

# FIRE DISTRICT 3

*Jackson County, Oregon*



## BUDGET DOCUMENT

2018/2019  
FISCAL YEAR

# Fire District 3

## 2018/2019 Fiscal Year Budget Document



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White City, OR 97503  
(541) 826-7100  
[www.jcfd3.com](http://www.jcfd3.com)

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# Table of Contents

## 2018/19 Fiscal Year Budget Document

**1) Introduction and Profile**

- 1 Introduction of Members
- 2 Distinguished Budget Award
- 3 Mission, Vision, Value Statement
- 4 Organization Chart
- 5 Personnel Summary
- 7 History of the District
- 15 Geographical Maps

**2) Budget Message, Process, and Policies**

- 18 Budget Message
- 24 Budget Process
- 25 Budget Calendar
- 27 Budget and Financial Policies

**3) Strategic Plan**

- 34 Introduction
- 36 Initiatives and Goal Statements
- 40 Financial Forecast

**4) Financial Summary Schedules**

- 43 Fund Schedules
- 45 Budget Comparison Schedules

**5) General Fund Revenue**

- 48 Revenue Comparisons and Trends by Source
- 53 Property Taxes - Actual to Budgeted
- 54 Assessed Valuation Trends
- 56 Top Taxpayers
- 57 Valuation of Taxable Property
- 58 Property Tax Levies and Collections

**6) Administration Department**

- 59 Departmental Information including Accomplishments, Measurements, Goals, Tasks
- 64 Departmental Budget and Expenditure Detail

**7) Operations Department**

- 67 Departmental Information including Accomplishments, Measurements, Goals, Tasks
- 81 Departmental Budget and Expenditure Detail

**8) Fire and Life Safety Department**

- 84 Departmental Information including Accomplishments, Measurements, Goals, Tasks
- 91 Departmental Budget and Expenditure Detail

**9) Training Department**

- 93 Departmental Information including Accomplishments, Measurements, Goals, Tasks
- 99 Department Budget and Expenditure Detail

**10) Support Services Department**

- 102 Departmental Information including Accomplishments, Measurements, Goals, Tasks
- 105 Department Budget and Expenditure Detail

**11) Technology Department**

- 109 Departmental Information including Accomplishments, Measurements, Goals, Tasks
- 113 Department Budget and Expenditure Detail

**12) Non-Departmental Section**

- 115 Overview and Appropriations

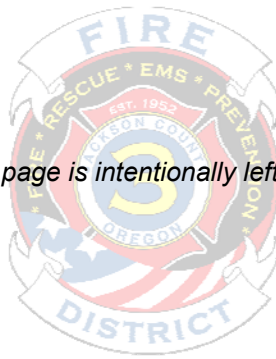
**13) Capital Projects Fund**

- 117 Fund Overview
- 118 Capital Replacement Schedule
- 120 Relationship of Capital Budget to Operating Budget
- 124 Capital Expenditure Detail

**14) Supplemental Data**

- 125 Glossary of Terms and Acronyms

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# Introduction of Members

## **BOARD OF DIRECTORS**

As of July 2018

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

### Term Expires

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

## **BUDGET COMMITTEE**

As of July 2018

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

Joe Strahl  
Rob Hernandez  
Steve Weber  
Ken Cummings  
Tim Snaith

### Term Expires

December 31, 2018  
December 31, 2019  
December 31, 2019  
December 31, 2020  
December 31, 2020

## **DISTRICT EXECUTIVE STAFF**

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

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

# Distinguished Budget Award



GOVERNMENT FINANCE OFFICERS ASSOCIATION

## *Distinguished Budget Presentation Award*

PRESENTED TO

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

For the Fiscal Year Beginning

**July 1, 2017**

*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, 2017. In order to receive this award, a governmental unit must publish a budget document that meets program criteria as a policy document, as an operations guide, as a financial plan and as a communications medium. The award is valid for a period of one year only. We believe our current budget continues to conform to program requirements, and therefore are submitting it to GFOA to determine its eligibility for another award.



# Mission, Vision, Value Statements

## Mission Statement

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



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

## Vision Statement

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



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

## Values

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



### **Honesty and Integrity**

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

### **Professionalism**

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

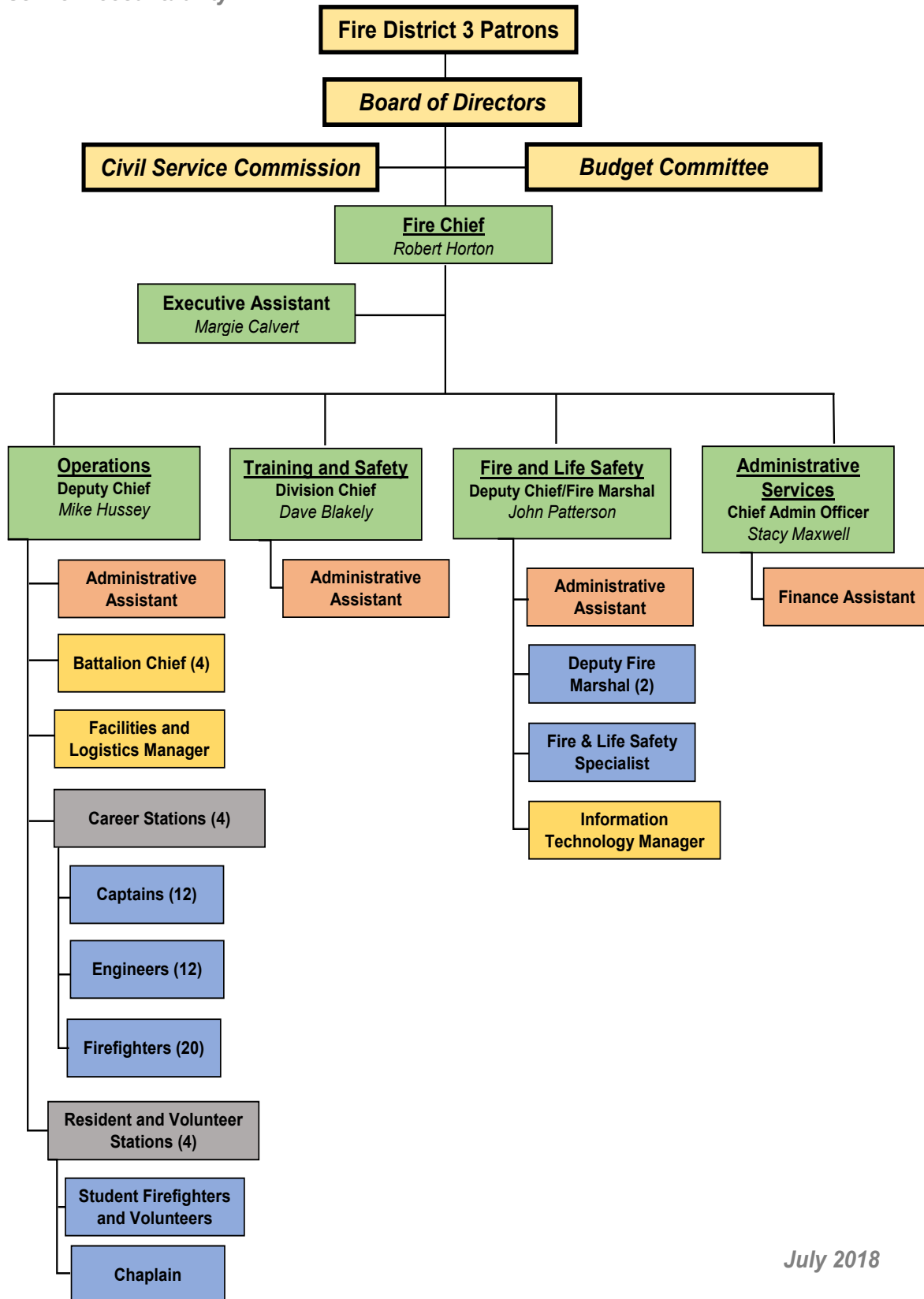
### **Health**

*Maintain physical and mental well-being.*



# Organization Chart

## Personnel Accountability



July 2018

# Personnel Summary

## Budgeted Staffing Level by Department

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

	2015/16	2016/17	2017/18	2018/19
	Actual	Actual	Adopted	Adopted
<b>Administration</b>				
Fire Chief	1	1	1	1
Chief Finance Officer	1	1	1	1
Finance Assistant	1	1	1	1
Executive Assistant	1	1	1	1
Program Assistant (part-time)	0	0	0	0.15
<b>Total</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>4.15</b>
<b>Operations</b>				
Deputy Chief of Operations	1	1	1	1
Rural Communities Chief	1	0.5	0	0
Battalion Chief – 56 Hour Shift	3	3	3	3
Battalion Chief – 40 Hour Staff	0	1	0	1
Fire Captain	12	12	12	12
Fire Engineer	12	12	12	12
Firefighter	20	20	20	20
Administrative Assistant	1	1	1	1
Program Assistant (part-time)	0	0	0	0
<b>Total</b>	<b>50</b>	<b>50.5</b>	<b>49</b>	<b>50</b>
<b>Fire and Life Safety</b>				
Deputy Chief/Fire Marshal	1	1	1	1
Deputy Fire Marshal	2	2	2	2
Fire and Life Safety Specialist	1	1	1	1
Administrative Assistant	1	1	1	1
<b>Total</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>
<b>Training</b>				
Division Chief of Training and Safety	1	1	1	1
Administrative Assistant	1	1	1	1
<b>Total</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>
<b>Support Services</b>				
Facilities/Logistics Manager	1	1	1	1
<b>Total</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>Technology</b>				
Information Technology Administrator	1	1	1	1
<b>Total</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>Total for All Departments</b>	<b>63.00</b>	<b>63.50</b>	<b>62.00</b>	<b>63.15</b>

# Personnel Summary

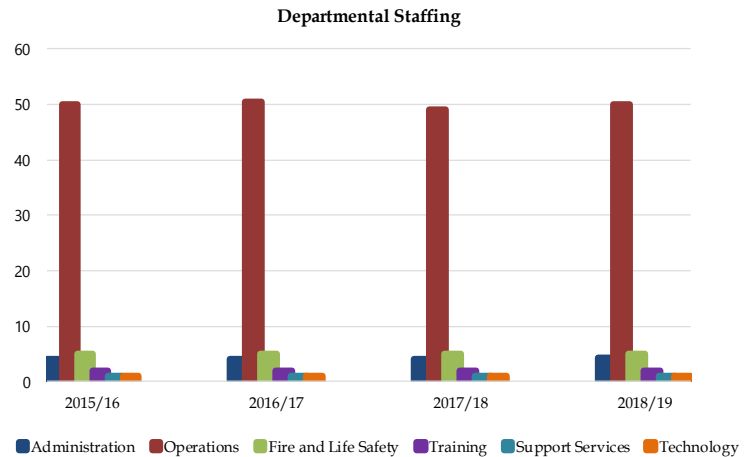
## SUMMARY OF PERSONNEL CHANGES

Following two years of staffing fluctuations due to retirements and program changes, this past year was one of steadiness and status quo. No staffing changes occurred during the 2017/18 fiscal year. In compliance with our Civil Service rules the District administered an Engineer promotional process in April of 2018, which resulted in a 26-month certified register with six individuals.

### 2018/19 Fiscal Year

The District has budgeted full salary and benefits for the Staff Battalion Chief. This position was first introduced in 2016 but after an unsuccessful recruitment process, was deferred. The position has been redeveloped, with a primary focus on the EMS program. The hiring process commenced in April 2018 with an anticipated start date in late summer. This position will serve under the Operations Department.

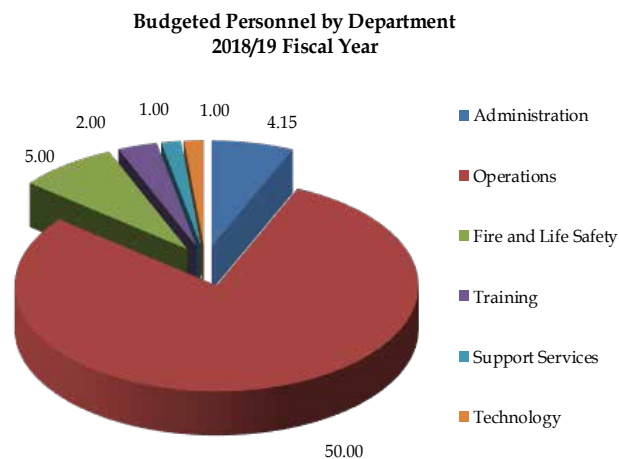
Under the Administration Department a part-time position has been added for a college student intern to assist with marketing and other administrative projects.



No additional position changes in this fiscal year are being recommended.

The firefighter entrance register will expire in September 2018. The District will administer another exam process to maintain a current register, which will be certified by the Civil Service Commission. This will be a 12 month register with the option to extend.

The District will continue looking towards the future, evaluating our response capabilities and support services, while assessing ways to maximize employee efficiency with patron's tax dollars.



# History of the District

## **1951**

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

## **1952**

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

## **1953**

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

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

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



## **1955**

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

## **1970**

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

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

## **1974**

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



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



# History of the District

## **1975**

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



## **1977**



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

## **1978**



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

## **1979**



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

## **1983**



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

## **1985**



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

# History of the District

## **1986**



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

## **1989**

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

## **1991**

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



## **1994**

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

## **1995**



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

## **1996**

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

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

# History of the District

## **1999**



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

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

## **2001**

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

## **2002**



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

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

## **2003**



The Central Point station is remodeled and expanded.

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

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

## **2004**

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

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

## **2005**

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

## **2006**

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



# History of the District

## **2007**



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

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

## **2008**



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

## **2009**

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

## **2010**

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

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

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

## **2011**

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



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

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

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

# History of the District

## **2012**

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

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



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

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

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

## **2013**

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

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

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

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

## **2014**

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

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

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

# History of the District

## **2015**



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

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

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

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

## **2016**

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

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

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

## **2017**



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

The District concluded the 2015-2017 Strategic Plan and established the 2018-2020 Strategic Plan through collaborative involvement from partnering agencies, stakeholders, and District members.

## **2018**

The District purchases land on Scenic Avenue in Central Point and working with Jackson County School District 6, begins the process of building the eighth fire station.

The District purchases and places in service two new structural fire engines from Pierce Manufacturing to continue the complement of like engines for each career station.

# Fast Facts

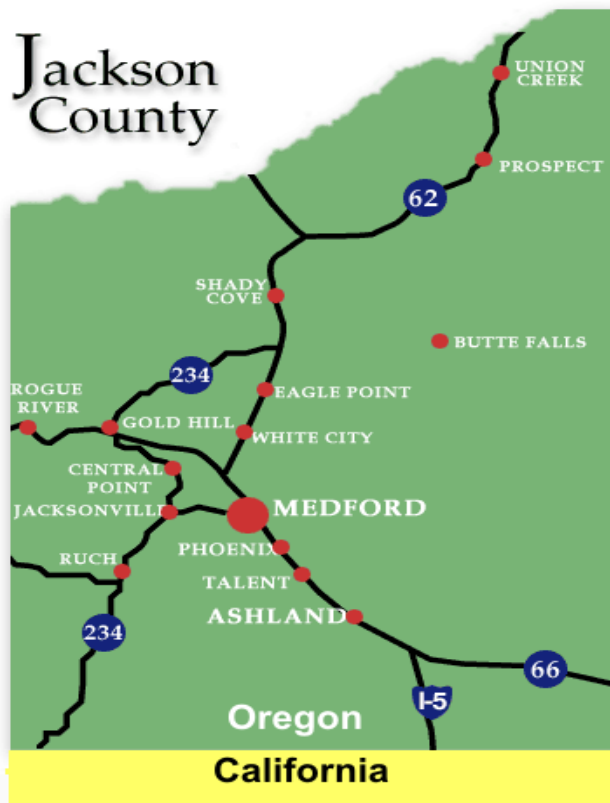
The District is located in the northern part of Jackson County, Oregon in the beautiful Rogue River Valley. Jackson County borders California to the south and is nestled between the majestic Cascade and Siskiyou Mountain ranges. It is conveniently located along Interstate 5 between Portland and San Francisco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



Population Served	53,973
Square Miles Served	167

City of Central Point	18,000	3.6 square miles
City of Eagle Point	9,046	2.6 square miles
City of Gold Hill	1,280	0.5 square miles
Unincorporated	25,647	159.9 square miles

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



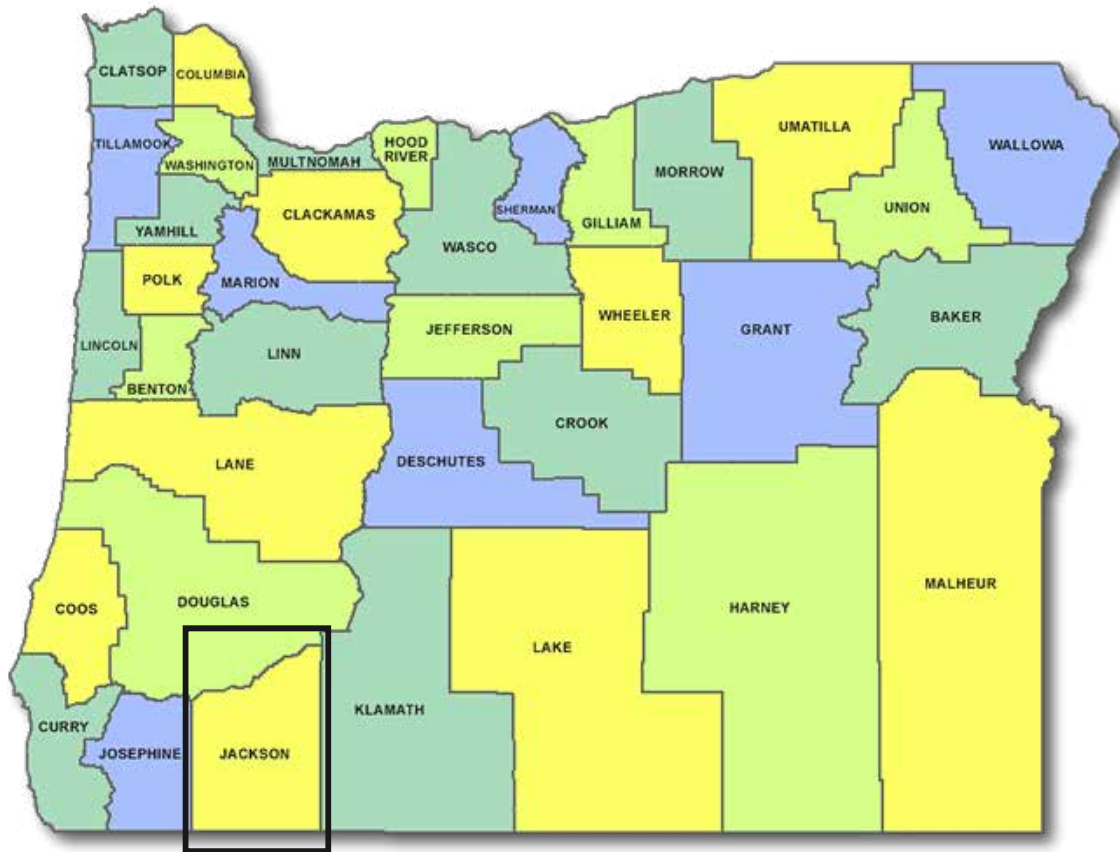
The Rogue Valley is home to a pair of well-known attractions - the Britt Music Festival and Ashland's Oregon Shakespeare Festival - and to dozens of museums, art galleries, theaters, wineries, and golf courses. History buffs will recognize the region as the site of Oregon's 19<sup>th</sup> Century gold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

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



# Geographical Location - State Map

## State of Oregon

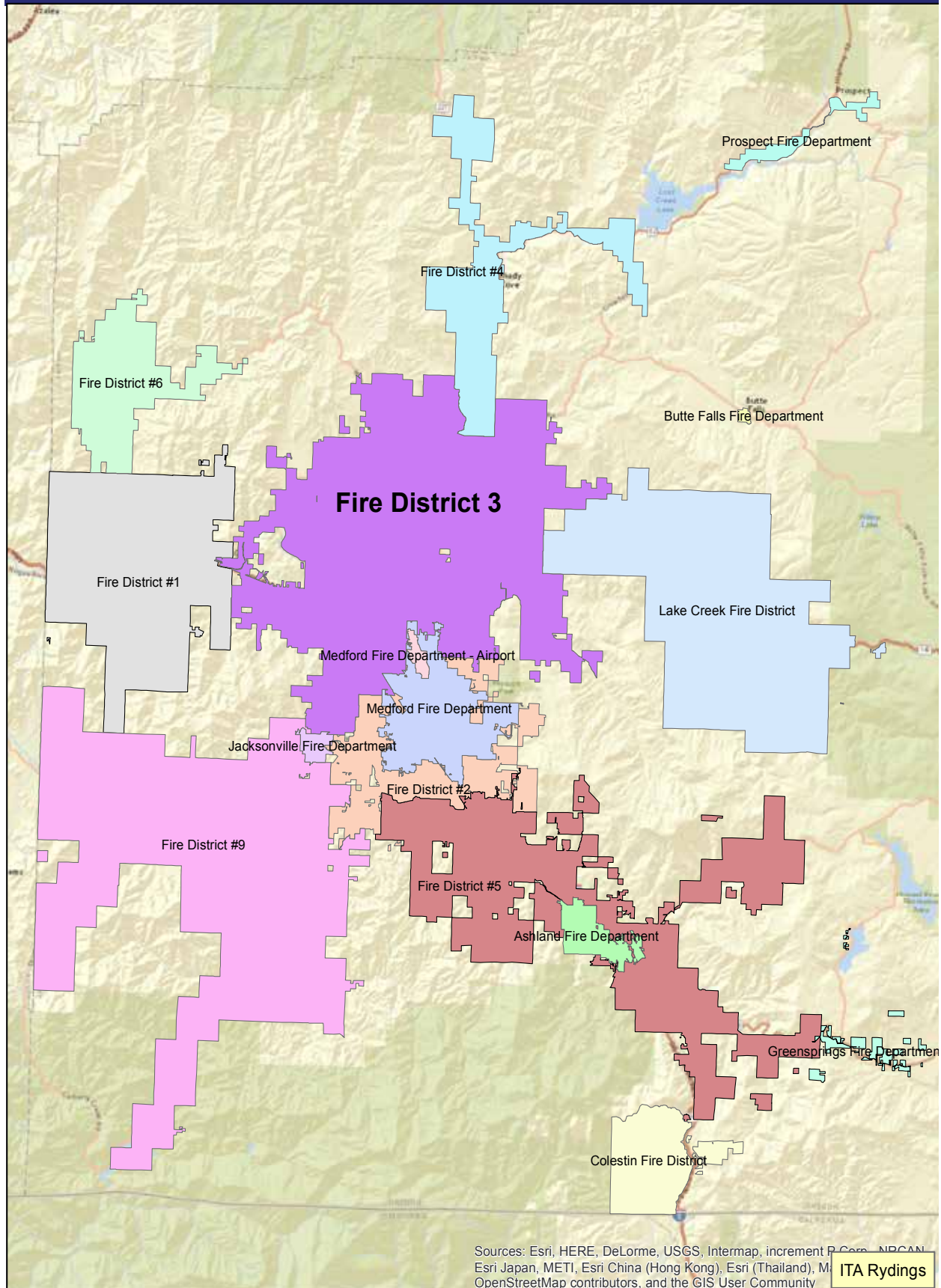


### Jackson County Demographics

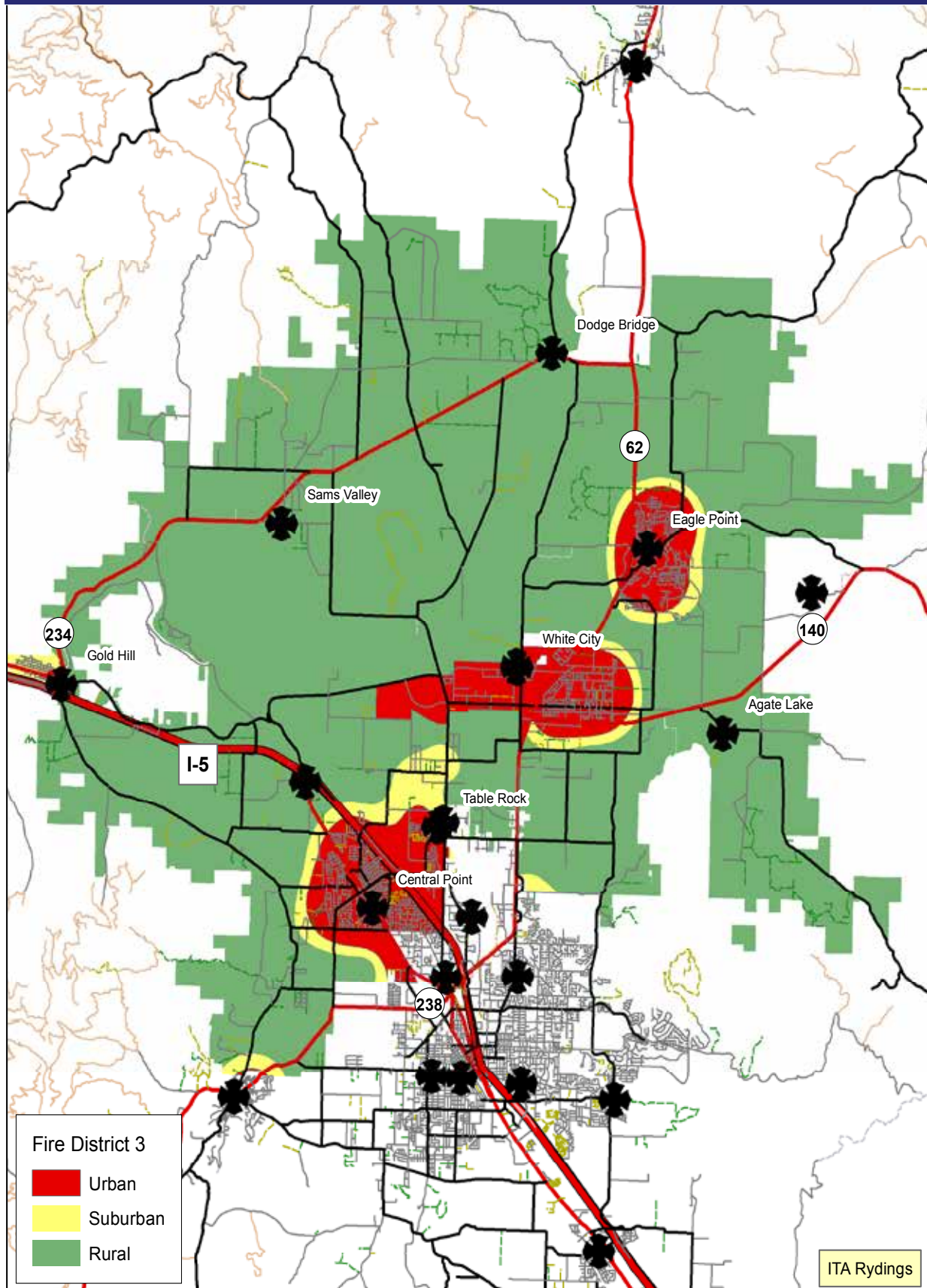
Calendar Year	Jackson County Population (a)	Total Personal Income (thousands of dollars)	Per Capita Personal Income	Unemployment Rate
2007	198,978	6,859,383	34,443	5.6%
2008	201,538	7,095,393	35,272	7.9%
2009	202,807	6,690,586	33,072	12.8%
2010	203,421	6,819,499	33,524	12.5%
2011	204,761	7,075,288	34,554	11.7%
2012	206,346	7,380,315	35,767	11.1%
2013	207,862	7,525,300	36,203	9.8%
2014	210,311	8,140,364	38,706	8.4%
2015	213,534	8,700,833	40,747	6.8%
2016	216,527	9,062,145	41,852	5.8%



# Geographical Location - County Map

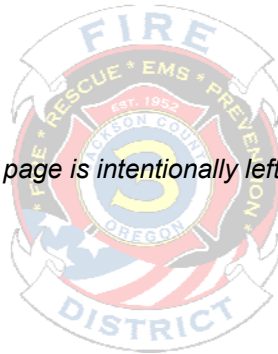


# Geographical Location - Station Locations





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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



April 19, 2018

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 2018/2019 fiscal year **proposed budget** for Jackson County Fire District 3. Staff has prepared this budget for your review and approval consistent with the District's vision, mission, and strategic 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. *This budget message contains figures based on what we are proposing to the Budget Committee at our April 19, 2018 meeting. Figures may change slightly from what is proposed and reflective in this message at the subsequent Budget Committee meetings, therefore the approved and adopted figures may differ. The budget message is not modified throughout the process to update these changes.*

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 2018-2020 Strategic Plan. In November of 2017, the District completed a community-based strategic planning session with an outcome of a new three year strategic plan that will continue to keep the organization focused and drive future budget and planning processes.

The Strategic Plan identifies five 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, innovation, 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 strategic partnerships.

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

Each year the District leadership 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 the goals. The Strategic Plan is a dynamic working document that ensures 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

During this past fiscal year the District had several accomplishments that we are most proud of:

- Completed the Standards of Cover document which are adopted written policies and procedures that determine the distribution, concentration, and reliability of fixed and mobile response forces for fire, emergency medical services, hazardous materials and other technical responses.
- Integrated the Interra data analysis program into the District's system to be able to real-time track 911 calls for service. The program provides us the capability to produce reports that will measure our performance with those identified in the Standards of Cover.
- Began building the framework for an additional component of the PulsePoint smartphone app entitled "Verified Responder" which alerts those subscribers that are members of the District's emergency response team of cardiac arrest victim calls occurring in either public or private locations, with the goal to improve a person's chance of survival. PulsePoint has been integrated into the 911 dispatch system. Also in an effort to improve out of hospital cardiac arrest outcomes, the District improved public access AED availability in six locations in the District.
- After years of data analysis, secured a location and purchased property for the permanent location of our eighth fire station.
- Continued the joint project between the District and Rogue Community College in construction of the Fire Science Educational Facility.

## Economic Factors and Long Range Financial Planning

The District has identified several key environmental assumptions that we are cognizant of throughout the budgetary process which may have impact on the ability to provide service at our current levels. In the development process, we ensure that compliance with financial policies is adhered to and that we preserve and protect our financial position for the future. Some of the factors have had longstanding impact, in which the District is still recovering. Others are ones we are watching closely and planning for those potential consequences in the future.

- Property assessed valuation is projected to increase modestly. We have forecasted a 4.5 percent assessed valuation growth for the 2018/19 fiscal year. The economy continues to remain strong and competitive. The unemployment rate for Jackson County in February 2018 was 4.4 percent, compared to 4.0 percent for the same month a year ago. New construction has rebounded and job growth is at 9.1 percent over the past year. These positive economic indicators reinforce that assessed valuations will continue to modestly grow, but we are not projecting it to return to pre-2008 growth.
- Call volume for the District was up 6.44 percent in 2017 compared to 1.08 percent in 2016. This past year we experienced a volatile fire season, which contributed to the higher increase in call volume. Central Point still remains our busiest station, experiencing a 7.3 percent increase in responses over the prior year. The Central Point area is where the dominate growth is occurring and we recognize that service demands will not decrease.
- The establishment of the Central Point urban renewal district in 2012 will continue to cause a loss in revenue for the District over the next 20 years, however the program will provide a significant increase in assessed valuation once the projects have been completed.
- Emergent medical calls continue to be the dominate type of incident the District responds to (42 percent for 2017). This category of response continues to change based on the socioeconomic environment, changing demographics, and changes in the national healthcare system. Calls often categorized as emergent upon dispatch are often determined non-emergent once our crews conduct a medical assessment. The District realizes that community education is important and that an analysis and discussion regarding trends for non-emergency requests for service is warranted at various stakeholder groups to address the growing movement. This topic has been identified in our Strategic Plan for further research and discussion.
- Taxpayers will continue to expect the District operate within its means. The community expects transparency, improvement of our key services, and a focus of our efforts on changing lives for the better.

# Budget Message

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

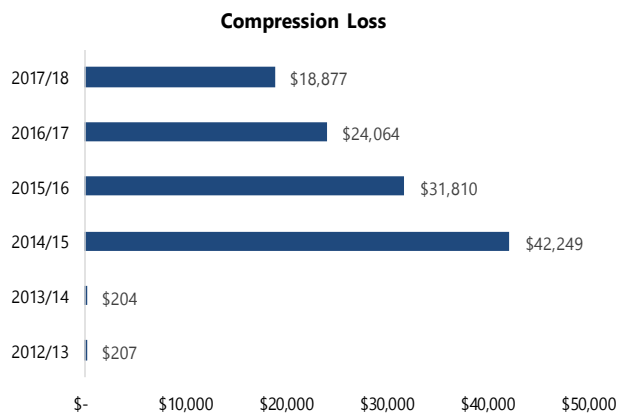
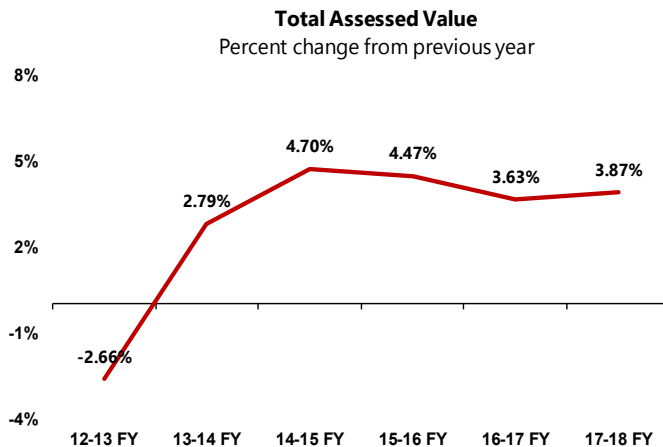
## Property Tax Analysis and Potential Impacts

The District experienced total assessed valuation (AV) growth of 3.87 percent for the 2017/18 fiscal year. The District’s financial forecast for the 2018/19 fiscal year and beyond includes continued modest increases in the growth rate of assessed value. Based on new construction growth within the residential and commercial sectors, this budget reflects a 4.5 percent increase.

**URBAN RENEWAL:** The City of Central Point’s Urban Renewal, which encompasses a portion of the District, will be in their sixth year. Under Oregon statute the total assessed value of the urban renewal is frozen and all future assessed valuation growth in the plan area is transferred to the urban renewal district until all identified projects are sufficiently funded. The District lost \$63,600 in tax revenue in fiscal year 2017/18 and \$165,000 since inception. This loss will continue to have an impact on the District, however the plan promises to provide substantial improvements in assessed valuation that would have otherwise not been possible.

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

The current combined tax rates in this code is \$11.262. As RMV increases the compression will decrease. Compression loss from the education side is added to the general government side, therefore increasing the potential for compression loss among the general government group.



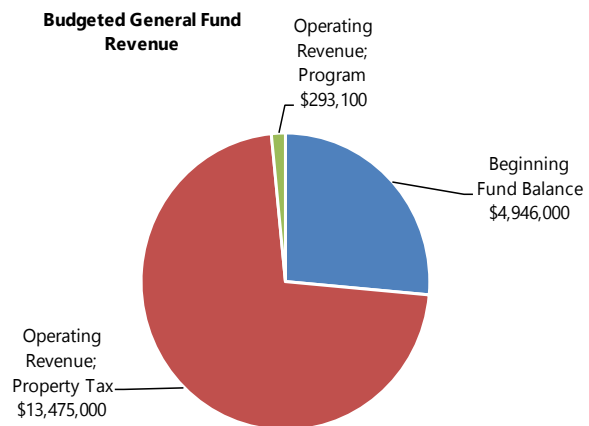
# Budget Message

## Summary of Revenue and Expenditures / Noteworthy Budgetary Items

### General Fund Revenue

This proposed budget reflects property tax revenue to be \$13,100,000, an increase over the prior year's budget by \$600,000. Current year taxes are calculated at our permanent tax rate of \$3.1194 per \$1,000 of assessed value with a 93.5 percent collectible rate. The District is experiencing a slightly higher collection rate for current year property taxes and a reduction in prior year property tax collection. Property tax is predominately derived from residential property and most tax payments are from bank escrow accounts. Prior year taxes is budgeted the same as last year, reflected at \$375,000. All property taxes combined account for 98 percent of the District's operating revenue.

Operating revenue consists of property tax, interest income, fees for service, contracts with other agencies, and proceeds from operational designated grants. Total operating revenue for the 2018/19 fiscal year is budgeted at \$13,768,100. Overall proposed General Fund revenue is \$18,714,100, a 1.32 percent increase from the 2017/18 fiscal year budget.



### Personnel Services

This proposed budget on April 19, 2018 reflects an increase in Personnel Services of 2.69 percent or \$276,600 from what was budgeted in the prior year. The District will be in the second year of a three year collective bargaining agreement with Rogue Valley Professional Firefighters (RVPFF) Local 1817. Positions that are represented include Firefighters, Engineers, Captains, Deputy Fire Marshals, and the Fire and Life Safety Specialist. This budget is based on a cost of living adjustment of 1.5 percent for both represented and non-represented employees.

**PERSONNEL:** The District has re-budgeted the Operations/EMS Staff Battalion Chief position. This position was developed in 2016 but filling it has remained on hiatus until further refinement was made and funding certain. This position is non-represented and serves under the Operations Department. Total increase to the budget for annualized salary and benefits is \$166,700. No other personnel changes are being recommended at proposal.

**PERS:** The District's employer contribution rate into the Public Employees Retirement System (PERS) will remain status quo for this budget year, but we will see another increase effective July 1, 2019. Employer rates are set by the PERS Board every two years and are based on a system-wide actuarial valuation that accounts for all costs, liabilities, rates of interest, and other factors to ensure System sustainability. A valuation report is only an estimate of the System's financial condition as of a single date. The valuation period that establishes rates effective July 1, 2017 through June 30, 2019 is from years 2013-2015 (the December 31, 2015 valuation).

The rate for all members in the tier one and tier two groups (those employees that have established membership prior to 2003) is 19.91 percent of payroll. Rates for firefighters in the tier three (OPSRP) group (those employees that have established membership after August 29, 2003) is 13.11 percent of payroll and the rates for general service members in the OPSRP group is 8.34 percent of payroll. The total budgeted PERS cost is \$1,135,000.

It is expected for the next two biennia that rates will continue to increase to the maximum of the PERS rate collar. This is dominantly due to stock market losses from the recession that started in 2008 and litigation that occurred after 2013 legislative reforms on the PERS program in order to reduce retirement cost of living increases and out-of-state tax remedies. Albeit these reforms were overturned by the Oregon Supreme Court, employer contribution rates established in 2015 that were based on the December 31, 2013 actuarial valuation, were calculated on these reforms not being overturned.

The District remains committed in maintaining costs to ensure the overall Personnel Services budget remains below our target of no more than 80 percent of operating revenue. We will continue to monitor PERS issues and brace for change due to benefit cuts and/or increasing employer costs.

# Budget Message

**HEALTH INSURANCE:** The District provides a medical and dental insurance plan for its full-time employees with a required employee cost share of four percent. In addition, an HRA-VEBA Health Reimbursement Plan is provided in which the District contributes a fixed amount for all employees. The budgeted contribution per employee for this proposed budget is \$330 per month for a total annualized expense of \$249,300.

At budget proposal, renewal rates for the medical insurance plan are still being negotiated for the plan year July 1, 2018 to June 30, 2019. Dental rates are being proposed with a zero percent increase. The District has budgeted for a minimal increase and once rates are solidified, will adjust the budget accordingly at the next phase of the budget process.

Total Personnel Services is proposed at \$10,541,400 which is 76.56 percent of operating revenue.

## **Materials and Services**

This proposed budget reflects a modest increase in Materials and Services of 1.86 percent or \$43,100 from the prior fiscal year. The District has focused efforts in all departments on the Strategic Plan to ensure fiscally sound spending practices at a sustainable level. A change for this budget year is rolling the Volunteer Department into the Operation Department. Under Operations, the student firefighters and volunteers have their own unique accounts established to identify expenditures related to that program. The District has felt over the last few years that having a stand-alone department entitled Volunteers did not warrant anymore, as this is really a program overseen by Operations. Total Materials and Services proposed is \$2,362,500 which is 17.16 percent of operating revenue.

## **Debt Service**

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

## **Contingency**

The Board of Directors has a policy that Operating Contingency will be six percent of property tax revenue. The District has been budgeting nine percent for the past several fiscal years in order to provide additional security with assessed valuation continuing to be under five percent. Staff is proposing to maintain contingency levels at nine percent or \$1,212,800 to ensure sustainability.

## **Ending Fund Balance**

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

## **Capital Projects Fund**

Staff is proposing to transfer \$1,076,500 to the Capital Projects Fund. This is substantially more than the annual target of \$300,000 but will provide for solid funding and reserves for future projects. With this contribution and after all budgeted expenditures, the fund is projected to have an ending balance of \$3,092,800, up \$245,700 from the current year.

Capital expenditures in the Capital Projects Fund increased \$1,373,300, to a total of \$5,525,100 reflecting several large projects in accordance with our Capital Replacement Plan. Significant projects include:

- Equipment to finish readying for service two structural type 1 fire engines with a budgeted cost at \$50,000.
- Seismic improvements to five fire stations. The District received a grant in 2017 from the Oregon Seismic Rehabilitation Program. This budget has \$975,000 allocated to finish these improvements.
- Fire science educational facility in collaboration with Rogue Community College (RCC). Over the past year the District has partnered with RCC in designing a classroom that will be used for the college's fire science program in addition to the District using it for internal and external training events, academy graduations, and ceremonies. The District is contributing \$500,000 towards the total project budget of \$1,000,000 and RCC has allocated \$500,000 from a general obligation bond. This project was started in the 2017/18 fiscal year with minimal amount expensed. This budget has identified \$900,000 in remaining expenditures and \$400,000 in revenue from RCC.

# Budget Message

- The District purchased land in March 2018 on Scenic Avenue in Central Point for a new fire station. During the 2018/19 fiscal year, the District will begin site development and the request for proposal (RFP) process for architectural and construction contracts. This budget has \$100,000 identified for land improvements and \$3,500,000 in station design and construction costs. The District is proposing to explore funding in the form of loan proceeds, therefore this budget has allocated \$3,000,000 under revenue. The expenditure and funding amounts identified in this budget are estimates and preliminary at this budgetary stage.

## Budgetary Item for Consideration

At the May 8<sup>th</sup> Budget Committee meeting we will present to you for consideration of approval an additional emergency response vehicle type that is not reflected in the original budget proposal. This new type 3 engine will allow us to expand our capabilities, especially in the challenging terrains of our rural environment, and is specifically designed to fit the needs of the urban interface while fulfilling the demands of all-hazard response. The proposed vehicle will be outfitted with 4-wheel drive capability, greater ground clearance, a rated pump and 4 person cab. It would meet both the requirements of a structural pumper and an off-road wildland firefighting vehicle. The configuration will provide greater capability and agility in response to wildland incidents, at a cost less than a type 1 structural engine. Due to its combined versatility and capability, this unit has become the preferred vehicle for structural protection at wildland incidents. The projected Capital Fund cost for this type 3 interface engine is \$385,000.

## Budget Summary

The 2018/19 fiscal year budget is organized into the following Departments; Administration, Operations, Fire and Life Safety, Training, Support Services, and Technology. In addition to these Departments, separate tabs identify the Non-Departmental section, General Fund Revenue, and the Capital Projects Fund.

The District has prepared this budget for all funds subject to the budget requirements of state law, including the legal requirement for a balanced budget, meaning that total beginning fund balance, revenues, and other financing sources are equal to the total of expenditures, other financing uses, contingency, and ending fund balance. Total budget appropriations or requirements for all funds the District is proposing totals \$27,556,100 which is \$2,047,800 higher than the prior year adopted budget or an eight percent increase.

Budgetary Summary - All Funds

Appropriations	2016/17 FY Adopted Budget	2017/18 FY Proposed Budget	Increase/ (Decrease)
Personnel Services	\$ 10,264,800	\$ 10,541,400	\$ 276,600
Materials and Services	2,319,400	2,362,500	43,100
Capital Outlay	4,151,800	5,475,200	1,323,400
Debt Service	261,900	261,900	-
Operating Transfers Out	1,349,300	1,076,500	(272,800)
Operating Contingency	1,224,000	1,511,800	287,800
Ending Fund Balance	5,937,100	6,326,800	389,700
Total Appropriations	\$ 25,508,300	\$ 27,556,100	\$ 2,047,800

The District considers operating expenses to consist of personnel services, materials and services, and debt service. This budget is proposed with total operating expenses at \$13,165,800 which is up \$319,700 from the current year.

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

Respectfully submitted,

**Jackson County Fire District 3**

*Robert B. Horton*

Robert B. Horton  
Fire Chief/CEO



# Budget Process

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

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

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

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

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

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

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

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

## Budget Process

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

## BUDGET CALENDAR

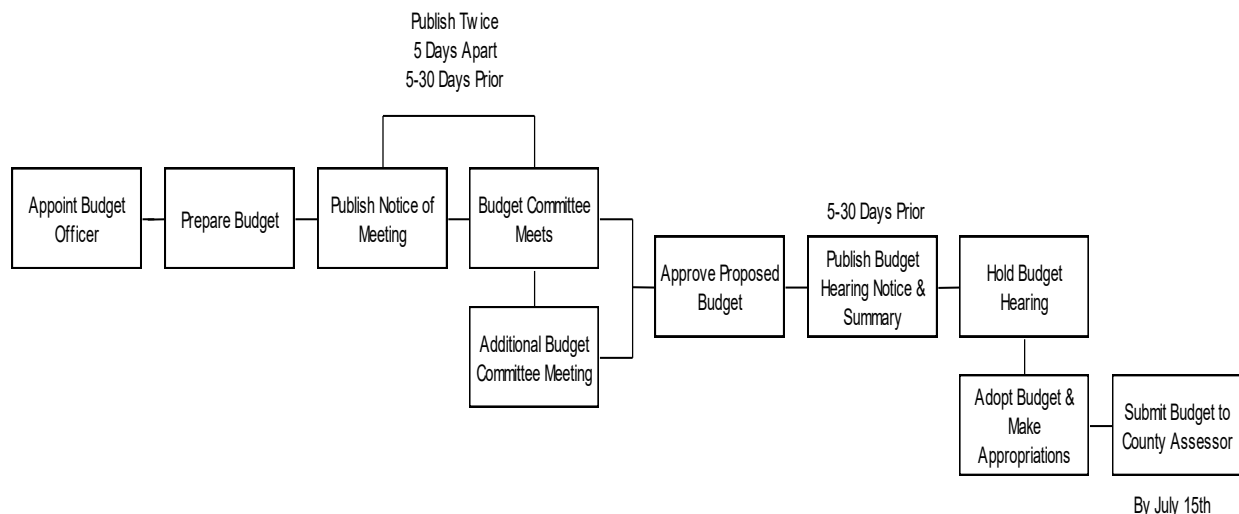
The District publishes a budget calendar that reflects both internal and external timeframes.

<b><u>January</u></b>	<b><u>Budget Development</u></b> <ul style="list-style-type: none"> <li>Budget worksheets distributed</li> <li>Support assignee's start preparing their respective budget requests</li> <li>Meetings are scheduled with support assignee's to review requests</li> <li>Chief Officers develop their internal timelines with due dates for <b>budget request worksheets</b> to be submitted by</li> <li>Chief Officers start preliminary review of performance measures and departmental objectives</li> </ul>
<b><u>February</u></b>  02/19/18  2/19/18  02/19/18 – 02/27/18  02/28/18	<b><u>Budget Development Continues</u></b> <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>First draft of budget detail sheets completed by Chief Officers</b></p> <p><b>Review departmental budgets – Chief Officers (Executive Team)</b></p> <p>Chief Officers work on any amendments to their first draft of respective budget</p> <ul style="list-style-type: none"> <li>Review measurements, objectives, and narratives</li> <li><b>Applicable budget revisions are due back to Finance</b></li> </ul>
<b><u>March</u></b> 3/12/18	<b>First draft of departmental narrative sections and performance measures due back to Finance</b>
03/22/18	<b>Final departmental sections due back to Finance no later than March 22nd, including performance measurements</b>
03/28/18	<u><b>Budget Meeting</b></u> <ul style="list-style-type: none"> <li>Chief Officers review and finalize draft departmental budget sections</li> <li>Set initial direction on budget presentations for April 19th meeting</li> </ul>

# Budget Process

<b><u>April</u></b> 04/09/18	Budget message completed
04/01/18 – 04/18/18	Budget document compilation, final touches, and assembly
04/10/18 04/10/18 – 05/08/18	<ul style="list-style-type: none"> <li>• Publish notice of budget committee meetings in Mail Tribune</li> <li>• Post notice of budget meetings on District website</li> </ul>
<b>Thursday 04/19/18</b>	<b><u>Budget Committee Meeting</u></b> <ul style="list-style-type: none"> <li>• <b>Budget document delivered and budget message presented</b></li> </ul>
<b><u>May</u></b> <b>05/07/18</b>	<b><u>Budget Presentation Preparation Meeting</u></b> <ul style="list-style-type: none"> <li>• Dress rehearsal for departmental budget presentations held on May 8th</li> </ul>
<b>Tuesday 05/08/18</b>	<b><u>Budget Committee Meeting</u></b> <ul style="list-style-type: none"> <li>• <b>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.</b></li> </ul>
<b><u>June</u></b> 06/12/18	Publish budget hearing notice and budget summary
<b>Thursday 06/21/18</b>	<b><u>Public Hearing and Adoption of 2018/19 Fiscal Year Budget</u></b>
<b><u>July</u></b> No later than 07/15/18	Submit Local Budget (LB) Form 50 to Jackson County Assessor with two copies of District Resolution adopting the 2018/19 Fiscal Year Budget

## BUDGET PROCESS TIMELINE



# Budget and Financial Policies

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

The **2018/19 fiscal year budget** has been prepared after analyzing, evaluating, and justifying requests from all departments and represents the requested financial support for the operation of the functions of Jackson County Fire District 3.

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

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

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








## **Fund Accounting**

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

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

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

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

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

# Budget and Financial Policies

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

## **Basis of Accounting and Budgeting**

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

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

## **Revenue**

Property taxes account for 72 percent of the District's total General Fund revenue, which includes beginning fund balance. Not considering beginning fund balance, current and prior year property taxes combined account for 98 percent. Past estimates have been based on multi-year historical trends with consideration given to the economic climate of our District, population, and assessed valuation increases. The District anticipates values to continue to slowly increase and remain at levels around the constitutionally allowed growth of three percent. The District is projecting values to increase 4.5 percent for the 2018/19 fiscal year. Although budgets are developed each year during April and May and adopted in June, the actual certification of property tax to be received by the County Treasurer for all taxing entities is not finalized until late October, well into the new fiscal year. Therefore, the District estimates growth conservatively and thus develops budgets accordingly. The rebound in the economy and the five year growth trend of three to four percent the District estimates, is a positive reinforcement into the future. Historical assessed valuation growth trends are presented on page 54.

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 2018/19 fiscal year is \$4,507,818,791.

## **Ending Fund Balances**

As a policy, Jackson County Fire District 3 will provide for an ending fund balance in the General Fund (budgeted as unappropriated ending fund balance) of 24 percent of budgeted property tax revenue. This budget represents \$3,234,000 for the 2018/19 fiscal year and is an increase of \$144,000 from the prior year budget. It is the philosophy of Staff, and supported by the Board of Directors, to have sufficient resources on hand at the beginning of each fiscal year to fund the District's operating expenses for four months until property taxes are received from the County Treasurer, thus eliminating the need for short-term borrowing. This tax collection turnover generally occurs the second week of November. This policy statement and financial objective is above GFOA's recommended practice of unreserved fund balance of no less than 5 to 15 percent of regular general fund operating revenues.

# Budget and Financial Policies

## **Operating Contingency**

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

This budget has operating contingency at nine percent or \$1,212,800 which is above the six percent minimum threshold. The District has taken the approach in recent fiscal years that during slower economic growth it is prudent to maintain the threshold above six percent in order help ensure fiscal soundness. The District has established the contingency level at nine percent of operating revenue until assessed valuation growth is significantly above the four percent range. Oregon Local Budget Law has no statutory limit of the amount which may be appropriated for operating contingency. Unexpended contingency is included in the beginning fund balance for the ensuing fiscal year and utilized for operational cash flow.

In addition to general operating contingency, the District is committed to allocating funds to provide for the District's liability for compensated absences, specifically vacation payouts upon retirement or separation from service. The District does not pay out sick leave benefits. At fiscal year end June 30, 2017 the District's Comprehensive Annual Financial Report identifies a compensated absences liability of \$808,235. Although this amount will never become due all at one time, the District desires to be proactive and recognize that retirements will occur in future years. This budget identifies \$25,000 for contingency allocated for future vacation payouts, or 3.09 percent of the liability. If the District has advance notification of intended retirements in the ensuing fiscal year then the District will budget for the compensated leave payout from the department where the employee is budgeted.

Total contingency budgeted is \$1,237,800.

## **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 2017 was \$5,894,537,870 up from \$5,497,121,929 in 2016. Jackson County Fire District 3's current legal debt limit is approximately \$73,681,723.

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

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

# Budget and Financial Policies

The District entered into a Full Faith and Credit Refinancing Agreement with Wells Fargo Bank, NA on November 4, 2013 for an eight year term at 2.38 percent in the amount of \$1,908,510. The amount financed includes cost of issuance, prepayment penalty on the 2007 issuance, and accrued interest charges. The refinance will save the District \$100,123 over the life of the loan. The 2018/19 fiscal year budget identifies \$242,195 in principal payments and \$19,608 in interest payments.

## Debt Service Schedule

2013 Refunding Issuance Dated 11-04-13 at 2.38% - 8 Year Term

Full Faith and Credit Bank Financing Agreement with Wells Fargo Bank, N.A.

	Debt Issued	Principal	Interest	Total	Annual Debt Service
<b>FY 14-15</b>	07/01/14	\$ 231,654.99	\$ 30,155.52	\$ 261,810.51	
	01/01/15	\$ 111,339.68	\$ 20,398.01	\$ 131,737.69	\$ 393,548.20
<b>FY 15-16</b>	07/01/15	\$ 111,339.68	\$ 18,740.50	\$ 130,080.18	
	01/01/16	\$ 113,997.97	\$ 17,689.24	\$ 131,687.21	\$ 261,767.39
<b>FY 16-17</b>	07/01/16	\$ 113,997.97	\$ 16,147.93	\$ 130,145.90	
	01/01/17	\$ 116,809.93	\$ 14,915.80	\$ 131,725.73	\$ 261,871.63
<b>FY 17-18</b>	07/01/17	\$ 116,809.93	\$ 13,274.84	\$ 130,084.77	
	01/01/18	\$ 119,645.59	\$ 12,089.39	\$ 131,734.98	\$ 261,819.75
<b>FY 18-19</b>	07/01/18	\$ 119,645.59	\$ 10,445.39	\$ 130,090.98	
	01/01/19	\$ 122,550.08	\$ 9,163.10	\$ 131,713.18	\$ 261,804.16
<b>FY 19-20</b>	07/01/19	\$ 122,550.08	\$ 7,547.25	\$ 130,097.33	
	01/01/20	\$ 125,512.36	\$ 6,181.59	\$ 131,693.95	\$ 261,791.28
<b>FY 20-21</b>	07/01/20	\$ 125,512.36	\$ 4,604.21	\$ 130,116.57	
	01/01/21	\$ 128,571.99	\$ 3,128.01	\$ 131,700.00	\$ 261,816.57
<b>FY 21-22</b>	07/01/21	\$ 128,571.99	\$ 1,538.51	\$ 130,110.50	
					\$ 130,110.50
<b>Total Principal Paid:</b>	<b>\$</b>	<b>1,908,510.19</b>			
<b>Total Interest Paid:</b>			<b>\$ 186,019.29</b>		
<b>Total Debt Service:</b>					<b>\$ 2,094,529.48</b>

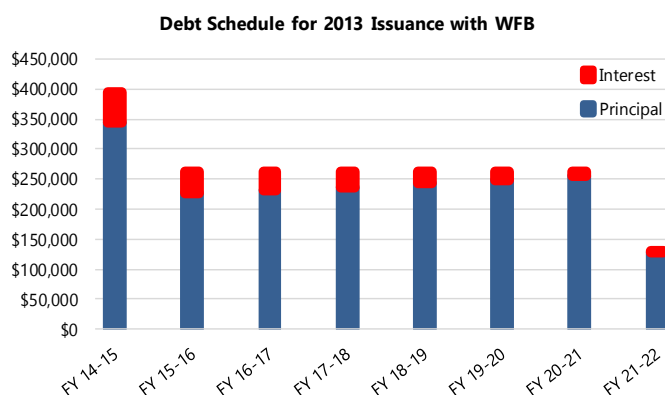
At fiscal year end June 30, 2019 outstanding debt principal will be \$630,719. The District has budgeted in 2018/19 fiscal year \$3 million in loan proceeds to fund new station construction. This debt will be backed by the full faith and credit of the agency.

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

## Cash Management and Investing

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

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





# Budget and Financial Policies

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

## **Capital Expenditures**

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

Items budgeted in the Capital Projects Fund are in compliance with the Capital Replacement Schedule and reviewed annually by management. The Capital Replacement Schedule is an evolving multi-year plan that forecasts capital needs and related budget requirements for future fiscal years. Identified purchases and projects are incorporated into the 10-year Financial Forecast as a means to verify if the targeted transfer from the General Fund can sustain the desired projects. The District is committed to transferring at least \$300,000 from the General Fund per fiscal year to support the Capital Fund. 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 establishes a contingency based on ten percent of the budgeted expenditures.

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

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

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

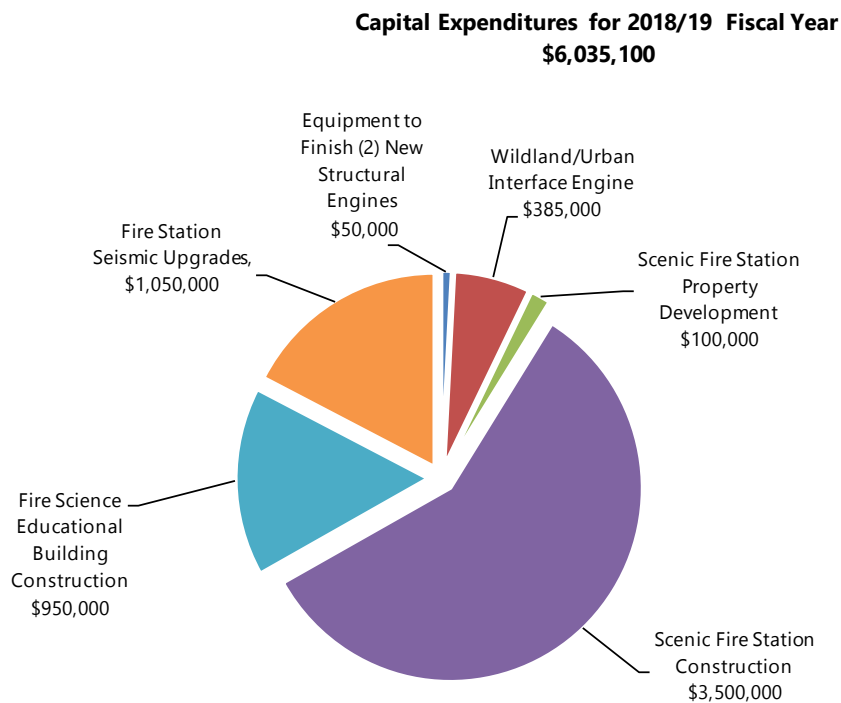
Individual assets that cost less than the capitalization threshold, but that operate as part of a network system, will be capitalized in the aggregate using the group method if the estimated average useful life of the individual assets is greater than one year. A network is determined to be where individual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

# Budget and Financial Policies

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

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

The 2018/19 fiscal year budget identifies \$6,035,100 in total capital expenditures.



# Budget and Financial Policies

## SUMMARY OF POLICIES

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

# Strategic Plan

The Strategic Plan for Jackson County Fire District 3 was adopted by the Board of Directors on February 22, 2018 and is designed to guide the District for the next three years. This Plan is vision driven and focused on the work that we see as necessary to advance that vision. The Plan is based on a survey that identified the challenges, opportunities, weaknesses, and strengths (COWS analysis) of the District and a community and organizational planning session that was held during the fall of 2017.

This 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 next year with desired outcomes we hope to achieve by a target date.

Initiatives, goals, and objectives, and the desired outcomes are adopted by the Board of Directors and 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 the Management Team to identify, track, and report on the progress toward the adopted initiatives.

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

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

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

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

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

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

### **Organizational Vision Statements**

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

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

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

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

Members who are enthusiastic, motivated, and empowered

An organization that is fiscally stable and prepared for the future

# Strategic Plan

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

## **Values and Guiding Principles**

- **Honesty and Integrity**  
Don't be afraid of the truth. Do the right thing, even if it hurts.
- **Professionalism**  
Take pride in your work, display confidence, be accountable and 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 five 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 people, facilities, fleet, and finances.
3. Develop, promote, and demonstrate professionalism, innovation, 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.

### **Process and Involvement**

The strategic planning process was guided by the Executive Team with a focus on community and agency involvement. A District survey was conducted in the fall of 2017, a community and agency planning session was held on November 29, 2017, a District open forum was offered on December 15, 2017, and an Executive retreat was attended on January 24, 2018.

The interpretation of the Challenges, Opportunities, Weaknesses, and Strengths (COWS), the community planning session and the development of the initiatives, goals, and objectives were completed by the Executive Team. These dedicated members have established an effective set of Specific, Measurable, Attainable, Realistic and Timely (SMART) tasks that will close the gap between desired and actual performance. These tasks are organized by department and will drive the budget process.

# Strategic Plan

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

**Goal: Enhance the District EMS program to provide the greatest chance for a positive outcome from acute medical emergencies.**

Objectives:

- Establish a community wide approach to out of hospital cardiac arrest
- Actively pursue protocol development to achieve a high standard of patient care
- Develop a comprehensive quality improvement program
- Integrate high quality EMS training that includes improving clinical care delivery based on QA feedback

**Goal: Enhance emergency response system reliability to meet or exceed performance expectations.**

Objectives:

- Identify and manage impacts to system reliability
- Align appropriate resource response based on needs "triage"

**Goal: Meet or exceed established Fire and Life Safety standards for preventing loss.**

Objectives:

- Establish a system to ensure occupancy inspections are conducted in accordance with NFPA 1730
- Ensure staffing meets service level objective
- Develop a Community Risk Reduction program focused on the risk assessment and experiences in the District

# Strategic Plan

## **INITIATIVE 2: Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances**

### **Goal: Explore and implement technology solutions.**

#### Objectives:

- Produce and relay readily available data for organizational management
- Implement technology that enhances the readiness and maintenance of fleet and equipment
- Research opportunities to improve the incident and patient care reporting experience
- Ensure GIS and preplanning are in place to support response needs

### **Goal: Develop the budget with consideration to projected and unknown impacts**

#### Objectives:

- Minimize impacts to service delivery resulting from forecasted cost increases such as PERS, healthcare, and insurances
- Ensure best practices are followed with consideration to public contracting, purchasing, and procurement of goods and services

### **Goal: Enhance response reliability for emergent incidents**

#### Objective:

- Ensure staffing meets service level objectives

### **Goal: Modernize the logistics tracking, analysis, and dissemination**

#### Objectives:

- Conduct a review of current logistics practices
- Implement technology that improves the supply chain

### **Goal: Maintain and enhance the Development Plan, providing guidance and opportunity for personnel**

#### Objective:

- Build upon the current Development Plan to include all divisions

# Strategic Plan

## **INITIATIVE 3: Develop, promote, and demonstrate professionalism, innovation, and excellence throughout the organization**

**Goal: Establish a system of continuous quality improvement in areas of service delivery to the community**

Objectives:

- Measure organizational performance against established expectations
- Identify industry benchmarks for best practice service delivery in areas of focus
- Provide employees access to personnel policies and guidelines for professional awareness

**Goal: Enhance the engagement and efficiency of District committees**

Objective:

- Review committee expectations, evaluate for opportunity to modify or add committees to best accomplish the mission and strategic plan of the District

**Goal: Cultivate an environment of data driven, evidence based decisions**

Objective:

- Effective data analysis is used to evaluate and improve performance and organizational decision making



# Strategic Plan

## **INITIATIVE 4: Maintain a high level of trust by promoting District engagement in the communities we serve**

### **Goal: Continual improvement to the District-patron experience**

#### Objectives:

- Foster participation in community events
- Improve patron interactions with the District, both in person and through digital media
- Develop District programs to reach non-English speaking members of the community

### **Goal: Encourage participation from volunteers, residents, and stakeholders**

#### Objectives:

- Maintain the resident firefighter program and promote response capable volunteers
- District patrons are included in hiring, promotional, and strategic planning processes

## **INITIATIVE 5: Develop and strengthen collaborative efforts and strategic partnerships**

### **Goal: Improve field communications and inter-operability for responders**

#### Objectives:

- Engage locally and regionally to influence the development of a reliable communication network
- Research opportunities to improve in-building emergency responder radio coverage

### **Goal: Maximize partnerships with agencies to reduce redundancy, maximize effectiveness, and achieve readiness.**

#### Objectives:

- Partner to educate the public on alternate resources for non-emergent needs
- Improve information sharing among agencies
- Integrate with local law enforcement for response and prevention of large scale planned events and emergencies
- Identify call criteria and establish a protocol for responses that are best served with a coordinated law/fire response
- Remain open to opportunities for consolidation of services

### **Goal: Actively participate with affiliations to support our mission and vision**

#### Objective:

- Be engaged in various industry, government, and business organizations and associations to remain current on issues that impact the internal and external environment

# Strategic Plan

## 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 November after the property tax certification is provided by the County Assessor and reviewed and adjusted as necessary during the budget development. Property taxes account for about 98 percent of the District's total operating revenue, so future projections are critical for maintaining existing services and planning for future growth. As constitutionally allowed for, a three percent increase on each taxing entity is certified each fiscal year. Exceptions to this is new construction, significant improvements, or in economic recessions, when the real market value of a property declines below the property's assessed value.

The District's projections are built using our permanent tax rate of \$3.1194 per \$1,000 of assessed valuation. Growth percentages are based on historical trends and future economic indicators. The District experienced a growth rate of 3.85 percent for 2017. Projections for the ensuing fiscal years are estimated to average 4.5 percent. We will continue to take a moderately conservative approach, adjusting when necessary, in developing the long-term financial forecast in order to ensure fiscal sustainability.

This forecast depicts minimal changes to District programs. No new positions are projected in future years. The Staff Battalion Chief position has been re-introduced back into the budget after deferment in fiscal year 2017/18. In fiscal year 2019/20 another Public Employees Retirement System (PERS) rate increase will be assessed on employers. This rate increase is estimated to have a \$300,000 plus impact on the budget. Modest cost of living adjustments have been projected across future years. Total revenue includes beginning fund balances. The current adopted budget year reflects a balanced budget, thus zero budget excess or shortfall.

## Financial Forecast Summary for General Fund

	Adopted Budget	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
GENERAL FUND	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28
<b>TOTAL REVENUE</b>	\$ 19,193,100	\$ 18,812,877	\$ 19,496,521	\$ 20,579,727	\$ 21,936,203	\$ 23,815,095	\$ 25,861,080	\$ 28,402,117	\$ 31,140,876	\$ 34,085,882
<b>TOTAL EXPENDITURES</b>	\$ 14,721,300	\$ 14,326,265	\$ 14,627,085	\$ 15,087,250	\$ 15,279,567	\$ 15,915,208	\$ 16,260,843	\$ 16,943,572	\$ 17,659,434	\$ 18,410,075
<b>Net Available for Commitments</b>	<b>\$ 4,471,800</b>	<b>\$ 4,486,612</b>	<b>\$ 4,869,436</b>	<b>\$ 5,492,477</b>	<b>\$ 6,656,636</b>	<b>\$ 7,899,887</b>	<b>\$ 9,600,237</b>	<b>\$ 11,458,545</b>	<b>\$ 13,481,443</b>	<b>\$ 15,675,807</b>
Ending Fund Commitments										
Unappropriated Ending Fund Balance	\$ (3,234,000)	\$ (3,381,110)	\$ (3,538,571)	\$ (3,703,419)	\$ (3,876,003)	\$ (4,056,689)	\$ (4,245,859)	\$ (4,443,913)	\$ (4,651,271)	\$ (4,868,374)
Operating Contingency	\$ (1,237,800)	\$ (1,292,916)	\$ (1,351,964)	\$ (1,413,782)	\$ (1,478,501)	\$ (1,546,258)	\$ (1,617,197)	\$ (1,691,467)	\$ (1,769,227)	\$ (1,850,640)
Budget excess/(shortfall)	\$ -	\$ (187,414)	\$ (21,098)	\$ 375,277	\$ 1,302,132	\$ 2,296,939	\$ 3,737,181	\$ 5,323,165	\$ 7,060,945	\$ 8,956,793
<i>* Amount available for appropriation</i>										

# Strategic Plan

## Financial Forecast Summary for Capital Projects Fund

	Adopted Budget	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
CAPITAL PROJECTS FUND	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28
TOTAL REVENUE	\$ 9,443,900	\$ 3,709,500	\$ 3,544,773	\$ 3,503,845	\$ 3,267,121	\$ 3,180,406	\$ 3,354,133	\$ 1,337,324	\$ 1,628,277	\$ 624,204
TOTAL EXPENDITURES	\$ 6,035,100	\$ 465,427	\$ 341,628	\$ 537,424	\$ 387,415	\$ 126,973	\$ 2,317,509	\$ 9,747	\$ 1,304,773	\$ -
Net Available for Commitments	\$ 3,408,800	\$ 3,244,073	\$ 3,203,145	\$ 2,966,421	\$ 2,879,706	\$ 3,053,433	\$ 1,036,624	\$ 1,327,577	\$ 323,504	\$ 624,204
Ending Fund Commitments										
Operating Contingency	\$ (244,400)	\$ (46,543)	\$ (34,163)	\$ (53,742)	\$ (38,742)	\$ (12,697)	\$ (231,751)	\$ (975)	\$ (130,477)	\$ -
Reserve for Future Capital Expenditures	\$ (3,164,400)	\$ (2,000,000)	\$ (2,000,000)	\$ (2,000,000)	\$ (2,000,000)	\$ (2,000,000)	\$ (2,000,000)	\$ (2,000,000)	\$ (2,000,000)	\$ (2,000,000)
Budget excess/(shortfall)	\$ -	\$ 1,197,530	\$ 1,168,982	\$ 912,679	\$ 840,965	\$ 1,040,736	\$ (1,195,127)	\$ (673,398)	\$ (1,806,973)	\$ (1,375,796)
<b>ALL FUNDS COMBINED</b>										
Net Ending Fund Balances	\$ 7,880,600	\$ 7,730,685	\$ 8,072,581	\$ 8,458,898	\$ 9,536,342	\$ 10,953,320	\$ 10,636,861	\$ 12,786,122	\$ 13,804,947	\$ 16,300,011

Management also reviews the growth at which operating revenues are increasing compared to basic operating expenditures. The District has a target of not allowing personnel services to exceed 80 percent of operating revenue and 20 percent for materials and services. By using moderately conservative assessed valuation growth percentages of 4.5 percent per year and an average increase for personnel services and materials and services combined of five percent, operating expenditures could soon exceed revenue if measures are not put in place to safeguard sustainability. This financial forecast however enables the District to prepare for the future by monitoring and projecting impacts and making prudent decisions in the current period to thwart off deficits in the future.

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

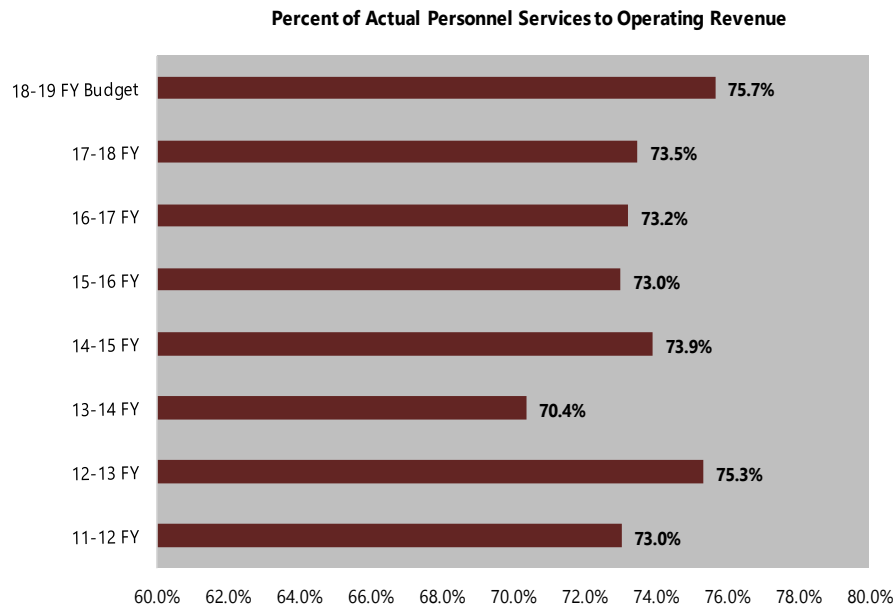
### General Fund

#### Operating Revenues Compared to Operating Expenditures

	Adopted Budget	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
GENERAL FUND	FY 18-19	FY 19-20	FY 20-21	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27
<b>OPERATING REVENUE</b>									
Taxes - Current & Prior	13,475,000	14,087,957	14,744,044	15,430,912	16,150,013	16,902,871	17,691,078	18,516,304	19,380,297
All Other Income	468,100	253,120	265,865	279,379	293,712	255,588	270,115	285,577	302,033
TOTAL OPERATING REVENUE	13,943,100	14,341,077	15,009,908	15,710,291	16,443,726	17,158,459	17,961,193	18,801,881	19,682,331
<b>OPERATING EXPENDITURES</b>									
Personnel Services	10,550,800	11,078,340	11,355,299	11,923,063	12,221,140	12,832,197	13,153,002	13,810,652	14,501,185
Materials and Services	2,362,500	2,386,125	2,409,986	2,434,086	2,458,427	2,483,011	2,507,841	2,532,920	2,558,249
Debt Service	261,900	561,800	561,800	430,100	300,000	300,000	300,000	300,000	300,000
TOTAL OPERATING EXPENDITURES	13,175,200	14,026,265	14,327,085	14,787,250	14,979,567	15,615,208	15,960,843	16,643,572	17,359,434
Net Operating Revenue vs Expenditures	767,900	314,812	682,824	923,041	1,464,159	1,543,251	2,000,350	2,158,309	2,322,897
<b>Percent of Operating Expenditures to Operating Revenue</b>									
Personnel Services	75.7%	77.2%	75.7%	75.9%	74.3%	74.8%	73.2%	73.5%	73.7%
Materials and Services	16.9%	16.6%	16.1%	15.5%	15.0%	14.5%	14.0%	13.5%	13.0%

# Strategic Plan

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



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# Financial Summary Schedules

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

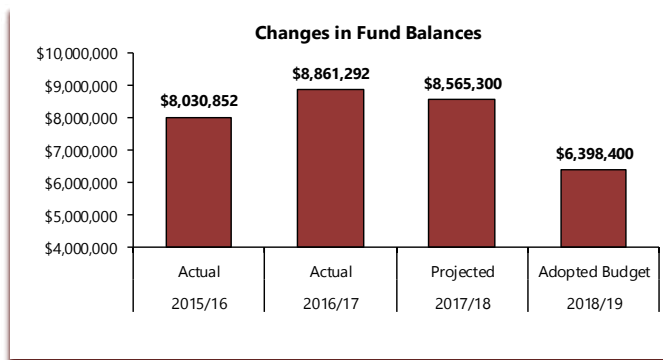
	Fiscal Year			2018/19 Adopted Budget
	2015/16 Actual	2016/17 Actual	2017/18 Projected	
<b>Summary of Revenues</b>				
Property Taxes	12,134,058	12,569,814	12,935,000	13,475,000
Earnings on Investments	63,274	108,035	170,000	160,000
Grants	38,968	90,701	55,000	1,152,000
Rental Income	6,749	10,551	9,000	8,000
Donations	6,500	16,500	0	501,000
Contracts	134,544	81,288	24,900	46,000
Miscellaneous	183,477	58,540	288,600	182,000
	<b>\$12,567,570</b>	<b>\$12,935,429</b>	<b>\$13,482,500</b>	<b>\$15,524,000</b>
Other Revenue Sources:				
Proceeds from Sale of Equip	593	5,355	13,200	1,500
Loan Proceeds	0	0	0	3,000,100
Transfers to and from	1,036,200	986,900	1,349,300	1,546,100
<b>Total All Revenue Sources</b>	<b>\$13,604,362</b>	<b>\$13,927,684</b>	<b>\$14,845,000</b>	<b>\$20,071,700</b>
<b>Summary of Expenditures</b>				
Personnel Services	9,178,049	9,366,767	9,913,300	10,550,800
Materials and Services	1,934,972	1,971,725	1,999,900	2,362,500
Capital Outlay	711,894	509,980	1,616,800	6,035,100
Debt Service	261,767	261,872	261,900	261,900
Operating Contingency	0	0	0	1,482,200
<b>Total All Expenditures</b>	<b>\$12,086,683</b>	<b>\$12,110,343</b>	<b>\$13,791,900</b>	<b>\$20,692,500</b>
<b>Excess or Deficiency</b>	<b>1,517,680</b>	<b>1,817,340</b>	<b>1,053,100</b>	<b>(620,800)</b>
<b>Changes in Fund Balance</b> <i>(The cash available at the end of the fiscal year)</i>				
Beginning Fund Balance	7,549,372	8,030,852	8,861,500	8,565,300
Excess Revenues over Expenditures	1,517,680	1,817,340	1,053,100	(620,800)
Interfund Transfers	(1,036,200)	(986,900)	(1,349,300)	(1,546,100)
<b>Ending Fund Balance</b>	<b>\$8,030,852</b>	<b>\$8,861,292</b>	<b>\$8,565,300</b>	<b>\$6,398,400</b>
Increase or Decrease in Fund Balance		10.34%	-3.34%	-25.30%

The increase in total fund balance at fiscal year end June 30, 2017 was the result of contingency funds not spent, a budgeted increase in unappropriated ending fund balance, monies across line item expenditure accounts not spent in their entirety, and an increase in capital funds set aside as reserve for future.

The projected decrease in fund balance of \$295,992 at fiscal year end June 30, 2018 is the result of closer spending aligned with budget across General Fund departmental accounts and Capital Fund expenditures. Fiscal year end June 30, 2017 experienced a higher ending fund balance than normal due to unanticipated staffing changes and some programs not coming to fruition.

Proposed fund balance reflected at fiscal year end June 30, 2019 is \$6,398,400 or a decrease of over 25 percent.

It is important to note however that this amount represents the minimum fund balance the District would end the fiscal year with, as operating contingency is appropriated and all line item accounts are reflected to be spent to zero. Since contingency is only spent for unforeseen circumstances and line item accounts are never completely spent in their entirety, this amount will more than likely be higher and carried forward in the ensuing fiscal year as beginning fund balance.





# Financial Summary Schedules

The following schedule represents the fund balance breakdown between the two funds. The ending fund balance amounts represented in the 2018/19 adopted budget column are depictive only and 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.

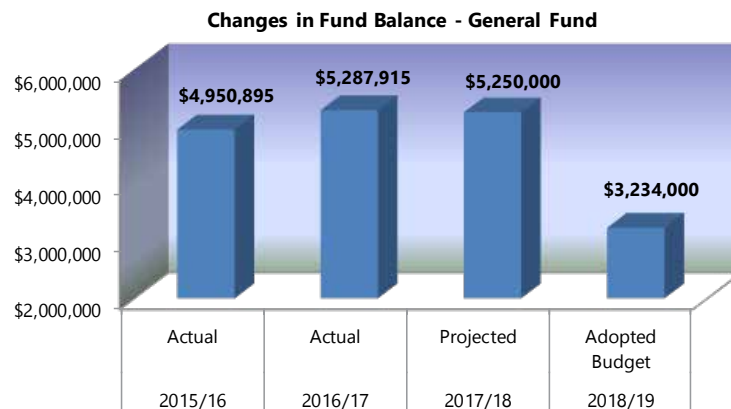
GENERAL FUND	Fiscal Year			2018/19 Adopted Budget
	2015/16 Actual	2016/17 Actual	2017/18 Projected	
<b>Revenue/Expenditures</b>				
Revenue	12,568,162	12,924,284	13,486,400	13,943,100
Expenditures	11,374,788	11,600,363	12,175,100	14,413,000
Excess or Deficiency	<b>\$1,193,374</b>	<b>\$1,323,921</b>	<b>\$1,311,300</b>	<b>(\$469,900)</b>
<b>Changes in Fund Balance</b>				
Beginning Fund Balance	4,793,720	4,950,895	5,288,000	5,250,000
Excess Revenues over Expenditures	1,193,374	1,323,921	1,311,300	(469,900)
Interfund Transfers Out	(1,036,200)	(986,900)	(1,349,300)	(1,546,100)
Ending Fund Balances	<b>\$4,950,895</b>	<b>\$5,287,915</b>	<b>\$5,250,000</b>	<b>\$3,234,000</b>
Increase or Decrease		6.81%	-0.72%	-38.40%

CAPITAL PROJECTS FUND	Fiscal Year			2018/19 Adopted Budget
	2015/16 Actual	2016/17 Actual	2017/18 Projected	
<b>Revenue/Expenditures</b>				
Revenue	0	16,500	9,300	4,582,500
Expenditures	711,894	509,980	1,616,800	6,279,500
Excess or Deficiency	<b>(\$711,894)</b>	<b>(\$493,480)</b>	<b>(\$1,607,500)</b>	<b>(\$1,697,000)</b>
<b>Changes in Fund Balance</b>				
Beginning Fund Balance	2,755,652	3,079,957	3,573,500	3,315,300
Excess Revenues over Expenditures	(711,894)	(493,480)	(1,607,500)	(1,697,000)
Interfund Transfers In	1,036,200	986,900	1,349,300	1,546,100
Ending Fund Balances	<b>\$3,079,957</b>	<b>\$3,573,377</b>	<b>\$3,315,300</b>	<b>\$3,164,400</b>
Increase or Decrease		16.02%	-7.22%	-4.55%

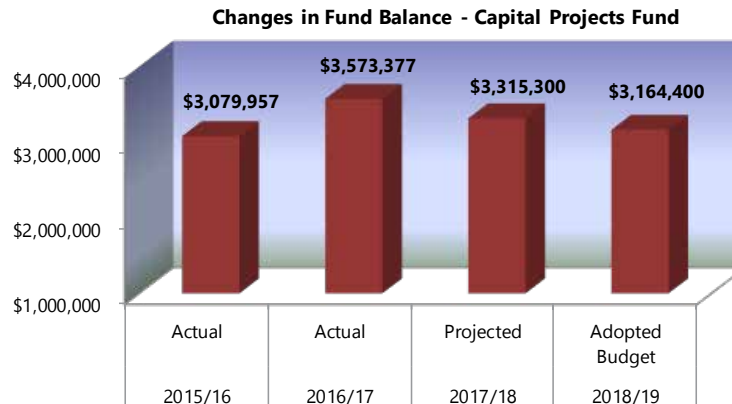
Expenditures in the General Fund consist of personnel services, materials and services, debt service, and contingency in this schedule.

# Financial Summary Schedules

The following graphs depict the District's changes in fund balance for the previous two fiscal years, the projected fund balance for the fiscal year just ended and the minimum fund balance that would be available at year end June 30, 2019 as established by policy.



- ➔ Fund balance in the **General Fund** increased at fiscal year end June 30, 2017 by 6.81 percent, the result of some staffing changes and departmental line item accounts not spent in their entirety.
- ➔ Fund balance is projected to decrease at fiscal year end June 30, 2018 by .72 percent, the result of spending closer aligned with budget. There were no mid-year staffing and program changes, which can impact ending fund balance.
- ➔ The proposed fund balance at fiscal year end June 30, 2019 reflects only the budgeted unappropriated ending fund balance (UEFB) or \$3,234,000. 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, 2017 by 16 percent, the result of an increase in the transfer of funds from the General and reserving a majority of those funds for future spending instead of appropriating the entirety for expenditure.
- ➔ Fund balance is projected to decrease 7.2 percent at fiscal year end June 30, 2018, the result of a significant expenditure towards apparatus replacement, land acquisition, and the start of construction projects.
- ➔ The proposed fund balance at fiscal year end June 30, 2019 represents a 4.5 percent decrease due to planned capital construction in relation to the amount of the transfer from the General Fund.

# Financial Summary Schedules

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

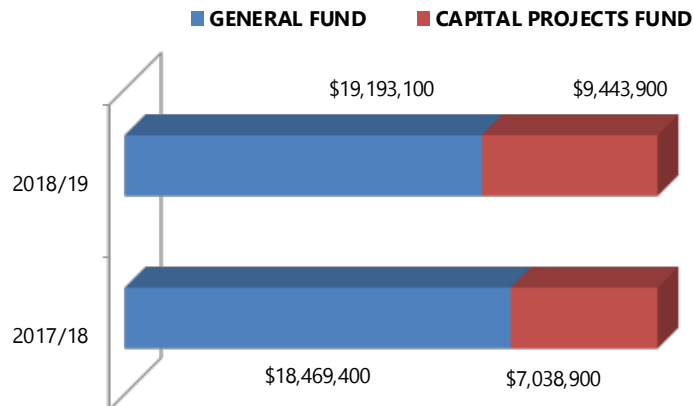
## GENERAL FUND

	Fiscal Year		Variance	Change
	2017/18	2018/19		
	Adopted Budget	Adopted Budget		
Personnel Services	10,264,800	\$10,550,800	286,000	2.79%
Materials and Services	2,319,400	\$2,362,500	43,100	1.86%
Operating Contingency	1,184,000	\$1,237,800	53,800	4.54%
Debt Service	261,900	\$261,900	0	0.00%
Transfer to Capital Projects Fund	1,349,300	\$1,546,100	196,800	14.59%
Unappropriated Ending Fund Balance	3,090,000	\$3,234,000	144,000	4.66%
	<b>\$18,469,400</b>	<b>\$19,193,100</b>	<b>\$723,700</b>	<b>3.92%</b>

## CAPITAL PROJECTS FUND

	Fiscal Year		Variance	Change
	2017/18	2018/19		
	Adopted Budget	Adopted Budget		
Department Equipment	50,000	100	(49,900)	-99.80%
Apparatus and Vehicles	1,260,000	435,000	(825,000)	-65.48%
Land and Improvements	260,000	100,000	(160,000)	-61.54%
Building Construction/Improvements	2,581,800	5,500,000	2,918,200	113.03%
Contingency	40,000	244,400	204,400	511.00%
Reserve for Future/Ending Fund Balance	2,847,100	3,164,400	317,300	11.14%
	<b>\$7,038,900</b>	<b>\$9,443,900</b>	<b>\$2,405,000</b>	<b>34.17%</b>

<b>TOTAL BUDGET</b>	<b>\$25,508,300</b>	<b>\$28,637,000</b>	<b>\$3,128,700</b>	<b>12.27%</b>
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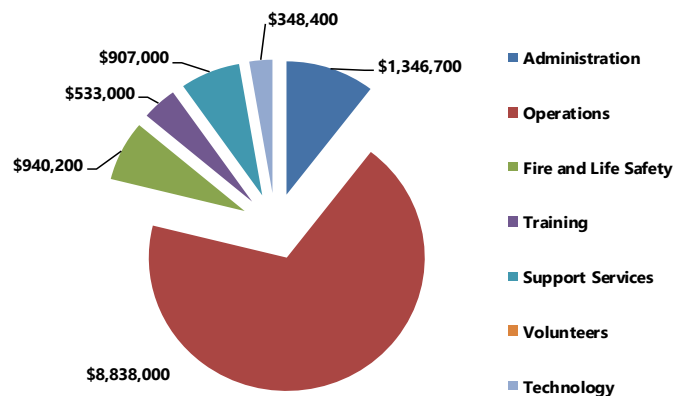


# Financial Summary Schedules

The following schedule reflects a departmental budgetary comparison between the prior and current fiscal years. After program analysis, volunteers and students will be a function under Operations, thus eliminating the need to have a standalone Department.

GENERAL FUND	2017/18 Adopted Budget	2018/19 Adopted Budget	Variance	Change
<b>Department 01 Administration</b>				
Personnel Services	583,200	624,600	41,400	7.10%
Materials and Services	687,000	722,100	35,100	5.11%
	<b>\$1,270,200</b>	<b>\$1,346,700</b>	<b>\$76,500</b>	<b>6.02%</b>
<b>Department 02 Operations</b>				
Personnel Services	8,299,100	8,503,500	204,400	2.46%
Materials and Services	261,000	334,500	73,500	28.16%
	<b>\$8,560,100</b>	<b>\$8,838,000</b>	<b>\$277,900</b>	<b>3.25%</b>
<b>Department 03 Fire and Life Safety</b>				
Personnel Services	774,000	802,700	28,700	3.71%
Materials and Services	207,500	137,500	(70,000)	-33.73%
	<b>\$981,500</b>	<b>\$940,200</b>	<b>-\$41,300</b>	<b>-4.21%</b>
<b>Department 04 Training</b>				
Personnel Services	364,000	374,000	10,000	2.75%
Materials and Services	178,200	159,000	(19,200)	-10.77%
	<b>\$542,200</b>	<b>\$533,000</b>	<b>-\$9,200</b>	<b>-1.70%</b>
<b>Department 05 Support Services</b>				
Personnel Services	107,000	107,000	0	0.00%
Materials and Services	776,300	800,000	23,700	3.05%
	<b>\$883,300</b>	<b>\$907,000</b>	<b>\$23,700</b>	<b>2.68%</b>
<b>Department 06 Volunteers</b>				
Materials and Services	70,000	0	(70,000)	-100.00%
	<b>\$70,000</b>	<b>\$0</b>	<b>(\$70,000)</b>	<b>-100.00%</b>
<b>Department 07 Technology</b>				
Personnel Services	137,500	139,000	1,500	1.09%
Materials and Services	139,400	209,400	70,000	50.22%
	<b>\$276,900</b>	<b>\$348,400</b>	<b>\$71,500</b>	<b>25.82%</b>
<b>TOTAL</b>	<b>\$12,584,200</b>	<b>\$12,913,300</b>	<b>\$329,100</b>	<b>2.62%</b>

Departmental Adopted Budget

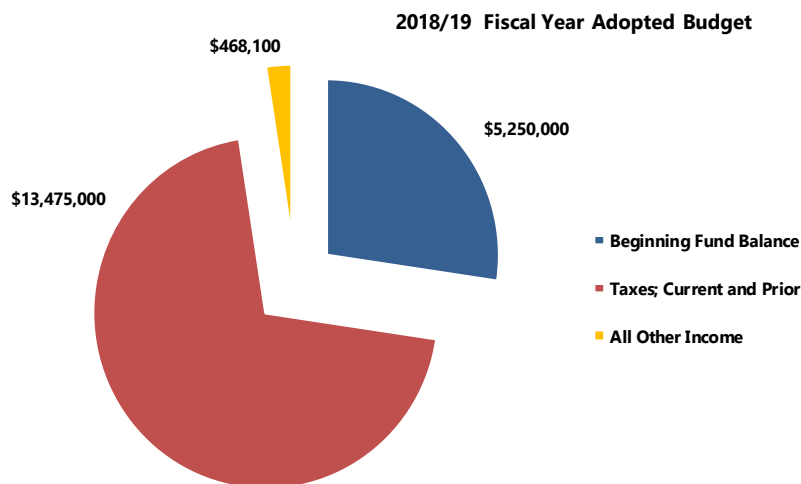


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# General Fund Revenue

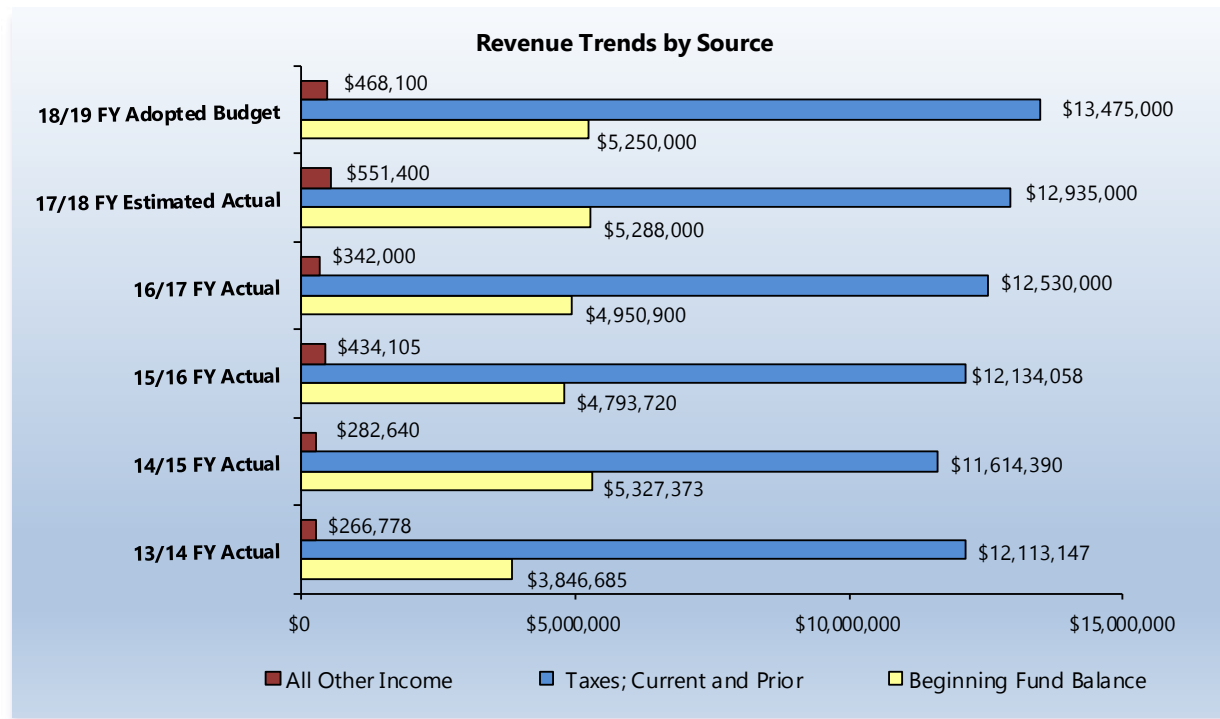
General Fund Description	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Beginning Fund Balance	4,793,720.23	4,950,894.55	5,155,000	4,946,000	5,345,000	5,250,000
Taxes; Current	11,792,665.16	12,239,478.03	12,500,000	13,100,000	13,100,000	13,100,000
Taxes; Prior	341,392.91	330,335.60	375,000	375,000	375,000	375,000
Interest	63,273.83	108,035.15	80,000	160,000	160,000	160,000
Workers' Comp Refund & Reimb	22,952.16	6,621.12	10,000	10,000	10,000	10,000
Sale of Equipment	592.75	5,354.75	500	1,000	1,000	1,000
OSFM Conflagrations	124,194.73	0.00	1,000	1,000	1,000	156,000
EMS Contract; Mercy Flights	7,512.56	0.00	0	0	0	0
Fees for Service; Suppression/EMS	10,468.02	21,282.50	10,000	10,000	10,000	10,000
Fees for Service; Drill Ground	1,210.95	600.00	1,000	1,000	1,000	1,000
Grants; Local, State, Federal	38,967.97	90,700.96	130,000	50,000	50,000	70,000
Contract; Financial Services	23,304.00	24,000.00	24,900	26,000	26,000	26,000
Contract; Management Services	111,240.00	57,288.00	0	0	0	0
Contract; Rogue Community College	111,240.00	0.00	0	20,000	20,000	20,000
Rental Income	6,748.50	10,551.00	8,000	8,000	8,000	8,000
Miscellaneous	17,138.83	30,036.48	5,000	5,000	5,000	5,000
Donations	6,500.00	0.00	1,000	1,000	1,000	1,000
Loan Proceeds	0.00	0.00	100	100	100	100
<b>TOTAL GENERAL FUND REVENUE</b>	<b>\$17,473,122.60</b>	<b>\$17,875,178.14</b>	<b>\$18,301,500</b>	<b>\$18,714,100</b>	<b>\$19,113,100</b>	<b>\$19,193,100</b>



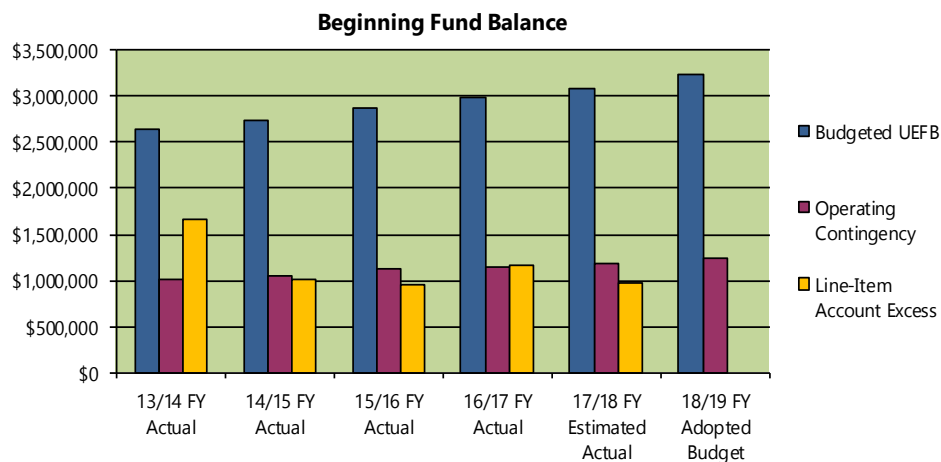


# General Fund Revenue

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



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

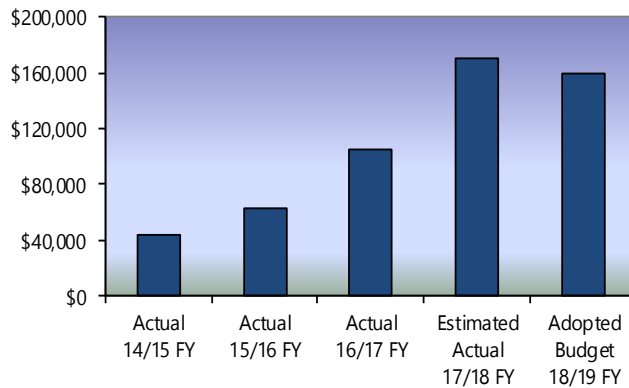


Beginning fund balance consists of the identified unappropriated ending fund balance (UEFB) from the prior fiscal year as established in the Budget and Financial Policies and as adopted by the Board of Directors, operating contingency, and dollars not expended in prior year budgeted line item accounts.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

# General Fund Revenue

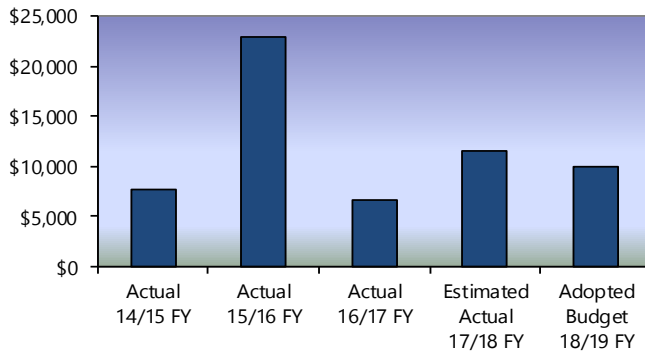
The following graphs portray an historical view of the "All Other Income" category illustrated in the "Revenue Trends by Source" chart:

**Interest Income**



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

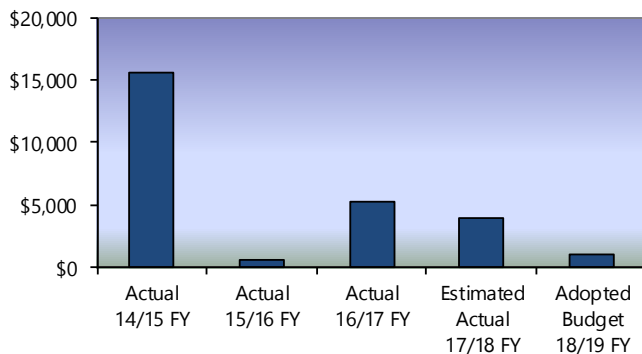
**Workers' Compensation Refund and Reimbursements**



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

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

**Sale of Equipment**



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

# General Fund Revenue

**Fees for service** include medical standby at sporting events and concerts. It also includes income from fire suppression costs incurred while responding to unprotected property and billable incidents along transportation routes.

For fiscal years ending 2016 and 2018 revenue was received from the State of Oregon as a reimbursement for District personnel deployed to serve on structural and wildland taskforce teams and State Overhead Incident Management Teams. Both teams assist with fire suppression during declared fire conflagrations.

**Contract revenue** accounts for proceeds from external sources in which the District has agreements with. The District has had an intergovernmental agreement (IGA) to provide accounting and financial services with neighboring agency Fire District No. 4 since 2003. In years 2015 and 2016 the District also provided management/emergent response oversight.

The District has revenue budgeted in the current year from a contract with Rogue Community College for use of our training facility and classroom to conduct fire science curriculum.

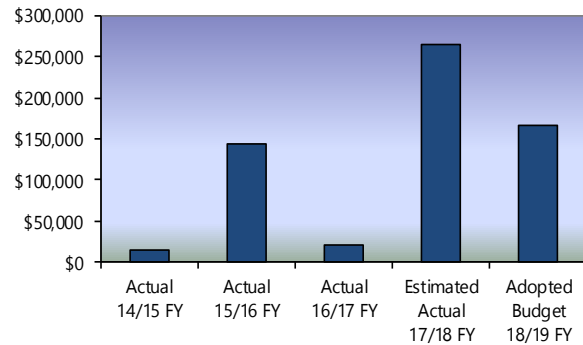
The **miscellaneous revenue** category consists of report copies, research fees, and any other non-anticipated income. Annual budgeted amounts are based on conservative estimates.

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

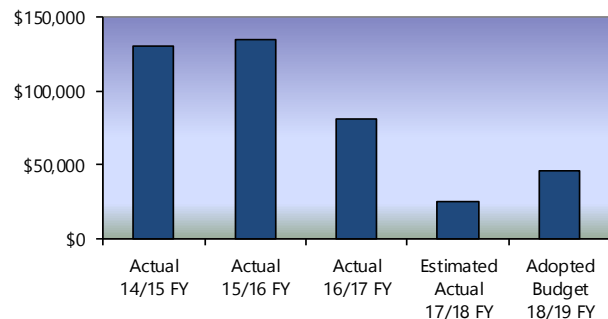
**Grant revenue** comes from Local, State, and Federal sources. For fiscal year end 2016 the District received a grant from the State of Oregon for administering Incident Command training workshops. For fiscal year end 2017 the District received a grant from Jackson County to promote Firewise communities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

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

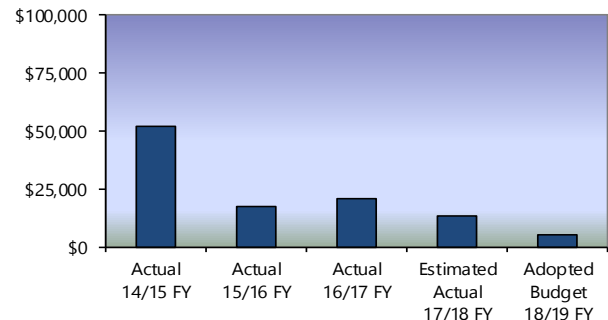
**Fees for Service**



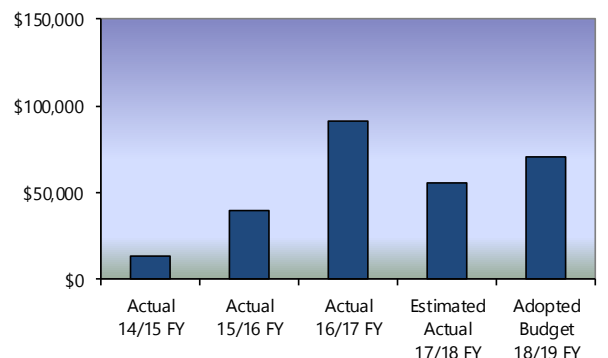
**Contract Revenue**



**Miscellaneous Revenue**

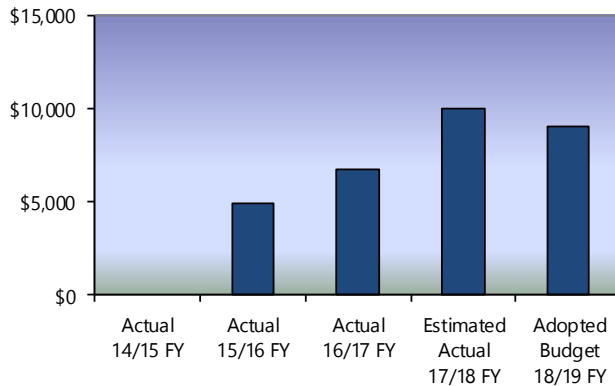


**Grant Revenue**



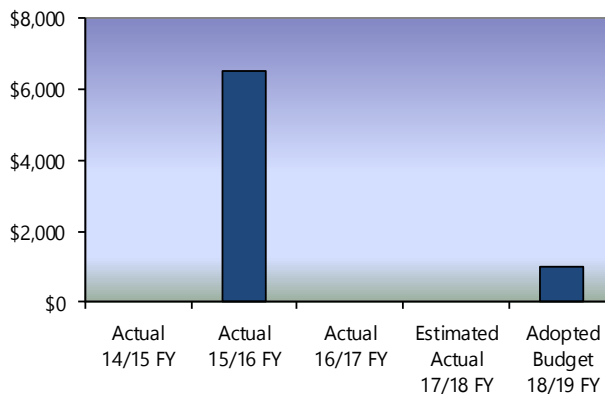
# General Fund Revenue

**Rental Income**



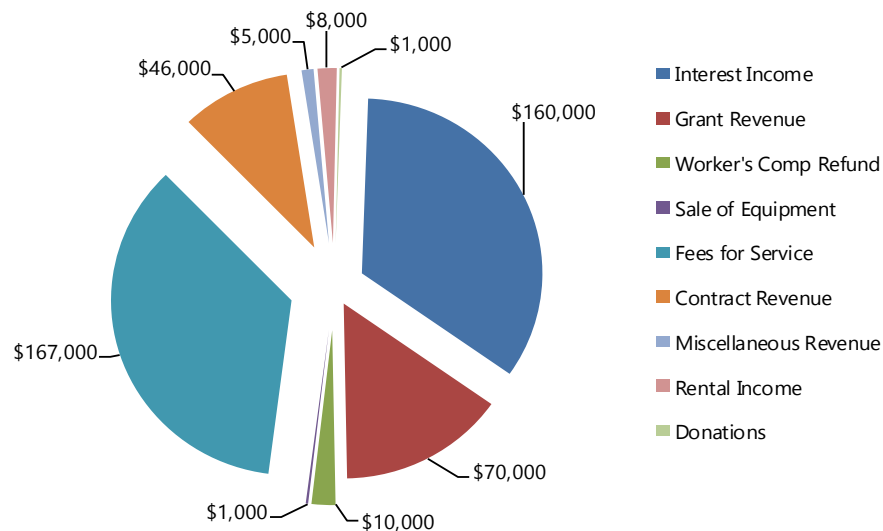
**Rental income** derives from an agreement the District has with the State Department of Public Safety Standards and Training (DPSST) to utilize a portion of the District's training grounds and offices for their regional programs. This agreement went into effect in September of 2014.

**Donations**



**Donations** was established in the 2015/16 fiscal year to accommodate monies received from community members and businesses. A \$5,000 donation was received in 2015 with designation towards the residential fire sprinkler program. A similar donation is budgeted for the 2018/19 fiscal year.

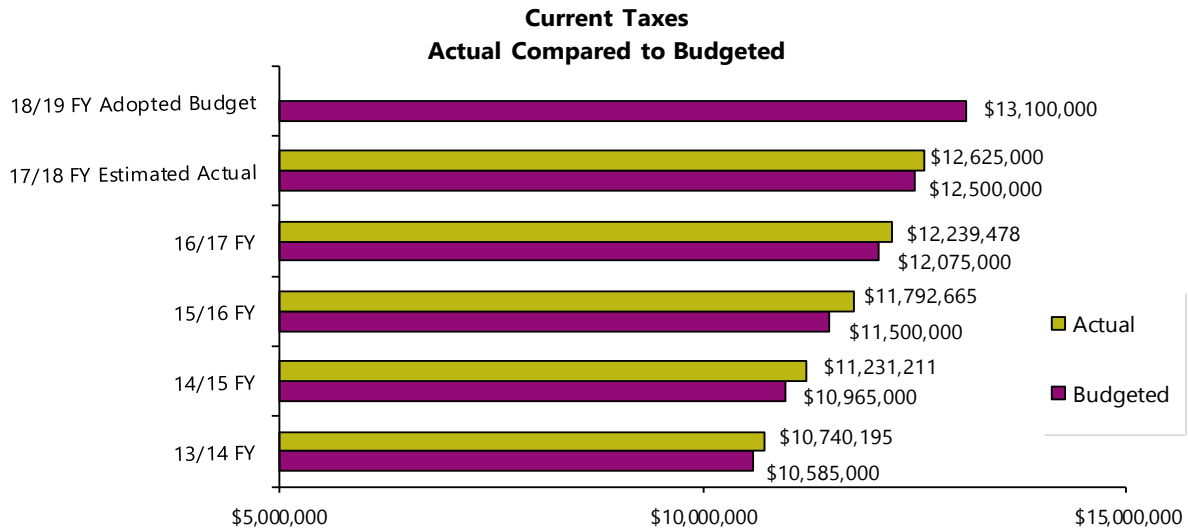
**"All Other Income" Category Adopted for the 2018/19 Fiscal Year**



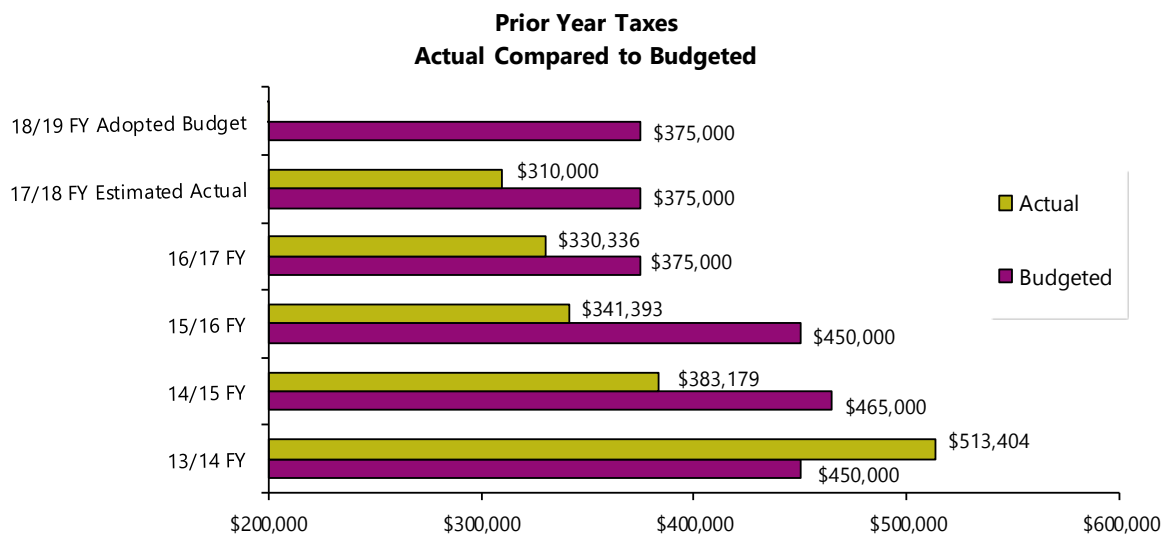
# General Fund Revenue

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

Current taxes for the 2018/19 fiscal year are budgeted based on assessed valuation growth projections of 4.5 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 93.75 percent collectible rate. The remaining are uncollectibles and discounts for payment in full. The collectible rate is based on the District's average over the last five years.



Prior year taxes for the 2018/19 fiscal year are budgeted at 2.85 percent of the 2017/18 Jackson County Assessor's certification of \$13,416,774.



# General Fund Revenue

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

## Assessed Valuation Trends:

### Unincorporated Areas Including White City

2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	2017/18 FY
\$2,012,001,200	\$1,955,768,951	\$2,010,328,589	\$2,086,359,059	\$2,192,594,013	\$2,263,221,391	\$2,340,508,449
Percent Change	-2.7948%	2.7897%	3.7820%	5.0919%	3.2212%	3.4149%

### City of Gold Hill

2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	2017/18 FY
\$63,707,623	\$61,948,821	\$64,971,898	\$68,264,529	\$71,355,116	\$73,155,754	\$75,354,098
Percent Change	-2.7607%	4.8800%	5.0678%	4.5274%	2.5235%	3.0050%

### City of Central Point

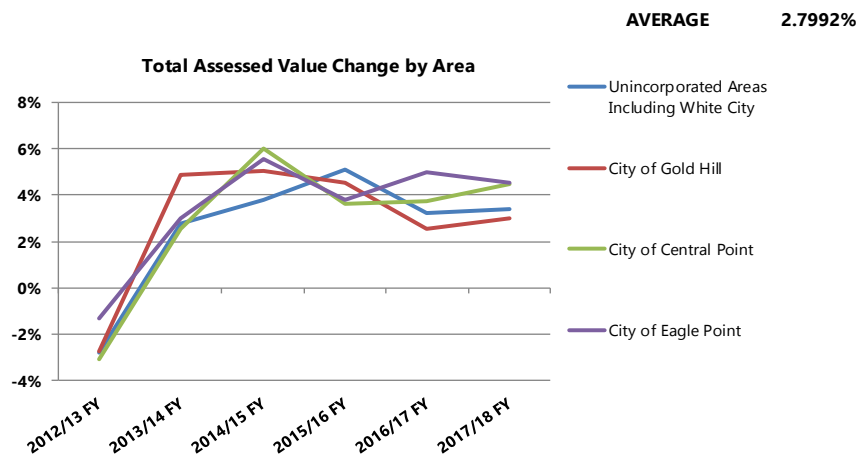
2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	2017/18 FY
\$1,036,034,076	\$1,004,088,294	\$1,029,836,014	\$1,091,728,520	\$1,131,372,600	\$1,173,815,611	\$1,226,268,279
Percent Change	-3.0835%	2.5643%	6.0099%	3.6313%	3.7515%	4.4686%

### City of Eagle Point

2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2016/17 FY	2017/18 FY
\$543,162,379	\$535,866,473	\$551,807,326	\$582,331,866	\$604,425,784	\$634,616,194	\$663,251,693
Percent Change	-1.3432%	2.9748%	5.5317%	3.7940%	4.9949%	4.5123%

### Total Assessed Valuation for all Areas Combined

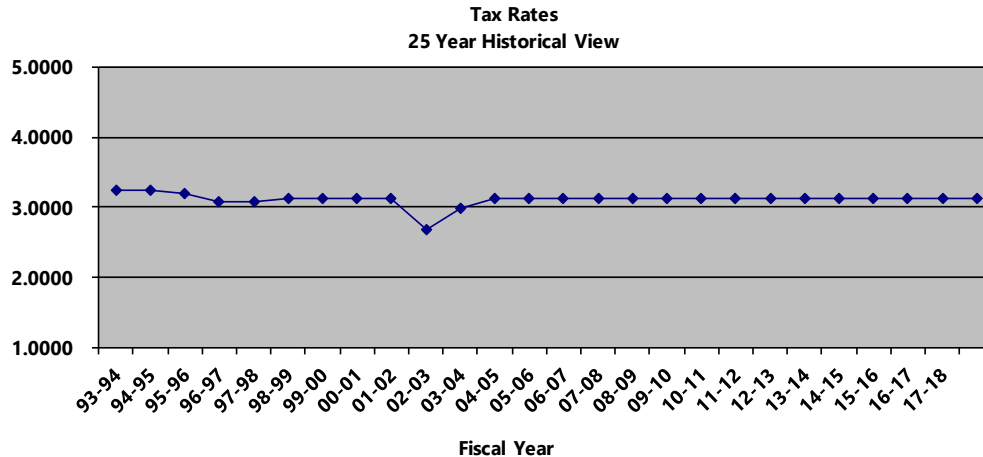
2010/11 FY	2011/12 FY	2012/13 FY	2013/14 FY	2014/15 FY	2015/16 FY	2017/18 FY
\$3,654,905,278	\$3,557,672,539	\$3,656,943,827	\$3,828,683,974	\$3,999,747,513	\$4,144,808,950	\$4,305,382,519
Percent Change	-2.6603%	2.7903%	4.6963%	4.4679%	3.6268%	3.8741%



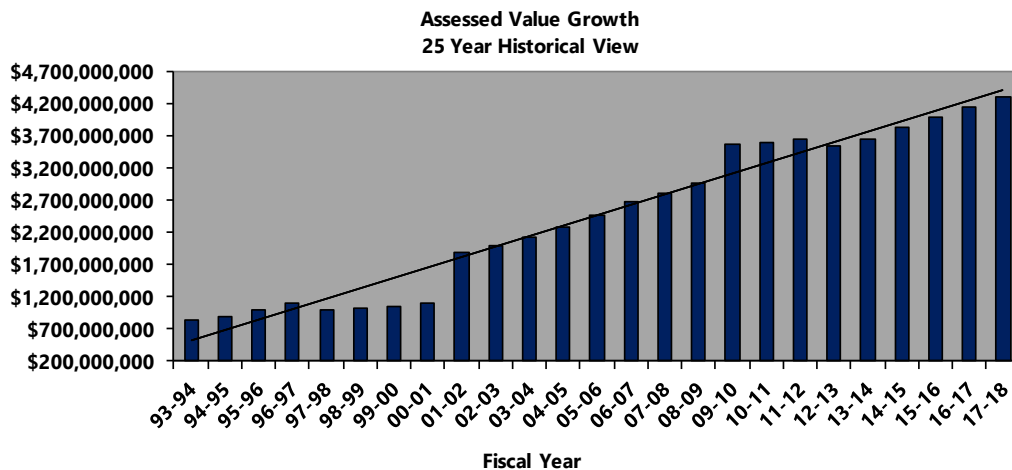


# General Fund Revenue

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



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



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

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

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

# General Fund Revenue

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

		2017			2007		
Top Taxpayers	Type of Business	Rank	Taxable Assessed Valuation	Tax Paid to District	Rank	Taxable Assessed Valuation	Tax Paid to District
Boise Cascade Wood Products	Wood Manufacturer	1	\$ 65,094,939	\$ 203,057	2	\$ 55,586,075	\$ 173,395
Carestream Health Inc	Medical Mfg Plant	2	\$ 51,367,370	\$ 160,235	1	\$ 115,529,360	\$ 360,382
Pacificorp	Electric Utilities	3	\$ 50,278,000	\$ 156,837	5	\$ 23,548,000	\$ 73,456
Amy's Kitchen	Organic Food Mfg	4	\$ 48,523,170	\$ 151,363	10	\$ 11,028,130	\$ 34,401
Avista Corp	Natural Gas Utilities	5	\$ 31,863,300	\$ 99,394	8	\$ 14,482,700	\$ 45,177
Linde LLC	Industrial Gases	6	\$ 21,693,620	\$ 67,671	7	\$ 18,251,840	\$ 56,935
Biomass One, Ltd	Industrial Mill	7	\$ 20,280,000	\$ 63,261	4	\$ 30,491,500	\$ 95,115
Plycem USA LLC	Wood Siding Plant	8	\$ 17,579,330	\$ 54,837	3	\$ 41,479,960	\$ 129,393
Table Rock Group LLC	Real Estate Developers	9	\$ 17,040,330	\$ 53,156	6	\$ 19,625,060	\$ 61,218
CenturyLink	Telephone	10	\$ 15,771,400	\$ 49,197	9	\$ 13,616,800	\$ 42,476
Murphy Company	Wood Products Mill	11	\$ 11,641,460	\$ 36,314	20	\$ 5,964,180	\$ 18,605
Wal-Mart	Retail	12	\$ 11,065,480	\$ 34,518			
Charter Communications	Cable Comm Provider	13	\$ 10,535,000	\$ 32,863			
Space LLC	Property Holdings	14	\$ 10,187,080	\$ 31,778	15	\$ 8,785,390	\$ 27,405
USF Reddaway	Trucking	15	\$ 8,793,110	\$ 27,429	16	\$ 7,389,740	\$ 23,052
Berdan Federal Way LLC	Trucking	16	\$ 8,133,450	\$ 25,371			
Ron Deluca Trustee	Property Holdings	17	\$ 8,054,813	\$ 25,126			
Cascade Wood Products Inc	Wood Manufacturer	18	\$ 7,631,700	\$ 23,806			
Rogue Waste Systems LLC	Sanitary	19	\$ 6,920,070	\$ 21,586			
Twin Creeks Retirement LP	Senior Living	20	\$ 5,832,180	\$ 18,193			
			\$ 428,285,802	\$ 1,335,995		\$ 365,778,735	\$ 1,141,010
Total District assessed value certified by Jackson County Treasurer			\$4,144,808,950			\$2,812,352,578	
Percent of top twenty taxpayers to total District assessed value			10.333%			13.006%	
Total property tax revenue received for year ending June 30th as stated on the governmental fund financial statements				\$ 12,569,814			\$ 7,987,801
Percent of top twenty taxpayers to total District property tax revenue received				10.629%			14.284%

# General Fund Revenue

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

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

# General Fund Revenue

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

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
2008	8,792,558	8,112,598	92.27	381,977	8,494,575	96.61	594,187	6.76 %
2009	9,291,810	8,545,870	91.97	343,252	8,889,122	95.67	727,166	7.83
2010	11,157,420	10,200,135	91.42	463,772	10,663,907	95.58	892,133	8.00
2011	11,254,507	10,379,903	92.23	475,519	10,855,422	96.45	977,187	8.68
2012	11,412,597	10,550,044	92.44	582,500	11,132,544	97.55	967,281	8.48
2013	11,112,431	10,386,202	93.46	429,978	10,816,180	97.33	858,401	7.72
2014	11,424,300	10,674,658	93.44	578,942	11,253,600	98.51	879,881	7.70
2015	11,909,282	11,292,333	94.82	322,057	11,614,390	97.52	861,868	7.24
2016	12,458,556	11,808,325	94.78	325,733	12,134,058	97.40	899,876	7.22
2017	12,911,941	12,280,183	95.11	289,636	12,569,819	97.35	929,394	7.20

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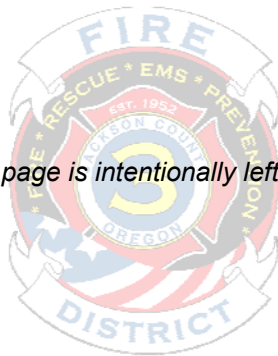
# Fire District 3

## Administration Department



**2018/19 Fiscal Year Budget**

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# Administration Department

## **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.

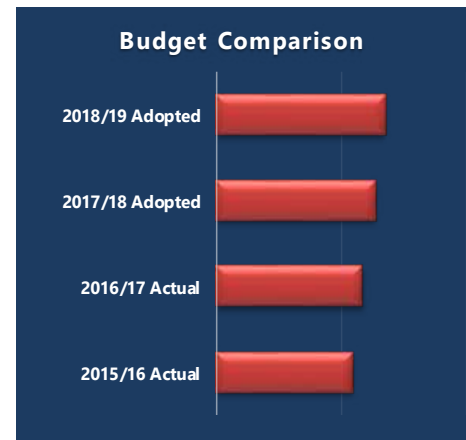
Administration supports the District in the achievement of its mission and vision by overseeing areas pertaining to strategic planning, policy development, staffing and personnel management, risk management, labor relations, and Civil Service. In addition support is provided to the District's Board of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

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

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

## **BUDGET SUMMARY**

Expenditures	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Personnel Services	\$541,536.21	\$508,749.37	\$583,200	\$624,600
Materials and Services	\$544,876.51	\$658,125.03	\$687,000	\$722,100
	<b>\$1,086,412.72</b>	<b>\$1,166,874.40</b>	<b>\$1,270,200</b>	<b>\$1,346,700</b>



## **PERSONNEL SUMMARY**

Position	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Fire Chief	1.00	1.00	1.00	1.00
Chief Administrative Officer	1.00	1.00	1.00	1.00
Finance Assistant	1.00	1.00	1.00	1.00
Executive Assistant	1.00	1.00	1.00	1.00
Part-Time Program Assistant	0.00	0.00	0.00	.15
<b>Total</b>	<b>4.00</b>	<b>4.00</b>	<b>4.00</b>	<b>4.15</b>

# Administration Department

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 7.1 percent or \$41,400 from the prior fiscal year. Factors impacting this classification include salary and benefit adjustments and the addition of a part-time program assistant position.

The overall Materials and Services classification is budgeted to increase five percent or \$35,100. The significant factor is an increase in account 60270-000; *Contractual Services* to account for construction management services. This account also includes the 911 dispatch contract which is experiencing a 3.87 percent increase.











## **PRIOR YEAR ACCOMPLISHMENTS**

- Completed long-term financial forecasting adjusting for modest economic improvement; revised the capital replacement plan that remains adequately funded.
- Received the Distinguished Budget Award and Certificate of Excellence in Financial Reporting from the Government Finance Officers Association (GFOA).
- Implemented an enhanced Employee Assistance Program (EAP) by retaining a counselor experienced in working with first responders and recognizing signs and symptoms of PTSD.
- Provided financial and administrative oversight of the Title 2 and Title 3 federal grants for hazardous fuels mitigation projects.
- Continued development of the employee performance management program to encourage courageous communication, collaboration, 360 feedback, and reinforcement of personal and professional development.
- Administered a Civil Service engineer position promotional examination.
- Hired and integrated new Fire Chief Robert B. Horton into the District.

## **DEPARTMENT MEASUREMENTS AND TARGETS**

<i><b>Types of Transactions (Output Measures)</b></i>	<i><b>2014/15 Actual</b></i>	<i><b>2015/16 Actual</b></i>	<i><b>2016/17 Actual</b></i>	<i><b>2017/18 Actual</b></i>	<i><b>2018/19 Projected</b></i>
<i>Accounts Payable Transactions</i>	2,056	2,120	2,231	2,421	2,500
<i>Payroll Disbursements (includes ACH)</i>	1,801	1,875	1,885	1,901	2,000
<i>Purchase Orders Issued</i>	1,255	1,300	1,423	1,625	1,700
<i>Cash Receipts Processed</i>	167	175	180	225	200

# Administration Department

<i>Effectiveness Measures</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Actual</i>	<i>2018/19 Projected</i>
<i>Award for Distinguished Budget</i>					
<i>Award for Excellence in Financial Reporting</i>					

## Service Measures and Desired Outcomes

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

<i>Effectiveness Measures</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Actual</i>	<i>2018/19 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>	.79	.86	.79	.75	.73

# Administration Department

## **2018/19 FISCAL YEAR DEPARTMENTAL TASKS**

The District's adopted 2018-2020 Strategic Plan is the overarching document that provides direction for the organization. Five 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 identified that support the success of the 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 five organizational strategic initiatives.

### **Initiative 2 – Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.**

<b>Goal</b>		Develop the budget with consideration to projected and unknown impacts	
<b>Objective</b>		Minimize impacts to service delivery resulting from forecasted cost increases such as PERS, healthcare, and insurances	
<b>Task</b>	Maintain a 5-10 year financial forecast that reflects financial trends and provides a depiction of how those assumptions may have impact on future budgets and financial stability	<b>Target Completion Date:</b>	June 30, 2019

<b>Objective</b>		Ensure best practices are followed with consideration to public contracting, purchasing, and procurement of goods and services	
<b>Task</b>	Assist Support Services in developing and administering requests for proposals for various construction projects	<b>Target Completion Date:</b>	June 30, 2019

### **Initiative 3 – Develop, promote, and demonstrate professionalism, innovation, and excellence throughout the organization.**

<b>Goal</b>		Cultivate an environment of data driven, evidence based decisions	
<b>Objective</b>		Effective data analysis is used to evaluate and improve performance and organizational decision making	
<b>Task</b>	Apply for Performance Management recognition	<b>Target Completion Date:</b>	December 1, 2018

# Administration Department

## Initiative 4 – Maintain a high level of trust by promoting District engagement in the communities we serve.

<b>Goal</b>	Continual improvement to the District-patron experience		
<b>Objective</b>	Foster participation in community events		
<b>Task</b>	Create a video for public presentations on the services the District provides	<b>Target Completion Date:</b>	December 1, 2018

<b>Objective</b>	Improve patron interactions with the District, both in person and through digital media		
<b>Task</b>	Consider a Patron Experience Committee	<b>Target Completion Date:</b>	July 1, 2018
<b>Task</b>	Identify opportunities to enhance the patron experience	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Review the digital experience to include website and social media	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Introduce new “digital experience”	<b>Target Completion Date:</b>	March 1, 2019
<b>Task</b>	“I am a Fire District 3” campaign focused on the commitment for the organization to the community	<b>Target Completion Date:</b>	June 30, 2019
<b>Task</b>	Annual community survey asking the question, “How are we doing?”	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Define the Community Engagement Program	<b>Target Completion Date:</b>	July 1, 2018

## Initiative 5 – Develop and strengthen collaborative efforts and strategic partnerships.

<b>Goal</b>	Actively participate with affiliations to support our mission and vision		
<b>Objective</b>	Be engaged in various industry, government, and business organizations and associations to remain current on issues that impact the internal and external environment		
<b>Task</b>	Explore opportunities to partner (SOU for projects/interns)	<b>Target Completion Date:</b>	July 1, 2018
<b>Task</b>	Explore partnering with a graduate or undergraduate intern to partner with the District	<b>Target Completion Date:</b>	September 1, 2018

# Administration Department

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	349,487.54	337,150.28	361,000	391,000	391,000	396,900
Overtime	0.00	823.34	500	1,000	1,000	1,000
Incentives	26,790.20	20,861.08	29,000	29,800	29,800	30,300
Retirement (PERS)	43,234.63	39,938.36	54,400	56,600	56,600	58,000
Unemployment Insurance	0.00	0.00	100	100	100	100
ER Deferred Comp Contrib	14,062.00	11,763.00	23,400	24,000	24,000	24,900
Health and Life Insurance	69,156.38	62,485.32	67,200	63,600	63,600	63,600
HRA-VEBA Contribution	9,218.88	13,444.20	15,600	15,800	15,800	15,800
FICA and Medicare PR Taxes	25,583.19	22,306.88	30,000	32,100	32,100	32,800
Workers' Comp Insurance	4,003.39	-23.09	2,000	1,200	1,200	1,200
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$541,536.21</b>	<b>\$508,749.37</b>	<b>\$583,200</b>	<b>\$615,200</b>	<b>\$615,200</b>	<b>\$624,600</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	565.00	0.00	1,000	1,000	1,000	1,000
Printing	3,949.17	3,426.80	3,000	3,000	3,000	3,000
Supplies; Office	7,719.90	5,389.04	10,000	10,000	10,000	10,000
Supplies; Administrative	17,593.18	27,213.81	28,000	36,000	36,000	36,000
Supplies; Fees	6,868.34	9,407.75	9,000	11,000	11,000	11,000
Contractual/Professional Services	415,150.22	510,605.68	531,000	552,000	552,000	552,000
Property and Casualty Insurance	71,794.50	69,807.00	76,000	80,000	80,000	80,000
Mileage Reimbursements	514.64	365.88	2,000	2,000	2,000	2,000
Membership Dues	5,824.00	6,495.00	8,400	8,500	8,500	8,500
Books and Subscriptions	2,028.59	1,787.80	1,500	1,500	1,500	1,500
Advertising	2,532.57	3,103.57	6,500	6,500	6,500	6,500
Hiring Processes, CS, Backgrounds	7,285.12	18,266.13	7,000	7,000	7,000	7,000
Postage and Shipping	3,051.28	2,256.57	3,500	3,500	3,500	3,500
Interest on Bank Loan	0.00	0.00	100	100	100	100
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$544,876.51</b>	<b>\$658,125.03</b>	<b>\$687,000</b>	<b>\$722,100</b>	<b>\$722,100</b>	<b>\$722,100</b>
<b>TOTAL ADMINISTRATION</b>	<b>\$1,086,412.72</b>	<b>\$1,166,874.40</b>	<b>\$1,270,200</b>	<b>\$1,337,300</b>	<b>\$1,337,300</b>	<b>\$1,346,700</b>

# Administration Department

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 1

Account	Description	Account Total
58203-000	<b>Physicals and Vaccinations</b> .....	\$ 1,000
60220-000	<b>Printing</b> ..... General administrative printing by outside sources including business cards, budget document, strategic plan, and annual performance report	\$ 3,000
60222-000	<b>Supplies; Office</b> .....	\$ 10,000
60223-001	<b>Supplies; Administrative</b> ..... General administrative supplies and board expenses 10,000 Years of service awards and annual banquet 10,000 District historical preservation and display 3,000 Miscellaneous office furnishings and equipment 5,000 Board of Director elections (three positions) 8,000	\$ 36,000
60223-002	<b>Licenses and Fees</b> ..... Expenses related to banking fees, employee benefits administrator fees, State of Oregon purchasing agreement, Oregon Ethics commission, ODOT land use fee, actuary fees, and other miscellaneous fees as required	\$ 11,000
60270-000	<b>Contractual/Professional Services</b> ..... 911 dispatch services contract 420,000 General legal counsel 35,000 Financial audit and filing expenses 10,000 Lobbyist 12,000 EMS physician supervisor contract 12,000 Employee assistance program through CenterPoint Services 28,000 Construction management 35,000	\$ 552,000
60370-000	<b>Property and Casualty Insurance</b> .....	\$ 80,000
60380-001	<b>Mileage Reimbursements</b> .....	\$ 2,000
60410-000	<b>Membership Dues</b> ..... Membership dues to organizations such as Special Districts Association, Rogue Valley Fire Chief's, Oregon Fire Chief's Association, International Association of Fire Chief's, Government Finance Officers Assn, Oregon Municipal Finance Officers, and Oregon Fire Service Museum	\$ 8,500

# Administration Department

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

General Fund 1, Department 1

Account	Description	Account Total
60412-000	Books and Subscriptions.....	\$ 1,500
60430-001	Advertising.....	\$ 6,500
60490-000	Hiring Processes, Civil Service, Backgrounds..... Includes entry level hiring processes and promotional exams, expenses for Civil Service meetings, and all expenses related to pre-employment background evaluations	\$ 7,000
60491-000	Postage and Shipping.....	\$ 3,500
62100-000	Interest on Bank Loan.....	\$ 100
TOTAL MATERIALS AND SERVICES		<u>\$ 722,100</u>





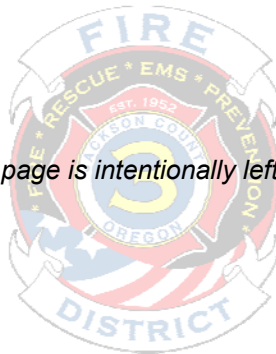
# Fire District 3

## Operations Department



**2018/19 Fiscal Year Budget**

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# Operations Department

## **DEPARTMENT DESCRIPTION**

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

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

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

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

Four of the District's fire stations are located in rural areas and served by volunteers who support the District's mission. The Agate Lake, Dodge Bridge, Sams Valley, and Gold Hill fire stations have volunteers assigned to them. A Volunteer Team Leader oversees the volunteers at each station, providing guidance, training, and experience. Prospective volunteers and students go through an application process followed by a background evaluation. Once accepted into the program, volunteers fall under one of three categories: student firefighter, resident volunteer, or community volunteer.

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

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

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

# Operations Department

## **DISTRICT STATIONS**

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

The White City station is located at 8333 Agate Road in White City and houses Engine Company 7702. The Battalion Chief is also stationed here. There were 1,981 requests for service in the White City area in 2017.



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

The Central Point station is located at 600 South Front Street and houses Engine Company 7701. There were 2,955 requests for service in the Central Point area in 2017.



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

The Eagle Point station is located at 213 Loto Street and houses Engine Company 7706. There were 1,394 requests for service in the Eagle Point area in 2017.



### **Table Rock (TR) Station 117 – Career Staffed**

The Table Rock station is located at 5159 Table Rock Road and houses Engine Company 7711. Calls for service for this station are categorized under White City or Central Point's fire management zone.



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

The Dodge Bridge station is located at 60 Rogue River Drive. Career personnel from White City and/or the Eagle Point stations may respond to supplement volunteer resident response. There were 190 requests for service in the Dodge Bridge area in 2017.



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

The Gold Hill station is located at 299 Access Road. Career personnel from the Central Point station may respond to supplement volunteer resident response. There were 414 requests for service in the Gold Hill area in 2017.



# Operations Department

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

The Sams Valley station is located at 3333 Tresham Lane. Career personnel from the White City, Eagle Point and/or Central Point stations may respond to supplement volunteer resident response. There were 250 requests for service in the Sams Valley area in 2017.



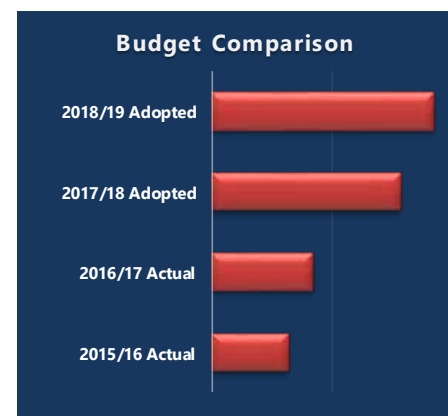
## Agate Lake (AL) Station 115 – Volunteer Staffed

The Agate Lake station is located at 880 East Antelope Road. Career personnel from the White City and/or Eagle Point stations may respond to supplement volunteer resident response. There were 57 requests for service in the Agate Lake area in 2017.



## BUDGET SUMMARY

Expenditures	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Personnel Services	\$7,394,120.61	\$7,593,860.38	\$8,299,100	\$8,503,500
Materials and Services	\$233,245.11	\$243,531.16	\$261,000	\$334,500
	<b>\$7,627,365.72</b>	<b>\$7,837,391.54</b>	<b>\$8,560,100</b>	<b>\$8,838,000</b>



## PERSONNEL SUMMARY

Position	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Deputy Chief of Operations	1.00	1.00	1.00	1.00
Chief of Rural Communities	1.00	.50	.00	0.00
Administrative Assistant	1.00	1.00	1.00	1.00
Battalion Chief – 56 Hour	3.00	3.00	3.00	3.00
Battalion Chief – 40 Hour	0.00	1.00	0.00	1.00
Fire Captains ( <i>Represented Positions</i> )	12.00	12.00	12.00	12.00
Fire Engineers ( <i>Represented Positions</i> )	12.00	12.00	12.00	12.00
Firefighters ( <i>Represented Positions</i> )	20.00	20.00	20.00	20.00
<b>Total</b>	<b>50.00</b>	<b>50.50</b>	<b>49.00</b>	<b>50.00</b>

# Operations Department

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 2.46 percent or \$204,400 from the prior fiscal year. Factors impacting this classification include cost of living salary adjustments and budgeted increases in benefit accounts. In the 2016/17 fiscal year the District budgeted a new 40-hour EMS Staff Battalion Chief position, however was unsuccessful in recruitment. At that time, the District felt it would be best to re-evaluate the intent and needs of the position and decided to leave it unfilled during the 2017/18 fiscal year. This position has been redeveloped and is fully funded in the 2018/19 fiscal year, which has contributed to the overall personnel services increase.

Overtime for state conflagration fire deployment is budgeted with a \$1,000 placeholder. If a deployment occurs, the revenue reimbursements received from the state and the corresponding overtime expenditures, are appropriated through a resolution. In years of a very active fire season, overtime expenditures can impact the departmental budgetary fiscal year comparisons.

The overall Materials and Services classification is proposed to increase 28 percent or \$73,500. The primary contributing factor is the consolidation of the Volunteer Department into Operations. Accounts have been streamlined with a new structure established in Operations that reflects the career firefighter group and the student firefighter / volunteer group. This change represents a \$60,000 increase to this department, but will prove to be more efficient from an overall budgetary and operational standpoint.

Notable budgetary projects in Operations include continued replacement of personal protective equipment and automatic external defibrillator (AED) intubation upgrade. The District will continue to budget college tuition costs for nine student firefighters to attain their fire science degree with Rogue Community College.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Presented the adopted Standards of Cover to the public.
- Worked collaboratively with other responding agencies to ensure a successful Country Crossings musical festival, the first of its kind in Jackson County.
- Deployed Incident Management Teams to assist in six wildfires in Oregon and California, mobilizing an engine company to four separate fires.
- Constructed and purchased a tactical tender as replacement to a 1970's vintage tender.
- Purchased two Type I Pierce structural engines.
- Participated in the first virtual ride-along through the District's Facebook.
- Improved call processing and turn out times to meet adopted standards.
- Established and delivered to crews a regional methodology for incident management.
- Analyzed and recommended the location for the new Central Point station.
- Continued a solid student firefighter program maintaining nine students.
- Encouraged graduating students in area employment processes and certification endeavors.



# Operations Department

## 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.

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

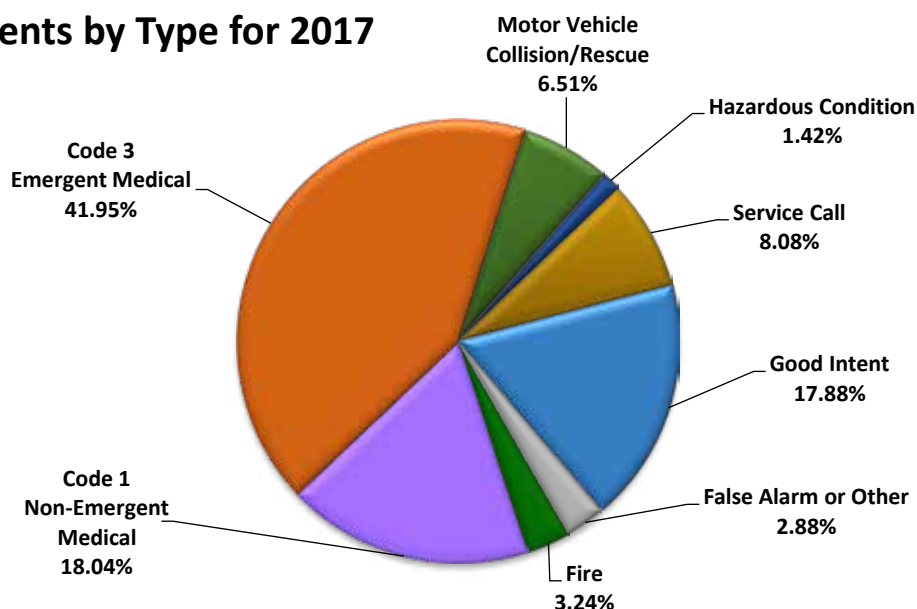
**Code 3 Emergent Medical:** This type of call is one where timeliness of the medical intervention has an impact on the positive outcome of the patient. Some examples of this type of call are chest pain, cardiac arrest, stroke, and difficulty breathing. Crews normally respond "Code 3" (lights and sirens)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

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

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

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

### Incidents by Type for 2017

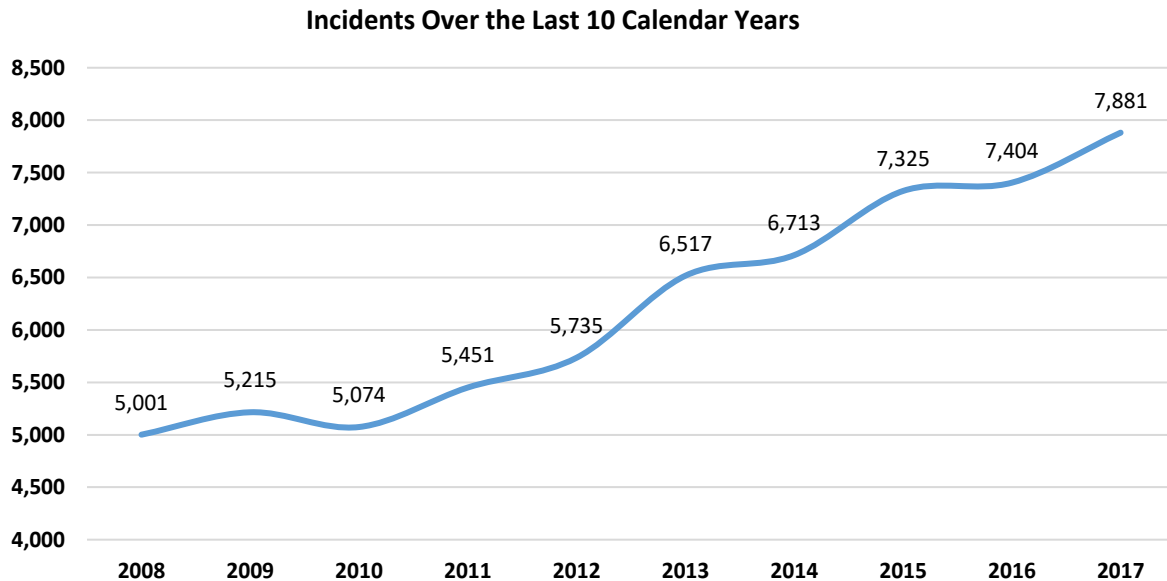


# Operations Department

<i>Types of Emergent Incidents (Outputs)</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Actual</i>	<i>2018 Target</i>
<i>Code 1 Emergent Medical</i>	1,178	1,199	1,336	797	848
<i>Code 3 Emergent Medical</i>	2,950	3,297	3,106	3,476	3,694
<i>Motor Vehicle Collision</i>	338	413	482	470	501
<i>Hazardous Condition</i>	75	122	105	134	143
<i>Service Call</i>	496	548	598	630	671
<i>Fire</i>	225	235	240	235	250
<i>False Alarm / Other</i>	191	221	213	251	267
<i>Good Intent</i>	1,260	1,290	1,324	1,888	2,009
<b>Total</b>	<b>6,713</b>	<b>7,325</b>	<b>7,404</b>	<b>7,881</b>	<b>8,383</b>

Target based on annual growth average of 6.44%

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





# Operations Department

Incident statistics are evaluated in the Standards of Cover and integrated into the strategic planning process. Critical decisions, such as whether or not to increase firefighter staffing or where to build future fire stations, are two examples of how the District uses trends relating to increases in incident activity to plan for future growth and development. The number of incidents have been increasing on average 6.4 percent per year over the past five years.

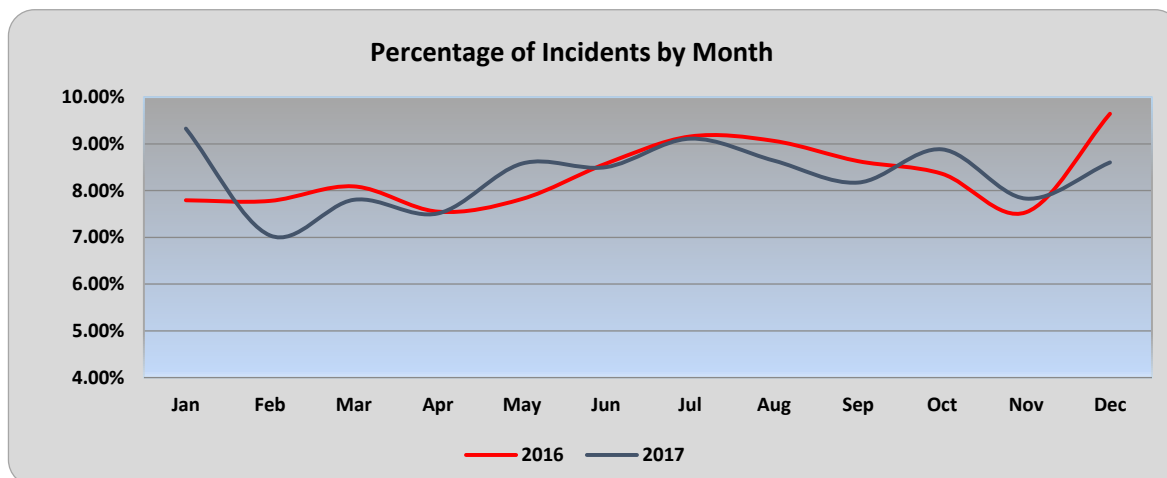
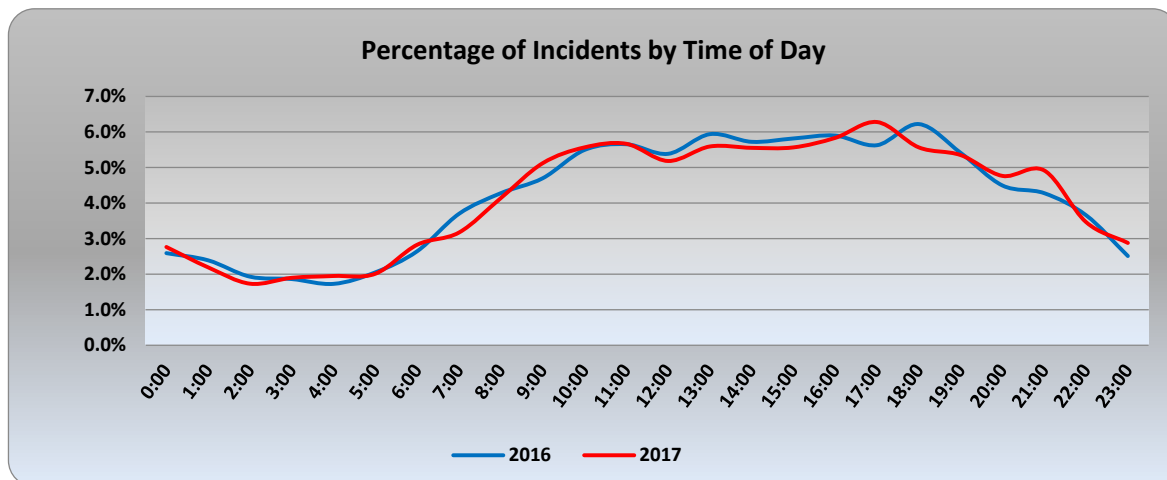
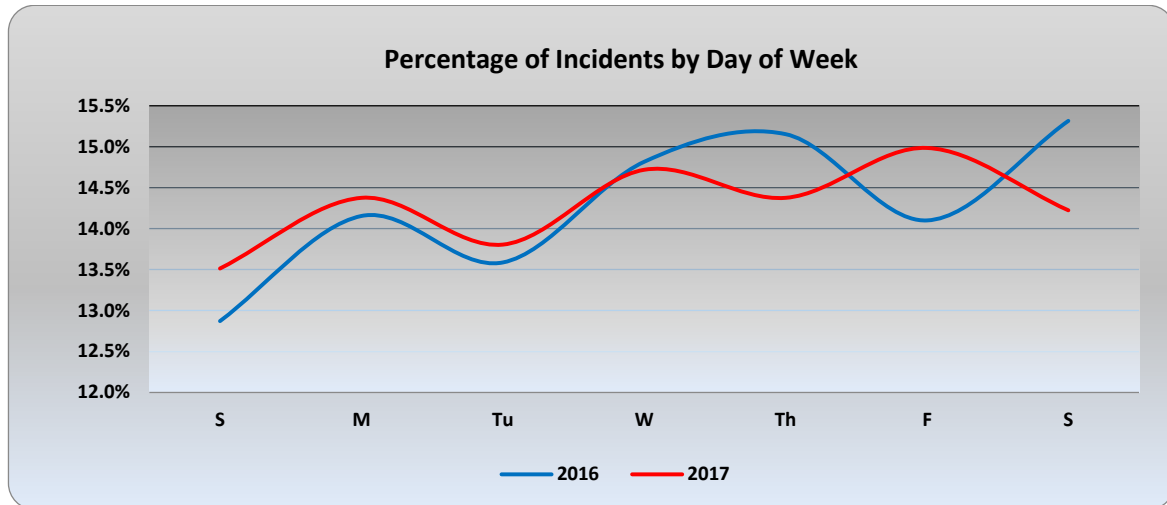
The following displays where emergency incidents have occurred over the past four years based on response area. Central Point, Eagle Point, and White City respond with career engine companies and the other locations with volunteer engine companies, although the career companies may respond anywhere in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

<i><b>Number of Incidents by Response Area (Outputs)</b></i>	<i><b>2014 Actual</b></i>	<i><b>2015 Actual</b></i>	<i><b>2016 Actual</b></i>	<i><b>2017 Actual</b></i>	<i><b>2018 YTD (1<sup>st</sup> Qtr 2018)</b></i>
<i>Agate Lake</i>	51	55	61	57	11
<i>Central Point</i>	2,492	2,825	2,736	2,955	706
<i>Dodge Bridge</i>	132	154	167	190	50
<i>Eagle Point</i>	1,212	1,268	1,341	1,394	323
<i>Gold Hill</i>	382	334	393	414	98
<i>Sams Valley</i>	224	238	233	250	56
<i>White City</i>	1,643	1,741	1,803	1,981	480
<i>Mutual Aid Calls</i>	577	710	670	640	125
<b>Total</b>	<b>6,713</b>	<b>7,325</b>	<b>7,404</b>	<b>7,881</b>	<b>1,849</b>

# Operations Department

## When Responses Occur

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



# Operations Department

## Response Times

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

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

The District updated the Standards of Cover in late 2017 and are currently changing our system and methods for tracking response data. The District has been using a methodology and data system that is outdated and has produced inconsistent information. A top priority for 2018/2019 is to implement the Intterra data analysis program (a Strategic Plan goal and objective). Once the new system is in place, we will be able to better determine if we are truly not meeting the response targets, and if not, address the reasons why. Our objective is to have answers and find solutions to improve our service delivery model.

<b>URBAN</b> <i>(Population greater than 1,000 people per square mile)</i>	
Total Incidents: 5,203	Code 3 Incidents: 1,558
GOAL: 80% of incidents within 7 minutes	Actual: 75.10%
BASELINE: 90% of incidents within 10 minutes	Actual: 94.61%
80th Percentile Response Time	7:26

The District is not meeting the goal in the urban area but is meeting the baseline standard.

<b>SUBURBAN</b> <i>(Population between 500 and 1,000 people per square mile)</i>	
Total Incidents: 457	Code 3 Incidents: 132
GOAL: 80% of incidents within 11 minutes	Actual: 75.00%
BASELINE: 90% of incidents within 12 minutes	Actual: 76.52%
80th Percentile Response Time	12:50

The District is not meeting the goal nor the baseline standard in the suburban area.

<b>RURAL</b> <i>(Population less than 500 people per square mile)</i>	
Total Incidents: 1,555	Code 3 Incidents: 522
GOAL: 80% of incidents within 13 minutes	Actual: 81.03%
BASELINE: 90% of incidents within 14 minutes	Actual: 85.25%
80th Percentile Response Time	12:50

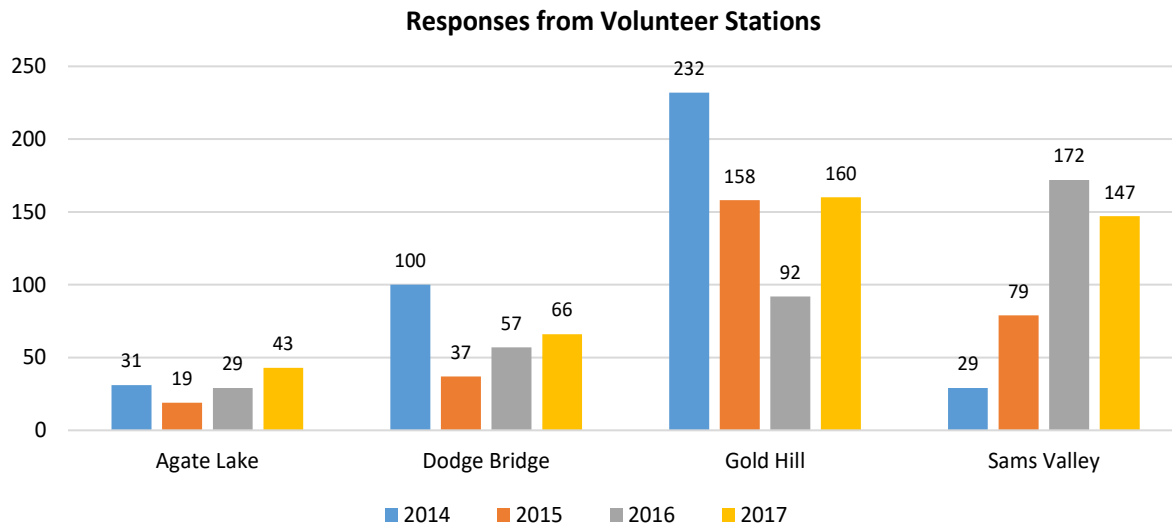
The District is meeting the goal in the rural area but is not meeting the baseline standard.

# Operations Department

## Volunteer Response Times

### Response from Volunteer Stations:

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



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

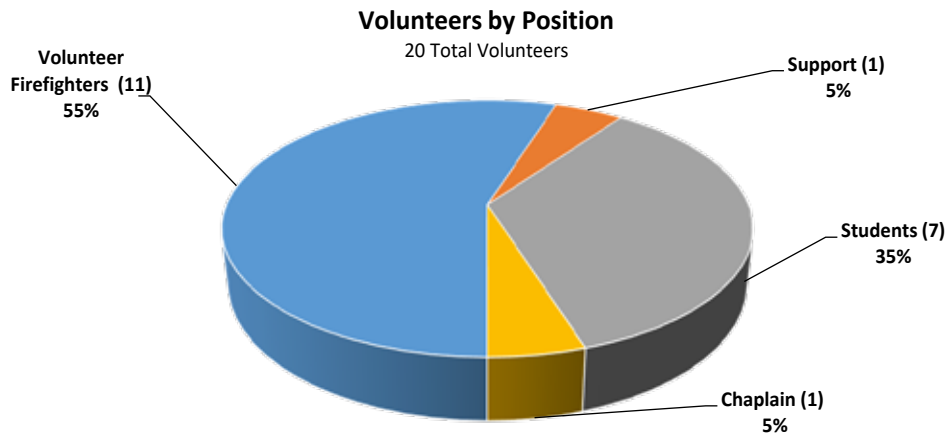
### Response Times in the Volunteer Station Fire Management Zones:

The primary goal of the volunteer program is to improve the response times in the volunteer station fire management zones. All of the volunteer stations are classified as "rural" and have a response time target of arriving on scene to 80 percent of the incidents within 13 minutes. District wide, the rural area received a 13 minute response time 81 percent of the time. We recognize we are not meeting the goal and with the implementation of the Intterra data analysis program, hope to refine the response data and determine solutions for addressing the problem.

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

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2015 Actual</i>		<i>2016 Actual</i>		<i>2017 Actual</i>		<i>2018 Target</i>
<i>Fire Management Zone / Station</i>	<b>80%</b>	Average	<b>80%</b>	Average	<b>80%</b>	Average	<b>80%</b>
<i>Agate Lake</i>	<b>14:13</b>	12:51	<b>16:47</b>	12:12	<b>13:13</b>	11:24	<b>13.00</b>
<i>Dodge Bridge</i>	<b>13:31</b>	10:49	<b>13:13</b>	10:32	<b>13:20</b>	10:39	<b>13.00</b>
<i>Gold Hill</i>	<b>15:28</b>	12:15	<b>15:44</b>	13:31	<b>16:04</b>	12:41	<b>13.00</b>
<i>Sams Valley</i>	<b>15:09</b>	13:34	<b>14:52</b>	11:27	<b>15:15</b>	12:01	<b>13.00</b>

# Operations Department



## 2018/19 FISCAL YEAR DEPARTMENTAL TASKS

The District's adopted 2018-2020 Strategic Plan is the overarching document that provides direction for the organization. Five 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 identified that support the success of the goal. Under each objective several tasks may be identified that support the accomplishment of the intended outcome. The initiatives and goals stay constant with the plan however the objectives and corresponding tasks may change with the fiscal year and typically drive a lot of the budget development. Some tasks have cost impact; others have minimal impact.

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

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

<b>Goal</b>			
Enhance the District EMS program to provide the greatest chance for a positive outcome from acute medical emergencies			
<b>Objective</b>			
Establish a community wide approach to out of hospital cardiac arrest			
<b>Task</b>	Create a process flow chart for out of hospital cardiac arrest	<b>Target Completion Date:</b>	July 1, 2018
<b>Task</b>	Identify components of the process for enhancement	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Establish measures for enhancement components	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Coordinate with L1817 on Verified Responder program	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Establish Verified Responder policy, equipment, and training needs	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Implement Verified Responder program	<b>Target Completion Date:</b>	March 1, 2019

# Operations Department

## Initiative 1 Continued...

<b>Objective</b>	Actively pursue protocol development to achieve a high standard of patient care		
<b>Task</b>	Implement recommendations for Dr. Rostykus' project on stroke patients	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Maintain active participation in protocol committee	<b>Target Completion Date:</b>	December 1, 2018

<b>Objective</b>	Develop a comprehensive quality improvement program		
<b>Task</b>	Develop a system to measure baseline impact on high risk medical events	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Review reporting system to improve efficiencies	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Fireground QA/QI program	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	QA/QI program for rural response including suburban 2	<b>Target Completion Date:</b>	September 1, 2018

<b>Goal</b>	Enhance emergency response system reliability to meet or exceed performance expectations		
<b>Objective</b>	Identify and manage impacts to system reliability		
<b>Task</b>	Review CAD status list identifying opportunities for detailed status of service schedules	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Evaluate alternative response and deployment models	<b>Target Completion Date:</b>	June 30, 2019

<b>Objective</b>	Align appropriate resource response based on needs "triage"		
<b>Task</b>	Determine default priority level for all available CAD codes	<b>Target Completion Date:</b>	June 30, 2019
<b>Task</b>	Explore alternative responder level for low priority requests for service	<b>Target Completion Date:</b>	December 1, 2018

<b>Goal</b>	Meet or exceed established Fire and Life Safety standards for preventing loss		
<b>Objective</b>	Ensure staffing meets service level objectives		
<b>Task</b>	Evaluate results of system performance analysis based on Standards of Cover	<b>Target Completion Date:</b>	September 1, 2018

<b>Objective</b>	Develop a Community Risk Reduction program focused on the risk assessment and experiences in the District		
<b>Task</b>	Conduct and report a Community Risk Assessment	<b>Target Completion Date:</b>	December 1, 2018

# Operations Department

## Initiative 2 – Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.

<b>Goal</b>	Explore and implement technology solutions		
<b>Objective</b>	Research opportunities to improve the incident and patient care reporting experience		
<b>Task</b>	Determine the needs of the organization for quality management	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Determine if current software can meet those needs	<b>Target Completion Date:</b>	March 1, 2019
<b>Task</b>	Research and recommend solutions to bridge gaps	<b>Target Completion Date:</b>	June 30, 2019

<b>Objective</b>	Ensure GIS and preplanning are in place to support response needs		
<b>Task</b>	Revamp the program based on technology solution	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Implement and train on new program	<b>Target Completion Date:</b>	June 30, 2019

<b>Goal</b>	Enhance response reliability for emergent incidents		
<b>Objective</b>	Ensure staffing meets service level objectives		
<b>Task</b>	Determine current level of response reliability	<b>Target Completion Date:</b>	July 1, 2018
<b>Task</b>	Call prioritization project	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Enhance policies for effective management of low priority calls for service	<b>Target Completion Date:</b>	March 1, 2019

## Initiative 3 – Develop, promote, and demonstrate professionalism, innovation, and excellence throughout the organization.

<b>Goal</b>	Establish a system of continuous quality improvement in areas of service delivery to the community		
<b>Objective</b>	Measure organizational performance against established expectations		
<b>Task</b>	Develop EMS QA standards for high risk medical conditions	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Develop QA standards for high risk litigation conditions (AMA's)	<b>Target Completion Date:</b>	December 1, 2018

<b>Objective</b>	Identify industry benchmarks for best practice service delivery in areas of focus		
<b>Task</b>	High risk medical	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	High risk litigation	<b>Target Completion Date:</b>	December 1, 2018

<b>Goal</b>	Enhance the engagement and efficiency of District committees		
<b>Objective</b>	Review committee expectations, evaluate for opportunity to modify or add committees to best accomplish the mission and strategic plan of the District		
<b>Task</b>	Review committee	<b>Target Completion Date:</b>	July 1, 2018
<b>Task</b>	Consider committees: Patron Experience, Problem Solving Team, QA/QI All Service Delivery	<b>Target Completion Date:</b>	July 1, 2018

# Operations Department

## Initiative 4 – Maintain a high level of trust by promoting District engagement in the communities we serve.

<b>Goal</b>	Continual improvement to the District-patron experience		
<b>Objective</b>	Foster participation in community events		
<b>Task</b>	Identify and track requests and occurrences of FD3 participation in community events	<b>Target Completion Date:</b>	September 1, 2018
<b>Goal</b>	Encourage participation from volunteers, residents, and stakeholders		
<b>Objective</b>	Maintain the resident firefighter program and promote response capable volunteers		
<b>Task</b>	Identify areas of greatest value to the response through analytics	<b>Target Completion Date:</b>	July 1, 2018
<b>Task</b>	Revise volunteer recruitment and training process to improve effectiveness on identified areas of greatest value	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Recruit for response capable volunteers to meet the Districts needs	<b>Target Completion Date:</b>	March 1, 2019

## Initiative 5 – Develop and strengthen collaborative efforts and strategic partnerships.

<b>Goal</b>	Maximize partnerships with agencies to reduce redundancy, maximize effectiveness, and achieve readiness		
<b>Objective</b>	Partner to educate the public on alternate resources for non-emergent needs		
<b>Task</b>	Partner with ECSO for non-emergent call line access	<b>Target Completion Date:</b>	June 30, 2019
<b>Objective</b>	Improve information sharing among agencies		
<b>Task</b>	Identify barriers effecting information sharing among pre-hospital givers and hospital care providers	<b>Target Completion Date:</b>	December 1, 2018
<b>Objective</b>	Identify call criteria and establish a protocol for responses that are best served with coordinated law/fire response		
<b>Task</b>	Identify call types benefitted coordination with law	<b>Target Completion Date:</b>	August 1, 2018
<b>Task</b>	Establish “best practice” for coordinated response	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Create a call type initiating Coordinate Response Protocol	<b>Target Completion Date:</b>	June 30, 2019



# Operations Department

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Description</b>						
<b>Personnel Services</b>						
Salaries	4,218,624.88	4,252,116.08	4,255,000	4,465,300	4,465,300	4,465,300
Overtime	394,889.12	445,120.80	574,000	600,000	600,000	600,000
Incentives	559,330.93	557,642.84	574,700	603,100	603,100	603,100
Retirement (PERS)	607,025.20	627,565.64	920,000	932,000	932,000	932,000
ER Deferred Comp Contrib	83,037.15	90,030.70	99,000	107,200	107,200	107,200
Health and Life Insurance	901,563.23	925,244.59	935,000	1,014,000	1,014,000	1,014,000
HRA-VEBA Contribution	114,099.09	188,277.27	195,000	197,900	197,900	197,900
FICA and Medicare PR Taxes	377,543.85	386,536.65	414,000	434,000	434,000	434,000
Workers' Comp Insurance	141,262.18	125,138.11	169,000	150,000	150,000	150,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$7,397,375.63</b>	<b>\$7,597,672.68</b>	<b>\$8,135,700</b>	<b>\$8,503,500</b>	<b>\$8,503,500</b>	<b>\$8,503,500</b>
<b>Materials and Services</b>						
<b>Career Firefighter Group</b>						
Physicals and Vaccinations	15,715.00	23,961.00	18,000	22,500	22,500	22,500
Licenses and Fees	674.60	6,644.50	4,000	7,000	7,000	7,000
Supplies; Operations	5,666.06	2,515.85	5,500	5,000	5,000	5,000
Supplies; Special Projects	193.99	2,519.62	7,000	7,000	7,000	7,000
<b>Fire Suppression Expenses</b>						
Personal Protective Equipment	51,614.69	70,565.87	50,300	52,800	52,800	52,800
Hose and Appliances	52,477.99	7,646.42	15,000	17,000	17,000	17,000
Apparatus Equipment and Supplies	12,179.95	15,392.59	22,000	29,500	29,500	29,500
Safety Equipment	18,921.72	15,654.16	14,000	11,700	11,700	11,700
Specialty Equipment	9,349.59	10,700.88	11,800	7,500	7,500	7,500
Technical Rescue Equipment	2,281.00	6,607.84	8,700	6,000	6,000	6,000
Rehabilitation and Consumables	5,885.17	4,254.15	6,000	6,000	6,000	6,000
Equipment for New Apparatus	870.00	16,455.39	35,000	40,000	40,000	40,000
M&R; Emergency Response Equip	22,515.62	41,323.33	40,000	44,500	44,500	44,500
Contractual/Professional Services	34,691.70	19,123.94	25,000	15,000	15,000	15,000
Membership Dues	790.00	845.00	1,200	1,000	1,000	1,000
Books and Subscriptions	1,965.63	1,583.13	1,500	2,000	2,000	2,000
<b>Student Firefighter / Volunteer Group</b>						
Pre-Entrance Screenings, Backgrounds,						
Vaccinations	2,280.00	921.00	4000	4,000	4,000	4,000
Student Firefighter Tuition Program	41,445.05	14242.05	46500	50,000	50,000	50,000
Length of Service Award Program (LOSAP)	8,150.00	200.00	10000	5,000	5,000	5,000
Scholarship Donations	1,000.00	1000.00	1000	1,000	1,000	1,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$288,667.76</b>	<b>\$262,156.72</b>	<b>\$326,500</b>	<b>\$334,500</b>	<b>\$334,500</b>	<b>\$334,500</b>
<b>TOTAL OPERATIONS</b>	<b>\$7,686,043.39</b>	<b>\$7,859,829.40</b>	<b>\$8,462,200</b>	<b>\$8,838,000</b>	<b>\$8,838,000</b>	<b>\$8,838,000</b>

# Operations Department

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 2

Account	Description	Account Total
<b>CAREER FIREFIGHTER GROUP</b>		
<b>58203-000</b>	<b>Physicals and Vaccinations.....</b>	<b>\$ 22,500</b>
<b>60223-002</b>	<b>Licenses and Fees.....</b>	<b>\$ 7,000</b>
	Oregon ambulance licensing fees, CLIA, DEA, FCC, Motorola, Drone, EMT Licensing	
<b>60223-007</b>	<b>Supplies; Operations.....</b>	<b>\$ 5,000</b>
	Purchase of operational supplies, meeting refreshments	
<b>60224-000</b>	<b>Special Projects.....</b>	<b>\$ 7,000</b>
	Standby events	3,000
	Emergency preparedness	3,000
	Pre-fire plans	1,000
<b>60225</b>	<b><u>Fire Suppression Expenses</u></b>	
<b>60225-001</b>	<b>Personal Protective Equipment.....</b>	<b>\$ 52,800</b>
	Routine purchase of structural and wildland personal protective equip	10,300
	Structural turnouts (4 year rotation cycle)	42,500
<b>60225-002</b>	<b>Hose and Appliances.....</b>	<b>\$ 17,000</b>
	Routine purchase of structural and wildland hose	12,000
	Routine purchase of structural and wildland nozzles and adapters	5,000
<b>60225-003</b>	<b>Apparatus Equipment and Supplies.....</b>	<b>\$ 29,500</b>
	Routine purchase of small tools, chainsaws and power equipment,	
	foam, salvage and overhaul, lettering / decals, and mounting supplies	13,000
	Rapid Intervention Team (RIT) supplies	2,500
	PROJECT: AED and intubation upgrade	14,000
<b>60225-004</b>	<b>Safety Equipment.....</b>	<b>\$ 11,700</b>
	Routine purchase of safety vests, flares, cones, warning tape, flashlights,	
	passport identification, ladders, batteries, fire extinguishers, and	
	miscellaneous equipment	8,200
	Self-contained breathing apparatus (SCBA) masks and annual fit testing	3,500
<b>60225-005</b>	<b>Specialty Equipment.....</b>	<b>\$ 7,500</b>
	Routine purchase of gas monitors, calibration, and testing equipment	5,100
	Routine purchase of extrication equipment	2,400
<b>60225-006</b>	<b>Technical Rescue Equipment.....</b>	<b>\$ 6,000</b>
	Routine replacement of rescue equipment, ropes, harnesses, and swift	
	water equipment	

# Operations Department

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

General Fund 1, Department 2

Account	Description	Account Total
<b>60225-007</b>	<b>Rehabilitation and Consumables.....</b>	\$ 6,000
	Purchase of incident rehabilitation supplies	
<b>60225-008</b>	<b>Equipment for New Apparatus.....</b>	\$ 40,000
	Initial purchases to equip (2) new structural engines with nozzles, appliances, hose and related equipment.	
<b>60254-000</b>	<b>M&amp;R; Emergency Response Equipment.....</b>	\$ 44,500
	Repair of medical, fire suppression, and extrication equipment (includes defibrillators, gurneys, hose, ladders, chainsaws, small tools, positive pressure ventilation (PPV) fans, extinguishers, nozzles, and appliances)	7,500
	SCBA equipment maintenance	6,000
	Extrication equipment maintenance	6,500
	Difibrillators	4,500
	PPE inspection and repair	20,000
<b>60270-000</b>	<b>Contractual/Professional Services.....</b>	\$ 15,000
	Hose and ladder testing contract	
<b>60410-000</b>	<b>Membership Dues.....</b>	\$ 1,000
	International Association of Fire Chief's, Oregon Fire Chief's Association, Rogue Valley Fire Chief's Association, Federation of Chaplains, Oregon Volunteer Firefighters Association	
<b>60412-000</b>	<b>Books and Subscriptions.....</b>	\$ 2,000
<b>STUDENT FIREFIGHTER AND VOLUNTEER GROUP</b>		
<b>65001-000</b>	<b>Pre-Entrance Screenings, Backgrounds, Vaccinations.....</b>	\$ 4,000
<b>65005-000</b>	<b>Student Firefighter Program.....</b>	\$ 50,000
	Associate's degree program for nine students (includes tuitions, books, and supplies)	
<b>65007-000</b>	<b>Length of Service Award Program (LOSAP).....</b>	\$ 5,000
	Annual District contribution for volunteer length of service	
<b>65010-000</b>	<b>Scholarship Donations.....</b>	\$ 1,000
	Student scholarship program for Crater and Eagle Point High Schools	
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 334,500</b>

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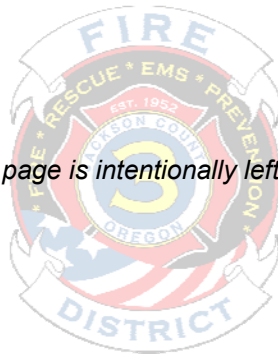
# Fire District 3

## Fire & Life Safety Department



**2018/19 Fiscal Year Budget**

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# Fire and Life Safety Department

## **DEPARTMENT DESCRIPTION**

The Fire and Life Safety team consists of the Fire Marshal, two Deputy Fire Marshals, a Fire and Life Safety Specialist, and an Administrative Assistant who are focused on providing public education, fire prevention, construction plans review, and conducting fire investigations. Periodically fire suppression personnel with an interest in fire prevention will assist on the team as a cross-training opportunity to gain new skills and experience.

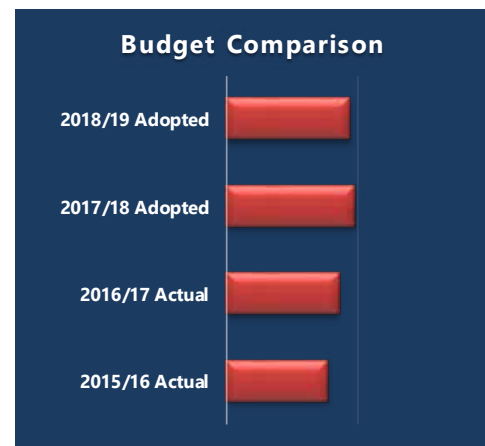
Our education programs endeavor to teach citizens of all ages how to prevent fires and what to do in the event of a fire or other emergency. Led primarily by the Fire and Life Safety Specialist, we deliver fire and life safety education to schools, businesses and industry. This education includes smoke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

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

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

## **BUDGET SUMMARY**

<b>Expenditures</b>	<b>2015/16 Actual</b>	<b>2016/17 Actual</b>	<b>2017/18 Adopted</b>	<b>2018/19 Adopted</b>
Personnel Services	\$708,683.60	\$724,496.89	\$774,000	\$802,700
Materials and Services	\$64,807.24	\$132,241.87	\$207,500	\$137,500
	<b>\$773,490.84</b>	<b>\$856,738.76</b>	<b>\$981,500</b>	<b>\$940,200</b>



# Fire and Life Safety Department

## **PERSONNEL SUMMARY**

Personnel	2015/16 Actual	2017/18 Actual	2017/18 Adopted	2018/19 Adopted
Deputy Chief/Fire Marshal	1.00	1.00	1.00	1.00
Deputy Fire Marshal ( <i>Represented Positions</i> )	2.00	2.00	2.00	2.00
Fire and Life Safety Specialist ( <i>Represented Position</i> )	1.00	1.00	1.00	1.00
Administrative Assistant	1.00	1.00	1.00	1.00
<b>Total</b>	<b>5.00</b>	<b>5.00</b>	<b>5.00</b>	<b>5.00</b>

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 3.7 percent or \$28,700 from the prior fiscal year. Factors impacting this classification include salary and benefit adjustments.

The overall Materials and Services classification is budgeted to decrease over 33 percent or \$70,000 due to the conclusion of some hazardous fuels mitigation grant projects budgeted under account *60223-009; Community Risk Reduction*. All other accounts remain consistent from the prior fiscal year.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Completed 1,403 inspections and calls for service.
- Inspectable occupancy inventory increased to 1,114 regular hazard, 320 moderate hazard, and 233 high hazard occupancies.
- 297 fire safety system inspections were completed using the Brycer Compliance Engine.
- Certified five Long Mountain Firewise communities in Eagle Point.
- Launched the PulsePoint phone app inspiring over 1,240 Fire District 3 followers and initiated the Jackson County HeartMap Challenge identifying public AED locations.
- Distributed annual newsletter to over 22,000 District households.
- Completed public education activities including CPR Anytime, team teaching Smokey Bear, and fire prevention week activities.
- Provided prevention tips and information regarding emergency response and ongoing District project to over 10,000 residents through social media.
- Maintained State level requirements to receive competency recognition and exempt jurisdiction status.
- Continued District representation in State IAAI Board, Fire Adapted Communities Network, Ready-Set-Go, and Oregon Fire Marshal's Association.



# Fire and Life Safety Department

## **DEPARTMENT SERVICE MEASUREMENTS AND TARGETS**

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

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

2017 total inspection and calls for service numbers increased slightly. This is mainly attributed to the implementation of The Compliance Engine (TCE). TCE is a simple, web-based service for Fire Prevention Bureaus to track and drive code compliance, reduce false alarm activity, and provide safer communities through third party inspection reporting and maintenance of required fire safety systems. TCE connects the contractors, those who inspect, test, and maintain fire protection systems, directly to Fire District 3. We have been able to gain a proactive, efficient process to review reports, track deficiencies, notify parties, and ensure compliance.

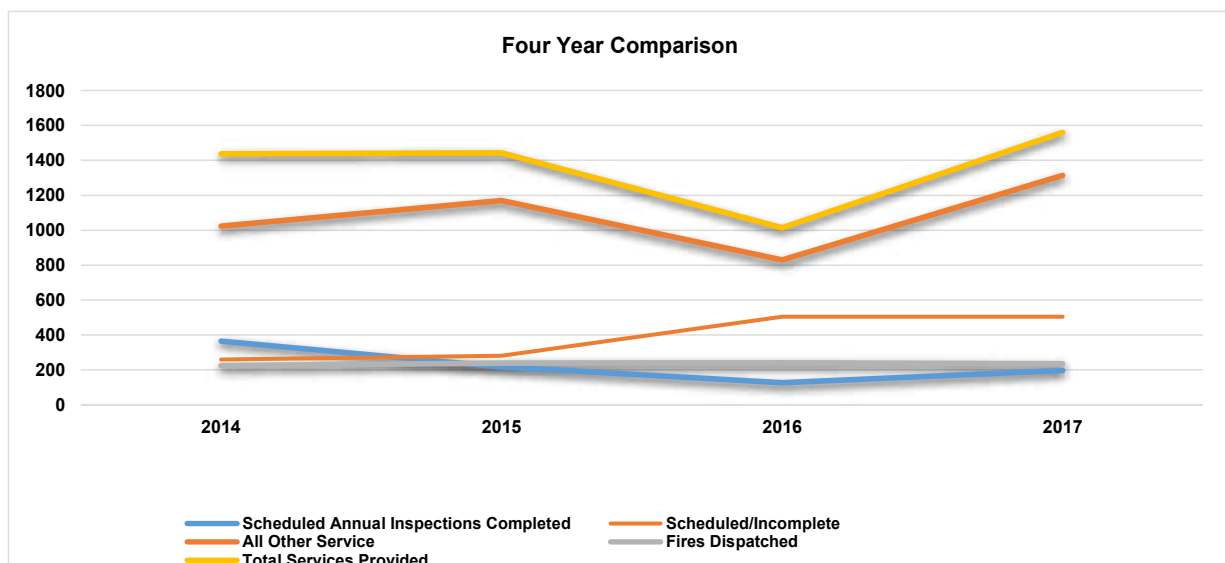
### **FIRE LIFE SAFETY INSPECTIONS**

#### **Statement of Measurement**

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

# Fire and Life Safety Department

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Actual</i>	<i>2018 Target</i>
<i>Low Hazard Inspections</i>	143	217	40	82	372
<i>Moderate Hazard Inspections</i>	75	73	26	33	160
<i>High Hazard Inspections</i>	147	128	61	82	233
<i>Re-Inspections</i>	206	215	77	74	100%
<i>Consultations</i>	157	152	144	230	100%
<i>Complaints</i>	27	34	19	24	100%
<i>Fire District Annexation Requests</i>	0	5	10	0	100%
<i>Land Development Consultations</i>	31	28	47	33	100%
<i>Construction Plan Reviews</i>	41	35	30	41	100%
<i>Construction Permit Inspections</i>	32	19	49	70	100%
<i>Home Fire Safety Inspections</i>	65	71	81	85	100%
<i>Wildland Urban Interface Fuels Reduction</i>	36	59	82	83	100%
<i>Target Hazard Familiarization Tours</i>	48	45	23	35	100%
<i>Expo and Special Events</i>	75	65	93	137	100%
<i>State Fire Marshal Certifications</i>	31	33	26	35	100%
<i>Referrals</i>	30	31	20	21	100%
<i>FLSD Fire Investigations</i>	52	55	57	49	100%
<i>Brycer &amp; Fire Protection Systems</i>	241	175	127	347	100%
<i>Firewise Property Assessments</i>	-	3	2	99	100%
<b>Totals</b>	<b>1,437</b>	<b>1,443</b>	<b>1,014</b>	<b>1,560</b>	



# Fire and Life Safety Department

## FIRE INVESTIGATIONS

### Statement of Measurement

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

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Actual</i>	<i>2018 Target</i>
<i>Investigations Performed – FLS Staff</i>	52	55	57	49	100%
<i>Investigations Performed – Operations Staff</i>	225	239	241	235	100%
<i>Juvenile Fire Setter Intervention</i>	20	11	20	2	100%
<b>Totals</b>	<b>297</b>	<b>305</b>	<b>318</b>	<b>286</b>	

## PUBLIC EDUCATION AND COMMUNITY OUTREACH

### Statement of Measurement

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

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Actual</i>	<i>2018 Target</i>
<i>Suburban/Rural Households &amp; Newsletters</i>	22,600	22,860	22,860	25,000	25,000
<i>Public Education/Community Events</i>	111	179	181	135	150
<i>Community Outreach Events</i>	104	71	71	50	50

## COMMUNITY AND INDUSTRIAL DEVELOPMENT

### Statement of Measurement

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

<i>Services Provided (Outputs) and Effectiveness Measures</i>	<i>2014 Actual</i>	<i>2015 Actual</i>	<i>2016 Actual</i>	<i>2017 Actual</i>	<i>2018 Target</i>
<i>Number of Plan Reviews</i>	41	36	30	41	100%
<i>Plan Review Turn-around Time</i>	7 Days	5 Days	5 Days	5 Days	5 Days
<i>Construction Permit Inspections</i>	32	19	49	70	100%
<i>Development Consultations</i>	189	152	144	177	100%
<b>Totals</b>	<b>262</b>	<b>207</b>	<b>223</b>	<b>288</b>	

# Fire and Life Safety Department

## 2018/19 FISCAL YEAR DEPARTMENTAL TASKS

The District's adopted 2018-2020 Strategic Plan is the overarching document that provides direction for the organization. Five 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 identified that support the success of the goal. Under each objective several tasks may be identified that support the accomplishment of the intended outcome. The initiatives and goals stay constant with the plan however the objectives and corresponding tasks may change with the fiscal year and typically drive a lot of the budget development. Some tasks have cost impact; others have minimal impact.

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

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

<b>Goal</b>	Enhance the District EMS program to provide the greatest chance for a positive outcome from acute medical emergencies		
<b>Objective</b>	Establish a community wide approach to out of hospital cardiac arrest		
<b>Task</b>	Identify community partners to participate in a Community AED program	<b>Target Completion Date:</b>	December 1, 2018

<b>Goal</b>	Meet or exceed established Fire and Life Safety standards for preventing loss		
<b>Objective</b>	Establish a system to ensure occupancy inspections are conducted in accordance with NFPA 1730		
<b>Task</b>	Review current performance against establish expectations	<b>Target Completion Date:</b>	July 1, 2018
<b>Task</b>	Identify solutions to manage performance gaps	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Recommend solutions for implementation in order to manage performance gaps	<b>Target Completion Date:</b>	December 1, 2018

<b>Objective</b>	Ensure staffing meets service level objectives		
<b>Task</b>	Evaluate results of system performance analysis based on Standards of Cover	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Explore technological efficiencies	<b>Target Completion Date:</b>	December 1, 2018

<b>Objective</b>	Develop a Community Risk Reduction program focused on the risk assessment and experiences in the District		
<b>Task</b>	Conduct and report a Community Risk Assessment	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Fall prevention/reduction	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Promote Fire Adapted Communities in new areas	<b>Target Completion Date:</b>	December 1, 2018

# Fire and Life Safety Department

## Initiative 4 – Maintain a high level of trust by promoting District engagement in the communities we serve.

Goal		Continual improvement to the District-patron experience	
Objective		Develop District programs to reach non-English speaking members of the community	
Task	Identify partners in the non-English speaking community to help on projects	Target Completion Date:	July 1, 2018
Task	Translate existing FD3 programs for non-English speaking communities	Target Completion Date:	September 1, 2018
Task	Provide satisfaction survey to District patrons	Target Completion Date:	December 1, 2018

## Initiative 5 – Develop and strengthen collaborative efforts and strategic partnerships.

Goal		Improve field communications and interoperability for responders	
Objective		Research opportunities to improve in-building emergency responder radio coverage	
Task	Identify buildings out of conformance with signal penetration requirements	Target Completion Date:	December 1, 2018
Task	Evaluate possible solutions for out of conformance buildings	Target Completion Date:	March 1, 2019

# Fire and Life Safety Department

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	421,283.82	425,574.77	438,000	455,200	455,200	455,200
Overtime	15,228.83	22,384.14	18,000	18,000	18,000	18,000
Incentives	54,691.33	55,912.75	57,000	59,500	59,500	59,500
Retirement (PERS)	62,315.43	63,682.36	91,600	94,300	94,300	94,300
ER Deferred Comp Contrib	5,094.90	6,766.11	10,900	11,300	11,300	11,300
Health and Life Insurance	92,560.07	95,058.36	98,300	102,800	102,800	102,800
HRA-VEBA Contribution	11,519.46	19,267.10	19,500	19,800	19,800	19,800
FICA and Medicare PR Taxes	35,516.95	36,391.28	39,200	40,800	40,800	40,800
Workers' Comp Insurance	10,472.81	-539.98	1,500	1,000	1,000	1,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$708,683.60</b>	<b>\$724,496.89</b>	<b>\$774,000</b>	<b>\$802,700</b>	<b>\$802,700</b>	<b>\$802,700</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	1,542.00	1,979.00	2,000	2,000	2,000	2,000
Printing	0.00	0.00	1,500	1,500	1,500	1,500
Licenses and Fees	210.00	540.00	1,000	1,000	1,000	1,000
Supplies; Fire Life Safety	20,569.91	5,224.21	10,000	10,000	10,000	10,000
Supplies; Public Education Materials	0.00	4,020.95	5,000	7,000	7,000	7,000
Community Risk Reduction	4,604.12	103,430.44	167,000	90,000	90,000	90,000
Contractual/Professional Services	31,261.37	11,133.17	10,000	10,000	10,000	10,000
Membership Dues	1,419.00	1,794.00	3,500	3,500	3,500	3,500
Books and Subscriptions	2,400.84	1,995.10	3,500	3,500	3,500	3,500
Advertising	2,800.00	2,125.00	4,000	9,000	9,000	9,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$64,807.24</b>	<b>\$132,241.87</b>	<b>\$207,500</b>	<b>\$137,500</b>	<b>\$137,500</b>	<b>\$137,500</b>
<b>TOTAL FIRE AND LIFE SAFETY</b>	<b>\$773,490.84</b>	<b>\$856,738.76</b>	<b>\$981,500</b>	<b>\$940,200</b>	<b>\$940,200</b>	<b>\$940,200</b>

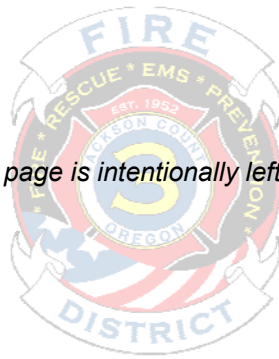
# Fire and Life Safety Department

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 3

Account	Description	Account Total
58203-000	Physicals and Vaccinations.....	\$ 2,000
60220-000	Printing.....	\$ 1,500
60223-002	Licenses and Fees..... Code recertification's and certification renewals	\$ 1,000
60223-004	Supplies; Fire Life Safety..... Supplies including address signs and reflective numbers, customer service kits, fire investigation tools, and personal protective equipment	\$ 10,000
60223-005	Supplies; Public Education Materials..... Supplies including school event handouts and public education materials such as fire hats, bracelets, stickers, and coloring books	\$ 7,000
60223-009	Community Risk Reduction..... Provide for the community in fire prevention and safety including but not limited to smoke alarms, fire suppression sprinkler system giveaways, boat safety life jackets, firewise example gardens, hazardous fuels mitigation, rural water supply enhancements, community events, and general programs 40,000 PROJECT: Jackson County Title 3 Grant - Firewise communities and fuels reduction 50,000	\$ 90,000
60270-000	Contractual/Professional Services..... District newsletter (design, printing, and mailing)	\$ 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	\$ 3,500
60412-000	Books and Subscriptions..... NFPA online access, reference materials, code updates	\$ 3,500
60430-001	Advertising..... Advertising through various media outlets including Expo Center, Chamber of Commerce, and public service announcements	\$ 9,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 137,500</b>

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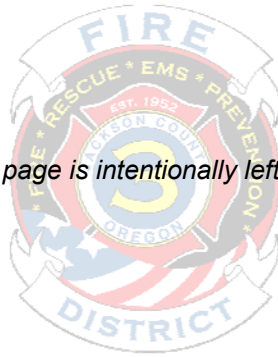
# Fire District 3

## Training Department



**2018/19 Fiscal Year Budget**

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# Training Department

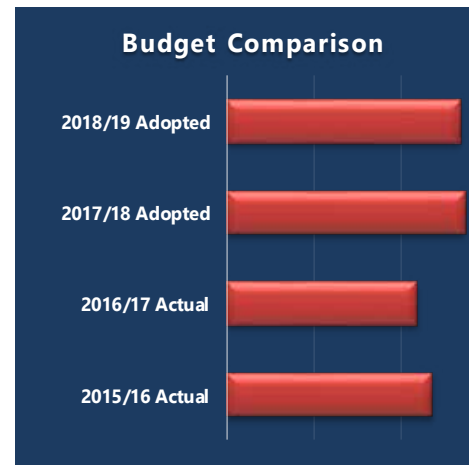
## DEPARTMENT DESCRIPTION

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

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

## BUDGET SUMMARY

Expenditures	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Personnel Services	\$307,746.15	\$311,143.50	\$364,000	\$374,000
Materials and Services	\$161,203.72	\$121,630.62	\$178,200	\$159,000
	<b>\$468,949.87</b>	<b>\$432,774.12</b>	<b>\$542,200</b>	<b>\$533,000</b>



## PERSONNEL SUMMARY

Personnel	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Division Chief of Training and Safety	1.00	1.00	1.00	1.00
Administrative Assistant	1.00	1.00	1.00	1.00
<b>Total</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>

# Training Department

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is budgeted to increase 2.75 percent or \$10,000 from the prior fiscal year. Factors impacting this classification include salary and benefit adjustments.

The overall Materials and Services classification is budgeted to decrease 10.7 percent or \$19,200. A notable project includes a QCPR manikin for emergency medical training. Account *60455-003; Training/Conferences Operations* decreased by 36 percent due to completion in the prior year of specialized training related to the Blue Card incident management program. A new account related to specialized emergency medical training was established.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Conducted a successful Engineer promotional exam resulting in a Civil Service Register of seven (7).
- Delivered, trained, and certified 29 District personnel in the Blue Card Incident Management program.
- Enhanced the live fire burn containers by adding six (6) additional containers to the facility, creating a second story for fire control and basement operations. With this addition we also added two vertical ventilation props (low and steep pitch) for coordinated fire control and ventilation training.
- Continued collaborative relationship with RCC Fire Science program supervisors.
- Hosted a NFPA Fire Officer 1 Academy and the Annual Oregon Fire Instructors Association (OFIA) conference.
- Provided Defensive Driving with DPSST's SKID truck for all District members.
- Delivered SDAO's "Virtual Reality" defensive driving course to volunteers and staff members.
- Supported six (6) members to attend the first annual Fire Service Cancer Symposium in Phoenix, AZ through a grant from DPSST.
- Evaluated and implemented a new staffing program called CrewSense.
- Obtained the renewal of a three-year accreditation agreement with DPSST.

# Training Department

## **DEPARTMENT MEASUREMENTS AND TARGETS**

### **TRAINING PROGRAM MANAGEMENT**

#### Statements of Measurement

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



### **TRAINING DEPARTMENT ACTIVITIES**

#### **Outputs**

- The Training Department facilitated an Engineer promotional testing process over a two day period that resulted in a certified register with seven (7) candidates to be used for future vacancies.
- The Safety Committee reviewed 10 reported injuries and five (5) other incidents that included accidents without injury, exposure reports, and near miss reports. Each injury was reviewed by the committee and recommendations were made in an effort to reduce and mitigate these types of injuries in the future.
- 36 applications for certification were submitted and approved by DPSST on behalf of 20 members.
- Workplace safety inspections were conducted with 100 percent compliance within OR-OSHA requirements.
- The District continues to support individual and career development by seeking outside opportunities for personnel to participate in various training and conferences locally, regionally and outside of Oregon; the District supported attendance and participation to 83 outside courses.

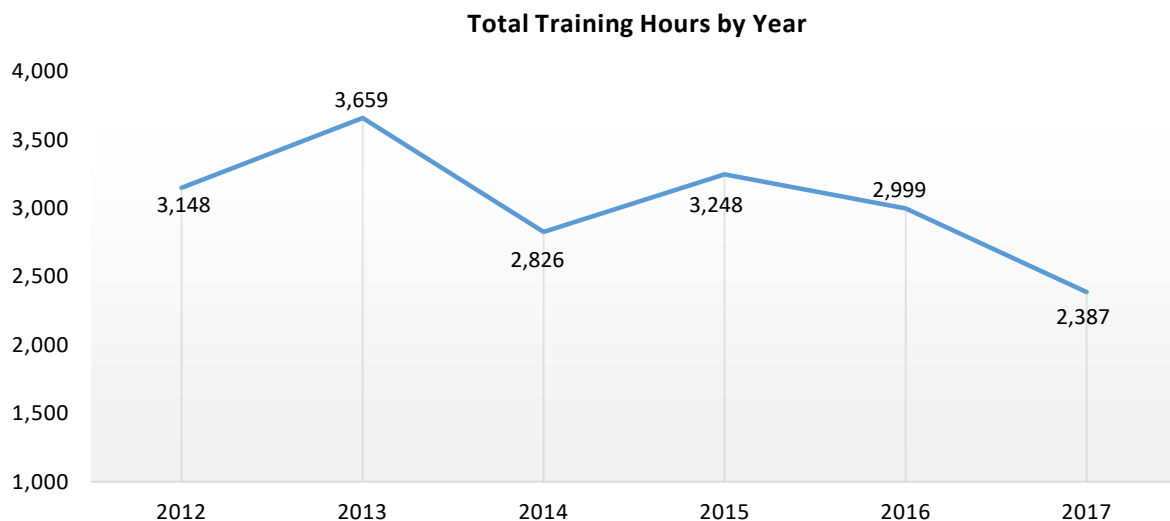
# Training Department

## TRAINING DEPARTMENT STATISTICS

### Outputs

- The Training Department coordinated 895 courses for the calendar year.
  - 674 courses were delivered by District members
  - 167 courses were delivered by external instructors
  - 54 courses were delivered by online sources
- Personnel participated in 2,389 hours of classroom and hands-on training.

<i><b>Number of Training Hours (Outputs)</b></i>	<i><b>2014 Actual</b></i>	<i><b>2015 Actual</b></i>	<i><b>2016 Actual</b></i>	<i><b>2017 Actual</b></i>
<i>Administration</i>	272	132	211.5	79
<i>Apparatus</i>	552	540	253	280.5
<i>EMS</i>	611	825	730.5	422.5
<i>Fire Officer</i>	139	144	61	617
<i>Haz-Mat</i>	6	11	4	8.5
<i>Health and Safety</i>	NA	28.5	22.5	51
<i>Instructional</i>	11	38.5	48	13.5
<i>Mandated</i>	NA	51	26.5	96
<i>Prevention</i>	225	84	305	59.5
<i>Suppression</i>	714	989	873	591
<i>Technical Rescue</i>	221	228	266	102.5
<i>Wildland</i>	75	177	198	66
<i><b>Totals</b></i>	<b>2,826</b>	<b>3,248</b>	<b>2,999</b>	<b>2,387</b>



# Training Department

## **2018/19 FISCAL YEAR DEPARTMENTAL TASKS**

The District's adopted 2018-2020 Strategic Plan is the overarching document that provides direction for the organization. Five 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 identified that support the success of the 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 five organizational strategic initiatives.

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

<b>Goal</b>	Enhance the District EMS program to provide the greatest chance for a positive outcome from acute medical emergencies		
<b>Objective</b>	Establish a community wide approach to out of hospital cardiac arrest		
<b>Task</b>	Partner with law to influence and train officers on Narcan use to prevent overdose deaths in the community	<b>Target Completion Date:</b>	June 30, 2019

<b>Objective</b>	Integrate high quality EMS training that includes improving clinical care delivery based on QA feedback		
<b>Task</b>	Identify partners for EMS training delivery	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Quarterly training integrates into prior quarter's QA feedback	<b>Target Completion Date:</b>	June 30, 2019

### **Initiative 2 – Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.**

<b>Goal</b>	Maintain and enhance the Development Plan, providing guidance and opportunity for personnel		
<b>Objective</b>	Build upon the current Development Plan to include all divisions		
<b>Task</b>	Identify gaps including Administration	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Create an Administration development track	<b>Target Completion Date:</b>	June 30, 2019

### **Initiative 3 – Develop, promote, and demonstrate professionalism, innovation, and excellence throughout the organization.**

<b>Goal</b>	Establish a system of continuous quality improvement in areas of service delivery to the community		
<b>Objective</b>	Measure organizational performance against established expectations		
<b>Task</b>	Develop QA standards for organizational programs such as incident command	<b>Target Completion Date:</b>	July 1, 2018

# Training Department

## Initiative 5 – Develop and strengthen collaborative efforts and strategic partnerships.

<b>Goal</b>	Maximize partnerships with agencies to reduce redundancy, maximize effectiveness, and achieve readiness		
<b>Objective</b>	Partner to educate the public on alternate resources for non-emergent needs		
<b>Task</b>	Coordinate training days with Mercy Flights and other external agencies	<b>Target Completion Date:</b>	June 30, 2019
<b>Objective</b>	Integrate with local law enforcement for response and prevention of large scale planned events and emergencies		
<b>Task</b>	Establish a relationship with law training coordinators	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Coordinate mass casualty incident drills	<b>Target Completion Date:</b>	July 1, 2018



# Training Department

General Fund	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
			Adopted	Proposed By	Approved By	Adopted By
Description	Actual	Actual	Budget	Budget Officer	Budget Committee	Governing Body
<b>Personnel Services</b>						
Salaries	155,632.97	159,427.86	164,200	171,700	171,700	171,700
Overtime	60,648.56	53,140.31	76,000	76,000	76,000	76,000
Incentives	14,493.80	14,399.60	17,200	17,600	17,600	17,600
Retirement (PERS)	20,030.66	20,015.95	36,900	37,700	37,700	37,700
ER Deferred Comp Contrib	6,180.95	6,502.19	6,300	6,400	6,400	6,400
Health and Life Insurance	25,799.20	28,192.44	29,500	30,400	30,400	30,400
HRA-VEBA Contribution	5,174.31	9,163.33	7,800	7,900	7,900	7,900
FICA and Medicare PR Taxes	15,305.47	16,437.65	19,700	20,300	20,300	20,300
Workers' Comp Insurance	4,480.23	3,864.17	6,400	6,000	6,000	6,000
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$307,746.15</b>	<b>\$311,143.50</b>	<b>\$364,000</b>	<b>\$374,000</b>	<b>\$374,000</b>	<b>\$374,000</b>
<b>Materials and Services</b>						
Physicals and Vaccinations	514.00	529.00	500	500	500	500
Licenses and Fees	1,068.75	491.00	1,000	500	500	500
Supplies; Training and Safety Equip	18,931.61	17,240.16	23,000	23,000	23,000	23,000
Training Props and Equipment	0.00	4,101.99	10,700	9,000	9,000	9,000
M&R; Training Equipment and Props	0.00	0.00	1,500	1,000	1,000	1,000
Health and Wellness	8,282.13	4,521.79	5,000	5,000	5,000	5,000
Contractual/Professional Services	33,688.05	9,025.00	15,000	15,000	15,000	15,000
Membership Dues	340.00	365.00	1,000	1,000	1,000	1,000
Books and Subscriptions	8,034.38	8,210.86	12,000	4,000	4,000	4,000
Meeting Travel Expenses	4,871.38	7,255.75	8,000	8,000	8,000	8,000
Training & Conferences; Admin & Ldrship	30,091.16	22,477.11	25,000	30,000	30,000	30,000
Training & Conferences; Board	2,032.18	1,232.52	2,500	2,500	2,500	2,500
Training & Conferences; Operations	41,126.09	37,448.77	55,000	30,000	30,000	30,000
Training & Conferences; Fire Life Safety	9,139.95	2,414.86	10,000	10,000	10,000	10,000
Training & Conferences; Students & Vol's	3,084.04	3,565.35	5,000	6,500	6,500	6,500
Training & Conferences; Technology	0.00	2,751.46	3,000	5,000	5,000	5,000
Training & Conferences; EMS	0.00	0.00	0	8,000	8,000	8,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$161,203.72</b>	<b>\$121,630.62</b>	<b>\$178,200</b>	<b>\$159,000</b>	<b>\$159,000</b>	<b>\$159,000</b>
<b>TOTAL TRAINING DEPARTMENT</b>	<b>\$468,949.87</b>	<b>\$432,774.12</b>	<b>\$542,200</b>	<b>\$533,000</b>	<b>\$533,000</b>	<b>\$533,000</b>

# Training Department

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 4

Account	Description	Account Total
58203-000	<b>Physicals and Vaccinations.....</b>	\$ 500
60223-002	<b>Licenses and Fees.....</b> DPSST fingerprinting costs for certification process	\$ 500
60223-012	<b>Supplies; Training and Safety Equipment.....</b> Consumable training supplies for props, equipment, materials for in-service training, towing service fees for extrication vehicles, and safety equipment	\$ 23,000
60223-014	<b>Training Props and Equipment.....</b> Miscellaneous training props and equipment 3,000 PROJECT: QPCR manikin with SLIMpad QPCR skill report 6,000	\$ 9,000
60254-000	<b>M&amp;R; Training Equipment and Props.....</b> Maintenance and repair of training equipment and props	\$ 1,000
60265-000	<b>Health and Wellness.....</b> Fitness supplies, miscellaneous equipment purchases, and fitness equipment maintenance and/or repair	\$ 5,000
60270-000	<b>Contractual/Professional Services.....</b> Personal services contracts for hiring instructors to teach District staff on site	\$ 15,000
60410-000	<b>Membership Dues.....</b> Annual dues for Oregon Fire Chief's Association and Safety and Health Section, Oregon Fire Instructor's Association, Rogue Valley Fire Chief's Association, International Association of Fire Chief's, International Society of Fire Service Instructors, and Rogue Interagency Training Association	\$ 1,000
60412-000	<b>Books and Subscriptions.....</b> Professional periodicals, general reference and training materials, and emergency medical services continuing education	\$ 4,000
60449-000	<b>Meeting Travel Expenses.....</b> Travel expenses for staff and board members to attend regional and statewide meetings and activities relating to the Oregon Fire Chief's Assn, Oregon Fire Instructor's Assn, National Fire Protection Assn, DPSST, Oregon State Fire Marshal, Governor's Fire Service Policy Council, and other meetings as necessary	\$ 8,000

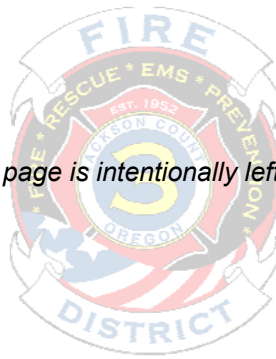
# Training Department

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

General Fund 1, Department 4

Account	Description	Account Total
60455-001	<b>Training and Conferences; Administrative and Leadership.....</b> Continued education and training through Oregon Fire Chief's Assn, Special District's Assn of Oregon, Oregon Municipal Finance Officers Assn, Oregon Fire Service Office Administrators, Int'l Assn of Fire Chief's, Oregon Fire Instructor's, staffing/scheduling training, approved higher education, supervision and leadership seminars, facilities and logistics inventory systems and various other conferences, training, and workshops	\$ 30,000
60455-002	<b>Training and Conferences; Board.....</b> Continued education for the Board of Directors such as the Special District's Assn of Oregon and Oregon Fire District Director's Assn conferences	\$ 2,500
60455-003	<b>Training and Conferences; Operations.....</b> Continued education and certification for fire suppression and technical rescue; additional opportunities are promoted to support professional development, safety and committee functions, Fire Department's Instructors Conference (FDIC), Firemanship conference, Oregon Fire Instructors Association (OFIA), and other relevant training, conferences and workshops	\$ 30,000
60455-004	<b>Training and Conferences; Fire and Life Safety.....</b> Continued education through the Oregon Fire Marshal's Assn, Pacific Northwest Fire Prevention Coop, Local and State Int'l Assn of Arson Investigators, and Fire Marshal's Roundtable; additional opportunities may include fire code training, fire adapted community training, and other relevant conferences, training, and workshops	\$ 10,000
60455-006	<b>Training and Conferences; 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, International Association of Chaplains, and other relevant conferences, training, and workshops	\$ 6,500
60455-007	<b>Training and Conferences; Technology.....</b> Continued technology training such as conferences, geographic information systems, data analysis , and other relevant conferences, training, and workshops	\$ 5,000
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	\$ 8,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 159,000</b>

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# Fire District 3

## Support Services Department



**2018/19 Fiscal Year Budget**

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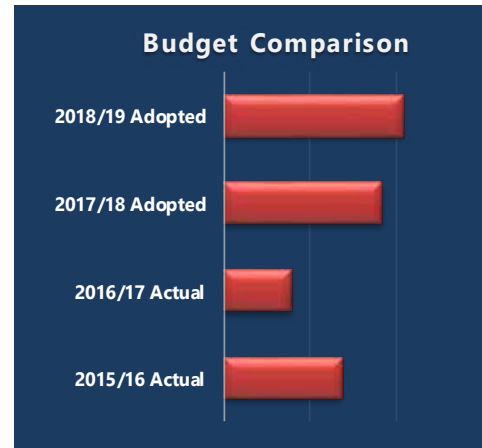
# Support Services Department

## DEPARTMENT DESCRIPTION

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

## BUDGET SUMMARY

Expenditures	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Personnel Services	\$99,216.14	\$99,490.13	\$107,000	\$107,000
Materials and Services	\$737,429.32	\$679,312.86	\$776,300	\$800,000
	<b>\$836,645.46</b>	<b>\$778,802.99</b>	<b>\$883,300</b>	<b>\$907,000</b>



## PERSONNEL SUMMARY

Personnel	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Facilities/Logistics Manager	1.00	1.00	1.00	1.00
<b>Total</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>

## NEW BUDGETARY SIGNIFICANT CHANGES

Personnel Services is budgeted with no increase from the prior fiscal year. The overall Materials and Services classification is budgeted to increase three percent or \$23,700. Some notable projects include installing electronic security access control systems at the White City station, Logistics Warehouse, and the Administration Building for a total project cost of \$25,000. Other notable projects in the new budget year include floor replacement at the Central Point station and installing vehicular exhaust removal systems at the Eagle Point and Central Point stations. Preventative maintenance and repairs made on all fire apparatus will continue to be subcontracted out to Medford City Shops. Two new accounts have been established to recognize maintenance and utility costs associated with the new Fire Science Educational Building.

# Support Services Department

## **PRIOR YEAR ACCOMPLISHMENTS**

- Established standardized specifications for equipment, appliances, and consumables.
- Developed timely response to maintenance and repair issues and improved turnaround time with minimal disruption to workflow productivity.
- Continued development of inventory control and loss prevention systems.
- Managed and provided oversight of five fire station seismic rehabilitation project grants.
- Selected through an RFP process the Design-Build contractor for the construction of the RCC and Fire District 3 joint fire science educational facility.
- Completed 2017/18 fiscal year budgeted special projects.
- Completed the engineering design for fire engine exhaust removal systems at the Eagle Point and Central Point stations.

## **DEPARTMENT MEASUREMENTS AND TARGETS**

<i><b>Types of Transactions (Output Measures)</b></i>	<i><b>2014/15 Actual</b></i>	<i><b>2015/16 Actual</b></i>	<i><b>2016/17 Actual</b></i>	<i><b>2017/18 Actual</b></i>	<i><b>2018/19 Target</b></i>
<b><u>Vehicles Maintained</u></b>					
<i>Fire Engines</i>	11	11	11	11	11
<i>Aerial Ladder Truck</i>	1	1	1	1	1
<i>Wildland Engines</i>	9	9	9	9	9
<i>Water Tenders</i>	3	3	3	3	2
<i>Tactical Tenders</i>	2	2	2	3	3
<i>Rescue Equipment</i>	2	2	2	2	2
<i>Support Vehicles</i>	15	16	17	17	18
<b>Total</b>	<b>43</b>	<b>43</b>	<b>46</b>	<b>46</b>	<b>46</b>

<i><b>Types of Transactions (Output Measures)</b></i>	<i><b>2014/15 Actual</b></i>	<i><b>2015/16 Actual</b></i>	<i><b>2016/17 Actual</b></i>	<i><b>2017/18 Actual</b></i>	<i><b>2018/19 Target</b></i>
<b><u>Facilities Maintained</u></b>					
<i>Fire Stations</i>	7	8	8	8	8
<i>Training Grounds</i>	1	1	1	1	1
<i>Maintenance Shop</i>	1	1	1	1	1
<i>Administrative Building</i>	1	1	1	1	1
<i>Warehouse Facility/Grounds</i>	1	1	1	1	1
<b>Total</b>	<b>11</b>	<b>12</b>	<b>12</b>	<b>12</b>	<b>12</b>



# Support Services Department

## **2018/19 FISCAL YEAR DEPARTMENTAL TASKS**

The District's adopted 2018-2020 Strategic Plan is the overarching document that provides direction for the organization. Five 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 identified that support the success of the 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 five organizational strategic initiatives.

### **Initiative 2 – Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.**

<b>Goal</b>	Explore and implement technology solutions		
<b>Objective</b>	Implement technology that enhances the readiness and maintenance of fleet and equipment		
<b>Task</b>	Develop metrics for effective management	<b>Target Completion Date:</b>	June 30, 2019
<b>Goal</b>	Modernize the logistics tracking, analysis, and dissemination		
<b>Objective</b>	Conduct a review of current logistics practices		
<b>Task</b>	Identify industry standards	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Review current practices against industry standards	<b>Target Completion Date:</b>	December 1, 2018
<b>Objective</b>	Implement technology that improves the supply chain		
<b>Task</b>	Evaluate current practices	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Identify areas for improvement	<b>Target Completion Date:</b>	December 1, 2018
<b>Task</b>	Implement solutions for improvement	<b>Target Completion Date:</b>	June 30, 2019

### **Initiative 5 – Develop and strengthen collaborative efforts and strategic partnerships.**

<b>Goal</b>	Maximize partnerships with agencies to reduce redundancy, maximize effectiveness, and achieve readiness		
<b>Objective</b>	Partner to educate the public on alternate resources for non-emergent needs		
<b>Task</b>	Conduct Fire Agency Logistics Survey to assess regional warehousing interest	<b>Target Completion Date:</b>	December 1, 2018

# Support Services Department

General Fund	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	67,272.96	67,475.20	69,500	69,500	69,500	69,500
Incentives	1,623.15	1,623.30	2,500	2,500	2,500	2,500
Retirement (PERS)	3,771.16	3,634.66	6,000	6,000	6,000	6,000
ER Deferred Comp Contrib	3,024.00	3,024.00	3,100	3,100	3,100	3,100
Health and Life Insurance	14,343.96	14,717.28	15,500	16,000	16,000	16,000
HRA-VEBA Contribution	2,304.72	3,841.20	3,900	3,900	3,900	3,900
FICA and Medicare PR Taxes	5,249.22	5,241.05	5,500	5,500	5,500	5,500
Workers' Comp Insurance	1,626.97	-66.56	1,000	500	500	500
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$99,216.14</b>	<b>\$99,490.13</b>	<b>\$107,000</b>	<b>\$107,000</b>	<b>\$107,000</b>	<b>\$107,000</b>
<b>Materials and Services</b>						
Uniforms	41,981.46	26,060.37	59,600	30,000	30,000	30,000
Janitorial Supplies and Laundry Services	26,137.77	37,460.41	30,000	30,000	30,000	30,000
Supplies/Equipment; Medical	54,841.24	54,091.31	50,000	60,000	60,000	60,000
Supplies; Logistics and Warehouse	1,733.64	2,730.44	4,000	0	0	0
Supplies; Station Consumables	5,130.29	2,787.77	6,000	6,000	6,000	6,000
Supplies; Furnishings and Appliances	42,280.93	10,000.03	10,000	25,000	25,000	25,000
Supplies; Facilities	12,493.77	4,592.62	5,000	10,000	10,000	10,000
Fuel and Lubricants	52,866.49	49,520.06	80,000	80,000	80,000	80,000
M&R of Vehicles and Apparatus	201,061.90	195,694.96	197,000	200,000	200,000	200,000
Bldgs & Grounds - WC Station	24,396.19	12,134.28	16,000	24,000	24,000	24,000
Bldgs & Grounds - CP Station	12,597.92	16,328.73	10,000	32,000	32,000	32,000
Bldgs & Grounds - DB Station	8,363.76	706.55	12,000	12,500	12,500	12,500
Bldgs & Grounds - SV Station	4,599.01	6,515.74	23,000	5,000	5,000	5,000
Bldgs & Grounds - GH Station	6,111.37	5,629.63	5,000	9,000	9,000	9,000
Bldgs & Grounds - AL Station	8,218.56	3,587.57	4,000	5,000	5,000	5,000
Bldgs & Grounds - EP Station	37,433.24	18,178.33	20,000	20,000	20,000	20,000
Bldgs & Grounds - TR Station	5,723.94	5,034.52	5,000	10,000	10,000	10,000
Bldgs & Grounds - TRNG Center	8,029.98	21,910.05	13,500	5,000	5,000	5,000
Bldgs & Grounds - ADMIN Bldg	31,481.80	21,548.20	22,000	22,300	22,300	22,300
Bldgs & Grounds - LOG Warehouse	374.48	902.19	1,500	2,500	2,500	2,500
Bldgs & Grounds - Fire Science Ed Bldg	0.00	0.00	0	2,000	2,000	2,000
M&R; District Equipment	3,733.68	6,091.22	7,500	7,500	7,500	7,500
M&R; Appliances and Furnishings	2024.15	2262.15	3,000	5,000	5,000	5,000
Contractual/Professional Services	4,290.00	4,140.00	7,000	7,000	7,000	7,000
Membership and Certifications	0.00	0.00	100	100	100	100
Subscriptions	0.00	0.00	100	100	100	100
Utilities; WC	26,646.23	30,721.15	32,000	32,000	32,000	32,000
Utilities; CP	17,445.27	20,998.04	22,000	22,000	22,000	22,000
Utilities; DB	5,750.38	11,769.27	14,000	14,000	14,000	14,000
Utilities; SV	8,677.22	12,305.85	14,000	14,000	14,000	14,000
Utilities; GH	9,643.58	10,013.37	14,000	14,000	14,000	14,000
Utilities; AL	4,575.10	7,084.91	10,000	10,000	10,000	10,000
Utilities; EP	16,272.32	18,891.66	20,000	20,000	20,000	20,000
Utilities; TR	6,961.91	9,951.47	10,000	10,000	10,000	10,000
Utilities; TC	10,830.12	13,024.54	12,000	12,000	12,000	12,000
Utilities; Adm Bldg	34,721.62	36,645.47	37,000	37,000	37,000	37,000
Utilities; Fire Science Ed Bldg	0.00	0.00	0	5,000	5,000	5,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$737,429.32</b>	<b>\$679,312.86</b>	<b>\$776,300</b>	<b>\$800,000</b>	<b>\$800,000</b>	<b>\$800,000</b>
<b>TOTAL SUPPORT SERVICES DEPARTMENT</b>	<b>\$836,645.46</b>	<b>\$778,802.99</b>	<b>\$883,300</b>	<b>\$907,000</b>	<b>\$907,000</b>	<b>\$907,000</b>

# Support Services Department

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 5

Account	Description	Account Total
<b>58213-000</b>	<b>Uniforms.....</b>	\$ 30,000
	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>	\$ 30,000
	Janitorial and cleaning supplies for all District facilities; truck towel and floor mat laundry	
<b>60223-003</b>	<b>Supplies/Equipment; Medical.....</b>	\$ 60,000
	Medical equipment and supplies, pharmaceuticals, automatic external defibrillators (AED's), bio-waste disposal, medical oxygen cylinder rental, and personal protective equipment	
<b>60223-008</b>	<b>Supplies; Consumables.....</b>	\$ 6,000
	Coffee and consumable supplies for all District facilities	
<b>60223-015</b>	<b>Supplies; Furnishings and Appliances.....</b>	\$ 25,000
	General facility furnishings and appliances	10,000
	PROJECT: Replace rolling chairs in Crater Lake conference room	15,000
<b>60223-016</b>	<b>Supplies; Facilities.....</b>	\$ 10,000
	Supplies for all facilities including but not limited to lightbulbs, extension cords, garden supplies, mattress covers, kitchen and cookware items	
<b>60230-000</b>	<b>Fuel and Lubricants.....</b>	\$ 80,000
<b>60250-000</b>	<b>M&amp;R of Vehicles and Apparatus.....</b>	\$ 200,000
<b>60251-</b>	<b><u>Buildings and Grounds</u></b>	
	Includes: generator service and testing, HVAC service and repair, pest control, landscape services and/or weed abatement, carpet and upholstery cleaning, apparatus bay door maintenance, plumbing, electrical, drains, and lot sweeping. Fiscal year specific projects will be listed as separate line items under respective stations	
<b>110- White City Station.....</b>		\$ 24,000
	General maintenance and repair	12,000
	PROJECT: Electronic security/access control system	12,000
<b>111- Central Point Station.....</b>		\$ 32,000
	General maintenance and repair	10,000
	PROJECT: Install exhaust removal system	12,000
	PROJECT: Day room floor replacement	10,000

# Support Services Department

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

General Fund 1, Department 5

Account	Description	Account Total
<b>112- Dodge Bridge Station.....</b>		<b>\$ 12,500</b>
	General maintenance and repair	4,000
	PROJECT: HVAC system in office/dayroom/classroom	5,000
	PROJECT: Frame in apparatus bay door	3,500
<b>113- Sam's Valley Station.....</b>		<b>\$ 5,000</b>
	General maintenance and repair	5,000
<b>114- Gold Hill Station.....</b>		<b>\$ 9,000</b>
	General maintenance and repair	5,000
	PROJECT: Septic system repair	4,000
<b>115- Agate Lake Station.....</b>		<b>\$ 5,000</b>
	General maintenance and repair	5,000
<b>116- Eagle Point Station.....</b>		<b>\$ 20,000</b>
	General maintenance and repair	8,000
	PROJECT: Install exhaust removal system	12,000
<b>117- Table Rock Station.....</b>		<b>\$ 10,000</b>
	General maintenance and repair	3,000
	PROJECT: Driveway repair (gravel or asphalt regrind)	7,000
<b>120- Training Center/Storage/Offices.....</b>		<b>\$ 5,000</b>
	General maintenance and repair	5,000
<b>121- Administrative Building.....</b>		<b>\$ 22,300</b>
	General maintenance and repair	10,300
	PROJECT: Electronic security/access control system	12,000
<b>122- Logistics Warehouse.....</b>		<b>\$ 2,500</b>
	General maintenance and repair	1,500
	PROJECT: Electronic security/access control system	1,000
<b>123- Fire Science Educational Building.....</b>		<b>\$ 2,000</b>
	General maintenance and repair	2,000
<b>60254-000 M&amp;R; District Equipment.....</b>		<b>\$ 7,500</b>
	Includes but is not limited to breathing air compressors, forklift, ATV mule, golf cart, flatbed trailer, scissor lift, blowers, sprayer, and fuel tanks	
<b>60255-000 M&amp;R; Station Appliances and Furnishings.....</b>		<b>\$ 5,000</b>
	Includes but is not limited to interior appliances, ice machines, dishwashers, refrigerators, and cook stoves	

# Support Services Department

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

General Fund 1, Department 5

Account	Description	Account Total
60270-000	<b>Contractual/Professional Services.....</b> Includes annual fire alarm monitoring, fire sprinkler testing, and station alerting testing	\$ 7,000
60410-000	<b>Membership and Certifications.....</b>	\$ 100
60412-000	<b>Subscriptions.....</b>	\$ 100
60500-	<b>Utilities; Stations and Facilities.....</b> Includes electricity, natural gas, propane, water, garbage, sewer, telephone, internet, and cable or satellite television services	\$ 190,000
110-	<b>White City Station</b>	32,000
111-	<b>Central Point Station</b>	22,000
112-	<b>Dodge Bridge Station</b>	14,000
113-	<b>Sams Valley Station</b>	14,000
114-	<b>Gold Hill Station</b>	14,000
115-	<b>Agate Lake Station</b>	10,000
116-	<b>Eagle Point Station</b>	20,000
117-	<b>Table Rock Station</b>	10,000
120-	<b>Training Center/Storage/Offices</b>	12,000
121-	<b>Administrative Building</b>	37,000
123-	<b>Fire Science Educational Building</b>	5,000
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 800,000</b>

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# Fire District 3

## Technology Department



2018/19 Fiscal Year Budget

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# Technology Department

## DEPARTMENT DESCRIPTION

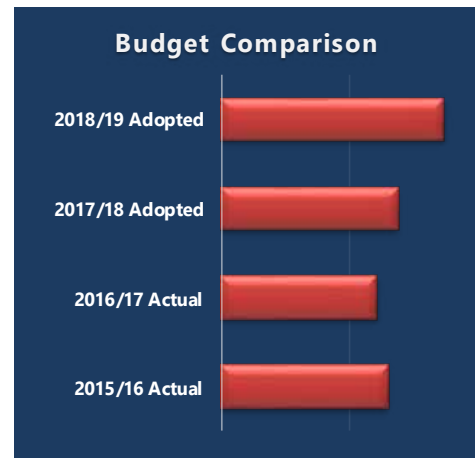
The Information Technology Department (IT) is responsible for supporting the District's computing infrastructure, including the Local Area Network, Wide Area Network, and Wireless Network. IT manages the District's computer work stations, servers and file systems, email system, network equipment, cloud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

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

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

## BUDGET SUMMARY

Expenditures	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Personnel Services	\$126,745.89	\$129,026.37	\$137,500	\$139,000
Materials and Services	\$134,732.49	\$114,445.20	\$139,400	\$209,400
	<b>\$261,478.38</b>	<b>\$243,471.57</b>	<b>\$276,900</b>	<b>\$348,400</b>



## PERSONNEL SUMMARY

Position	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Information Technology Administrator	1.00	1.00	1.00	1.00
<b>Total</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>

# Technology Department

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Personnel Services is proposed to only increase one percent or \$1,500 from the prior fiscal year. The overall Materials and Services classification is proposed to increase 50 percent or \$70,000 from the prior year. Contributing factors include increased technology costs such as switch and arcmail backup upgrades and increases in account 60240-000: *Licenses and Subscriptions*. This new budget year reflects \$55,000 for the Intterra data situation analyst pro subscription, which provides the District the ability to monitor, track, and record real-time 911 dispatched response. This new subscription will provide the District with statistics and reporting capability that is more reliable than the current methods used. In addition, this account also reflects other technology based subscriptions that had been recognized in other departments, but due to some departmental restructuring, have been moved to this account for improved transparency.

## **PRIOR YEAR ACCOMPLISHMENTS**

- Installed incident status displays at the Eagle Point, White City stations.
- Updated the White City computer network switch gear and fiber backbone.
- Integrated the Intterra data situation analysis program.
- Installed Wi-Fi at the Central Point and Table Rock stations.
- Installed security cameras at the White City station.
- Designed the IT layout and function for the RCC/FD3 fire science classroom.

## **DEPARTMENT MEASUREMENTS AND TARGETS**

<i>Types of Transactions (Output Measures)</i>	<i>2014/15 Actual</i>	<i>2015/16 Actual</i>	<i>2016/17 Actual</i>	<i>2017/18 Actual</i>	<i>2018/19 Target</i>
<i>Computer Workstation Replacement</i>	10	10	10	10	10
<i>Mobile Display Computers and Tablets</i>	10	0	4	4	4
<i>Computer Server</i>	2	0	1	1	1
<i>Network Services Uptime Target</i>	99%	99%	99%	99%	99%

# Technology Department

## 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 migrate the District to Office 365, increased cloud storage, server upgrades, and enhanced media delivery.
- Perform GIS mapping and data analysis to provide Executives with accurate information in tracking call volume and making managerial decisions.  
Measured By: Quarterly reports to the Executive Team; incorporate data into annual performance report; perform other specialized GIS services upon request to outside agencies if appropriate.  
➡ Successfully able to run GIS data; developed reports and maps that provide detail with respect to call volume and anticipate future demand for service.

## 2018/19 FISCAL YEAR DEPARTMENTAL TASKS

The District's adopted 2018-2020 Strategic Plan is the overarching document that provides direction for the organization. Five 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 identified that support the success of the 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 five organizational strategic initiatives.

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

Goal	Meet or exceed established Fire and Life Safety standards for preventing loss		
Objective	Ensure staffing meets service level objectives		
Task	Establish software based analytics	Target Completion Date:	July 1, 2018

# Technology Department

## Initiative 2 – Ensure sustainability of service delivery by efficient use of our people, facilities, fleet, and finances.

<b>Goal</b>	Explore and implement technology solutions		
<b>Objective</b>	Produce and relay readily available data for organizational management		
<b>Task</b>	Conduct a performance measure report	<b>Target Completion Date:</b>	September 1, 2018
<b>Objective</b>	Implement technology that enhances the readiness and maintenance of fleet and equipment		
<b>Task</b>	Identify and propose a technology solution for fleet and equipment	<b>Target Completion Date:</b>	July 1, 2018
<b>Task</b>	Train and implement technology solution	<b>Target Completion Date:</b>	September 1, 2018
<b>Objective</b>	Ensure GIS and preplanning are in place to support response needs		
<b>Task</b>	Implement or advance the use of proven technology at the engine company level	<b>Target Completion Date:</b>	September 1, 2018

## Initiative 3 – Develop, promote, and demonstrate professionalism, innovation, and excellence throughout the organization.

<b>Goal</b>	Cultivate an environment of data driven, evidence based decisions		
<b>Objective</b>	Effective data analysis is used to evaluate and improve performance and organizational decision making		
<b>Task</b>	Identify and support data analyzing software that provides “real time” analysis on District standards	<b>Target Completion Date:</b>	September 1, 2018
<b>Task</b>	Produce monthly performance management report	<b>Target Completion Date:</b>	September 1, 2018

# Technology Department

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<b>Personnel Services</b>						
Salaries	93,712.16	92,996.81	95,500	95,800	95,800	95,800
Incentives	3,248.00	4,412.35	5,300	5,300	5,300	5,300
Retirement (PERS)	5,124.60	5,123.61	8,200	8,400	8,400	8,400
ER Deferred Comp Contrib	3,264.00	3,264.00	4,200	4,400	4,400	4,400
Health & Life Insurance	11,622.48	11,903.64	12,300	13,000	13,000	13,000
HRA-VEBA Contribution	2,304.72	3,841.20	4,000	4,000	4,000	4,000
FICA and Medicare PR Taxes	7,400.46	7,415.86	7,500	7,600	7,600	7,600
Workers' Comp Insurance	69.47	68.90	500	500	500	500
<b>TOTAL PERSONNEL SERVICES</b>	<b>\$126,745.89</b>	<b>\$129,026.37</b>	<b>\$137,500</b>	<b>\$139,000</b>	<b>\$139,000</b>	<b>\$139,000</b>
<b>Materials and Services</b>						
Supplies; Computers and Tech	33,295.68	21,777.64	45,500	37,000	37,000	37,000
Supplies; Communication Devices	20,927.52	22,062.80	10,000	11,000	11,000	11,000
Licenses and Subscriptions	39,332.85	30,454.88	43,900	121,400	121,400	121,400
Technical Support	0.00	8,789.60	8,000	8,000	8,000	8,000
M&R; Office and Tech Equip	5,372.79	6,468.53	7,000	7,000	7,000	7,000
M&R; Communication Devices	5,820.85	5,455.61	5,000	5,000	5,000	5,000
Contractual/Professional Services	10,110.65	0.00	0	0	0	0
Communication Services	19,872.15	19,436.14	20,000	20,000	20,000	20,000
<b>TOTAL MATERIALS and SERVICES</b>	<b>\$134,732.49</b>	<b>\$114,445.20</b>	<b>\$139,400</b>	<b>\$209,400</b>	<b>\$209,400</b>	<b>\$209,400</b>
<b>OTAL TECHNOLOGY DEPARTMENT</b>	<b>\$261,478.38</b>	<b>\$243,471.57</b>	<b>\$276,900</b>	<b>\$348,400</b>	<b>\$348,400</b>	<b>\$348,400</b>

# Technology Department

## MATERIALS AND SERVICES DETAIL BY ACCOUNT

General Fund 1, Department 7

Account	Description	Account Total
<b>60223-011</b>	<b>Supplies; Computers and Technology Equipment.....</b>	<b>\$ 37,000</b>
	Technology related equipment and supplies including computers, laptops, tablets, monitors, printers, keyboards, speakers, software, routers, cables, connectors, switches, and general supply items	25,000
	PROJECT: Replace EOL Shoretel T1 switch	5,000
	PROJECT: Replace arcmail defender	7,000
<b>60223-013</b>	<b>Supplies; Communication Devices.....</b>	<b>\$ 11,000</b>
	Radio equipment, communication devices, and batteries for pagers	
<b>60240-000</b>	<b>Licenses and Subscriptions.....</b>	<b>\$ 121,400</b>
	SonicWall (server firewall)	500
	3E online safety data sheet management	500
	Fire Rescue Protocols web platform subscription	500
	Appraver secure spam filter	700
	IBM support (backup server and Shortel server)	900
	Website hosting	900
	DNS Hosting and Active 911	600
	ArcMail service (email backup)	3,000
	Trend security (Antivirus)	1,700
	Shortel annual license and limited support (phone system)	2,900
	GIS annual license	1,000
	Photocopier lease payment (Admin color copier)	2,000
	Cloud hosted exchange service	6,500
	Zoom video conferencing	2,000
	Emergency Reporting computer aided dispatch interface	1,500
	Emergency Reporting (records management system)	7,200
	Sierra Wireless for wifi engine routers	5,000
	Personnel staffing management program	7,000
	Target Solutions web based learning subscription	6,000
	Accela financial software support	8,000
	Pulse Point First Responder	2,500
	PS Traks apparatus maintenance and inventory subscription	3,000
	Cisco smartnet subscription for firmware updates	2,500
	Interra data situation analyst (SA) pro subscription	55,000
<b>60241-000</b>	<b>Technical Support.....</b>	<b>\$ 8,000</b>
	Core Business Solutions updates and monitoring support	4,000
	GIS support, ER support, other hardware/software support	4,000
<b>60252-000</b>	<b>M&amp;R; Office and Tech Equipment.....</b>	<b>\$ 7,000</b>
<b>60253-000</b>	<b>M&amp;R; Emergency Response Communication Devices.....</b>	<b>\$ 5,000</b>
	Reprogramming and repair of pagers, radios, tables, mobile display computers	
<b>60290-000</b>	<b>Communication Services.....</b>	<b>\$ 20,000</b>
	Monthly expenses for mobile phone plans, wifi cards for laptops and mobile display computer connections	
<b>TOTAL MATERIALS AND SERVICES</b>		<b>\$ 209,400</b>



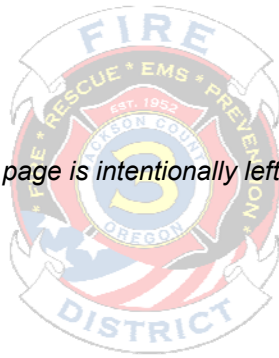
# Fire District 3

## Non-Departmental



**2018/19 Fiscal Year Budget**

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# Non-Departmental

## DESCRIPTION

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

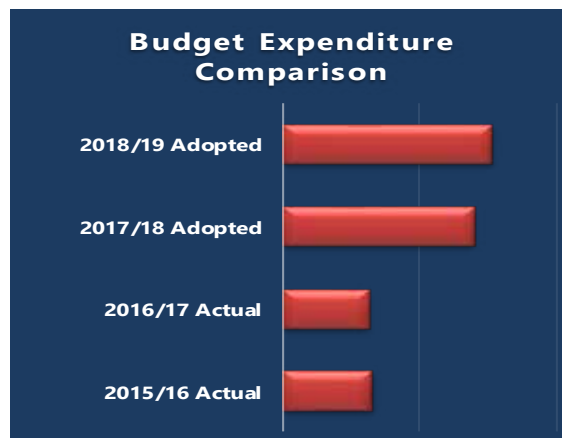
The General Fund transfers budgeted funds to the Capital Projects Fund for all capital expenditures. Operating contingency is appropriated money available for unanticipated expenditures that may arise during the budget year. Utilization of these funds requires Board of Director approval.

Unappropriated ending fund balance is budgeted at \$3,234,000. While listed as a requirement, it is actually a resource for the ensuing fiscal year and cannot be expended in the current year. This figure is computed at 24 percent of property tax revenue. It is the District's philosophy to provide funding for the ensuing year's requirements until levied taxes are received in November. When calculating the actual ending fund balance, the District includes budgeted funds not expended in line item accounts.

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

## BUDGET SUMMARY

Expenditures	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Transfers	\$1,036,200.00	\$986,900.00	\$1,349,300	\$1,546,100
Operating Contingency	\$0.00	\$0.00	\$1,159,000	\$1,212,800
Contingency for Liabilities	\$0.00	\$0.00	\$25,000	\$25,000
Debt Service	\$261,767.39	\$261,871.62	\$261,900	\$261,900
	<b>\$1,297,967.39</b>	<b>\$1,248,771.62</b>	<b>\$2,795,200</b>	<b>\$3,045,800</b>
<b>Ending Fund Balance</b>	<b>\$4,950,894.55</b>	<b>\$5,287,915.28</b>	<b>\$3,090,000</b>	<b>\$3,234,000</b>



# Non-Departmental

## NEW BUDGETARY SIGNIFICANT CHANGES

- The transfer to the Capital Projects Fund has increased based on available appropriations in the General Fund and to maintain compliance with the capital policy, ensuring the fund and future commitments are supported.
- Contingency is funded at nine percent of the General Fund's budgeted property tax revenue.
- The District established a sub-account under Operating Contingency as a means to address the vacation accrual liability. Compensated absences activity for the year ending June 30, 2017 and as reflected in the Comprehensive Annual Financial Report, was \$808,235. The \$25,000 allocated represents 3.09 percent of the liability.
- Unappropriated Ending Fund Balance has increased from \$3,090,000 to \$3,234,000. This amount represents 24 percent of the General Fund's budgeted property tax revenue and is higher as a result of the District's assessed valuation increasing. This commitment to policy, in conjunction with other reserves, allows the District to remain financially responsive to operating costs during the dry cash flow period of July to November.
- Debt Service payments represent the third year under a financing agreement with Wells Fargo Bank, N.A. and is in compliant with the debt service schedule.

## Expenditures by Account

General Fund	<u>HISTORICAL</u>			<u>BUDGET FOR NEXT FISCAL YEAR</u>		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
Description	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
<u>Transfers</u>						
Transfer to Capital Projects Fund	1,036,200.00	986,900.00	1,349,300	1,076,500	1,475,500	1,546,100
	<b>\$1,036,200.00</b>	<b>\$986,900.00</b>	<b>\$1,349,300</b>	<b>\$1,076,500</b>	<b>\$1,475,500</b>	<b>\$1,546,100</b>
<u>Operating Contingency</u>						
Operating Contingency	0.00	0.00	1,159,000	1,212,800	1,212,800	1,212,800
Contingency for Vacation Liabilities	0.00	0.00	25,000	25,000	25,000	25,000
	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,184,000</b>	<b>\$1,237,800</b>	<b>\$1,237,800</b>	<b>\$1,237,800</b>
<u>Debt Service</u>						
Debt Service Principal	225,337.65	230,807.89	236,500	242,200	242,200	242,200
Debt Service Interest	36,429.74	31,063.73	25,400	19,700	19,700	19,700
	<b>\$261,767.39</b>	<b>\$261,871.62</b>	<b>\$261,900</b>	<b>\$261,900</b>	<b>\$261,900</b>	<b>\$261,900</b>
<u>Unappropriated Ending Fund Balance</u>						
Ending Fund Balance	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,090,000</b>	<b>\$3,234,000</b>	<b>\$3,234,000</b>	<b>\$3,234,000</b>
<b>TOTAL NON-DEPARTMENTAL</b>	<b>\$1,297,967.39</b>	<b>\$1,248,771.62</b>	<b>\$5,885,200</b>	<b>\$5,810,200</b>	<b>\$6,209,200</b>	<b>\$6,279,800</b>



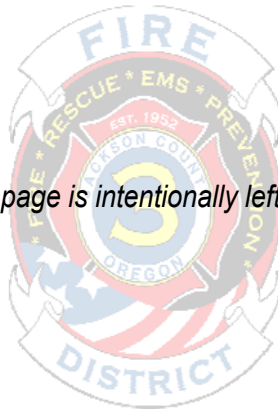
# Fire District 3

## Capital Projects Fund



**2018/19 Fiscal Year Budget**

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# Capital Projects Fund

## FUND DESCRIPTION

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

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

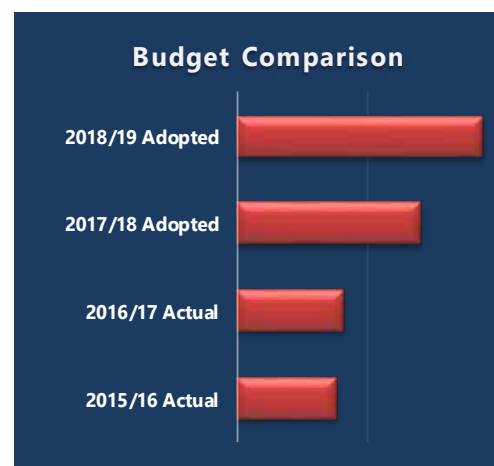
The Specification Committee consisting of District members develop the technical requirements of each apparatus purchased. The Committee reviews specifications and makes site visits to the manufacturing plant ensuring that the unit purchased will meet the District's requirements. Once an apparatus is 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	2015/16 Actual	2016/17 Actual	2017/18 Adopted	2018/19 Adopted
Capital Expenditures	\$711,894.48	\$509,980.49	\$4,151,800	\$6,035,100
Contingency	\$0.00	\$0.00	\$40,000	\$244,400
Reserve for Future/Ending Fund Balance	\$3,079,957.13	\$3,573,376.64	\$2,847,100	\$3,164,400
	<b>\$3,791,851.61</b>	<b>\$4,083,357.13</b>	<b>\$7,038,900</b>	<b>\$9,443,900</b>



# Capital Projects Fund

## **NEW BUDGETARY SIGNIFICANT CHANGES**

Budgeted capital expenditures planned for and considered routine in nature include finishing equipping for service two structural fire engines purchased in December 2017. Anticipated delivery of the engines is expected in September 2018. Once delivered items such as radios, electronics, headsets, and intercoms will be installed prior to the units being placed into service. This budget has \$50,000 identified to finish out this project.

A wildland interface engine is budgeted to be purchased with a project cost of \$385,000. This engine will complement the existing fleet and will provide us the ability to respond in more rural environments. With the rise of forest fires in which structures are threatened, the District has experienced an increase in deployments to assist other communities in providing structural protection. This engine will aid in that ability.

In addition to routine purchases the District will be continuing construction projects. The Fire Science Educational Building, in collaboration with Rogue Community College (RCC), will be completed this fiscal year. This project is being funded with a \$500,000 partnership donation from RCC and a \$500,000 budgetary commitment from the District. The educational facility is a classroom style building on the White City campus to house the college's fire science program and host various District training events. This budget has \$950,000 allocated towards this project.

The District will also be proceeding with construction of our eighth fire station. Land was purchased in March 2018 on Scenic Avenue in Central Point. During this fiscal year site development will occur and the process to solicit proposals from architectural firms and contractors will commence with construction beginning in 2019. This budget has \$3,600,000 allocated towards this project with loan proceeds offsetting \$3,000,000. As more project refinement occurs, the District may need to make budget adjustments mid-fiscal year to accommodate actual versus estimated costs. Contingency within this fund will assist in those adjustments if necessary.

The District was successful in attaining a \$1.081 million grant from the Oregon Seismic Rehabilitation Program through the State of Oregon in the 2017/18 fiscal year. The grant provides 100 percent reimbursement of funds to retrofit five fire stations to current seismic standards. This budget has \$1,050,000 identified for the completion of those retrofits.

## **Capital Replacement Schedule**

The following schedules reflect apparatus/equipment to be replaced in the next ten years. Expenditures are considered routine in nature because they are on a rotation replacement schedule.

Apparatus and Vehicles	Lifespan	Prior Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
		17/18 FY	18/19 FY	19/20 FY	20/21 FY	21/22 FY	22/23 FY	23/24 FY	24/25 FY	25/26 FY	26/27 FY	27/28 FY
Structural Engine	10/20/25 years	2							2			
Interface Engine	20/30 years		1									
Wildland Engine	20/30 years				1			1	1			
Tactical Tender	20/30 years					1			1			
Aerial Ladder Truck	25 years										1	
Rescue/Ambulance	25 years											
Battalion Chief Command Unit	5/10/15 years				1							
Technical Rescue Truck	20 years											
Staff Vehicle	10/20 years			2		2						
Service Vehicle	20 years											

# Capital Projects Fund

		Prior Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Suppression Equipment	Lifespan	17/18 FY	18/19 FY	19/20 FY	20/21 FY	21/22 FY	22/23 FY	23/24 FY	24/25 FY	25/26 FY	26/27 FY	27/28 FY
Breathing Apparatus	15 years			1								
Defibrillators/AED's	10 years								6			
Extrication Equipment	10 years				4			1	1			
Thermal Imagers	10 years											
Radio's - Portable and Mobile	15 years						80					
Technology												
Computer Main Server	3 years			1			1			1		
Mobile Display Computers	8 years					10						

## Apparatus Program Goals

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

## Equipment Program Goals

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

## Building, Land, and Improvement Program Goals

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

## Future Projects

Focus will be in the 2018/19 fiscal year to complete the identified construction projects. At this point in time, no other large-scale construction projects have been identified in future fiscal years. In 2019/20 the District will need to replace all self-contained breathing apparatus for an estimated cost of \$375,000. The District has applied to FEMA for a grant to replace this equipment; in the event we are unsuccessful in attaining the grant Capital funds set aside for future expenditure will be appropriated.

# Capital Projects Fund

## Capital Projects and Costs

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

		Replacement Cost with Inflationary Factors											
SCHEDULED - Apparatus and Vehicles	Current Cost	Prior Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	
		17/18 FY	18/19 FY	19/20 FY	20/21 FY	21/22 FY	22/23 FY	23/24 FY	24/25 FY	25/26 FY	26/27 FY	27/28 FY	
	Structural Engine	\$630,000	1,260,000	50,000	-	-	-	-	-	1,549,641	-	-	-
	Interface Engine	\$385,000		385,000	-	-	-	-	-	-	-	-	-
	Wildland Engine	\$84,000		-	-	91,789	-	-	100,300	103,309	-	-	-
	Tactical Tender	\$350,000		-	-	-	393,928	-	-	430,456	-	-	-
	Aerial Ladder Truck	\$1,000,000		-	-	-	-	-	-	-	-	1,304,773	-
	Rescue/Ambulance	\$160,000		-	-	-	-	-	-	-	-	-	-
	Battalion Chief Command Unit	\$140,000		-	-	150,765	-	-	-	-	-	-	-
	Technical Rescue Truck	\$90,000		-	-	-	-	-	-	-	-	-	-
Staff Vehicle	\$40,000		-	84,050	-	88,305	-	-	-	-	-	-	
Service Vehicle	\$75,000		-	-	-	-	-	-	-	-	-	-	
		\$ 1,260,000	\$ 435,000	\$ 84,050	\$ 242,554	\$ 482,233	\$ -	\$ 100,300	\$ 2,083,406	\$ -	\$ 1,304,773	\$ -	
SCHEDULED - Suppression													
Breathing Apparatus	\$355,000		-	372,972	-	-	-	-	-	-	-	-	
Defibrillators/AED's	\$30,000		-	-	-	-	-	-	206,763	-	-	-	
Extrication Equipment	\$23,000		-	-	99,074	-	-	26,673	27,340	-	-	-	
Thermal Imagers	\$7,500		-	-	-	-	-	-	-	-	-	-	
Radio's - Portable and Mobile	\$4,500		-	-	-	-	378,364	-	-	-	-	-	
		\$ -	\$ -	\$ 372,972	\$ 99,074	\$ -	\$ 378,364	\$ 26,673	\$ 234,103	\$ -	\$ -	\$ -	
SCHEDULED - Technology													
Computer Main Server	\$8,000		-	8,405	-	-	9,051	-	-	9,747	-	-	
Mobile Display Computers	\$5,000		-	-	-	55,191	-	-	-	-	-	-	
Wi-Fi Routers for Engines	\$30,000		-	-	-	-	-	-	-	-	-	-	
		\$ -	\$ -	\$ 8,405	\$ -	\$ 55,191	\$ 9,051	\$ -	\$ -	\$ 9,747	\$ -	\$ -	
Other Proposed Projects (non-routine in nature)													
			381,377	99,074	55,191	387,415	26,673	234,103	9,747	-	-	-	
Tactical Repeaters for Radio Frequency	50,000	-	-	-	-	-	-	-	-	-	-	-	
Fire Science Educational Building	1,500,000	950,000	-	-	-	-	-	-	-	-	-	-	
Seismic Upgrades to Fire Stations	1,081,800	1,050,000	-	-	-	-	-	-	-	-	-	-	
Fire Station Site Development and Const	100,000	3,600,000	-	-	-	-	-	-	-	-	-	-	
		\$ 2,731,800	\$ 5,600,000	-	-	-	-	-	-	-	-	-	
Total Project Costs		\$ 3,991,800	\$ 6,035,000	\$ 465,427	\$ 341,628	\$ 537,424	\$ 387,415	\$ 126,973	\$ 2,317,510	\$ 9,747	\$ 1,304,773	\$ -	



# Capital Projects Fund

## Fund Balances

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

	Prior Year 17/18 FY	Year 1 18/19 FY	Year 2 19/20 FY	Year 3 20/21 FY	Year 4 21/22 FY	Year 5 22/23 FY	Year 6 23/24 FY	Year 7 24/25 FY	Year 8 25/26 FY	Year 9 26/27 FY	Year 10 27/28 FY
<b>Beginning Fund Balance</b>	\$ 3,573,500	\$ 3,315,300	\$ 3,408,900	\$ 3,243,473	\$ 3,201,845	\$ 2,964,422	\$ 2,877,007	\$ 3,050,033	\$ 1,032,524	\$ 1,322,777	\$ 318,004
Transfers in from General Fund *	1,349,300	1,546,100	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000	300,000
Other Revenue **	9,300	4,582,500	-	-	-	-	-	-	-	-	-
Expenditures	1,616,800	6,035,000	465,427	341,628	537,424	387,415	126,973	2,317,510	9,747	1,304,773	-
<b>Ending Fund Balance ***</b>	<b>\$ 3,315,300</b>	<b>\$3,408,900</b>	<b>\$3,243,473</b>	<b>\$3,201,845</b>	<b>\$2,964,422</b>	<b>\$2,877,007</b>	<b>\$3,050,033</b>	<b>\$1,032,524</b>	<b>\$1,322,777</b>	<b>\$ 318,004</b>	<b>\$ 618,004</b>

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

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

\*\*\* Ending fund balance includes contingency

## Capital Construction Historical

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

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

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

### Projects funded with District funds:

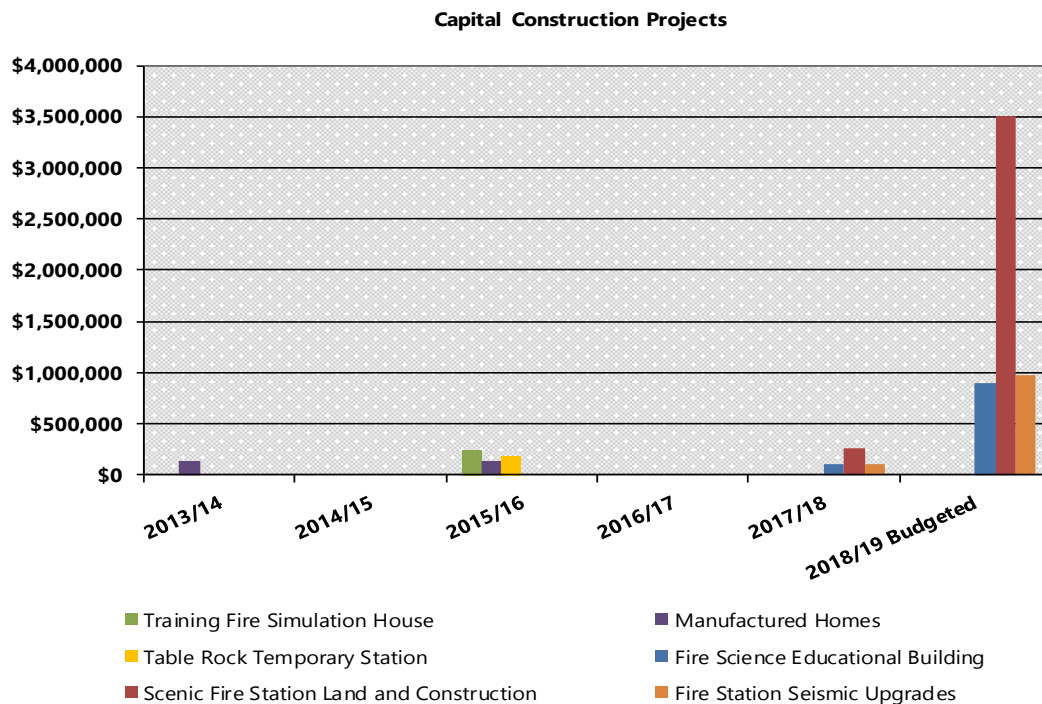
- Eagle Point Land Acquisition – *Purchased 2002*
- Central Point Station Remodel – *Constructed 2004*
- Training Center Complex and Parking Lot – *Constructed 2003*
- White City Fire Station Remodel – *Constructed 2009/2010*
- Central Point Fire Station Kitchen Remodel – *Constructed 2014*
- Eagle Point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

### Projects funded by donations:

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

# Capital Projects Fund

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



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

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

Budgeted capital expenditures for the 2018/19 fiscal year are identified below and are anticipated to have the following impact on the General Fund operating budget.

Project	Budgeted Cost	Description and Operating Budget Impact
<b><u>Apparatus</u></b>		
Equipment to complete structural fire engines	\$50,000	<p>The structural fire engines were purchased in December 2017. The District will take delivery in September 2018 and will finish equipping the units for service with built-in radios, electronics, headsets, and intercom systems.</p> <p>The impact of these engines on the operating budget is anticipated to be \$25,000 in fuel and operating costs. These units will be under warranty and are more fuel efficient. They are replacing older units that will be decommissioned from service.</p>

# Capital Projects Fund

Project	Budgeted Cost	Description and Operating Budget Impact
Wildland Interface Engine	\$385,000	The interface engine will be a new addition to the current fleet, therefore the District will realize higher fleet operating costs. The timing of this engine being placed into service will not be recognized in this fiscal year. It is estimated that in future fiscal years operating costs will be \$15,000.
<b><u>Building and Construction</u></b>		
Fire Science Educational Building	\$950,000	<p>The Fire Science Educational building is designed to accommodate up to 130 persons with a large partitioned classroom, lockers, an office, and restroom facilities. The Rogue Community College (RCC) fire science program will operate out of this facility; the District will use it for multi-level training events and ceremonies.</p> <p>This facility will have impact on the operating budget as the District will be responsible for all preventative maintenance, utility costs, security, and scheduling oversight. Although construction will not be completed until mid-fiscal year, this budget has \$7,000 allocated in the General Fund for utility costs and maintenance. This figure will be adjusted once actual expenses are realized. However, RCC will be compensating the District through an intergovernmental agreement (IGA) for a certain portion of these overhead costs and the use of the District's training facility, which will help to offset the impact on the General Fund. That IGA and compensation amount will be finalized in late 2018; this budget has \$20,000 identified as an estimate only.</p>
Fire Station Seismic Upgrades	\$1,050,000	The seismic upgrades will bring the Agate Lake, Central Point, Dodge Bridge, Eagle Point, and Sams Valley fire stations up to current seismic standards that are essential for emergency services facilities. It is not anticipated that these improvements will have a significant impact on the General Fund operating budget, as these improvements focus on shoring up the foundations, masonry walls, and rooflines.
Scenic Avenue Fire Station Construction and Land Development	\$3,600,000	During the construction phase its anticipated there will be minimal impact on the operating budget, as all costs will be budgeted out of the Capital Fund. Once the project is completed in its entirety, impact of a new station will be significant. Those costs will be determined within the next fiscal year.

# Capital Projects Fund

## Revenues and Expenditures by Account

Description	HISTORICAL			BUDGET FOR NEXT FISCAL YEAR		
	2015/16 FY	2016/17 FY	2017/18 FY	2018/2019		
	Actual	Actual	Adopted Budget	Proposed By Budget Officer	Approved By Budget Committee	Adopted By Governing Body
Beginning Fund Balance	2,755,651.61	3,079,957.13	3,607,000	3,390,000	3,407,300	3,315,300
Sale of Capital Equip & Vehicles	0.00	0.00	500	500	500	500
Grants; Local, State, Federal	0.00	0.00	1,082,000	975,000	975,000	1,082,000
Donations	0.00	16,500.00	1,000,000	400,000	450,000	500,000
Transfer from General Fund	1,036,200.00	986,900.00	1,349,300	1,076,500	1,475,500	1,546,100
Loan Proceeds	0.00	0.00	100	3,000,000	3,000,000	3,000,000
	<b>\$3,791,851.61</b>	<b>\$4,083,357.13</b>	<b>\$7,038,900</b>	<b>\$8,842,000</b>	<b>\$9,308,300</b>	<b>\$9,443,900</b>
Department Equipment	53,141.07	42,990.00	50,000	100	100	100
Apparatus and Vehicles	45,588.40	409,200.49	1,260,000	50,000	435,000	435,000
Land and Improvements	0.00	0.00	260,000	100,000	100,000	100,000
Building Construction & Improvements	613,165.01	57,790.00	2,581,800	5,375,000	5,425,000	5,500,000
Contingency	0.00	0.00	40,000	224,100	241,400	244,400
Reserve for Future Exp & End Fund Bal	0.00	0.00	2,847,100	3,092,800	3,106,800	3,164,400
	<b>\$711,894.48</b>	<b>\$509,980.49</b>	<b>\$7,038,900</b>	<b>\$8,842,000</b>	<b>\$9,308,300</b>	<b>\$9,443,900</b>
<b>Fund Balance</b>	<b>\$3,079,957.13</b>	<b>\$3,573,376.64</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## DETAIL BY ACCOUNT

### Capital Projects Fund 5

Account	Description	Account Total
<b>70530-000</b>	<b>Department Equipment.....</b>	<b>\$ 100</b>
	Account placeholder only	
<b>70531-000</b>	<b>Apparatus and Vehicles.....</b>	<b>\$ 435,000</b>
	Equipment to finish (2) new structural engines for service	50,000
	Wildland/Urban Interface Type 3 Engine	385,000
<b>70532-000</b>	<b>Land and Improvements.....</b>	<b>\$ 100,000</b>
	Fire station site development on Scenic Road property	
<b>70533-000</b>	<b>Building Construction/Improvements.....</b>	<b>\$ 5,500,000</b>
	Fire science educational building construction (completion of project started in prior fiscal year)	950,000
	Seismic upgrade grant - Fire station improvements (started in prior fiscal year; budget figures represent amount for completion)	
	Agate Lake Station	74,500
	Central Point Station	702,200
	Dodge Bridge Station	108,500
	Eagle Point Station	43,000
	Sams Valley Station	121,800
		1,050,000
	Scenic fire station construction	3,500,000
<b>TOTAL CAPITAL EXPENDITURES</b>		<b><u>\$ 6,035,100</u></b>

# Glossary of Terms and Acronyms

**Account**

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

**Administrative (ADM)**

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

**Advanced Life Support (ALS)**

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

**Agate Lake Station (AL)**

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

**Alarm**

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

**Appropriation**

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

**Assessed Valuation**

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

**Assets**

Property owned by the District that has monetary value.

**Assistance to Firefighters Grant (AFG)**

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

**Battalion Chief (BC)**

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

**Balanced Budget**

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

**Basic Life Support (BLS)**

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

**Board of Directors (BOD)**

Elected body of officials that governs the District.

**Budget**

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

# Glossary of Terms and Acronyms

**Budget Document**

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

**Budget Message**

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

**Budgetary Control**

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

**Capital Outlays**

Expenditures for the acquisition of capital assets.

**Captain**

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

**Carbon Monoxide (CO)**

A colorless, odorless, highly poisonous gas.

**Cardiopulmonary Resuscitation (CPR)**

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

**Central Point Station (CP)**

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

**Certificates of Participation (COP)**

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

**Chart of Accounts**

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

**Chief Finance Officer (CFO)**

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

**Chief Fire Officer Designation (CFOD)**

Internationally recognized level of career and academic achievement.

**Civil Service Commission (CSC)**

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

**Clinical Laboratory Improvement Amendments (CLIA)**

Certification for medical blood testing.

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

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

# Glossary of Terms and Acronyms

**Computer Aided Dispatch (CAD)**

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

**Current Liabilities**

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

**Current Taxes**

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

**Debt**

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

**Debt Limit**

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

**Department of Environmental Quality (DEQ)**

Establishes vehicle emissions standards for all vehicles and apparatus.

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

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

**Depreciation**

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

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

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

**Deputy Chief of Operations (DC)**

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

**Deputy Fire Marshal (DFM)**

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

**Dispatch**

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

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

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

**Dodge Bridge Station (DB)**

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

# Glossary of Terms and Acronyms

**Drug Enforcement Agency (DEA)**

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

**Eagle Point Station (EP)**

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

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

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

**Electro Cardio-Gram (EKG)**

Procedure used to diagnose the heart's electrical rhythm.

**Emergency Medical Service (EMS)**

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

**Emergency Medical Technician (EMT)**

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

**Engine**

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

**Engineer**

One who maintains and drives the apparatus during emergency calls.

**Expenses**

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

**Fair Labor Standards Act (FLSA)**

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

**Federal Communications Commission (FCC)**

Agency that oversees radio communication.

**Fire and Life Safety (FLS)**

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

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

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

**Fire Chief (FC)**

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



# Glossary of Terms and Acronyms

**Firefighter (FF)**

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

**Fire Management Zone (FMZ)**

An initial response area defined by geography.

**Fiscal Year (FY)**

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

**Fixed Assets (FA)**

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

**Full Time Equivalent (FTE)**

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

**Fund**

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

**Fund Balance**

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

**Generally Accepted Accounting Principles (GAAP)**

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

**General Fund**

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

**General Long-Term Debt**

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

**Geographic Information System (GIS)**

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

**Gold Hill Station (GH)**

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

**Government Finance Officers Association (GFOA)**

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

**Governmental Funds**

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

# Glossary of Terms and Acronyms

**Gross Bonded Debt**

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

**Hazardous Materials (Haz-Mat)**

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

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

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

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

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

**Incident**

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

**Incident Commander (IC)**

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

**Interface**

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

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

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

**International Association of Firefighters (IAFF)**

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

**International Fire Code (IFC)**

The agency that regulates fire code standards.

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

Agency that provides fire training student manuals.

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

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

**Jackson County (JC)**

The most southwesterly county located in Oregon.

**Jackson County Fire District No. 4 (JC4)**

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

# Glossary of Terms and Acronyms

**Levy**

Tax imposed/collected for the support of District activities.

**Local Government Investment Pool (LGIP)**

A pooled account where the County Treasurer deposits tax receipts.

**Local Government Personnel Institute (LGPI)**

Agency that compiles and publishes governmental salary and benefit statistics.

**Long Term Disability (LTD)**

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

**Major Fund**

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

**Mobile Display Computer (MDC)**

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

**Modified Accrual Basis**

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

**Municipal Corporation**

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

**National Fire Protection Association (NFPA)**

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

**Net Bonded Debt**

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

**Object Classification**

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

**Operations (OPS)**

Department responsible for emergency medical treatment and fire suppression.

**Operating Statement**

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

**Oregon (OR)**

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

# Glossary of Terms and Acronyms

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

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

**Oregon Department of Forestry (ODF)**

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

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

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

**Oregon Fire Marshals Association (OFMA)**

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

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

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

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

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

**Oregon Revised Statute (ORS)**

Rules that govern public entities.

**Performance Measures**

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

**Personal Protective Equipment (PPE)**

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

**Public Employees Retirement System (PERS)**

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

**Prior Year Tax Levies**

Taxes levied for fiscal periods preceding the current one.

**Property Taxes**

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

**Rapid Intervention Team (RIT)**

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

**Resources**

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

**Response**

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

**Revenue**

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

# Glossary of Terms and Acronyms

**Rogue Community College (RCC)**

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

**Rogue Interagency Training Association (RITA)**

The combined Jackson and Josephine County fire agency training association.

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

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

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

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

**Sams Valley Station (SV)**

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

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

Facemasks and pressurized air cylinders for fire suppression purposes.

**Shift**

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

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

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

**Special Revenue Fund**

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

**Supplemental Budget**

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

**Technical Rescue Team (TRT)**

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

**Table Rock Station (TR)**

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

**Tax Anticipation Note (TAN)**

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

**Tax Base**

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

**Tax Levy**

The total amount to be raised by general property taxes.

# Glossary of Terms and Acronyms

**Tax Increment Financing**

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

**Tax Rate**

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

**Technical Rescue**

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

**Tender**

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

**Training Center (TC)**

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

**Unappropriated Ending Fund Balance (UEFB)**

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

**Urban Renewal (UR)**

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

**VA Southern Oregon Rehabilitation Center**

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

**White City Station (WC)**

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

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

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