



**Emergency Services  
Consulting International**  
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North Willamette Valley Fire Protection District  
**Implementation Plan**

**ESCI** Emergency Services  
Consulting International

Providing Expertise & Guidance that Enhances Community Safety

## CONTENTS

<b>Contents .....</b>	<b>1</b>
<b>Implementation Planning .....</b>	<b>1</b>
<b>Sample Implementation Plan.....</b>	<b>9</b>
Transition Action Plan .....	42

## IMPLEMENTATION PLANNING

ESCI has published and presented many studies and reports to clients over the years. Often, clients are overwhelmed with information and options. It takes time to digest the report and then figure out what to do next. ESCI finds it useful to offer a plan to help our clients break down the process into smaller segments. Those smaller pieces allow policymakers, fire chiefs, and communities to examine details and have discussions about what is possible. The following is offered as a framework to consider in the initial stages of evaluation. It is a strategic planning approach to partnerships.

The first decision is whether the organizations are to do anything at all, or continue on a status quo basis. Once a decision is made to consider an enhanced regional service delivery model, ESCI offers the following steps as a systematic and manageable process.

### **Conduct Vision Session(s) with Policymakers**

The initial stage of implementation begins with the most elementary decision: "Do we want to move forward or not?" It is extremely important that, at this stage of the process, it is clearly recognized that this is a public policy decision on the part of the governing entities involved. A decision to consider altering the way in which a critical public safety service is provided, in some cases even permanently altering the governance of those services, is clearly in the purview of the elected bodies. While senior management input should be considered, the final decision should not rest at any level lower in the organization than those who are elected to represent the customers.

For this reason, ESCI recommends that the elected representatives of the agencies meet for the initial discussion of the feasibility study and its projected operational and fiscal outcomes. Depending on the number of elected officials, the policymakers can decide whether to include all elected officials or a group assigned to represent each governing entity. During this policy stage, additional staff involvement should be somewhat limited, perhaps at the senior management level, and then for the sole purpose of providing technical support. It is important to limit the ability for the process to be "hijacked" at this point by strenuous arguments for or against the idea from those operations level personnel whose opinions may be influenced by turf, power, or control issues. Stakeholder input is important, but plentiful opportunities can be provided for this once the policy bodies have determined what is in the best interest of their citizens as a matter of public policy.

It is equally important that the policy bodies recognize exactly what decision is being considered in the initial vision meetings. The purpose is to weigh the strategies, operational advantages, fiscal outcomes, and potential impediments of the feasibility to determine whether to commit local resources to move the process forward. The decision is not, at this point, a final decision to "flip the switch." The final commitment to take legal actions necessary to finalize the implementation of any given strategy will come much further into the process.

This initial vision meeting can be likened to the court process known as a probable cause hearing. The purpose of such a hearing is for a judge or grand jury to determine if sufficient evidence exists to warrant an arrest and a trial. The probable cause hearing does not determine the final verdict or sentence. That occurs after the much more thorough process and deliberation of the trial. Likewise, the vision meetings are for the policymakers to judge whether sufficient evidence exists to warrant moving forward. The final verdict on whether to take legal or contractual actions to implement will come after weeks, months, or even years of additional detailed planning work involving stakeholders, operations staff, legal counsel, finance personnel, and others. As this actual implementation planning work moves forward, there may be several points at which new information or significant obstacles arise that cause one or more communities to decide not to finalize and implement the Plan.

The term "vision session" is used here because the policymakers will be determining their joint decision on a future vision toward which the additional work of implementation will be directed. In many cases, several legal, operational, or functional strategies are presented as being feasible in the study. These may involve various options for governance, finance, and organizational structure. Which one or ones should the entities pursue, if any? This will become the joint vision of the policymakers.

One of the best methods for initiating this visioning process is to begin with policymakers sharing an open discussion of critical issues. Each entity's representatives can present a short description of those critical issues, service gaps, or service redundancies that might be concerning them relative to their provision of public safety services. As each entity takes their turn presenting these issues, a picture typically emerges of those shared critical issues that two or more of the entities have in common. This assists in focusing the discussion on which of the feasible options from the study best address those critical common issues and how.

As the discussion focuses on those feasible options with the greatest opportunity to positively impact shared critical issues, the discussion can expand to the strengths and weaknesses of the strategies relative to the conditions, financial abilities, and cultural attitudes of the communities involved. There should be a concerted effort to remain at a policy level without becoming overly embroiled in operational discussions of implementation details. Those will be addressed once a common vision has been established for a future strategy that is in the best interest of all the communities involved.

This is also the time that participants may decide to opt-out of further involvement. This may occur for several reasons. There may be a legitimate concern that an individual community does not truly share an adequate number of common critical issues with the other communities. There may also be a legitimate concern that the feasible strategies do not do enough to benefit a given community and would leave it with too many remaining critical issues. And, of course, there is always the possibility that a given community will not feel that the projected financial outcome is within their ability or provides a cost-benefit that is better than their current situation. Any such decisions by one or more communities should not be considered a discouraging factor, for that is the very purpose of the vision sessions. In many cases, other remaining entities continue moving forward with a shared vision for cooperative service delivery even after one or more communities determine not to.

The goal of the vision session(s) is to come out with a decision by the policy bodies on whether to continue with the next steps and, if so, what direction those steps should take. The vision should be sufficiently decisive as to be actionable by senior appointed officials and staff. While there will be many, many details to work out in the implementation process, the vision should clearly articulate the intention of the agreeing policy bodies on the desired outcome from the specified cooperative service strategy or strategies. Once this occurs, the real work begins.

After setting the joint vision, this policymaker group should meet together at set intervals, or as needed, to hear the progress of the Implementation Committee and its Working Groups and refine direction when necessary. The appropriate interval will depend on the situation and the complexity and length of the process itself, but a quarterly meeting is often sufficient.

### **Establish a Joint Implementation Committee**

The next step in the process is to establish a Joint Implementation Committee that will be given the overall responsibility with leadership and management of the planning and implementation process. This will be the "nuts and bolts" group that works through the details, overcomes the challenges, reacts to new information, and makes many of the actual decisions on the implementation plan. This group should have a much wider representation from stakeholders both inside and outside of the individual organizations involved. Membership in the Joint Implementation Committee may include senior management personnel and, where appropriate, labor representatives. The following is an example of a Joint Implementation Committee:

- City Manager or Board Chair (or equivalent) from each organization
- Fire Chief
- Finance Director from each organization
- Labor representatives from each agency
- Volunteer representatives from each volunteer organization involved

The Joint Implementation Committee should select a chair or co-chairs to function as organizers and facilitators for the committee meetings. In addition, their first order of business should be to determine the rules and procedures of this committee. This should include such items as:

- How often does this group meet (monthly is typical)?
- How are absences handled (assigned alternates are recommended)?

- How does communication (occasionally secure) within this committee take place?
- How will meetings be conducted? Are there "rules of conduct" for the meetings?
- Under what circumstances will the meetings be opened to attendance by non-members?
- How will the group pursue consensus? When voting is necessary, how will that occur?

### **Develop an Implementation Strategic Plan**

Once the ground rules have been set, the Joint Implementation Committee should schedule a strategic planning process. The strategic planning process should be held in a neutral setting away from the daily activities and noise of the usual office environment. It need not be an expensive retreat, but it should be organized to focus energy and attention exclusively on the planning process for its duration.

The purpose of the initial strategic planning session should be as follows:

- To further articulate and refine the joint vision set by the policy bodies.
- To identify critical issues that will be met as the implementation process unfolds.
- To identify potential impediments to implementation from:
  - Organizational culture
  - Availability of data and information
  - Lack of sufficient staff to carry through implementation processes
  - Outside influences and time demands
- To set the specific goals and objectives of the implementation process and the timelines for accomplishment.
- To establish the necessary Implementation Working Groups.

This process should result in the preparation of an implementation-planning document that can be shared with the policy body, stakeholders, and others who will be involved in or affected by the implementation process. The document should provide the joint vision, describe the cooperative service strategy or strategies being pursued, the desired outcome, the goals that must be met in order for implementation to be achieved, and the individual objectives, tasks, and timelines for accomplishment. When fully and adequately prepared, this document will serve as the master "road map" for the process and will help guide the next steps of developing working groups and assigning responsibilities.

### **Establish Implementation Working Groups**

As part of the implementation strategic planning process, various Implementation Working Groups should be established that would be charged with responsibility for performing the necessary detailed work involved in analyzing, weighing, and deciding on specific processes. Membership for these Implementation Working Groups should be roughly identified as part of that process as well.

The number and titles of the working groups will vary, depending on the type and complexity of the strategies being pursued. However, the following list provides some typical working groups used in most consolidation processes and a description of some of their primary assigned functions and responsibilities.

#### **Governance Working Group**

This group will be assigned to examine and evaluate various governance options for the cooperative services effort. A recommendation and process steps will be provided back to the Joint Implementation Committee and the Policymaker Group. Once approved, this working group is typically assigned the task of shepherding the governance establishment through to completion. The membership of this group typically involves one or more elected officials and senior city/district and agency management.

#### **Finance Working Group**

This group will be assigned to review the financial projections contained in the feasibility study and complete any refinements or updating necessary. The group will look at all possible funding mechanisms and will work in partnership with the Governance Working Group to determine the impact on local revenue sources and options. Where revenue is to be determined by formula rather than a property tax rate, such as in a contractual cooperative venture, this group will evaluate various formula components and model the outcomes, resulting in recommendations for a final funding methodology and cost distribution formula. The membership of this group typically involves senior financial managers and staff analysts and may also include representatives from the agencies' administrative staffs.

**Legal Working Group**

Working in partnership with the Governance Working Group, this group will identify all of the legal aspects of the selected strategy and will identify steps to ensure the process meets all legal obligations of process and law. Where necessary, this group will oversee the preparation and presentation of policy actions such as ordinances, joint resolutions, petitions, dissolutions, and enabling legislation. The group will also be responsible for working with other elected bodies, such as State Legislatures, the State Fire Marshal, and the insurance industry, when necessary, to accomplish the establishment of local selected governance. The membership of this group typically involves legal counsel from the various entities involved and may also include senior city/district management staff.

**Operations Working Group**

This group will be responsible for an extensive amount of work and may need to establish multiple sub-groups to accommodate its workload. The group will work out all the details of the necessary operational changes required by the strategy. This involves a detailed analysis of assets, processes, procedures, service delivery methods, deployment, and operational staffing. Detailed integration plans, steps, and timelines will be developed. The group will coordinate closely with the Support Services and Logistics Working Group, if established. The membership of this group typically involves senior agency management, mid-level officers, training staff, and volunteer representatives. This list often expands with the complexity of the services being provided by the agencies.

**Support Services and Logistics Working Group (Optional)**

This group will be responsible for any required blending of capital assets, disposition of surplus, upgrades necessary to accommodate operational changes, and the preparation for ongoing administration and logistics of the cooperative effort. The membership of this group typically involves mid-level agency management, administrative, and support staffs. Where involved, support divisions such as Maintenance, Fire Prevention, etc., will also be represented.

**Communications Working Group**

Perhaps one of the most important, this group will be charged with developing an internal and external communication policy and procedure to ensure consistent, reliable, and timely distribution of information related to the cooperative effort. The group will develop public information releases to the media and will select one or more spokespersons to represent the communities in their communication with the public on this particular process. The importance of speaking with a common voice and theme, both internally and externally, cannot be overemphasized. Fear of change can be a strong force in motivating a group of people to oppose what they do not clearly understand. A well-informed workforce and public will reduce conflict. The membership of the group typically involves public information officers and senior city or agency management.

**Meet, Identify, Challenge, Refine, and Overcome**

Once the working groups are established, meeting, and completing their various responsibilities and assignments, it will be important to maintain organized communication up and down the chain. The working group chairs should regularly report to the Joint Implementation Committee. When new challenges, issues, impediments, or opportunities are identified by the working groups, these issues need to be communicated to the Joint Implementation Committee so the information can be coordinated with the findings and processes of the other working groups. Where necessary, the Joint Implementation Committee and a working group chairperson can meet with the Policymakers to discuss significant issues that may precipitate a refinement of the original joint vision.

The process is continuous as the objectives of the strategic Plan are accomplished one by one. When sufficient objectives have been met, the Joint Implementation Committee can declare various goals as having been fully met until the point comes when the actual implementation approval or petitioning for a district formation/vote needs to be sought from the policy bodies. This formal "flipping of the switch" will mark the point at which implementation ends and integration of the agencies begins.

## **SAMPLE IMPLEMENTATION PLAN**

Starting the direct delivery of fire/EMS service will not be a simple task. Much work is required to ensure the seamless transition of service from Existing Yamhill Agencies to the North Yamhill Fire Protection District. The primary focus of this effort must be to effectively manage the transition so that there is no interruption of service to the community.

This Transition Plan describes in detail the actions that are necessary to accomplish the transfer of operational responsibility. The Plan is divided into eight functional areas:

1. Organization and Operations
2. Capital Assets and Equipment
3. Human Resources
4. Finance
5. Risk Management
6. Legal
7. Technology
8. External Relationships

Each functional area begins with a summary description of the work effort required to ensure all needs of that function have been properly addressed prior to transition. Following the summary is a comprehensive and detailed list of tasks to be completed, the outcomes intended by each task, and the person(s) or department(s) responsible for completing each task.

The transition of service will add workload to all the participating agencies. Establishing clear authority and effective communications systems during the transition will be important. The use of interdisciplinary teams focused on developing collaborative solutions should produce efficient support systems for each participating agency.

Finally, keeping an open line of communications with the public will be imperative. They will need assurance that their fire and emergency services will continue unimpaired through the transition from the current agencies to the new fire district and beyond.

Implementation of this Plan should provide for a smooth transition of service in keeping with the core goal of providing seamless and uninterrupted delivery of fire and emergency services to the community.

## Organization and Operations

A variety of activities are necessary. Clearly defined service delivery standards of performance must be established to lay the foundation for the acquisition of resources needed to deliver the desired service level. Policies, procedures, and guidelines must be developed to define operational practices. Staffing plans, training systems, response assignments, and other organizational systems must be developed and implemented.

The most pressing need is the recruitment and retention of a Chief Executive Officer (Fire Chief) for the new fire district. This person will lead the organization pre- and post-transition and must be intimately involved in its establishment. The new fire district board should seek a dynamic, modern-thinking leader with the energy and capability to develop the organization into a robust, efficient, and effective service delivery system.

A staffing plan will need to be developed and implemented, listing all of the human resources needed to deliver the defined level of service within budgetary limitations. Many of these staff members will transition from the existing agencies to the new fire district, but it is not certain how many, or what rank and experience levels staff may migrate. However, it is not expected that all positions will be filled in this manner. The Fire Chief will need to work closely with the new districts Human Resources Department to recruit quality staff for the new fire district (specific tasks are listed in the Human Resources section of this Plan).

Organization and Operations Tasks	Estimated Hours	Responsibility
<p>1. Establish a transition team made up of key stakeholders from the [AGENCY] and [AGENCY]. Implement a regular meeting schedule and update process.  <b>Outcome:</b> Transition activities are well coordinated, and all parties are invested in the result.</p>	80	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Transition Rep</p>
<p>2. Clearly define the level of service expected to be provided by [AGENCY]:</p> <ul style="list-style-type: none"> <li>a. Fire suppression</li> <li>b. EMS</li> <li>c. Fire prevention</li> <li>d. Hazardous materials</li> <li>e. Technical rescue</li> </ul> <p><b>Outcome:</b> Level of service is defined allowing [AGENCY] resources and systems to be developed and acquired to provide that level of service.</p>	80	<p>[AGENCY] Fire Services Coordinator</p>
<p>3. Create and regularly distribute public information about the transition. Emphasize that service continuity will be preserved. Create and distribute the message jointly with the [AGENCY] and the [AGENCY].  <b>Outcome:</b> The public is fully informed of transition activities and its impact on them.</p>	60	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Community Relations                      [AGENCY] Human Resources</p>
<p>4. Create and regularly distribute information about the transition to [AGENCY] Fire Department, [AGENCY], and regional departments. Create and distribute the message jointly with the [AGENCY] Fire Chief and [AGENCY] Fire Chief.  <b>Outcome:</b> [AGENCY] staff are fully informed of transition activities and its impact on them.</p>	90	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Community Relations                      [AGENCY] Fire Chief                      [AGENCY] Human Resources</p>
<p>5. Establish the position of [AGENCY] Fire Chief. Develop the classification specification, reporting relationships, pay, and benefits. Recruit and retain a Fire Chief for [AGENCY].  <b>Outcome:</b> A Fire Chief is hired and ready to assist with transition implementation.</p>	150	<p>[AGENCY] Fire Services Coordinator                      Assistant City Manager                      [AGENCY] Community Relations                      [AGENCY] Human Resources</p>
<p>6. Prepare, refine, and finalize the staffing plan and position list for all operations and support positions. Establish all positions, including classification specifications.  <b>Outcome:</b> A comprehensive staffing plan has been developed that fully supports [AGENCY]'s defined level of service.</p>	60	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Human Resources</p>

Organization and Operations Tasks	Estimated Hours	Responsibility
<p>7. Work with Human Resources to produce and publish notifications to hire firefighters and staff members fulfilling required staffing as indicated by staffing templates. Set deadlines well in advance of transition for receiving applications, interviews, background checks, and all testing processes.  <b>Outcome:</b> All requires staff members have been appointed, and are in place prior to transition.</p>	100	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Human Resources</p>
<p>8. Review and evaluate available options for emergency dispatch services and select the most appropriate dispatch provider. Develop and execute agreements as needed.  <b>Outcome:</b> The most appropriate provider supporting both cost efficiency and response effectiveness in place prior to transition.</p>	40	[AGENCY] Fire Services Coordinator
<p>9. Develop and establish clear lines of communication and accountability between the [AGENCY] Fire Chief and city support functions.  <b>Outcome:</b> Expectations between the parties are clearly defined, resulting in more efficient delivery of support services.</p>	10	<p>[AGENCY] Fire Services Coordinator                      City Manager                      [AGENCY] Department Heads</p>
<p>10. Evaluate existing apparatus owned by [AGENCY] for suitability to the [AGENCY] service area. Develop apparatus specifications for appropriate [AGENCY] apparatus and develop an apparatus replacement plan.  <b>Outcome:</b> The most appropriate apparatus type and configuration for [AGENCY] operations have been defined.</p>	Detail in Capital Asset Section Task 1.	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Transition Rep                      [AGENCY] Fleet Services Manager</p>
<p>11. Identify if co-location of [AGENCY] fire prevention personnel conducting new construction activities in the Building and Safety Department is feasible. If so, arrange for space and furnishings.  <b>Outcome:</b> Co-location, if practical, promotes strong interaction between [AGENCY] and the Building and Safety Department.</p>	10	<p>[AGENCY] Fire Services Coordinator                      Building and Safety Facilities Manager</p>
<p>12. Develop a procedure for a joint review of new development proposals for building projects.  <b>Outcome:</b> Developers experience a seamless transition of services between [AGENCY] and [AGENCY].</p>	16	[AGENCY] Fire Services Coordinator Building and Safety
<p>13. Establish a detailed matrix for the construction code elements that are reviewed by the Building and Safety Department and those that will be reviewed by [AGENCY] fire prevention staff.  <b>Outcome:</b> Division of authority and responsibility between the Building and Safety Department and [AGENCY] is clearly defined.</p>	40	[AGENCY] Fire Services Coordinator Building and Safety

Organization and Operations Tasks	Estimated Hours	Responsibility
<p>14. Develop [AGENCY] policies, procedures, and standard operating guidelines. Review current [AGENCY] policies, procedures, and standard operating guidelines for use as a base.  <b>Outcome:</b> [AGENCY] policies, procedures, and guidelines are comprehensive and appropriate to achieved defined levels of service.</p>	210	[AGENCY] Fire Services Coordinator Human Resources
<p>15. Identify alternative revenue opportunities to support [AGENCY] operations. Propose revenue opportunities for implementation as appropriate.  <b>Outcome:</b> [AGENCY] is capturing all appropriate revenue to support the delivery of services.</p>	40	[AGENCY] Fire Services Coordinator Finance Manager
<p>16. Establish workflow procedures for the plans review and site inspection process.  <b>Outcome:</b> Workflow expectations between [AGENCY] and the Building and Safety Department are clearly defined.</p>	24	[AGENCY] Fire Services Coordinator Building and Safety
<p>17. Determine the most appropriate source of medical director services and execute agreements to provide that service. Consider using the current [AGENCY] medical director.  <b>Outcome:</b> Medical director services are available on the transition date.</p>	24	[AGENCY] Fire Services Coordinator EMS Director
<p>18. Identify records maintained by [AGENCY] that should be transferred to [AGENCY]. Identify the most appropriate method for transferring the records to [AGENCY] and address record transfer costs.  <b>Outcome:</b> All records maintained by the [AGENCY] that are needed by [AGENCY] have been identified and transferred.</p>	20	[AGENCY] Fire Services Coordinator [AGENCY] Transition Rep
<p>19. Determine whether [AGENCY] can continue to use the [AGENCY] Knox Box keys or whether [AGENCY] area boxes will need to be re-keyed.  <b>Outcome:</b> [AGENCY] has access to Knox Boxes installed in its service area.</p>	10	[AGENCY] Fire Services Coordinator Building and Safety
<p>20. Develop effective response forces, response assignments, and station order tables for the computer-aided dispatch (CAD) system. Provide assignments and station order tables to the dispatch provider for implementation. This data may be available from [AGENCY].  <b>Outcome:</b> Dispatch protocols are developed and in place by the transition date, ensuring seamless service delivery to the community.</p>	60	[AGENCY] Fire Services Coordinator [AGENCY] Transition Rep

Organization and Operations Tasks	Estimated Hours	Responsibility
21. Develop desk manuals containing all policies and procedures for administrative functions to be performed by [AGENCY]. <b>Outcome:</b> [AGENCY] support staff members have the tools to assist them in performing their work.	64	[AGENCY] Fire Services Coordinator
22. Determine the exact date and time for the transition of service delivery from the [AGENCY] to [AGENCY]. Develop a transfer of service process and notify all cooperating and area agencies of the details. <b>Outcome:</b> The transfer of service responsibility occurs with no impact on the delivery of fire and emergency services.	20	[AGENCY] Fire Services Coordinator
23. Acquire occupancy and inspection records for [AGENCY] businesses from [AGENCY]. <b>Outcome:</b> [AGENCY] fire prevention staff has any historic inspection information to use for their work.	16	[AGENCY] Fire Services Coordinator
24. Complete a skills, knowledge, and certification inventory for all [AGENCY] employees. <b>Outcome:</b> The current level of knowledge and capability of all [AGENCY] employees is known.	80	[AGENCY] Fire Services Coordinator Human Resources [AGENCY] Training Chief
25. Based on the skills, knowledge, and certification inventory, defined job requirements, and skills needed that are unique to each service area, develop a training plan that maintains required personnel capability and develops personnel for succession purposes. <b>Outcome:</b> A comprehensive training program is in place and ready to be delivered on the transition date.	80	[AGENCY] Fire Services Coordinator Human Resources [AGENCY] Training Chief
26. Quantify existing firefighting, EMS, etc., supplies inventory that will be transferred from [AGENCY] to [AGENCY]. Identify and acquire supplies that need to be in-stock. <b>Outcome:</b> Supplies are available on the date of transition.	45	[AGENCY] Fire Services Coordinator Fleet Services Manager Facilities Manager
27. Develop a radio communication and frequency utilization plan and procedure in conjunction with [COMM CENTER]. <b>Outcome:</b> A radio communication and frequency use Plan and procedure are in place by the transition date.	64	[AGENCY] Fire Services Coordinator [AGENCY] Transition Rep

Organization and Operations Tasks	Estimated Hours	Responsibility
28. Determine the mapping system that will be used for [AGENCY] mapping mobile data computers and map books. Produce new map systems for all [AGENCY] apparatus. <b>Outcome:</b> Map systems using a common system are available by the date of transition.	120	[AGENCY] Fire Services Coordinator [AGENCY] GIS
29. Revise the station and apparatus numbering system for the [AGENCY]. Use the [AGENCY] regional numbering system. <b>Outcome:</b> The numbering system is established and all stations and apparatus are properly marked by the date of transition.	10	[AGENCY] Fire Services Coordinator Fleet Manager
30. Develop and deliver training for [AGENCY] personnel on geography, risks, and target hazards in the service area. <b>Outcome:</b> [AGENCY] personnel are familiar with the service area.	100	[AGENCY] Fire Services Coordinator [AGENCY] Training Chief
31. Apply and receive a state emergency medical services advanced life support (ALS) license. <b>Outcome:</b> The state license is properly in place so that ALS delivery can continue during transition.	20	[AGENCY] Fire Services Coordinator EMS Coordinator
32. Purchase new firefighting and EMS equipment to be used by [AGENCY]. <ul style="list-style-type: none"> <li>a. Personal Protective Equipment-for all firefighting, EMS activities</li> <li>b. Uniforms, badges, etc.</li> <li>c. Helmets</li> <li>d. Footwear</li> <li>e. Medical Equipment</li> </ul> <b>Outcome:</b> Equipment consistency is provided to ensure effective operations and minimize training requirements.	120	[AGENCY] Fire Services Coordinator [AGENCY] Training Chief
33. Develop a list of community fire prevention programs delivered by [AGENCY]. Determine which of these will be delivered to the [AGENCY]. <b>Outcome:</b> The type and level of fire prevention services to be delivered are determined.	20	[AGENCY] Fire Services Coordinator
34. Implement State and County EMS protocols for all levels of EMS service to be provided. Gain approval by the [AGENCY] medical director. <b>Outcome:</b> EMS protocols are developed so that appropriate levels of EMS service can be delivered.	30	[AGENCY] Fire Services Coordinator EMS Coordinator

## Capital Assets and Equipment

The effective delivery of fire and emergency services requires the use of facilities, apparatus, equipment, and supplies. Each participating agency owns many of these assets that are currently operating in the new fire district.

These assets will need to be converted for use by the new fire district. During the transition, a variety of tasks will be required. Facilities, apparatus, and equipment owned by each participating agency will need to be inventoried, and agreements reached on the timing for the transition. The current condition of each asset will need to be identified, and any required repairs completed prior to the transition.

Systems to provide ongoing repair and maintenance for facilities, apparatus, and equipment will need to be developed and resources to conduct that work acquired. Contracts for service and repair vendors will need to be negotiated and executed. Utility services must be notified of the transition so that billings are routed correctly.

The suitability of apparatus for the new fire district service area should be evaluated. If apparatus type changes are needed, the acquisition process should begin early in the transition process.

A supplies inventory will need to be identified and enough supplies acquired. This includes office supplies, station operation and maintenance supplies, and more.

Agreements must be reached with each participating agency for specific timing of conversion of assets and inventory. The existing agency will be the service provider until the actual date and time of transition. Developing a plan for the seamless transition of service and the hand-off of the assets necessary to conduct that service will be critical.

Capital Assets and Equipment Tasks	Estimated Hours	Responsibility
<p>1. Develop a Fleet Master Plan. Meet with [AGENCY] to establish a mutually agreeable fleet transition plan. Evaluate assigned fleet resources for condition and serviceability. Obtain guidance from [AGENCY] Public Works Director on the process. Determine minimum standards for fleet acceptance. Evaluate the fleet to determine if surplus apparatus/vehicles exist and if sufficient numbers of apparatus by type are available. Surplus or acquire apparatus/vehicles as needed based on the evaluation.  <b>Outcome:</b> A Fleet Master Plan listing [AGENCY] apparatus fleet reflecting the most appropriate quantity and type of front line and reserve equipment.</p>	<p>160</p>	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Transition Rep                      [AGENCY] Fleet Services Manager</p>
<p>2. Review workload of new Facilities Management staff and determine if additional staffing and other resources are needed.  <b>Outcome:</b> Adequate staffing and resources are available to conduct facilities maintenance for [AGENCY].</p>	<p>20</p>	<p>[AGENCY] Fleet Manager</p>
<p>3. Perform a space needs assessment study to identify and acquire building space for [AGENCY] administration based on, but not limited to, the following criteria:</p> <ul style="list-style-type: none"> <li>a. Employee count</li> <li>b. Functional needs</li> <li>c. Connectivity (telephone, computer, radio)</li> <li>d. Parking</li> <li>e. Power</li> <li>f. Growth Planning</li> </ul> <p><b>Outcome:</b> Suitable building space is available for [AGENCY] administrative personnel.</p>	<p>60</p>	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Facilities Manager</p>
<p>4. Evaluate the fleet to determine if surplus apparatus/vehicles exist and if sufficient numbers of apparatus by type are available. Surplus or acquire apparatus/vehicles as needed based on the evaluation.  <b>Outcome:</b> The [AGENCY] apparatus fleet reflects the most appropriate quantity and type of equipment.</p>	<p>45</p>	<p>[AGENCY] Fire Services Coordinator                      [AGENCY] Transition Rep                      [AGENCY] Fleet Services Manager</p>

Capital Assets and Equipment Tasks	Estimated Hours	Responsibility
<p>5. Complete a current condition assessment of the [AGENCY] stations:</p> <ul style="list-style-type: none"> <li>a. Conduct inspection</li> <li>b. Identify maintenance and repair needs</li> <li>c. Determine responsibility for repairs required prior to the transfer of operations.</li> </ul> <p><b>Outcome:</b> Facilities staff has a thorough understanding of the current condition of [AGENCY] stations and any repair work required prior to the transition.</p>	<p>20</p>	<p>[AGENCY] Facilities Manager</p>
<p>6. Review deeds of [AGENCY] fire station/land to determine appropriate measures for the transition to [AGENCY].</p> <p><b>Outcome:</b> Deeds properly reflect [AGENCY] ownership prior to transition</p>	<p>40</p>	<p>[AGENCY] Fire Services Coordinator [AGENCY] Facilities Manager [AGENCY] Transition Rep</p>
<p>7. Acquire maintenance and repair records for [AGENCY] apparatus. Retain an outside contractor and complete an evaluation of the condition of the [AGENCY] apparatus/vehicles.</p> <p><b>Outcome:</b> Equipment Services fully understands the condition of the fleet, can anticipate ongoing maintenance costs, and all repairs required prior to transition have been completed.</p>	<p>80</p>	<p>[AGENCY] Fire Services Coordinator [AGENCY] Fleet Manager [AGENCY] Transition Rep</p>
<p>8. Determine the number of garage spaces available for fire apparatus. Identify available space to house apparatus for which no garage space currently exists or develop a plan to fund and construct new space.</p> <p><b>Outcome:</b> Suitable indoor apparatus storage is available for those vehicles that need it.</p>	<p>16</p>	<p>[AGENCY] Fire Services Coordinator [AGENCY] Fleet Manager</p>
<p>9. Develop an accurate inventory of all [AGENCY] owned equipment, radios, station inventory, and other assets currently in [AGENCY]'s possession. Reach an agreement with [AGENCY] on inventory transfer to [AGENCY].</p> <p><b>Outcome:</b> [AGENCY] owned assets have been converted by the date of transition.</p>	<p>45</p>	<p>[AGENCY] Fire Services Coordinator</p>

Capital Assets and Equipment Tasks	Estimated Hours	Responsibility
<p>10. Identify station maintenance that will be provided by [AGENCY] and the staffing/budget needed by Facilities to support that service. Include appropriate costs in future [AGENCY] Facilities budgets:</p> <p>a. [#] staffed fire stations</p> <p><b>Outcome:</b> The impact of the additional work is identified and resources are available to maintain facilities.</p>	40	<p>[AGENCY] Fire Services Coordinator</p> <p>[AGENCY] Fleet Manager</p> <p>[AGENCY] Transition Rep</p>
<p>11. Identify outside contracts that will be needed for station equipment and services such as communication/tech services, generator maintenance, alarm system maintenance, appliance maintenance, landscaping, etc.</p> <p><b>Outcome:</b> All outside contracts are in place on the date of transition.</p>	45	<p>[AGENCY] Fire Services Coordinator</p> <p>[AGENCY] Facilities Manager</p>
<p>12. Decide if the fleet costs will be charged as a monthly rental or on time/materials basis with [AGENCY] responsible for replacement planning.</p> <p><b>Outcome:</b> The most appropriate method for charging fleet costs has been determined.</p>	30	<p>[AGENCY] Fire Services Coordinator</p> <p>[AGENCY] Fleet Manager</p>
<p>13. Set up apparatus and vehicles in a fleet records management system.</p> <p><b>Outcome:</b> Apparatus and vehicle maintenance and repair can be accurately tracked in a fleet records system.</p>	25	[AGENCY] Fleet Manager
<p>14. Establish preventative maintenance schedules for each apparatus and vehicle.</p> <p><b>Outcome:</b> Schedules are in place on the date of transition.</p>	20	[AGENCY] Fleet Manager
<p>15. Identify any [AGENCY] owned shop equipment, parts, and supplies that are devoted to [AGENCY] operations.</p> <p><b>Outcome:</b> [AGENCY] owned shop equipment, parts, and supplies devoted to [AGENCY] operations have been identified</p>	10	<p>[AGENCY] Fire Services Coordinator</p> <p>[AGENCY] Fleet Manager</p> <p>[AGENCY] Transition Rep</p>
<p>16. Identify the annual cost of fleet maintenance and repair for a future [AGENCY] budget.</p> <p><b>Outcome:</b> [AGENCY] has budgeted sufficient funds for fleet repair and maintenance.</p>	20	<p>[AGENCY] Fire Services Coordinator</p> <p>[AGENCY] Fleet Manager</p> <p>Finance Manager</p>
<p>17. Identify parts that should be in stock for [AGENCY] apparatus. Purchase and/or identify a ready source for the parts.</p> <p><b>Outcome:</b> Parts are readily available to ensure a minimum of apparatus down-time.</p>	30	[AGENCY] Fleet Manager

Capital Assets and Equipment Tasks	Estimated Hours	Responsibility
18. Acquire fuel cards for apparatus that will need them. Consider the use of an independent system. <b>Outcome:</b> The source of fuel for [AGENCY] apparatus has been determined and made available.	10	[AGENCY] Fleet Manager
19. Notify utilities and garbage services of the new billing address for [AGENCY] stations. <b>Outcome:</b> Notification has been made to ensure the continuation of service.	10	[AGENCY] Facilities Manager
20. Re-key all facilities. <b>Outcome:</b> The security of fire stations has been maintained.	10	[AGENCY] Facilities Manager
21. Recruit, hire, and train new Equipment Services employees. <b>Outcome:</b> New staff is employed and ready to begin service on the date of transition.	20	[AGENCY] Fire Services Coordinator [AGENCY] Fleet Manager Human Resources
22. Transition the fleet to [AGENCY] maintenance. <b>Outcome:</b> Apparatus are transitioned to [AGENCY] maintenance.	10	[AGENCY] Fire Services Coordinator [AGENCY] Fleet Manager
23. Complete the transition of legal ownership of buildings and land of all [AGENCY] fire stations in [AGENCY]. <b>Outcome:</b> All stations and properties are under [AGENCY] legal ownership	20	[AGENCY] Fire Services Coordinator [AGENCY] Fleet Manager Finance Manager

## Human Resources

The delivery of fire and emergency services is a human resources intensive function. The new fire district will need to hire, equip, and train personnel and have them ready to provide service by the date of transition. Much work is involved in accomplishing this.

Human resources rules will need to be established for the new fire district. Ideally, the existing rules, with minor modifications, can be used for the new fire district.

Wages, benefits, and other considerations must be determined. Insurance plans will need to be established, the status of health plans for existing retirees determined, and benefits coordinated between insurance plans.

Records systems need to be established and relevant information entered into these systems. Labor and volunteer association representation will need to be determined and any agreements developed as necessary.

A recruitment, testing, and hiring process will be required. This is a time-intensive activity and should begin as quickly as possible. All existing participating agency employees/volunteers will require orientation and training in advance of the date of transition. This training includes required compliance training (EEO, substance abuse, workplace, etc.) and job-specific training so that personnel can provide effective service on the date of transition.

The use of interdisciplinary teams for this transition activity will be important. Systems and considerations established for fire district employees and volunteers will impact a variety of support departments. Coordination is important to develop ongoing support capability that has the least impact on workload.

Human Resources Tasks	Estimated Hours	Responsibility
<p>1. Review potential new Human Resources workload and determine the staffing needed to effectively manage the workload.  <b>Outcome:</b> Human Resources workload is quantified and resources required to support that workload have been identified for pay administration, records, employee relations, benefits administration, labor relations, legal, and training.</p>	30	[AGENCY] Fire Services Coordinator Human Resources
<p>2. Determine the number of former [AGENCY] employees who may elect to seek [AGENCY] employment.  <b>Outcome:</b> The number and names of potential employees have been identified.</p>	10	[AGENCY] Fire Services Coordinator Human Resources
<p>3. Obtain personnel files from any former [AGENCY] employees to determine former class, hire date, promotion dates, certifications, etc.  <b>Outcome:</b> Information has been gathered regarding former [AGENCY] employees.</p>	20	Human Resources
<p>4. Develop classification specifications for all [AGENCY] positions.  <b>Outcome:</b> Classification specifications are available for all positions.</p>	80	[AGENCY] Fire Services Coordinator Human Resources Labor Consultants
<p>5. Identify wages, benefits, and other considerations for newly hired [AGENCY] employees.  <b>Outcome:</b> The wage and benefit packages have been identified.</p>	40	[AGENCY] Fire Services Coordinator Human Resources Labor Consultants

Human Resources Tasks	Estimated Hours	Responsibility
<p>6. Recruit, select, and hire employees as needed:</p> <ul style="list-style-type: none"> <li>a. Fire Chief</li> <li>b. Division Chiefs</li> <li>c. Battalion Chiefs</li> <li>d. Captains</li> <li>e. Engineers</li> <li>f. Firefighters</li> <li>g. Paramedics</li> <li>h. Office Staff</li> <li>i. Mechanics</li> <li>j. Fire Marshal</li> <li>k. Fire Inspectors</li> <li>l. Others as needed</li> </ul> <p><b>Outcome:</b> All positions are filled with qualified employees in time to conduct required training prior to the date of transition.</p>	<p>240</p>	<p>[AGENCY] Fire Services Coordinator Human Resources</p>
<p>7. Develop curriculum and deliver orientation training to all new [AGENCY] personnel.</p> <p><b>Outcome:</b> All [AGENCY] employees have received quality orientation training.</p>	<p>80</p>	<p>[AGENCY] Fire Services Coordinator Human Resources</p>
<p>8. Identify personnel file information that will be maintained by [AGENCY] and information to be maintained by Human Resources. Establish procedures to ensure information is routed correctly.</p> <p><b>Outcome:</b> Complete personnel files are maintained.</p>	<p>40</p>	<p>[AGENCY] Fire Services Coordinator Human Resources</p>
<p>9. Develop a plan to format labor representation for [AGENCY]:</p> <ul style="list-style-type: none"> <li>a. Line Staff</li> <li>b. Management</li> <li>c. Administrative staff</li> </ul> <p><b>Outcome:</b> Labor representation concepts have been identified, described, and implemented.</p>	<p>80</p>	<p>[AGENCY] Fire Services Coordinator Human Resources Labor Consultants Legal</p>
<p>10. Review [AGENCY] human resources rules to determine their suitability for [AGENCY]. Add or modify rules as appropriate to accommodate [AGENCY] human resources activities.</p> <p><b>Outcome:</b> Fully developed human resources rules have been established and are in place in the [AGENCY] prior to transition.</p>	<p>40</p>	<p>[AGENCY] Fire Services Coordinator Human Resources Labor Consultants</p>

Human Resources Tasks	Estimated Hours	Responsibility
<p>11. Add lateral entry provisions to the [AGENCY] human resources recruitment rules to support efficient appointments to open fire positions for experienced personnel.  <b>Outcome:</b> Qualified and experienced personnel can be hired by [AGENCY].</p>	32	Human Resources
<p>12. Develop a program for [AGENCY] employees to be included in [AGENCY] insurance programs. If applicable, develop an orientation plan for the new health benefit programs.  <b>Outcome:</b> [AGENCY] employee eligibility for health insurance programs has been determined.</p>	45	Human Resources
<p>13. Develop a website for [AGENCY] that will support recruitment activities and employee information.  <b>Outcome:</b> The website is developed and is a useful source of information for potential employees.</p>	60	[AGENCY] Fire Services Coordinator Technology Services
<p>14. Examine legal method of obtaining full personnel files for any employees hired from [AGENCY].  <b>Outcome:</b> Personnel files have been acquired.</p>	10	Human Resources
<p>15. Provide notice to PERS that [AGENCY] is an active employer with both safety and non-safety personnel working.  <b>Outcome:</b> Proper notice has been provided to PERS.</p>	10	Human Resources
<p>16. Establish clear pathways and coordination for the relationship between [AGENCY] and Human Resources functions:                      a. Employee complaints                      b. Disciplinary investigations                      c. Classification process  <b>Outcome:</b> Responsibilities, authorities, and processes have been defined and acknowledged by all.</p>	20	[AGENCY] Fire Services Coordinator Human Resources
<p>17. Deliver compliance training to all [AGENCY] employees (EEO, workplace harassment, substance abuse, etc.)  <b>Outcome:</b> All [AGENCY] employees have received quality compliance training prior to the transition date.</p>	60	[AGENCY] Fire Services Coordinator Human Resources
<p>18. Establish a process and vendor to conduct and monitor elective or mandatory annual medical exams. (Policy decision)  <b>Outcome:</b> Employees are provided the required annual medical exams.</p>	20	[AGENCY] Fire Services Coordinator Human Resources

Human Resources Tasks	Estimated Hours	Responsibility
<p>19. Identify the source of health benefits and deferred compensation programs for [AGENCY] employees. Align these as closely as possible to plans offered to existing [AGENCY] employees.  <b>Outcome:</b> Plans offered to the consolidated organization employees are in place and as consistent as possible.</p>	<p>30</p>	<p>Human Resources                      Labor Relations</p>

## Finance

Like any organization, the new fire district will need a wide range of budget and accounting services. Establishing highly efficient systems will be a very important consideration during the transition.

Initially, a transition budget must be developed and adopted along with the necessary appropriation of funds. The transition will incur a variety of costs, including the appointment of new fire department employees in advance of the actual date of transition.

A budget for the new fire district must be developed and adopted. Accounting systems must be established to manage district funds. Use of the new district financial system will be the base of accounting efficiency, and will require programming the system to support that activity.

Purchase agreements and open purchase orders need to be established. An asset tracking system will need to be developed to ensure assets are accurately recorded. A five-year capital improvement plan will need to be developed and adopted.

Accounting and purchasing procedures will need to be developed and personnel trained in their use. Decisions will need to be made regarding the level of financial analysis capability that will exist within the new organization and qualified personnel retained to perform those functions.

This is an area where the use of interdisciplinary teams will be very important. Agreements reached by one area of the organization will impact the workload of the Finance function. Developing highly efficient systems must be a critical consideration.

Finance Tasks	Estimated Hours	Responsibility
<p>1. Identify and appropriate funding for [AGENCY] transition costs.  <b>Outcome:</b> Sufficient funds are available to complete transition activities.</p>	80	[AGENCY] Fire Services Coordinator Assistant City Manager Finance Manager
<p>2. Establish and implement a process to ensure active coordination between Finance, Human Resources, and Technology Services as records systems, processes, and labor agreements are being developed and implemented to ensure [AGENCY] internal systems can support changes.  <b>Outcome:</b> All related financial systems support the [AGENCY] operations.</p>	80	[AGENCY] Fire Services Coordinator Finance Manager Technology Services Human Resources
<p>3. Identify the type and level of financial administration capability that should exist within the [AGENCY] administrative staff. Determine if that capability is best provided by contracted services or full-time staff. If full-time staff, ensure that position(s) is included in the [AGENCY] staffing plan:</p> <ul style="list-style-type: none"> <li>a. Budget development and reporting</li> <li>b. Annual audit preparation</li> <li>c. Other accounting activities</li> <li>d. Coordination with [AGENCY] Finance Department</li> </ul> <p><b>Outcome:</b> Fiscal administration capability has been defined and the source of that capability identified.</p>	16	[AGENCY] Fire Services Coordinator Finance Manager Technology Services Human Resources
<p>4. Conduct analysis to determine the value of all fire/EMS/ancillary services provided by [AGENCY] to the [LOCATION]. Consider an annual contract for services to be presented to the [LOCATION] for services rendered.  <b>Outcome:</b> Understand the dollar value of fire/EMS services to UC [AGENCY] Campus has been quantified and secure an appropriate contract.</p>	40	[AGENCY] Fire Services Coordinator Finance Manager
<p>5. Coordinate labor agreements regarding employee compensation with Finance to ensure financial systems and payroll can accommodate accounting requirements.  <b>Outcome:</b> Financial systems can efficiently support employee compensation processing.</p>	30	[AGENCY] Fire Services Coordinator Finance Manager Technology Services Human Resources

Finance Tasks	Estimated Hours	Responsibility
<p>6. Determine if the current internal finance department staffing levels can manage the anticipated new workload associated with [AGENCY]. Identify and quantify staff and other resources that will be needed.  <b>Outcome:</b> Finance Department's workload is quantified, and the resources required to support the new workload have been identified.</p>	40	[AGENCY] Fire Services Coordinator Finance Manager Human Resources
<p>7. Establish cost centers within the financial accounting system so that costs can be appropriately attributed to functional activities.  <b>Outcome:</b> Cost centers are established that provide detailed functional area cost accounting information.</p>	20	[AGENCY] Fire Services Coordinator Finance Manager Technology Services Human Resources
<p>8. Develop a five-year capital improvement plan for the [AGENCY].  <b>Outcome:</b> The five-year capital improvement plan has been developed and adopted.</p>	40	[AGENCY] Fire Services Coordinator Finance Manager Human Resources
<p>9. Negotiate and enter into a heavy equipment vendor contract.  <b>Outcome:</b> Heavy equipment is available to support [AGENCY] response by the date of transition.</p>	30	[AGENCY] Fire Services Coordinator Finance Manager
<p>10. Confirm that [AGENCY] assets are accurately recorded in an asset management system. Update the system as needed for missing assets.  <b>Outcome:</b> A complete and accurate list of [AGENCY] assets is available.</p>	40	[AGENCY] Fire Services Coordinator Finance Manager
<p>11. Identify and establish open purchase orders needed to support [AGENCY] operations.  <b>Outcome:</b> Open purchase orders are in place to support [AGENCY] activities.</p>	45	[AGENCY] Fire Services Coordinator Finance Manager
<p>12. Identify the number of purchasing cards that will be needed for [AGENCY] operations. Establish a policy and procedure for the use of purchasing cards.  <b>Outcome:</b> Purchasing cards are provided to appropriate [AGENCY] employees, procedures are in place for their use, and training on the procedures has been provided.</p>	20	[AGENCY] Fire Services Coordinator Finance Manager
<p>13. Develop and adopt [AGENCY] one-year and five-year budgets for FY TBA at the time of transition.  <b>Outcome:</b> [AGENCY] has adopted budgets by the date of transition.</p>	80	[AGENCY] Fire Services Coordinator Assistant City Manager Finance Manager

## **Risk Management**

Risk management services include health and safety services as well as insurance programs. A variety of activities must be completed prior to the date of transition.

All fire stations will need to be evaluated for safety and compliance concerns and corrections made prior to transition.

Insurance policies will need to be updated to reflect the return of direct service delivery. Workers' compensation coverage will need to be obtained and coordinated with employee health insurance programs.

Databases and other records systems will need to be established and updated to properly track claims activity. Employee wellness/fitness programs will need to be established.

Decisions will need to be made regarding the provider of risk management services and any third-party administration. Predicted new workload and the current capability of existing resources will be key considerations in this process.

Risk Management Tasks	Estimated Hours	Responsibility
<p>1. Work with Technology Services to develop a property and liability claims database for [AGENCY].  <b>Outcome:</b> A property and liability claims database is in place.</p>	30	<p>[AGENCY] Fire Services                      Coordinator                      Human Resources                      Technology Services                      Risk Management</p>
<p>2. Identify sources and costs for contracted EAP and wellness/fitness programs for [AGENCY] employees. Establish vendor relationships as appropriate.  <b>Outcome:</b> Wellness/fitness programs are available to [AGENCY] employees.</p>	35	<p>[AGENCY] Fire Services                      Coordinator                      Human Resources                      Risk Management</p>
<p>3. Conduct inspections of facilities to identify any potential risk issues, such as code compliance, OSHA, etc., that may be present (in conjunction with Facilities).  <b>Outcome:</b> All risk issues have been identified and resolved by the date of transition.</p>	50	<p>[AGENCY] Fire Services                      Coordinator                      Risk Management                      Facilities Manager</p>
<p>4. Coordinate health benefits coverage with workers' compensation coverage provided to [AGENCY] employees.  <b>Outcome:</b> Health insurance and workers' compensation benefits coverage have been coordinated.</p>	26	<p>Risk Management                      Human Resources</p>
<p>5. Provide [AGENCY] employee count and payroll information to Risk Management for insurance application updates.  <b>Outcome:</b> Information is provided that allows insurance applications to be updated.</p>	16	<p>[AGENCY] Fire Services                      Coordinator                      Human Resources                      Management Services</p>
<p>6. Develop workers' compensation coverage to support [AGENCY] staff members. Identify any alternative coverage for [AGENCY] as appropriate.  <b>Outcome:</b> An administrator has been identified with the capacity to support [AGENCY] workers' compensation processes.</p>	20	<p>[AGENCY] Fire Services                      Coordinator                      Human Resources                      Risk Management</p>
<p>7. Explore methods to legally obtain and review copies of workers' compensation claim files for any [AGENCY] employees appointed to the [AGENCY].  <b>Outcome:</b> Information about active workers' compensation claims has been obtained.</p>	20	<p>[AGENCY] Fire Services                      Coordinator                      Human Resources                      Risk Management                      Legal</p>

Risk Management Tasks	Estimated Hours	Responsibility
<p>8. Set up [AGENCY] employees in a workers' compensation database.  <b>Outcome:</b> All [AGENCY] employees are entered into the workers' compensation database.</p>	20	Human Resources Risk Management
<p>9. Determine if current staffing levels can manage the anticipated new workload associated with [AGENCY]. Identify staff and other resources that will be needed.  <b>Outcome:</b> Risk Management workload is quantified and resources required to support that workload have been identified.</p>	30	[AGENCY] Fire Services Coordinator Human Resources Risk Management
<p>10. Work with insurance broker/carriers to update all applicable insurance applications:                      a. Workers' compensation, adding new full-time workers                      b. Property and equipment                      c. Motor vehicles                      d. General liability  <b>Outcome:</b> Insurance is in effect, providing coverage when needed.</p>	60	Human Resources Risk Management

## Legal

Legal services will be required throughout the process of transition. The new fire district will need to review, renegotiate, and execute a long list of agreements with other agencies and entities. These include cooperative service agreements (hazardous materials response), mutual and automatic aid agreements, purchase of services agreements (heavy equipment, dispatch), and more. A legal review of these documents will be required.

As transition discussions progress, legal services will be needed to interpret these various agreements and contained provisions to ensure a smooth, legal transition.

There will likely be disagreements between various parties about how the transition should occur and details regarding assets, employees, and the like. It will be very valuable to have an effective dispute resolution process in place so these disagreements can be resolved quickly.

Legal Tasks	Estimated Hours	Responsibility
<p>1. Identify and implement a dispute resolution process to address disagreements regarding transition issues, costs, and activities.  <b>Outcome:</b> A dispute resolution process has been implemented and disagreements are resolved through this process.</p>	40	[AGENCY] Fire Services Coordinator Human Resources Legal Counsel [AGENCY] Transition Rep
<p>2. Finalize and execute the transfer of all fleet and facility resources from [AGENCY] to [AGENCY].  <b>Outcome:</b> All fleet resources, facilities, and land are the sole ownership of [AGENCY].</p>	30	[AGENCY] Fire Services Coordinator Legal Counsel [AGENCY] Transition Rep Facilities Manager Fleet Manager
<p>3. Develop and adopt an agreement to allow [AGENCY] to enforce all Federal, State, County, and City Fire Codes.  <b>Outcome:</b> [AGENCY] has the authority to enforce the Fire Code.</p>	24	[AGENCY] Fire Services Coordinator
<p>4. Identify and modify all applicable contracts and agreements as required to reflect the transition to [AGENCY] operational service delivery:</p> <ul style="list-style-type: none"> <li>a. Dispatch</li> <li>b. Radio Frequency Use—[COMM CENTER]</li> <li>c. Medical Director</li> <li>d. Regional Training Centers</li> </ul> <p><b>Outcome:</b> All contracts and agreements have been modified and re-executed by the date of transition.</p>	60	[AGENCY] Fire Services Coordinator
<p>5. Negotiate and execute automatic and mutual aid agreements:</p> <ul style="list-style-type: none"> <li>a. [AGENCY]</li> <li>b. [LIST MUTUAL AID PARTNERS]</li> <li>c. Coordinated Communications System</li> </ul> <p><b>Outcome:</b> All automatic and mutual aid agreements have been modified and re-executed by the date of transition.</p>	40	[AGENCY] Fire Services Coordinator Legal Counsel [AGENCY] Transition Rep
<p>6. Monitor transition activities for legal concerns. Review all agreements between [AGENCY] and various agencies and entities.  <b>Outcome:</b> Potential legal risk has been identified and resolved.</p>	60	[AGENCY] Fire Services Coordinator Legal Counsel

## Technology

The use of technology is essential to the delivery of services and provides an opportunity to maximize the effectiveness of those services. The new fire district will need to ensure that various technologies are available for its use before the transition. These include telecommunications equipment, computer software and hardware, radios, and computer networks.

A comprehensive inventory of existing systems must be completed. This will provide a baseline for needed acquisitions and for the transition of systems from existing agencies to the new fire district.

A thorough technology needs assessment must be prepared to ensure that technology acquisitions support the new fire districts mission. Service improvement opportunities through technology should be identified at this stage so that acquisitions provide maximum value to the organization.

Appropriate technology must be available to new fire district prior to and especially on the date of transition. System "cut-over" agreements must be reached with the existing agencies to ensure uninterrupted service.

Technology Tasks	Estimated Hours	Responsibility
<p>1. Conduct a walk-through of each station to review existing network, computer, and telecom equipment and systems.  <b>Outcome:</b> A full and accurate inventory of existing IT systems has been developed.</p>	28	[AGENCY] Fire Services Coordinator [AGENCY] Transition Rep Facilities Manager Fleet Manager Technology Services
<p>2. Work with [AGENCY] Technology Department personnel to identify computer hardware, software, and other system components that need to be installed in [AGENCY] facilities and apparatus.  <b>Outcome:</b> A full and accurate inventory of existing system components has been developed.</p>	80	[AGENCY] Fire Services Coordinator [AGENCY] Transition Rep Technology Services
<p>3. Confirm the type and make of the telephone system used in the fire stations, what phone equipment is in place, and who owns the equipment.  <b>Outcome:</b> A full and accurate inventory of telecommunications equipment and its ownership has been developed.</p>	30	[AGENCY] Fire Services Coordinator [AGENCY] Transition Rep Technology Services
<p>4. Evaluate existing network connectivity and performance. Identify the ideal pathway and configuration options to transition to [AGENCY] network systems.  <b>Outcome:</b> The best solution for network configuration that provides high performance has been identified.</p>	40	[AGENCY] Fire Services Coordinator [AGENCY] Transition Rep Technology Services
<p>5. Complete a technology assessment and plan to determine and quantify hardware and software requirements to fully support [AGENCY] operations:</p> <ul style="list-style-type: none"> <li>a. Office use systems</li> <li>b. Communications equipment (cell, radios, tablets, electronic patient care reporting systems—EPCR)</li> <li>c. Mobile systems (MCT, mobile laptops for operations, etc.)</li> </ul> <p><b>Outcome:</b> Technology needs have been thoroughly assessed and a plan for implementation developed.</p>	80	[AGENCY] Fire Services Coordinator Facilities Manager Fleet Manager Technology Services

Technology Tasks	Estimated Hours	Responsibility
<p>6. Determine if current staffing levels can manage the anticipated new workload associated with [AGENCY]. Identify and quantify staff and other resources that will be needed.  <b>Outcome:</b> Technology Services workload is quantified and resources required to support that workload have been identified.</p>	20	[AGENCY] Fire Services Coordinator Technology Services
<p>7. Acquire and implement a staff scheduling software system.  <b>Outcome:</b> A staff scheduling software system has been acquired and installed prior to the date of transition that communicates with the accounting and payroll system.</p>	20	[AGENCY] Fire Services Coordinator Technology Services Human Resources
<p>8. Based on the inventories and needs assessment, purchase and install new technology equipment, network connectivity, telephone systems, etc., as needed.  <b>Outcome:</b> Technology systems and equipment have been acquired and installed as of the date of transition.</p>	40	[AGENCY] Fire Services Coordinator Technology Services
<p>9. Evaluate available fire records management systems (RMS). Acquire, implement, and install suitable software. Develop policies and procedures for system use.  <b>Outcome:</b> A fire records management system has been acquired and installed prior to the date of transition.</p>	100	[AGENCY] Fire Services Coordinator Technology Services
<p>10. Meet with geographic information systems (GIS) staff to determine the capacity of GIS use in [AGENCY] for administrative and field use. Determine levels of GIS use in [AGENCY], acquire and implement needed hardware and software equipment.  <b>Outcome:</b> Geographic information systems software has been explored, acquired, and installed prior to the date of transition.</p>	60	[AGENCY] Fire Services Coordinator Technology Services
<p>11. Develop curriculum and deliver training to [AGENCY] employees on the use of computer systems, telephone systems, and other technology.  <b>Outcome:</b> All [AGENCY] employees have received training on the technology systems they will use during the course of their employment.</p>	120	[AGENCY] Fire Services Coordinator Technology Services

## External Relationships

No single agency can provide effective delivery of service without the cooperation of other regional service providers. New Fire District will need to develop new relationships and identify new opportunities for regional cooperation.

Partnerships for the delivery of specialized services will need to be identified and agreements set in place. This includes fire/EMS service delivery, hazardous materials response, technical rescue services, and fire prevention programs.

Developing cooperative programs with neighboring agencies and mutual and automatic aid partners, will provide new fire district residents significant benefit by sharing resources. In turn, the new fire district could also offer services outside to neighboring agencies in a reciprocal manner. Training, quality improvement, and EMS supply partnerships should be evaluated and entered, as appropriate.

Establishing effective regional partnerships now will enhance the overall quality of service provided to the community.

External Relationship Tasks	Estimated Hours	Responsibility
<p>1. Develop or revise and execute an agreement for a regional hazardous materials response team.  <b>Outcome:</b> The agreement for the three-party regional hazardous materials response team is in effect as of the date of transition.</p>	24	[AGENCY] Fire Services Coordinator Finance Manager [AGENCY] Transition Rep Legal Counsel
<p>2. Identify alternatives for technical rescue services. Negotiate and implement agreements as appropriate for services delivered by other regional departments or through cooperative ventures until [AGENCY] staff can be fully trained and operational:</p> <ul style="list-style-type: none"> <li>a. Confined space rescue</li> <li>b. High angle rescue</li> <li>c. Water rescue</li> </ul> <p><b>Outcome:</b> The source of technical rescue services has been identified, and agreements are in place as of the date of transition.</p>	10	[AGENCY] Fire Services Coordinator [AGENCY] Transition Rep Legal Counsel
<p>3. Identify regional efforts in which [AGENCY] should be a participant, such as regional arson investigation programs, and regional juvenile fire-setter education programs. Determine [AGENCY]'s appropriate participation level and the resources needed.  <b>Outcome:</b> The regional initiatives [AGENCY] will participate in have been identified, and resources are assigned.</p>	20	[AGENCY] Fire Services Coordinator
<p>4. Create an agreement and set up procedures to accomplish EMS supply exchange between an appropriate local hospital (EXAMPLE), or vendors, and the [AGENCY] Fire Department. Explore the ability to re-supply at the EMT-intermediate level 24X7.  <b>Outcome:</b> EMS re-supply agreements and procedures are in place at the agreed-upon EMT level by the date of transition.</p>	36	[AGENCY] Fire Services Coordinator EMS Director Legal Counsel
<p>5. Develop automatic and mutual aid agreements between [AGENCY], [MA AGENCY], [MA AGENCY], [MA AGENCY], and other regional departments for improved service delivery to [AGENCY]. Negotiate and execute agreements as appropriate.  <b>Outcome:</b> Signed agreements are in place prior to transition.</p>	30	[AGENCY] Fire Services Coordinator [AGENCY] Legal

External Relationship Tasks	Estimated Hours	Responsibility
<p>6. Evaluate opportunities for sharing services between [AGENCY], [AGENCY], [MA AGENCY], [MA AGENCY], and other regional departments for services such as fire prevention services and Battalion Chief coverage.  <b>Outcome:</b> Service-sharing opportunities are identified and evaluated.</p>	64	[AGENCY] Fire Services Coordinator
<p>7. Establish a task force including [AGENCY] and staff from [AGENCY] (to assist) to develop response protocols and point of dispatch procedures for emergency medical response. Determine EMS incidents by priority level that are appropriate for [AGENCY] response. Continue to focus on the use of tiered dispatch procedures.  <b>Outcome:</b> Point of dispatch and response protocols have been developed that provide the most effective level of service to the community.</p>	90	[AGENCY] Fire Services Coordinator EMS Director
<p>8. Identify EMS training that can be provided to [AGENCY] by regional departments along with the costs and logistics associated with that training. Integrate appropriate training opportunities into the [AGENCY] training plan.  <b>Outcome:</b> EMS training to be provided by has been identified and agreements are in place to implement the training.</p>	20	[AGENCY] Fire Services Coordinator EMS Director
<p>9. Develop an internal CQI program to measure [AGENCY] EMS effectiveness and quality.  <b>Outcome:</b> The way the [AGENCY] will conduct CQI programs has been identified and implemented by the date of transition.</p>	20	[AGENCY] Fire Services Coordinator EMS Director

## Implementation

This transition plan describes the work to be accomplished to effect the transition of service delivery from the existing agencies to new fire district. There is a great deal to be done in a relatively short time frame. Key considerations to ensure success include:

1. Establishing clear lines of authority and accountability.
2. Ensuring constant and comprehensive communication between the various agencies staff, the new fire district staff, and other internal and external interests.
3. Detailing each task into an action plan to fully define the work effort involved.
4. Keeping the public and employees fully informed of activities and progress.

### ***Authority and Accountability***

There needs to be one person to whom responsibility clearly rests for the accomplishment of this Plan. This person needs to have the organizational placement required to ensure his or her authority regarding this transition plan is respected.

All who have the responsibility to accomplish tasks outlined in this Plan need to be held accountable. Reporting systems must be in place to identify the level of progress on the Plan at key milestones.

### ***Communication***

Many tasks outlined in this Plan involve more than one agency or interest. Developing systems to ensure constant and productive communication between the various stakeholders will be important to success.

Multi-disciplinary teams should be established to ensure the work of one department or interest does not adversely affect the work of another. These teams should also ensure that work is not duplicated.

Regular progress meetings should be conducted so that all stakeholders understand the progress and challenges of others. Further, these meetings will help coordinate efforts to avoid duplication or progress along different paths.

Documenting progress in written form will also provide value. Written progress reports provide a ready reference to all stakeholders as to the status of the transition effort, challenges being encountered, and a listing of tasks completed.

**Action Plans**

This Transition Plan provides a comprehensive and detailed list of tasks to be accomplished. Detailing each task into a written action plan will help to define potential roadblocks, describe special resources that may be required, identify unexpected inter-relationships, and define critical milestones.

The following page provides an example action plan form that could be used for this effort. These plans should be shared with other stakeholders, particularly those who are involved in task accomplishment.

**Public Information**

Providing frequent information to the public will be important to the transition's success. The public will be understandably concerned about the future of their fire and emergency services because of the termination of the services currently provided by the existing agencies.

Information should be provided on a regular basis identifying progress on the Transition Plan. Details about how service will be delivered by the newly constituted fire district should be included. As early as possible, contact information for new fire district] should be provided so members of the public with concerns or special needs post-transition can begin to share those directly with the new fire district staff.

Transition Action Plan				
<b>Task:</b>				
<b>Start Date:</b>			<b>End Date:</b>	
<b>Task Lead:</b>			<b>Assisting:</b>	
Action Steps	Start Date	End Date	Person Assigned	Resources Required
<b>Desired Outcome:</b>				
<b>Special Considerations:</b>				
<b>Results:</b>				