**City of Medford and Fire District 3**

**Cooperative Services Study**

**SCOPE OF WORK**

## Phase I: Project Initiation

Task 1-A: Project Initiation & Development of Work Plan

The vendor will confer with the Agency Representatives to gain a comprehensive understanding of the backgrounds, goals and expectation for the project. The vendor’s project manager will develop and refine a proposed work plan that will guide the project team. The vendor will establish the work plan that will guide the project. This work plan will be developed identifying:

* Primary tasks to be performed
* Person(s) responsible for each task
* Time table for each objective to be completed
* Method of evaluating results
* Resources to be utilized
* Possible obstacles or problem areas associated with the accomplishment of each task

Conferences will also help to establish working relationships, make logistical arrangements, determine appropriate lines of communications, and finalize contractual arrangements.

**Task 1-B: Acquisition & Review of Background Information**

The vendor will acquire the pertinent information and data from each of the organizations. This data will be used extensively in the analysis and development of the report document. The documents and information relevant to this project will include, but not be limited to, the following:

* Past or current emergency service studies or research
* Financial data, including debt information, long-range financial plans and projections
* Department administrative policies and procedures
* Standard Operating Guidelines (SOGs) and service delivery practices
* Current service delivery objectives and targets for each community
* Facilities and apparatus inventories
* Local collective bargaining agreements
* Automatic and mutual aid agreements
* Records management data, including National Fire Incident Reporting System incident data
* Computer-Aided Dispatch (CAD) incident records
* Local Geographic Information Systems (GIS) data, where available

### Task 1-C: Stakeholder Input

The vendor’s project team will conduct site visits in each community and department for the purpose of conducting interviews with, and gathering information from, key personnel including:

* Elected or appointed officials
* Fire department managers and other key staff
* Finance function managers
* Human resource function coordinators
* Labor officials
* Employee and volunteer groups
* Others as they may contribute to this project

From these interviews, the vendor will obtain additional perspective on operational, economic, and policy issues facing the agency. In addition, the project team will learn more about availability of data necessary to meet projected goals.

## Phase II: Baseline Agency Review

The vendor will conduct an organizational review of both agencies. The purpose of this review is to assess the agencies’ operations in comparison to industry standards and best practices, as well as to create a benchmark against which the opportunities and options for future service delivery can be measured.

### Task 2-A: Organization Overview

An overview of each organization and community will be developed discussing:

* Service area population and demographics
* History, formation, and general description of the fire agencies
* Description of the current service delivery infrastructure
* Governance and lines of authority
* Foundational policy documents
* Organizational design

**Task 2-B: Financial Analysis**

* Source of revenue
* Existing revenue and projections for the next 3-5 years
* Cost for existing levels of service and projections for the next 3-5 years
* Contractual services provided by each agency

**Task 2-C: Management Components**

Each organization’s basic management processes will be reviewed, including:

* Vision, mission, strategic planning, goals, and objectives
* Internal assessment of critical issues
* Internal assessment of future challenges
* Internal and external communications processes
* Document control and security
* Reporting and recordkeeping
* Information technology systems

**Task 2-D: Capital Assets and Capital Improvement Programs**

The vendor will review status of current major capital assets (facilities and apparatus) and analyze needs relative to the existing condition of those assets and their viability for continued use in future service delivery.

**Facilities** *–* Tour and make observations in areas related to station efficiency and functionality.

Review both agencies’ facilities maintenance and improvement plans

**Equipment/Apparatus/Vehicles***–* Review and make observations regarding inventory of apparatus and capital equipment. Items to be reviewed include:

* Age, condition, and serviceability
* Distribution and deployment
* Maintenance program
* Regulations compliance
* Vehicle and equipment replacement program
* Funding for replacement program

### Task 2-E: Staffing and Personnel Management

The vendor will review each department’s staffing levels. Areas to be considered include:

* Review and evaluate administration and support staffing levels
* Review and evaluate operational staffing levels
* Review staff allocation to various functions and divisions
* Review staff scheduling methodology
* Analyze current standard of coverage and staffing performance for incidents
* Review firefighter/EMS staff distribution
* Review utilization of career and volunteer companies, where applicable
* Review responsibilities and activity levels of personnel
* Review emergency call back procedures and the associated costs/events

Personnel management systems of the departments will also be reviewed focusing on:

* Human resources policies and handbooks
* Quality and status of job descriptions
* Personnel reports and recordkeeping
* Compensation systems
* Disciplinary process
* Counseling services
* Application and recruitment processes
* Testing, measuring, and promotion processes
* Member retention efforts and programs
* Health and wellness programs

### Task 2-F: Service Delivery and Performance

The vendor will review and make observations in areas specifically involved in, or affecting, service levels and performance of the departments, either individually or when operating in concert with one another in the study area (the collective jurisdiction of all organizations included in the study). Areas to be reviewed shall include, but not necessarily be limited to:

1. **Emergency Services**

* Service demand
* Distribution of resources
* Concentration of resources
* Reliability of resources allocated
* Performance summary
* Incident control and management methods
* Mutual and automatic aid systems
* Dispatch service
* Specialty teams
* Statistical collection and analysis

### (2) Fire and Life Safety Services (Fire Prevention)

* Code enforcement activities
* New construction inspection and involvement
* General inspection program
* Fire and Life-Safety public education programs
* Fire investigation programs
* Pre-incident planning

### Task 2-G: Support Programs

The vendor will review and make overall observations involving support programs within each organization for the critical areas of training and logistics. Items to be reviewed include:

1. **Training**

* Administration and staffing
* Schedules and method of delivery
* Training facilities and equipment
* Training procedures, manuals, and protocols

1. **Logistics**

* Communication equipment and systems
* Supply request and delivery systems
* Purchasing systems
* Inventory storage and controls

## Phase III: Opportunities for Cooperative Efforts

The vendor will use the completed baseline assessment of each agency to identify opportunities and feasibility for cooperative efforts. The project team will identify areas of duplication that can be reduced through cooperative service efforts, as well as potential service improvements that can be accomplished.

Items in this section of the report include but are not limited to the areas listed below. The detailed information provides department heads and elected officials with the information necessary to make important decisions regarding emergency services cooperative service. Included are:

**Task 3-A: General Partnering Strategies**

The following strategic alternatives will be evaluated and discussed:

* Current level of cooperation
* Expanded cooperative services
* Shared governance
* Legal unification or merger

### Task 3-B: Options for Shared Services Evaluation of Partner Strategies

The vendor will evaluate each of the four strategies following the following list as a minimum:

* Specific areas of cooperative service where opportunity exists
* Estimated timeline necessary to implement specific initiative
* Affected section, i.e. Administration, Operations, Support Services
* Affected stakeholders
* Objective of initiative
* Summary of initiative
* Guidance required
* Fiscal considerations
* Social considerations
* Policy actions necessary

### Task 3-C: Fiscal Analysis

Identify and evaluate the fiscal impact of each of the partnering strategies for both jurisdictions.

* Short term
* Medium range 1-3 years
* Long term >3 years

### Task 3-D: Service Delivery Analysis

Identify and evaluate the impact on service delivery (Emergency response and Fire & Life Safety) of each of the partnering strategies for both jurisdictions.

* Short term
* Medium range 1-3 years
* Long term >3 years

## Phase IV: Recommendations and Final Report

### Task 4-A: Recommendations

The vendor will provide the recommendations from the study in a continuum of options, focusing on those strategies and initiatives that have the most chance of success; highest possibility for service improvement; and most favorable impact on budget.

Include the findings, priorities, policy action necessary, timeline, and implementation plan for the highest ranking recommendations.

Where a proposed strategy is rejected, the vendor will clearly delineate the reason(s) for rejection.

### Task 4-B: Development and Review of Draft Project Report

The vendor will develop and produce an electronic copy of the written report for review by the group. The Agency Representatives will provide feedback to be included in the final report.

### Task 4-C: Delivery and Presentation of Final Project Report

The vendor will complete any necessary revisions of the draft and produce twenty (20) printed copies of the bound, final version of the written report, along with an electronic version.

Two formal presentations of the project report will be made by the vendor (one for the City of Medford and the other for Jackson County Fire District 3). The vendor will provide the cost for an additional presentation should it be requested by Agency Representatives.