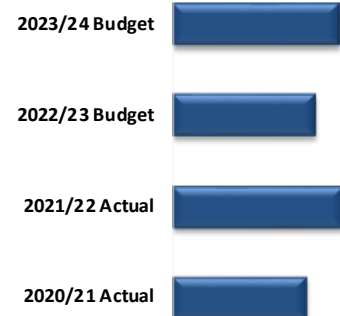
Transfers from the General Fund provide funding for the budgeted requirements. The Capital Replacement Schedule identifies a committed minimum transfer amount each fiscal year in order to meet targeted expenditures. A higher transfer amount will be made in fiscal years where the General Fund supports 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	2020/21 Actual	2021/22 Actual	2022/23 Budget	2023/24 Budget
Capital Expenditures	\$282,743	\$1,027,360	\$1,196,000	\$1,289,000
Contingency	\$0	\$0	\$121,600	\$139,800
Reserve for Future/Ending Fund Balance	\$4,573,001	\$5,137,040	\$3,878,400	\$4,836,200
	<b>\$4,855,744</b>	<b>\$6,164,401</b>	<b>\$5,196,000</b>	<b>\$6,265,000</b>

### Budget Comparison



# Capital Projects Fund

2023/24 Fiscal Year

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## **NEW BUDGETARY SIGNIFICANT CHANGES**

Identified in the Capital Replacement Schedule and re-budgeted for this fiscal year is the purchase of three wildland engines. These units were ordered in 2022 but due to production timelines, will not be completed until early 2024. They will replace the first-generation wildland engines purchased in 1997. The units will be on a Ford 550 extended cab chassis with the ability to carry 400 gallons of water. The District has budgeted \$575,000 for these units.

A chip truck with a dump box for the fuels reduction team is budgeted for \$50,000. Budgeted as a used vehicle purchase, it will provide staff with an efficient option in disposing of debris from hazardous vegetation removal.

This budget has identified \$35,000 for the purchase of a power lift gurney to be used on medical incidents, \$85,000 for the purchase of two cordless vehicular extrication sets to be used in performing rescues, and \$43,000 identified for a Fotokite tethered drone to be placed on the battalion chief truck for aerial assistance during certain types of responses.

This budget has identified \$450,000 as a placeholder for the continued exploration of expanding office space for administrative staff. Several options are being explored; this placeholder will provide flexibility in the coming budget year should a remodel, new construction, or a direct purchase occur. In addition, \$50,000 is allocated for the refurbishment of the Dodge Bridge station to include new windows, siding, and painting.



# Capital Projects Fund

2023/24 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 in the plan during the immediate years the purchase is planned for, or during construction, 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
		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	32/33
Structural Engine	10/20/25 years		2				2				
Interface Engine	20/30 years							1			
Wildland Engine	20/30 years	3				2					
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		
Technical Rescue Truck	20 years										
Staff Vehicle	10/20 years					3				3	
Service Vehicle	20 years										
<b>Suppression Equipment</b>											
Breathing Apparatus	15 years										
Defibrillators/AED's	10 years			6							
Extrication Equipment	10 years	2			2						
Thermal Imagers	7 years					5					
<b>Technology</b>											
Computer Main Server	5 years		1			1			1		

## Apparatus Program Goals

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

## Equipment Program Goals

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

# Capital Projects Fund

2023/24 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 adjusted to six percent per year for apparatus and vehicles and four percent for equipment 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
		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	32/33
Structural Engine	\$920,000	-	2,067,424	-	-	-	2,610,075	-	-	-	-
Interface Engine	\$385,000	-	-	-	-	-	-	578,898	-	-	-
Wildland Engine	\$205,000	575,000	-	-	-	548,672	-	-	-	-	-
Tactical Tender	\$390,000	-	-	-	-	-	-	-	-	-	-
Aerial Ladder Truck	\$2,600,000	-	-	3,096,642	-	-	-	-	-	-	-
Rescue/Ambulance	\$160,000	-	-	-	-	-	-	-	-	-	-
Battalion Chief Command Unit	\$145,000	-	-	-	-	-	-	-	231,108	-	-
Technical Rescue Truck	\$90,000	-	-	-	-	-	-	-	-	-	-
Staff Vehicle	\$70,000	-	-	-	-	281,027	-	-	-	354,791	-
Service Vehicle	\$75,000	-	-	-	-	-	-	-	-	-	-
		\$ 575,000	\$ 2,067,424	\$ 3,096,642	\$ -	\$ 829,700	\$ 2,610,075	\$ 578,898	\$ 231,108	\$ 354,791	\$ -
<b>SCHEDULED - Suppression</b>											
Breathing Apparatus	\$450,000	-	-	-	-	-	-	-	-	-	-
Defibrillators/AED's	\$30,000	-	-	202,476	-	-	-	-	-	-	-
Extrication Equipment	\$28,500	85,000	-	-	66,682	-	-	-	-	-	-
Thermal Imagers	\$7,000	-	-	-	-	42,583	-	-	-	-	-
		\$ 85,000	\$ -	\$ 202,476	\$ 66,682	\$ 42,583	\$ -	\$ -	\$ -	\$ -	\$ -
<b>SCHEDULED - Technology</b>											
Computer Main Server	\$15,000	-	15,914	-	-	17,389	-	-	19,002	-	-
		\$ -	\$ 15,914	\$ -	\$ -	\$ 17,389	\$ -	\$ -	\$ 19,002	\$ -	\$ -
<b>Other Proposed Projects (non-routine in nature)</b>											
Station Improvements		501,000	-	-	-	-	-	-	-	-	-
Chip Truck with Dump Box		50,000	-	-	-	-	-	-	-	-	-
Powerlift Gurney		35,000	-	-	-	-	-	-	-	-	-
Fotokite Tethered Drone		43,000	-	-	-	-	-	-	-	-	-
		\$ 629,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Project Costs</b>		\$ 1,289,000	\$ 2,083,338	\$ 3,299,117	\$ 66,682	\$ 889,672	\$ 2,610,075	\$ 578,898	\$ 250,110	\$ 354,791	\$ -

# Capital Projects Fund

2023/24 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 goal of transferring \$500,000 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 23/24 FY	Year 2 24/25 FY	Year 3 25/26 FY	Year 4 26/27 FY	Year 5 27/28 FY	Year 6 28/29 FY	Year 7 29/30 FY	Year 8 30/31	Year 9 31/32	Year 10 32/33
Beginning Fund Balance	\$ 4,767,000	\$ 4,976,000	\$ 3,396,663	\$ 601,545	\$ 1,038,863	\$ 653,192	\$ (1,452,884)	\$ (1,527,781)	\$ (1,273,891)	\$ (1,124,681)
Transfers in from General Fund *	1,395,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000	500,000
Other Revenue **	103,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000
Expenditures	1,289,000	2,083,338	3,299,117	66,682	889,672	2,610,075	578,898	250,110	354,791	-
Ending Fund Balance ***	\$ 4,976,000	\$ 3,396,663	\$ 601,545	\$ 1,038,863	\$ 653,192	\$ (1,452,884)	\$ (1,527,781)	\$ (1,273,891)	\$ (1,124,681)	\$ (620,681)

\* 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

The District continues to evaluate station and administrative capacity, call volume demand, and geographical areas with future population trends where growth is occurring in new housing developments. Aside from continuing to explore the need to expand capacity in administrative office space, the District has no immediate plans for new infrastructure growth at this time.

## 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

2023/24 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
<b><u>Apparatus and Vehicles</u></b>		
Wildland Engines (3)	\$575,000	The impact of these units on the operating budget is anticipated to be \$10,000 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 repurposed to other operations within the District. 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.
Chip Truck	\$50,000	The impact on the operating budget of adding a chip truck with dump box to the District fleet is anticipated to be an additional \$8,000 in fuel and operating costs. This truck will be purchased as used and will not be in service to the capacity of other vehicles.
<b><u>Building Construction/Improvements</u></b>		
Dodge Bridge Station Refurbish	\$50,000	Upgrading windows and siding to this fire station will result in lower energy costs by approximately 20 percent.
Administrative Office Expansion	\$450,000	Once a decision is made as to the most viable option in expanding office space for administrative staff, including community care and risk reduction, more information will be known on how this expansion will impact the general operating budget.

# Capital Projects Fund

2023/24 Fiscal Year

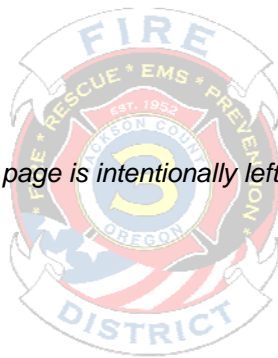
## Revenues and Expenditures by Account

Description	HISTORICAL		2022/23 FY Adopted Budget	BUDGET FOR NEXT FISCAL YEAR		
	2020/21 FY	2021/22 FY		2023/2024		
	Actual	Actual		Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Beginning Fund Balance	\$3,838,043.81	\$4,573,000.00	\$5,137,000	\$4,870,000	\$4,870,000	\$4,767,000
Sale of Capital Equip & Vehicles	21,500.00	0.00	1,000	1,000	1,000	100,000
Grants; Local, State, Federal	0.00	0.00	1,000	1,000	1,000	1,000
Donations	0.00	0.00	1,000	1,000	1,000	1,000
Transfer from General Fund	996,200.00	1,591,400.00	55,000	1,223,000	1,223,000	1,395,000
Loan Proceeds	0.00	0.00	1,000	1,000	1,000	1,000
	<b>\$4,855,743.81</b>	<b>\$6,164,400.00</b>	<b>\$5,196,000</b>	<b>\$6,097,000</b>	<b>\$6,097,000</b>	<b>\$6,265,000</b>
Department Equipment	\$160,279.27	\$201,354.00	\$10,000	\$523,000	\$163,000	\$163,000
Apparatus and Vehicles	114,973.71	802,831.00	1,005,000	700,000	700,000	625,000
Land and Improvements	7,490.30	23,175.00	1,000	1,000	1,000	1,000
Building Construction & Improvement	0.00	0.00	180,000	300,000	300,000	500,000
Contingency	0.00	0.00	121,600	183,000	139,800	139,800
Reserve for Future Exp & End Fund Bal	0.00	0.00	3,878,400	4,390,000	4,793,200	4,836,200
	<b>\$282,743.28</b>	<b>\$1,027,360.00</b>	<b>\$5,196,000</b>	<b>\$6,097,000</b>	<b>\$6,097,000</b>	<b>\$6,265,000</b>
Ending Fund Balance	<b>\$ 4,573,000.53</b>	<b>\$5,137,040.00</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## Detail by Account

Account	Description	Account Total
<b>70530-000</b>	<b>Department Equipment.....</b>	<b>\$ 163,000</b>
	Power lift gurney	35,000
	Extrication cordless tool set (2)	85,000
	Fotokite tethered drone	43,000
<b>70531-000</b>	<b>Apparatus and Vehicles.....</b>	<b>\$ 625,000</b>
	Wildland engines (3) on Ford F550 chassis ( <i>rollover from 22/23 FY</i> )	575,000
	Chip truck with dump box	50,000
<b>70532-000</b>	<b>Land and Improvements.....</b>	<b>\$ 1,000</b>
<b>70533-000</b>	<b>Building Construction/Improvements.....</b>	<b>\$ 500,000</b>
	Dodge Bridge station refurbish (siding, windows, painting)	50,000
	Administrative office expansion	450,000
<b>TOTAL CAPITAL EXPENDITURES</b>		<b><u>\$ 1,289,000</u></b>

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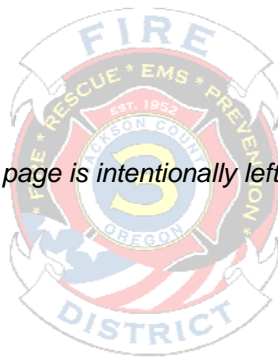
# Supplemental Information

## FIRE DISTRICT 3



2023/24  
Fiscal Year Budget

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# Principal Taxpayers

2022					2013				
			Taxable Assessed Valuation	Percentage of Total Taxable Assessed Valuation			Taxable Assessed Valuation	Percentage of Total Taxable Assessed Valuation	
	Type of Business	Rank			Rank				
PRIVATE ENTERPRISES:									
	Boise Cascade Wood Products	2	\$ 78,812,698	1.45 %	2	\$ 60,468,693		1.70	
	Amy's Kitchen	4	59,584,290	1.10	5	24,964,040		0.70	
	Carestream Health Inc	5	48,098,400	0.88	1	63,339,900		1.78	
	Linde LLC	6	40,338,430	0.74	4	25,090,820		0.71 %	
	Costco Wholesale Corporaton	7	27,729,150	0.51					
	Smith Crossing LLC	8	21,610,230	0.40					
	Plycem Usa Inc	9	19,336,380	0.36					
	Biomass One, Ltd				9	15,850,000		0.45	
	Table Rock Group LLC				6	22,723,368		0.64	
	Certainteed Corp				8	18,291,820		0.51	
PUBLIC UTILITIES:									
	Pacific Corp	1	89,732,000	1.65	3	40,637,000			
	Avista Corp	3	60,490,000	1.11	7	19,012,000		0.53	
	Lumen Technologies	10	19,329,000	0.36	10	14,992,400		0.42	
ALL OTHER TAXPAYERS:			4,970,366,142	91.44		3,252,302,498		91.42	
TOTAL ASSESSED VALUE			\$ 5,435,426,720	100.00 %		\$ 3,557,672,539		98.86 %	

Source: Jackson County Assessment Department.

# Summary of Assessed Values

## Unincorporated Areas including White City

2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
\$2,263,221,391	\$2,340,508,449	\$2,466,173,066	\$2,554,351,321	\$2,666,376,219	\$2,768,536,637	\$2,953,963,337
	3.41%	5.37%	3.58%	4.39%	3.83%	6.70%

## City of Gold Hill

2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
\$73,155,754	\$75,354,098	\$80,446,032	\$83,752,472	\$88,069,402	\$92,011,725	\$97,664,314
	3.01%	6.76%	4.11%	5.15%	4.48%	6.14%

## City of Central Point

2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
\$1,173,815,611	\$1,226,268,279	\$1,299,855,035	\$1,343,235,803	\$1,400,692,822	\$1,450,597,207	\$1,516,749,020
	4.47%	6.00%	3.34%	4.28%	3.56%	4.56%

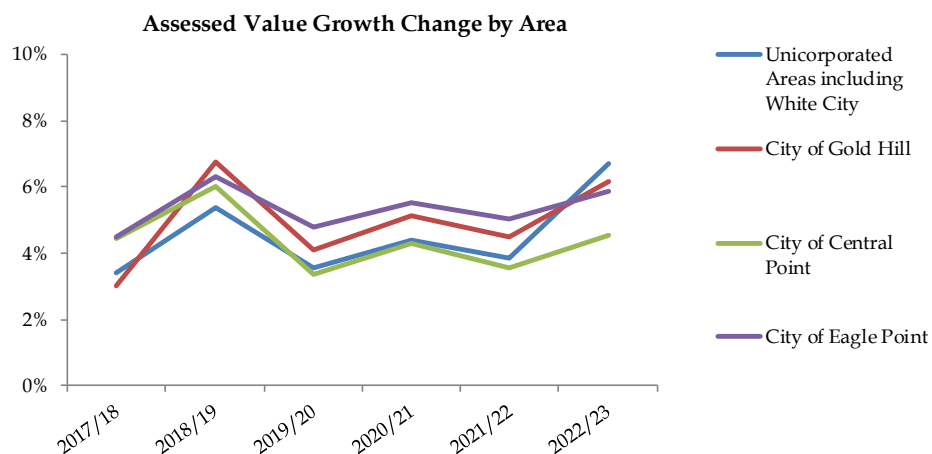
## City of Eagle Point

2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
\$634,616,194	\$663,251,693	\$705,232,847	\$738,930,152	\$779,613,103	\$819,040,786	\$867,050,049
	4.51%	6.33%	4.78%	5.51%	5.06%	5.86%

## Total Assessed Valuation for all Areas Combined

2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	Budgeted 2023/24
\$4,144,808,950	\$4,305,382,519	\$4,551,706,980	\$4,720,269,748	\$4,934,751,546	\$5,130,186,355	\$5,435,426,720	
	3.87%	5.72%	3.70%	4.54%	3.96%	5.95%	5.50%

**AVERAGE** **4.63%**



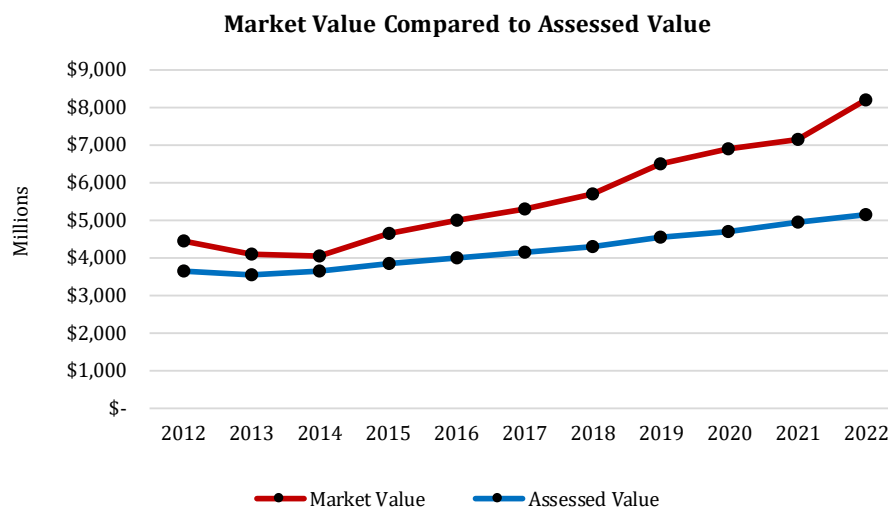
# Market and Assessed Value

## Last Ten Fiscal Years

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 of 1997, Oregon voters approved Measure 50 that revised the property tax system state-wide effective July 1, 1997. For property tax purposes, the measure changed a property's assessed valuation from real market value to a value for tax purposes. In addition, the maximum assessed value of a property was limited to a maximum of 3% growth per year. Accordingly, since that date, there is a difference between market value and assessed value.



# Property Tax Levies and Collections

Fiscal Year Ended June 30,	Taxes Levied by Assessor	Current Tax Collections	Current Tax Collections as Percent of Current Levy	Delinquent Tax Collections	Total Tax Collections	Total Collections as Percent of Current Levy	Outstanding Delinquent Taxes	Delinquent Taxes as Percent of Current Levy
2013	11,112,431	10,362,351	93.25	453,829	10,816,180	97.33	858,401	7.72
2014	11,424,300	10,740,195	94.01	513,404	11,253,599	98.51	879,881	7.70
2015	11,909,282	11,231,211	94.31	383,179	11,614,390	97.52	861,868	7.24
2016	12,458,556	11,792,665	94.66	341,393	12,134,058	97.40	899,876	7.22
2017	12,911,941	12,239,478	94.79	330,336	12,569,814	97.35	929,394	7.20
2018	13,416,774	12,713,654	94.76	310,257	13,023,911	97.07	987,975	7.36
2019	14,193,426	13,409,890	94.48	312,846	13,722,736	96.68	982,880	6.92
2020	14,718,202	13,880,987	94.31	324,887	14,205,874	96.52	963,387	6.55
2021	15,478,260	14,588,632	94.25	814,984	15,403,616	99.52	671,861	4.34
2022	16,028,243	15,294,618	95.42	287,493	15,582,111	97.22	650,444	4.06

# Demographic and Economic Statistics

Calendar Year	Jackson County Population	Total Personal Income (thousands of dollars)	Per Capita Personal Income	School Enrollment	Unemployment Rate
2012	205,860	7,438,436	36,133	8,061	10.5%
2013	207,155	7,564,605	36,513	8,101	9.1%
2014	209,226	8,216,284	39,270	8,119	7.4%
2015	211,432	8,797,567	41,609	8,356	6.0%
2016	215,498	9,212,901	42,752	8,439	5.1%
2017	218,087	9,657,327	44,282	8,585	4.7%
2018	220,838	10,095,949	45,717	8,524	4.9%
2019	222,195	10,615,059	47,774	8,997	3.8%
2020	223,394	11,708,142	52,410	8,729	6.7%
2021	223,734	12,717,430	56,842	8,914	4.6%

**Sources:** Population, personal income, and per capita personal income information provided by the Bureau of Economic Analysis. School enrollment provided by the Oregon State Department of Education. Unemployment data provided by the Oregon Employment Department.

**Notes:** Population, personal income, per capita income, and unemployment data is for entire Jackson County. School enrollment is based on the census of the two school district's within the Fire District at the start of the school year.

# Acronyms

TERM	STANDS FOR
ACFR	Annual Comprehensive Financial Report
ADM	Administrative
AED	Automated External Defibrillator
AFG	Assistant 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
DSS	Data Systems Specialist
ECISO	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

TERM	STANDS FOR
HIPPA	Health Insurance Portability and Privacy Act
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
NEMIS	National EMS Information System
NFORS	National Fire Operations Reporting System
NFPA	National Fire Protection Association
NIMS	National Incident Management System
ODF	Oregon Department of Forestry
OFCA	Oregon Fire Chiefs Association
OFMA	Oregon Fire Marshals Association
OFSOA	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
RVFFF	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

**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

2023/24 Fiscal Year

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## **Capital Outlays**

Expenditures for the acquisition of capital assets.

## **Chart of Accounts**

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

## **Current Liabilities**

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

## **Current Taxes**

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

## **Debt**

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

## **Debt Limit**

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

## **Depreciation**

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

## **Dispatch**

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

## **Engine**

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

## **Expenses**

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

## **Full-time Equivalent**

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

## **Fund**

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

## **Fund Balance**

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

# Glossary of Terms

2023/24 Fiscal Year

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## **General Fund**

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

## **General Long-Term Debt**

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

## **Governmental Funds**

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

## **Gross Bonded Debt**

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

## **Hazardous Materials (Haz-Mat)**

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

## **Incident**

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

## **Interface**

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

## **Levy**

Tax imposed/collected for the support of District activities.

## **Major Fund**

A governmental fund reported as a separate column in the basic fund financial statements. The general fund is always a major fund. Otherwise, major funds are funds whose revenues or expenditures are at least ten percent of the total budget. Any other government fund may be reported as a major fund, if that fund is particularly important to the financial statements.

## **Modified Accrual Basis**

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

## **Municipal Corporation**

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

## **Net Bonded Debt**

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

## **Object Classification**

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

## **Performance Measures**

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

# Glossary of Terms

2023/24 Fiscal Year

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## **Prior Year Tax Levies**

Taxes levied for fiscal periods preceding the current one.

## **Property Taxes**

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

## **Resources**

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

## **Response**

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

## **Revenue**

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

## **Shift**

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

## **Special Revenue Fund**

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

## **Supplemental Budget**

The process that modifies the adopted budget during a fiscal year.

## **Tax Base**

In Oregon, a designated amount of property tax 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 23-05

### RESOLUTION ADOPTING THE BUDGET FOR THE 2023/2024 FISCAL YEAR

BE IT RESOLVED, that the Board of Directors of Jackson County Fire District 3 hereby adopts the budget for fiscal year 2023/2024 for a total of \$31,061,000. 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, 2023, and for the purposes shown below are hereby appropriated:

#### GENERAL FUND

##### **Appropriations - Allocated to Organizational Programs**

Administration	\$	2,208,000
Response Services	\$	11,722,000
Risk Reduction	\$	1,441,500
Training	\$	666,500
Support Services	\$	1,162,000
Technology	\$	547,000

##### **Not Allocated to Organizational Programs**

Debt Service	\$	449,000
Transfers	\$	1,395,000
Contingency	\$	1,041,000
<b>Total</b>	<b>\$</b>	<b>20,632,000</b>

#### CAPITAL PROJECTS FUND

##### **Capital Outlay Allocated to Organizational Programs**

Response Services	\$	738,000
Risk Reduction	\$	50,000

##### **Not Allocated to Organizational Programs**

Land and Improvements	\$	1,000
Building Construction	\$	500,000
Contingency	\$	139,800
<b>Total</b>	<b>\$</b>	<b>1,428,800</b>

**Total Appropriations - All Funds** **\$ 22,060,800**

**Total Unappropriated and Reserve Amounts - All Funds** **\$ 9,000,200**

**TOTAL ADOPTED BUDGET** **\$ 31,061,000**

### 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 2023/2024 upon the assessed value of all taxable property within the District:

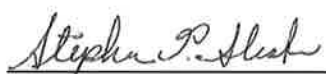
**Tax rate of \$3.1194 per \$1,000 of assessed value for permanent rate tax**

### 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 15th day of June, 2023.

  
Board of Directors

  
Board of Directors

# JACKSON COUNTY FIRE DISTRICT 3



## RESOLUTION NO. 23-04

### IN THE MATTER OF AUTHORIZING THE SALARY AND BENEFITS SCHEDULE FOR FISCAL YEAR 2023-2024 (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 four-year period starting July 1, 2020 through June 30, 2024; and

WHEREAS, the cost of living adjustment (COLA) effective July 1, 2023 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, 2023, through June 30, 2024, as follows:

POSITION		FTE	A	B	C	D	E
Battalion Chief	56-Hr	03	8,400	8,820	9,261	9,724	10,210
Fire Captain	56-Hr	13	7,783	8,172	8,580	9,009	9,460
Fire Engineer	56-Hr	12	6,764	7,102	7,457	7,830	8,222
Firefighter	56-Hr	24	6,123	6,430	6,751	7,089	7,443
Deputy Fire Marshal 3	40-Hr	01	7,783	8,172	8,580	9,009	9,460
Deputy Fire Marshal 2	40-Hr	01	6,764	7,102	7,457	7,830	8,222
Deputy Fire Marshal 1	40-Hr	01	6,123	6,430	6,751	7,089	7,443
Community Care Supervisor	40-Hr	01	5,857	6,150	6,457	6,780	7,119
Community Care Paramedic	40-Hr	02	4,881	5,125	5,381	5,651	5,933
Community Care EMT	40-Hr	02	3,827	4,019	4,220	4,431	4,652

Date adopted: June 15, 2023

  
BOARD OF DIRECTORS

  
BOARD OF DIRECTORS

# JACKSON COUNTY FIRE DISTRICT 3



## RESOLUTION NO. 23-03

### IN THE MATTER OF AUTHORIZING THE SALARY AND BENEFITS SCHEDULE FOR NON-BARGAINING PERSONNEL FISCAL YEAR 2023/2024

**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 2023/2024 fiscal year represent a 3% cost of living adjustment, and

**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, 2023, through June 30, 2024, as follows for full-time equivalent employees:

POSITION	FTE	A	B	C	D	E
Deputy Chief	1	10,118	10,624	11,155	11,712	12,298
Division Chief	2	9,694	10,179	10,688	11,222	11,784
Chief Administrative Officer	1	9,694	10,179	10,688	11,222	11,784
People Services Administrator	1	7,412	7,782	8,172	8,580	9,009
Technology Systems Administrator	1	7,412	7,782	8,172	8,580	9,009
Data Systems Specialist	1	5,566	5,844	6,137	6,443	6,766
Community Engagement Coordinator	1	5,060	5,313	5,579	5,858	6,151
Facilities Technician	1	5,060	5,313	5,579	5,858	6,151
Executive Assistant	1	4,747	4,985	5,234	5,496	5,770
Finance Assistant	1	4,747	4,985	5,234	5,496	5,770
Administrative Assistant	2	4,186	4,395	4,615	4,846	5,088

**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. At hire, two days (20 hours) will be posted to the employee's sick leave accrual bank.

## Jackson County Fire District 3 - RESOLUTION NO. 23-03

**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 Division Chief.

**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 1<sup>st</sup> to the employee's personal leave accrual. Hours must be utilized by June 30<sup>th</sup> 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. 23-03

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**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 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 \$86; Single tier with child dependents an additional monthly contribution of \$141; Married tier with no child dependents an additional monthly contribution of \$181; and Married tier with child dependents an additional monthly contribution of \$258.

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 (\$7,443). The monthly amount equates to \$372 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 (\$372/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, Division Chief, Chief Administrative Officer, People Services Administrator, Information Technology Administrator, Data Systems Specialist, and Facilities 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. 23-03

**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 1.5 hours of accrued time for each day they serve as the Duty Officer and ten hours of accrued time for each week they serve as the 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 Division Chief Chief Administrative Officer	4%
People Services Administrator Technology Systems Administrator Data Systems Specialist Community Engagement Coordinator Recruitment Retention Coordinator Facilities Technician	3%
Executive Assistant Finance Assistant Administrative Assistant Logistics Support	2%

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 401(a) 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 in 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. 23-03

**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	29.20	30.66	32.19	33.80	35.49
Logistics Support Technician	15.92	16.71	17.55	18.43	19.35

**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  
Memorial Day  
Fourth of July

Labor Day  
Veterans Day  
Thanksgiving Day

Christmas 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 1<sup>st</sup> to the employee's personal leave accrual. Hours must be utilized by June 30<sup>th</sup> 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 \$86; Single tier with child dependents an additional monthly contribution of \$141; Married tier with no child dependents an additional monthly contribution of \$181; and Married tier with child dependents an additional monthly contribution of \$258.

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. 23-03

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**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 (\$7,443). The monthly amount equates to \$186 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:** June 15, 2023



BOARD OF DIRECTORS



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