



CONTINUITY OF SERVICE PLAN

Estacada Rural Fire District #69

MISSION

“To serve our community by providing quality fire and life safety services”

Richard Beaudoin

Interim Fire Chief



Contents

FOREWORD	3
EXECUTIVE SUMMARY	4
HISTORY OF ESTACADA RURAL FIRE DISTRICT #69	5
GOVERNANCE	7
Policies and Procedures	7
Record Keeping	8
Financial Review.....	10
Employees.....	12
Assets	13
Real Property	13
Apparatus and Vehicles	13
Radios.....	13
Self-Contained Breathing Apparatus	14
Emergency Medical Services Equipment.....	14
Thermal Imaging Cameras	14
Hydraulic Rescue Equipment	14
Department Programs	15
Suppression.....	15
Emergency Medical Services.....	15
Training	16
Fire Prevention.....	16
Hazardous Materials	16
Technical Rescue.....	16
Emergency Communications	17
Fleet Maintenance	17
Facilities Maintenance	17
CONCLUSIONS.....	18
ACTION ITEMS.....	20
Action Item #1 – Sever contract for services with Clackamas Fire District #1.....	20
Action Item #2 – Staff key fire department positions.....	20
Action Item #3 – Establish Necessary Contracts/Agreements/Programs.....	21



Action Item #4 – Create/Update Employee/Employment Policies.....	22
Action Item #5 – Staff Additional Management and Support Positions.....	22
Action Item #6 – Recruit/Select for New Line Positions	22
Action Item #7 – Evaluate/Inventory District Assets	23
Action Item #8 – Evaluate/Establish/Re-Establish Contracts for Service/Intergovernmental Agreements.....	23
Action Item #9 – Evaluate/Establish/Re-Establish Vendor Contracts.....	23
Action Item #10 – Evaluate/Establish/Re-Establish Department Programs/Processes	24
Action Item #11 – Supplemental Staffing	24
Action Item #12 - Finalize FY21/22 Budget.....	24
Action Item #13 - New Employee Training/Orientation	24
Transition Budget (Personal Services)	24
ATTACHMENTS.....	26
Attachment #1 – ESCI Cooperative Services Study.....	26
Attachment #2 – CFD1 Contract for Services.....	26
Attachment #3 – Collective Bargaining Agreement between ERFD69 & Local 1159	26
Attachment #4 – FY20 Adopted Budget	26
Attachment #5 – ISO Report	26
Attachment #6 – ERFD69 Strategic Plan.....	26
Attachment #7 – Matrix Report (Draft)	26
Attachment #8 – Comprehensive Annual Financial Report FY18.....	26
Attachment #9 – Real Property Information	26
Attachment #10 – Intergovernmental Agreement with CFD1.....	26
Attachment #11 – Seismic Retrofit Grant Contract George Fire Station.....	26
Attachment #12 – ERFD69 Business Practices Document – DRAFT 2015	26



FOREWORD

This plan is a general guideline document to assist the Board of Directors of the Estacada Rural Fire District #69 (ERFD69) to re-establish service within the District if a vote to legally integrate ERFD69 and Clackamas Fire District #1 (CFD1) is not passed. It is not intended to be an in-depth analysis of the organization or technical evaluation of policies, procedures, and/or practices of the organization. The report provides a basic snapshot of the organization as of December 31, 2019.

The intent is to provide the same level of service to the community as is being provided through the contract for services, which is a 3-person, advanced life support, engine company. There are many variations on how to best achieve this model that should be evaluated moving forward. However, due to the short time frame for re-establishing a stand-alone organization, utilizing the existing model and budget is a prudent initial step.

There are basic observations regarding the status of policy and procedures and the general organization ERFD69 that have a direct impact on the safe and effective management of the district. These items are of utmost importance and should be a high priority for the Board and the new fire chief moving forward.

The process of moving to a contract for services would not have been successful without the dedicated support of Rodonna Demeter, Administrative Manager and Melissa Liesegang, Administrative Assistant. The extraordinary amount of work required to support the career and volunteer staff of ERFD69 and the transition team from CFD1 deserves recognition.



EXECUTIVE SUMMARY

The Estacada Rural Fire District #69 (ERFD69) and Clackamas Fire District #1 (CFD1) engaged the services of Emergency Services Consulting International (ESCI) to perform a cooperative services feasibility study. The study was completed and presented to both agencies in June 2019 ([Attachment 1](#)). Contained within the document was comprehensive analysis of both agencies, review of various service models, and a recommendation for legal integration of both districts.

As a first step towards potential integration, both districts have entered into a contract for services ([Attachment 2](#)). The contract becomes effective January 1, 2020. The general scope of the contract is that CFD1 will provide emergency response, fire prevention, emergency incident command and control, administrative management, and logistical support for ERFD69. The contract is an 18-month agreement with a projected end date of June 30, 2021. The total cost of the 18-month agreement is \$4,324,197; \$1,458,256 for the period of January 1, 2020 through June 30, 2020, and \$2,865,941.

One component of the contract is to present to the electorate of both districts the question of whether a legal integration of services is desired. The question to the electorate of ERFD69 is whether to merge with Clackamas Fire District #1. The question to the electorate of CFD1 is whether to approve the merger of ERFD69 into CFD1. The vote is tentatively scheduled for the November 2020 election.

If there is a dissenting vote from the electorate of the ERFD69, there are two options. Option #1 is to reconvene both district boards, rebrand the legal integration model, and return to the electorate of both districts at a future election (presumably May 2021). Option #2 is for ERFD69 to notify CFD1 of their intention to end the contract and begin the transition to providing fire and emergency services as a stand-alone fire department.

This document provides a general overview of ERFD69. It contains a review of adopted budget prior to the contract for services as well as future budget projections/assumption. Included is an outline of initial actions to be taken by the ERFD69 Board of Directors and subsequent actions by future staff to prepare the district for the end of the contract for services with Clackamas Fire District #1 and maintain a continuity of service to the residents of ERFD69.



HISTORY OF ESTACADA RURAL FIRE DISTRICT #69

The first known fire protection for the area now known as the ERFD69 began in 1901. The railroad constructed the first fire station where firefighting apparatus and equipment was stored. Built originally as a site for workers building a dam on the Clackamas River, the City of Estacada was incorporated in 1905. The Oregon Water Power Townsite Company installed a reservoir and the first two fire hydrants in the City.

Through the early 1900's, two fire departments evolved to serve the citizens of the community; the City of Estacada Fire Department and the Currinsville-Cazadero Rural Fire Protection District #69. These two agencies served the greater Estacada area until 1962.

By a majority vote of the electorate on March 10, 1962, the City of Estacada was annexed into the Currinsville-Cazadero Rural Fire Protection District #69 for the purposes of fire protection. This annexation created the need for a larger fire station to house all the equipment from both agencies. The current fire station was constructed with bond funds in 1964.

In 1965, the name of the department was changed to the ERFD69. 115 voters turned out for the election and the name change was approved by a 67 to 48 vote.

Today, the ERFD69 serves approximately 88 square miles with one career and one volunteer station (George Station). There are 15 budgeted (FY 19-20) career staff members (13 sworn and 2 civilian) and 20 active volunteers that support the district. There is a current collective bargaining agreement (CBA) with the International Association of Firefighters Local 1159 and ERFD69 ([Attachment 3](#)). The term of the CBA ends on June 30, 2020.

The district responds to nearly 1800 calls for service annually, which includes automatic and mutual aid responses with our neighboring agencies. Evaluating the 10-year trend in calls for service from 2009 through 2019, it is estimated that there will be 2120 calls for service annually by 2024.

The district has one fire engine/pumper, two fire engine/tenders, one water tender, two brush units, a rehab unit, and three utility vehicles. The department provides advanced life support paramedic services and ambulance transportation is provided by American Medical Response (AMR).

In addition to the two fire stations, ERFD69 owns several miscellaneous properties, including a modular training tower located adjacent to the main fire station.

The daily minimum staffing on the engine is two career personnel. The goal is to have a minimum of three career personnel every day.



The current adopted budget (Fiscal Year 19-20) for ERFD69 is \$4,941,547 ([Attachment 4](#)).

A 2016 review by the Insurance Services Office, Inc. (ISO) identified the Public Protection Classification (PPO) for ERFD69 as a 03/10 ([Attachment 5](#)).

The District has a Strategic Plan that was published in 2016 and facilitated by ESCI. The planning process established, among other key goals, the District's vision, mission, slogan and core values ([Attachment 6](#)).

Vision

"To become a premier agency and model within the fire service"

Mission

"To serve our community by providing quality fire and life safety services"

Slogan

"Desire to serve, courage to act"

Core Values – D.R.I.V.E.

Dedication – We serve our community and each other.

Responsibility – We hold ourselves accountable for our actions and inactions.

Integrity – We will remain ethical and honest at all times.

Vision – We plan for the futures and work towards common goals.

Excellence – We strive to be better ourselves.



GOVERNANCE

Estacada Rural Fire District #69 (ERD69) is a legally organized rural fire protection district as defined by Oregon Revised Statutes Chapter 478. The five-member board of directors are elected at large to four-year overlapping terms. The board president, vice-president, and secretary/treasurer are appointed by board of directors.

The current five-member board of directors includes:

Director Matthew Silva, President – Board Position 1 – Term ends June 30, 2021

Director John Bresko, Vice-President – Board Position 2 – Term ends June 30, 2023

Director Ken Oliver, Member – Board Position 3 – Term ends June 30, 2023

Director Ed Thoreson, Member – Board Position 4 – Term ends June 30, 2021

Director John McAdoo, Secretary-Treasurer – Board Position 5 – Term ends June 30, 2023

The Board of Directors meet on the third Thursday of every month to conduct the business of the District. Special meetings may be called as the Board deems necessary. All meetings (unless otherwise pre-announced) are held at ERFD69 fire administrative offices located at 445 SE Currin Street, Estacada, OR 97023. All meetings are open to the public in accordance with ORS Chapter 192.630.

Policies and Procedures

The foundation of defined policies and procedures within the organization is scattered. Policies and procedures that do exist can be found on the department computer system. The filing of those documents is not cohesive and makes them difficult to locate. Many current employees believe that policies do not exist because they are unable to locate them or have not reviewed training on them.

Emergency operating policies do exist in several forms. There are regional fire and rescue protocols adopted by agencies within Clackamas County under the oversight of the Clackamas County Fire Defense Board. Previous managers of ERFD69 had also generated emergency operating guidelines. In 2018, those guidelines were going through an update process, but that project was stalled. Fewer than 25% of the ERFD69 guidelines had been updated.

Many ERFD69 policies and procedures paralleled those of CFD1. This was intended to streamline operations on the emergency scene to maximize both firefighter safety and service



to the community. Though there are minor variations based on specific local needs of ERFD69, operating on a common platform with all mutual and automatic aid partners is a key component of an emergency service delivery system. Regardless of the outcome of a merger as a result of the contract for services, cooperation throughout the region on a standard policy platform will serve the residents of Clackamas County very well.

Certain key documents are missing that are legally mandated and provide protections to the district and its employees. Two notable documents are a Safety and Health Management Program and a Personnel/Employee Manual. Individual policies that should be contained in either a safety and health management program or personnel/employee manual do exist. These policies need updating and fall short of completing either manual. Access to these documents, as described earlier, is inconsistent. There are also limited records, if any, to support required training on these topics.

Development of reliable, relevant, and defensible policies and procedures is a daunting task. Fortunately, many organizations (both for-profit and non-profit) exist that have model programs and policies to help organizations like ERFD69. The Special District Association of Oregon (SDAO), International City/County Manager Association (ICMA), the International Association of Firefighters (IAFF), and the International Association of Fire Chiefs (IAFC) are just a few of the many resources at ERFD69's disposal to assist with this. There are also commercial vendors who develop full policy manuals, which include training modules, based on all relevant federal and state laws to assist. These subscription-based services also maintain and update their product as laws change.

Contracted providers of services (workers compensation, accidental death and disability insurance, health insurance, etc.) also have model programs designed to maximize employee health and welfare while minimizing costs to the employer.

It will be critically incumbent upon the Board select the right management team to lead ERFD69 if a legal integration is unsuccessful. Policies, procedures, and guidelines have no more value than the paper they are written on if there is not a culture that embraces them. The right leader for the organization will set that course.

Record Keeping

Record keeping and retention is inconsistent. The ability to locate, in a timely manner, critical documents of the organization (e.g. legal documents establishing the district, deeds to district property and assets, and past employee files) is difficult at best. Many documents are stored "in the attic" in filing boxes, unprotected from potential damage or destruction. Documents of such importance should be stored in such a manner to protect them from potential damage.



There is not a policy on records retention in accordance with ORS 192.001.

Fire and emergency medical incident reporting are accomplished using ImageTrend®, a commercially acquired emergency incident reporting and records management system. This system is also used for scheduling, activity tracking, and storing personnel information. Once the contract for services begins, all of the above-mentioned activities will be migrated to CFD1's various data management platforms.

During an audit by the Oregon Department of Public Safety Standards and Training (DPSST) on December 26, 2019, potentially severe record-keeping failures were discovered. The preliminary findings indicate that many personnel (primarily volunteer but could also include career staff) were issued certifications without properly documented training. It was further discovered that the keeping of those records did not conform to DPSST standards. These findings indicate that one person was primarily responsible for these actions (that individual separated from ERFD69 in October 2019). If these findings are sustained, it is possible that the certifications for any member of ERFD69 that had the signatures of the previous employee may be voided.

QuickBooks® is utilized for all tracking of income and expenditures. These activities are handled by the administrative manager and supported by the administrative assistant. A combination of hard copy checks and department issued credit cards are utilized to pay for supplies and services. Annual Comprehensive Financial Reviews are performed by the contracted firm Accuity LLC.

Payroll services are provided through a contract with PayrollNW®. District employees' complete internal timecards on a Microsoft Excel® file created and maintained by the administrative manager. The timecards are signed by the employees and the administrative manager submits the data to PayrollNW® for processing and payment. The contract with PayrollNW® includes payroll tax services.



Financial Review

Two separate reviews of ERFD69 finances have been conducted within the last two years. The most recent was conducted by Emergency Services Consulting International (ESCI). This review was a component of the Cooperative Services Feasibility Study between ERFD69 and Clackamas Fire District #1. The second financial review was performed by the Matrix Consulting Group and was completed in November 2018 ([Attachment 7](#)). The Matrix Report was specifically focused on the finances of the ERFD69, whereas the ESCI review was a component of a much larger evaluation of service delivery.

Both reports reviewed and analyzed historical financial data and provided future projections based on defined assumptions. Each report provides a slightly different perspective and the figures in each report differ slightly, which is to be expected from two different authors. Overall, the Matrix Report and ESCI report provide valuable information for the ERFD69 board of directors for decision making moving forward.

The Matrix and ESCI reports demonstrate clearly that recurring expenses are outpacing recurring revenue. Each report uses a slightly different set of assumptions but both reports demonstrate that differences between expenditures and revenue will become critical in the 2024 fiscal year.

The revenue/expenditure issue is not unique to ERFD69. Cities and special districts throughout the nation, and internationally, are facing the same challenges. The primary impacts to the budget for ERFD69 are personal services related. As with any operating budget, personal services are the largest expenditure. The direct impacts to the growing Personal Services budget at ERFD69 include increases to health care costs, Oregon Public Employee Retirement System (PERS) costs, and financial commitments in the current collective bargaining agreement.

It is important to remember that the projections are based on assumed growth of revenues, which ERFD69 has benefitted from in the last five years. History demonstrates that market adjustments do occur. The Great Recession of 2008 is now 10+ years old. Reviewing any number of opinions from the financial profession indicates that the United States economy is approaching some type of "market adjustment." Exactly when that will occur, and the depth of adjustment, is yet to be seen. Regardless of when, a reduction in recurring revenue to the district will accelerate the timeline of increasing expenses and decreasing revenues.

The unappropriated ending fund balance at the beginning of the 2020 Fiscal Year was approximately \$700,000. A reduction in this balance is anticipated as part of the contract with Clackamas Fire District #1. Upgrades to Fire Station 330 are the primary impactors to that balance. Bathroom upgrades, appropriate storage of turnouts, and miscellaneous repairs will impact the funds. Those expenditures are currently estimated at \$50,000.



The contract for services with CFD1 also stipulates that ERFD69 “shall pay for capital improvements as determined by DISTRICT (CFD1) standards.” CFD1 established standards for facilities does exceed ERFD69. The logical conclusion is that additional upgrades/enhancements may be required to meet contract compliance. The likely location of funding for unanticipated facility needs would be the unappropriated ending fund balance and/or the Facilities and Property Reserve Fund, which has a current estimated balance of approximately \$57,000.

Payout of existing employee leave balances and other contractual obligations are part of the contract for services will also impact the overall budget. Ongoing discussions with employee groups regarding contract interpretation and policy directives are continuing. However, assuming a scenario where the interpretation by the employee groups prevails, payouts will have a significant influence on the budget and availability of funds moving forward. The current projection for total value of payouts is approximately \$200,000.

ERFD69 is currently evaluating the option of selling the real property located at 480 SE Short Street. Proceeds from that sale will help to offset additional expenditures from the general fund during the contract transition with CFD1.

ERFD69 receives annual Comprehensive Annual Financial Reports (CAFR) from a contracted CPA firm. The most recent board adopted CAFR is FY18 ([Attachment 8](#)). The FY19 draft CAFR was presented to the Board of Directors and approved at the November 2019 meeting. The final, adopted document was not available by the time of this writing.



Employees

There are 10 ERFD69 career employees that will be transferring to CFD1 on January 1, 2020. Those employees are:

- Lieutenant Ron Schmitt – 10 Years of Service
- Lieutenant Brooke Gramer – 6 Years of Service
- Engineer Don Ireland – 10 Years of Service
- Engineer Chris James – 6 Years of Service
- Engineer Trent Westenfelt – 3 Years of Service
- Engineer Brian Neault – 3 Years of Service
- Engineer Jonathon McCord – 9 Months of Service
- Engineer Anthony Hadeed – 6 Months of Service
- Administrative Manager Rodonna Demeter – 5 Years of Service
- Administrative Assistant Melissa Liesegang – 3 Years of Service

Several ERFD69 volunteers are also making the move to CFD1. At the time of this writing, the exact number is unclear. Several are still in various phases of pre-transfer evaluation.

If a legal integration between the two districts is not approved, and ERFD69 chooses to provide services again as an independent organization, these employees and volunteers are entitled to return to the ERFD69 under ORS 236.640 if the employees choose.

The interim Fire Chief and Interim Deputy Fire Chief will end their employment with ERFD69 on December 31, 2019.

At the December 30, 2019 special meeting of the ERFD69 board, Interim Fire Chief Beaudoin was approved to remain with the district through January 2020 to oversee the final transition between ERFD69 and CFD1.

The Estacada Fire Volunteer Association is a 501 (c) (3). There is a planned dissolution of the Association. According to adopted bylaws, all remaining assets and settlement of expenses are to be conveyed to the Colton Volunteer Firefighters Association.



Assets

Throughout the course of the contract for services, ERFD69 will retain ownership of all District assets. They are required to be available for use by CFD1 during their execution of the contract. The district owns real property, fire apparatus, radios, computers (both mobile and desktop), personal protective equipment, firefighting equipment, emergency medical services equipment, uniforms, and all furnishings within the real property. ERFD69 and CFD1 personnel having been working diligently to inventory and catalog all assets and equipment prior to the beginning of the contract. Listed below are the real property assets and capital items that had a value of greater than \$5000 at the time of acquisition.

Real Property ([Attachment 9](#))

- Fire Station 330 – 261 SE Jeremy Loveless Avenue, Estacada, OR 97023
- Fire Station 333 – 40595 SE George Road, Estacada, OR 97023
- Lot immediately north of George Station – No Situs Address
- Administration Building – 445 SE Currin Street, Estacada, OR 97023
- Fire Training Facility – No Situs Address, NE Corner of SE Jeremy Loveless Avenue & SE Currin Street, Estacada, OR 97023
- 408 SE Currin Street, Estacada, OR 97023
- 424 SE Currin Street, Estacada, OR 97023
- 460 SE Currin Street, Estacada, OR 97023
- 480 SE Short Street, Estacada, OR 97023

Apparatus and Vehicles

- Engine 330 – 2015 Pierce 1500 GPM/800 Gallon Pumper
- Engine 331 – 2019 Pierce 1500 GPM/2000 Gallon Pumper/Tender
- Engine 333 – 1998 E-One 1000 GPM/1500 Gallon Pumper/Tender
- Brush 330 – 2005 Ford F550
- Brush 331 – 2008 Ford F250
- Tender 330 – 2003 E-One 500 GPM/3000 Gallon Water Tender
- Rehab 330 – 2008 Ford F450 Rehabilitation Unit
- C-330 – 2013 Ford Explorer
- BC-331 – 2009 Ford F350
- BC-332 – 2012 Ford F350
- 2011 Enclosed Trailer

Radios

- 16 – Motorola APX7500 Mobile Tri-Band Radios
- 35 – Motorola APX7000E Portable Tri-Band Radios



Self-Contained Breathing Apparatus

- 16 – MSA Self Contained Breathing Apparatus
- 22 – SCBA Masks (various sizes)
- 46 – SCBA Cylinders
- Miscellaneous SCBA equipment
- Bauer UNICUS III Breathing Air Compressor/Filling Station

Emergency Medical Services Equipment

- Two (2) Zoll® Series E Cardiac Monitor/Defibrillator
- Two (2) Zoll® Series X Cardiac Monitor/Defibrillator

Thermal Imaging Cameras

- Three (3) MSA Thermal Imaging Cameras

Hydraulic Rescue Equipment

- Two (2) Holmatro E-Hydraulic Cutters
- Two (2) Holmatro E-Hydraulic Spreaders
- Two (2) Holmatro E-Hydraulic Rams

ERFD69 currently possesses all necessary property, apparatus, and equipment to enable it to provide emergency responses services in the event a legal merger of ERFD69 and CFD1 is unsuccessful.

Personal protective clothing, uniforms, and equipment specific to employees will need to be acquired if the need arises to hire new emergency response personnel.



Department Programs

Suppression

Fire suppression response is provided from Fire Station 330 on Jeremy Loveless Avenue. Career personnel (minimum of 2 per day) are supplemented by suppression volunteers, support volunteers, and water tender operators. The personnel at the main fire station respond to every incident within the 88 square miles of ERFD69 boundary. Career personnel are also supported by volunteers that staff Engine 333 at the George Station.

ERFD69 participates in automatic and mutual aid agreements with all Clackamas County fire agencies as well as the statewide mutual aid system.

Command and control are provided through a combination of ERFD69 chief officers and an intergovernmental agreement (IGA) with CFD1 ([Attachment 10](#)). Night and weekend coverage is provided by CFD1. Daytime coverage is provided by ERFD69 chief officers, when staffed. If there is not chief officer staffing, CFD1 will also cover daytime command and control situations. The expenditure for chief officer coverage from May 31, 2019 through October 31, 2019 was approximately \$42,355, with an average of \$7,059 per month. This expenditure will end with the implementation of the contract for services with CFD1.

Emergency Medical Services

ERFD69 provides advanced life support first responder services. All eight of the suppression personnel moving to CFD1 are Oregon licensed paramedics.

Ambulance transportation services are provided by American Medical Response (AMR).

ERFD69 has a contract in place for medical direction. The annual cost of the contract is \$5000. That contract is ending with the implementation of the CFD1 contract for services.

CFD1 staffs an advanced life support engine (E318) Monday through Thursday for 10 hours per day in the Eagle Creek community. Fire Station 18 is located at 32200 SE Judd Road. Partial funding for staffing this engine comes from an IGA between CFD1 and ERFD69. The direct costs to ERFD69 is \$101,800. This amount also covers a large portion of the command and control described in the Suppression section of this document. ERFD69 provides response to the Eagle Creek community when E318 is not staffed.

During FY 2020, the remaining full time Division Chief separated from ERFD69. This left one part-time fire chief. This left a serious gap in the command and control aspect of the emergency response. Additional expenditures above the \$101,80 described above have occurred to maintain this vital response component.



Training

Training for ERFD69 is provided by CFD1 through an IGA. The cost of the IGA is \$42,000. The scope of the IGA includes online and hands-on individual and multi-company training. CFD1 provides a stand-by engine at Fire Station 330 while the ERFD69 engine is training out of district.

ERFD69 maintains a training site located at the northeast corner of Jeremy Loveless Avenue and SE Currin Street. The site contains a modular fire training simulator which was acquired with grant funds. This site is under utilized for the capabilities that it offers to ERFD69 personnel, both career and volunteer.

Fire Prevention

Fire Prevention services are contracted with CFD1 for a cost of \$95,790. The scope of the services is outlined in the IGA. This service becomes part of the overall contract for service effective January 1, 2020.

Absent legal integration, the Board will need to determine if a contract for fire prevention services should continue or another means of providing those services should be sought. Options for providing those services could include filing for exempt status with the Oregon State Fire Marshal's (OSFM) office and providing fire prevention services directly or deferring to the OSFM.

Hazardous Materials

All personnel are trained to the hazardous materials operations level. Initial response, isolation, and investigation within ERFD69 boundaries is handled by ERD69 personnel.

ERFD69 lies within Regional Hazardous Materials Response Area 3. The regional team for response to a hazardous materials incident is Team 3 which is staffed by the Gresham Fire Department and Multnomah County Sheriff's Office.

Technical Rescue

Though many of the ERFD69 personnel have varying levels of technical rescue training, there is not a formal technical rescue program within the organization. Initial response is by ERFD69 and if specialty resources are required, the assignment is upgraded and resources of CFD1 are dispatched to facilitate the rescue.



Emergency Communications

Emergency communication services are provided through Clackamas County Communications (CCOM). Cost of services from CCOM is approximately \$82,000 per year.

ERFD69 participates in the regional 800 MHz radio system, referred to as C-800. Annual fees for membership are approximately \$22,000.

Fleet Maintenance

Fleet maintenance is handled by a shift lieutenant.

The most recent preventative maintenance on all apparatus was performed by Hughes Fire Equipment in Portland, Oregon, in the Spring of 2019. Utility vehicles and both brush apparatus are serviced at Canby Ford.

The total adopted budget in FY 20 for apparatus maintenance and repairs (including fuels and lubricants) is \$89,000.

Facilities Maintenance

Facility maintenance is managed by a shift lieutenant. All maintenance is contracted out to a general contractor or specific contractor based on the maintenance need. Simply repairs/replacement (light bulbs, etc.) is handled by on duty personnel.

The main fire station was seismically upgraded in 2018 through a grant from the State of Oregon. The grant amount was \$702,794. The District has been awarded a second grant from the State of Oregon in the amount \$504,945 for the seismic upgrade to the George Fire Station ([Attachment 11](#)). This amount was adopted in the FY20 budget process. The George Fire Station grant is a reimbursement type of grant, meaning that the district will need to front the funds for upgrades and then submit for reimbursement.



CONCLUSIONS

Available working capital will be the primary challenge for ERFD69 while transitioning from the CFD1 contract for services to a stand-alone entity. The monthly payment to CFD1 for contracted services is \$243,042.66. There will be an overlap where ERFD69 has employees on staff for training and preparation for cut over while still paying the monthly fee to CFD1 for services. This will put a significant strain on the adopted budget and will likely force the Board to make decisions about utilizing reserve funds for the re-establishment of services.

During the transition, the newly appointed administration must be tasked with re-evaluating salary and benefits to bring them more in line with comparable agencies. This will play a significant factor in the long-term success of ERFD69 as recurring expenses begin to outpace recurring revenues. This will be a challenge if any current member of ERFD69 returns to employment with the district. They will be subject to the same wages and working conditions as when they left.

Evaluation and analysis of the previous IGA with CFD1 should also occur. The total cost of that IGA is approximately \$239,000 annually. This amount exceeds the fully burdened value of an ERFD69 division chief (at current pay scale) by approximately \$45,000. Having an IGA with neighboring agency for service is not without merit. The decision point for the Board is the level of service desired within the ERFD69 boundary and the value of the service provided.

No one agency can handle every incident without some type of assistance. Automatic and mutual aid agreements are critical to the health and safety of not just the residents of ERFD69, but the greater Clackamas County area and beyond. These agreements must be balanced with the concern by some policy makers that “there is too much auto- and mutual aid” or “it is a gift of public funds.” Existing mutual and auto-aid agreements should be evaluated to ensure that each signatory is reciprocating appropriately and meeting the intent of language of the agreement(s).

ERFD69 has in place a cost recovery policy for hazardous materials incidents. A much broader fee and cost recovery policy should be adopted to further recoup costs for service. Some examples for fee adoption include responses to highway incidents, costs for certain suppression activities, standby fees, public records requests, and false alarm/unauthorized fire responses.

It is important to point out the strained relationships within the ERFD69 at the time of transition. There is an inherent lack of trust between the volunteer association membership and career staff. Failed leadership at the senior management levels of the organization for the last several years has degraded the foundation upon which the organization exists.

Actions by previous employees and public conduct by elected members of the organization have eroded the trust of the staff and community members. The perception of conflict of



interest at the Board of Directors level does exist and that the board's well-intentioned actions may, at times, harm the district. Previous management decisions were conducted in a silo and not shared with key members of the organization which further degraded relationships. It is believed by many that the best course of action is a legal integration with CFD1 because ERFD69 is unable to provide service to the community that is above reproach and worthy of the tax dollars it receives.

Overcoming these perceptions will not be easy, but it is not impossible. The best course of action in the process of re-establishing ERFD69 as the sole provider of service to the district may be a rebranding. A name change and new look that communicates to the community that we are serious about serving and are willing to change who we are for the betterment of our citizens.

Along with the rebranding must come a philosophy and a firm belief in being the professional fire organization that everyone deserves. 21st century business practices and modern policies and procedures are a must. A professional staff that is empowered by the Board to lead the organization. The leadership must include accountability at every level of the organization.

Estacada Rural Fire District #69 has a long history of serving this region of Clackamas County. Though there have been struggles along the way, the ability to regain the trust of the community is still there. A telling sign will be the vote for integration in November of 2020. If the voters of ERFD69 reject the merger, that should be a clear message to the district that the electorate is giving us one more chance. Let's take that chance and show them they made the right decision!



ACTION ITEMS

The following list of action items are a general guideline to re-establish stand-alone fire protection services for ERFD69. They are based on the current service model with the one exception of adding a Fire Captain position and eliminating one (1) Fire Lieutenant position. They also assume established pay rates and practices as of December 31, 2019 and an average burden rate of 50% for personal services.

At all times throughout the process, an open communication between the CFD1 liaison and ERFD69 must occur. This, in addition to, the multi-agency committee established within the contract for services with EFD1.

The timeline is tight. The availability of working capital is questionable. A consideration of the ERFD69 Board of Directors may be to seek a six-month extension of the contract for services with CFD1 through December 31, 2021. This will provide a longer timeframe to evaluate delivery models for ERFD69 and extend through November when tax revenues are received from Clackamas County. This will lessen the impact on the budget and provide some additional working capital for the transition and unforeseen expenditures.

Action Item #1 – Sever contract for services with Clackamas Fire District #1

Completion Date – June 30, 2020

- Separation to be effective July 1, 2021 (unless otherwise approved by the ERFD69 Board)
- Requires majority vote of the Board of Directors for approval.
- Letter to be transmitted to CFD1 Fire Chief by ERFD69 Board President following approval
- Section 12 of the Contract for Services requires a 12-month written notice to CFD1 for the intent to terminate the contract. ERFD69 Board action and direction would need to be provided by June 30, 2020 if the board intends to end the contract if the vote outlined in Section 10B (1) of the contract does not support a legal integration.

Action Item #2 – Staff key fire department positions

Completion Date - December 31, 2020

- Recruit/Select Fire Chief
- Recruit/Select Administrative Manager**



Note: Due to the absence (or inadequate levels of coverage due to the downsizing of ERFD69 during the contract period) of legally required benefits (e.g. worker's compensation insurance, liability insurance, etc.) and the lack of voluntary employment benefits (e.g. health insurance, etc.), these two positions may need to be independent contractors for a short duration until the above identified benefits are contracted by ERFD69.

Option #1 – Recruit and retain both positions as independent contractors until a transition to permanent employee status can be completed.

Option #2 – Contract with a neighboring jurisdiction (e.g. Colton Fire Protection District, CFD1) to provide these two essential staff positions until ERFD69 can support employees.

** The Administrative Manager position is subject to re-employment right under Section 6H of the contract for Services with CFD1.

Action Item #3 – Establish Necessary Contracts/Agreements/Programs

Completion Date - January 30, 2021

- Worker's Compensation Insurance
- General Liability Insurance
- Vehicle/Capital Assets Insurance
- Health Insurance
- Life Insurance
- Short and Long-term Disability
- Employee Assistance Program
- Oregon Public Employee Retirement System
- Information Technology Services/Support
- Telephone Services (landline and cellular)
- Photocopy Service
- Civil Service Commission
- Legal Consultant
- Budgeting/Accounting Software
- Records Management Software
- Purchasing Process
- Payroll Services



Action Item #4 – Create/Update Employee/Employment Policies

Completion Date - January 30, 2021

- Engage Labor Group
- Personnel Rules and Regulations
- Organizational Chart
- Job Related Job Descriptions
- Salary/Compensation Schedule
- Benefit Package
- Safety and Health Management Program
- Begin 2022 Budget Process
- Define FLSA Cycle
- Establish Work Schedule

Action Item #5 – Staff Additional Management and Support Positions

Completion Date - January 30, 2021

- Recruit/Select Deputy Fire Chief
- Recruit/Select Administrative Assistant **

** The Administrative Assistant position is subject to re-employment right under Section 6H of the contract for services with CFD1

Action Item #6 – Recruit/Select for New Line Positions

- Fire Captain/Paramedic – One Position – Complete by March 30, 2021
- Fire Lieutenant/Paramedic – Two Positions – Complete by March 30, 2021
- Fire Engineer/Paramedic – Three Positions – Complete by April 30, 2021
- Firefighter/Paramedic – Three Positions – Complete by April 30, 2021

Note: Pursuant to Section 6H of the contract and Oregon Revised Statute 236.640, ERFD69 employees transferred to the CFD1 have the right of return to the original employer.



Action Item #7 – Evaluate/Inventory District Assets

Completion Date - February 28, 2021

- Apparatus
- Facilities
- Tools and Equipment
- Supplies

Action Item #8 – Evaluate/Establish/Re-Establish Contracts for Service/Intergovernmental Agreements

Completion Date - April 30, 2021

- 9-1-1/Dispatch Services Agreement with Clackamas County Communications Center (CCOM)
- 800 mHz Radio System (C800) Agreement
- Medical Advisor
- Mutual Aid Agreements
- Automatic Aid Agreements
- United States Forest Service Agreement
- Facilities Maintenance
- Apparatus Maintenance
- Equipment Maintenance
- Urban Renewal Agreement

Action Item #9 – Evaluate/Establish/Re-Establish Vendor Contracts

Completion Date - April 30, 2019

- Personal Protective Equipment
- Uniforms
- Firefighting Tools and Equipment
- Emergency Medical Service Supplies
- Department Supplies
- Fuel



Action Item #10 – Evaluate/Establish/Re-Establish Department Programs/Processes –

Completion Date - April 30, 2019

- Fire/Rescue Training Program
- Emergency Response Standard Operating Guidelines
- Emergency Medical Services Training Program
- Emergency Medical Services QA/QI Program
- Health and Safety Committee
- New Employee Orientation

Action Item #11 – Supplemental Staffing

Completion Date - June 30, 2021

- Evaluate best alternatives to supplemental staffing (i.e. volunteer program, reserve firefighter program, auxiliary program)
- Develop a plan for implementation in Fiscal Year 21/22

Action Item #12 - Finalize FY21/22 Budget

Completion Date - May 30, 2021

- Formal Adoption by the Board
- Direction from the Board on possible alternative funding options during transition

Action Item #13 - New Employee Training/Orientation

Completion Date - June 30, 2021

- Ensure all mandated training for firefighting personnel is completed/demonstrated
- Ensure all safety employees are registered with Oregon Department of Public Safety Standards and Training
- Ensure that all required training/certifications are provided to DPSST

Transition Budget (Personal Services)

The following is an estimated personal services budget expenditure based on salary and benefit packages in place on December 31, 2019 for the period of January 1, 2020 through June 30, 2020. Estimates for service contracts will vary widely as many of the described services will be provided by CFD1 as part of the contract for services. Therefore, those numbers are not included.



Estacada Rural Fire District #69

Continuity of Service Plan
December 2019

DRAFT

Month	Personal Services	Contract for Service	Total	Comments
January-20	\$26,284.00	\$243,042.66	\$269,326.66	1 Fire Chief and 1 Administrative Manager
February-20	\$49,551.00	\$243,042.66	\$292,593.66	1 Fire Chief, 1 Division Chief, 1 Administrative Manager, 1 Administrative Assistant
March-20	\$49,551.00	\$243,042.66	\$292,593.66	1 Fire Chief, 1 Division Chief, 1 Administrative Manager, 1 Administrative Assistant
April-20	\$87,786.00	\$243,042.66	\$330,828.66	1 Fire Chief, 1 Division Chief, 1 Administrative Manager, 1 Administrative Assistant, 1 Fire Captain, 2 Fire Lieutenants
May-20	\$161,323.00	\$243,042.66	\$404,365.66	1 Fire Chief, 1 Division Chief, 1 Administrative Manager, 1 Administrative Assistant, 1 Fire Captain, 2 Fire Lieutenants, 3 Fire Engineers, 3 Firefighters
June-20	\$161,323.00	\$243,042.66	\$404,365.66	1 Fire Chief, 1 Division Chief, 1 Administrative Manager, 1 Administrative Assistant, 1 Fire Captain, 2 Fire Lieutenants, 3 Fire Engineers, 3 Firefighters
Totals	\$535,818.00	\$1,458,255.96	\$1,994,073.96	This number represents 40.35% of the TOTAL adopted budget for FY20. It is 80.05% of the adopted Personal Services budget for FY20



ATTACHMENTS

[Attachment #1 – ESCI Cooperative Services Study](#)

[Attachment #2 – CFD1 Contract for Services](#)

[Attachment #3 – Collective Bargaining Agreement between ERFD69 & Local 1159](#)

[Attachment #4 – FY20 Adopted Budget](#)

[Attachment #5 – ISO Report](#)

[Attachment #6 – ERFD69 Strategic Plan](#)

[Attachment #7 – Matrix Report \(Draft\)](#)

[Attachment #8 – Comprehensive Annual Financial Report FY18](#)

[Attachment #9 – Real Property Information](#)

[Attachment #10 – Intergovernmental Agreement with CFD1](#)

[Attachment #11 – Seismic Retrofit Grant Contract George Fire Station](#)

[Attachment #12 – ERFD69 Business Practices Document – DRAFT 2015](#)