Joint Meeting of the Village of Somerset and Town of Somerset
Village Hall, 110 Spring Street Somerset, WI 54025 | Wednesday, April 23, 2025

Village President, Ryan Sicard called the Regular Joint Meeting to order at 7:00 p.m. Present from the Village was Chris Dubak, Brandon Krohn, Ryan Sicard, Chris Moreno, Donnie Kern and Jessica Plourde. Present from the Town were Doug Plourde, Jason Crotty, Lenny Germain, Shane Demulling, and Tim Witzmann. Present from the Fire/Rescue Commission were Dave Wolner, Wally Neumann and Rita Lawson. Present from the Fire Department were Sarah Kobs and Travis Belisle.

<u>Approval of Agenda</u>
- *Motion by Demulling, second by Moreno to approve the agenda and motion carried unanimously.*

<u>Public Comment</u>
- No public comment.

<u>Minutes</u>
- *Motion by Germain, second by Krohn to approve the minutes of the January 22, 2025 meeting. Motion carried unanimously.*

<u>Financial Report</u>
- *Motion by Witzmann, second by Kern to approve the Financial Report. Motion carried unanimously with abstention by Crotty, he is directly related to item.*

<u>Old Business</u>
- Pine Vale Storm Water Update
    - Kern, Moreno, Dubak, Gunther and Ryan Vanasse walked the site with MSA & Capstone. All agreed to wait one (1) year to make sure the system operates properly. Vanasse's property is listed in the punch list to make sure everything is ok.
    - Witzman asked if Mondor's encroachment issues were resolved? Larry said he wasn't invited to the meeting. Kern stated the issue they were meeting about was the runoff on Vanasse's property. The Village's position has been between Mondor & Capstone.
    - Sicard will arrange a meeting with Capstone and Mondor. Mondors are concerned about future development towards the North and how the water will be managed so Mondors aren't flooded out. Krohn said ultimately our hands are tied on stuff like that by the DNR.
    - Demulling asked Gunther about the Mondor property. Gunther stated the developer offered some solutions for the encroachment, but they weren't acceptable by the Mondors. They could counter the offer. Mondors are asking the Village to assist with communication. Gunther said he can't force the developer to put a fence in. Amanda Mondor said that was an initial starting point. Hoping that was part of a resolution for hunting, Village vs Township. The developer could have come back with we will pay for half. Nothing has been discussed, they have provided no solution to the problem. As far as the fence goes, Larry Mondor threw that out there because he thought it would be cheaper to put a fence up than to regrade that whole hill for the encroachment on his property and reimburse us for the trees. But if they would like to cut it back and regrade and reimburse us for the trees then that's fine. Mondor was

throwing it out there as an option. The developer has someone out there installing black chain link fencing, that would be fine with Mondors. Kern questioned how many trees? Amanda said they didn't do a tree evaluation on their own property before it was graded. Kern, how can they reimburse you for trees if you don't know how many were there? Mondors would like to have a meeting with Gunther and Capstone. Sicard said they would arrange something.

- Changes to Village Fire/Rescue Ordinance to match the Town of Somerset's Ordinance
    - Dubak worked with the town. The town and village should have the same ordinance for the insurance audit and so they don't lose out on $50,000.00 funding.
    - Belisle stated there should be a Fire Commission Ordinance to "reference" state statute.

<u>New Business</u>

- Review Fire Department 5-Year Equipment Plan
    - Belisle said our share alone as of today's pricing new radios will be over $316,000.00. That does not include licensing or fees. The state is lagging behind using VHF (analog) radios. In 2029 we won't be able to communicate with the county unless we have new 800MHZ radios. The DNR and or FEMA have grants available.
    - Keep the fire engine on your radar. It takes 3-4 years to get it once it's ordered. Demulling said we will need to figure out where the truck would be kept.

- Fire Department Comprehensive Plan Options
    - Belisle said with the growth of Somerset, we can't keep this up at this pace. The majority of calls is medical. If it's a structure fire - we need everyone.
    - By having a Comprehensive Plan it will help guide us in the future.
    - *Motion by Witzmann, second by Kern to move forward on the RFP Comprehensive Plan for Fire and Rescue Department and motion carried unanimously.*

- Right-of-Way along LaGrandeur Road
    - Gunther informed the members there would be no trail down 190th Street.
    - Germain questioned what kind of path? Gunther said it is non-motorized.
    - Witzmann suggested putting signs on either side of driveways.

- Parent Street/180th Avenue Road Transfer/Addresses
    - Witzmann said Jeri can get you all the information needed as she has talked to the DOT about the jurisdictional process.
    - Kern said they are trying to figure out through the state if there is an easier way by possibly incorporating current language and verbiage of the surveys without having to go through a secondary survey and that expense.
    - Witzmann said the process is pretty well defined. The town would have to have a meeting to actually turn over ownership of township property.
    - Sicard said the Village will continue to follow through with the legal requirements and surveying and complete the documents hopefully for processing as soon as they can be turned around.
    - Demulling wants to make sure the residents don't acquire any cost by taking over the road and having to change addresses from 180th to Parent Street.

- Need for Additional Sport Fields and Parks
  - Sicard & D. Plourde talked earlier. They would like to appoint a joint committee. 2 Village Board, 2 Town Board, 1 Village citizen and 1 town citizen.
  - Sicard will meet with Shannon Donnelly on Monday.

- New Appointed Fire/Rescue Commission Members
  - Sicard said this will be filled at the May Village Board Meeting.

Next meeting will be held at 7pm July 23rd at Town Hall.

<u>Adjourn</u>

- *Motion by Kern, second by Krohn to adjourn at 8:33 p.m. Motion carried unanimously.*

Somerset Fire & Rescue

Balance Sheet Detail

As of June 30, 2024

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
ASSETS							
11111 RCU Operating Account -0729							
Beginning Balance							65,740.70
04/09/2024	Check	10231	Grey Goose Graphics/g3Coding		52304 Office Supplies & Expenses	-1,560.00	64,180.70
04/09/2024	Check	10229	Emergency Automotive Technologies		52201 Maintenance of Vechicles&Equip.	-1,126.76	63,053.94
04/09/2024	Check	10230	Kwik Trip		52301 Vehicle & Equipment Gas\\Oil	-202.56	62,851.38
04/09/2024	Check	10235	Northview Service / Mr Tire	Acct# 02611	52201 Maintenance of Vechicles&Equip.	-1,142.28	61,709.10
04/09/2024	Check	10236	Finken Water Inc.		52302 Utilities	-8.25	61,700.85
04/09/2024	Transfer			Sale of Chainsaws	11700 Royal Credit Unio- Fund Raising	-1,000.00	60,700.85
04/09/2024	Check	10232	Lexipol LLC		52304 Office Supplies & Expenses	-114.64	60,586.21
04/09/2024	Deposit			Deposit	48901 Sale of Property	1,000.00	61,586.21
04/09/2024	Check	10233	FlowMSP, Inc.		52304 Office Supplies & Expenses	-1,200.00	60,386.21
04/09/2024	Check	10234	Northwest Communications	Acct# 181151	52302 Utilities	-157.72	60,228.49
04/17/2024	Check	10237	Nicholas J Rieken		-Split-	-85.42	60,143.07
04/17/2024	Check	10239	Huebsch	Acct# 1031	52304 Office Supplies & Expenses	-89.07	60,054.00
04/17/2024	Check	EFTPS	RCU CREDIT UNION	39-1881288	-Split-	-14.16	60,039.84
04/17/2024	Check	10238	Business Card	Acct# XXXXX - 9472	52300 Operating Supplies & Equipment	-12.55	60,027.29
04/24/2024	Deposit		Wisconsin Dept. of Revenue	Deposit	48900 Other Miscellaneous Revenues	553.69	60,580.98
04/24/2024	Check	10240	Xcel Energy	Acct# 52-4327326-9	52302 Utilities	-265.17	60,315.81
04/24/2024	Check	10241	B & J Hardware	Acct #1604	52300 Operating Supplies & Equipment	-7.99	60,307.82
04/24/2024	Check	10242	Midwest Natural Gas Inc	Acct #4-33-7028-00	52302 Utilities	-182.06	60,125.76
04/24/2024	Check	10243	T-Mobile	Acct #979154436	52302 Utilities	-179.32	59,946.44
04/30/2024	Deposit			Interest	48110 Interest Earned on Bank Accts	14.93	59,961.37
05/05/2024	Check	10246	Nicholas J Rieken		-Split-	-68.34	59,893.03
05/05/2024	Check	10244	Northwest Communications	Acct# 181151	52302 Utilities	-157.84	59,735.19
05/05/2024	Check	10245	Kwik Trip		52301 Vehicle & Equipment Gas\\Oil	-104.85	59,630.34
05/05/2024	Check	EFTPS	RCU CREDIT UNION	39-1881288	-Split-	-11.32	59,619.02
05/07/2024	Check	10247	West Bend Mutual Insurance Co		52402 Property & Liability Insurance	-2,104.00	57,515.02
05/16/2024	Check	10256	Business Card	Acct# XXXXX - 9472	-Split-	-1,323.46	56,191.56
05/16/2024	Check	10254	District 2, Inc		52201 Maintenance of Vechicles&Equip.	-308.52	55,883.04
05/16/2024	Check	10248	Nicholas J Rieken		-Split-	-68.34	55,814.70
05/16/2024	Check	10253	MacQueen Equipment		52201 Maintenance of Vechicles&Equip.	-972.10	54,842.60
05/16/2024	Check	10252	Designer Logo		52300 Operating Supplies & Equipment	-369.00	54,473.60
05/16/2024	Check	10251	Huebsch	Acct# 1031	52304 Office Supplies & Expenses	-73.82	54,399.78
05/16/2024	Check	EFTPS	RCU CREDIT UNION	39-1881288	-Split-	-11.32	54,388.46
05/16/2024	Check	10250	Sign Results.Com LLC		52506 Fund Raising Expenses	-200.00	54,188.46

Somerset Fire & Rescue

Balance Sheet Detail

As of June 30, 2024

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
05/16/2024	Check	10249	Medline Industries, Inc.		52300 Operating Supplies & Equipment	-244.27	53,944.19
05/16/2024	Check	10255	Finken Water Inc.	Acct# 02611	52302 Utilities	-8.25	53,935.94
05/22/2024	Check	10258	National Volunteer Fire Council		52504 Dues, Publications & Subscript.	-483.00	53,452.94
05/22/2024	Check	10257	Foreman Fire Service & Repair		52201 Maintenance of Vechicles&Equip.	-2,192.80	51,260.14
05/22/2024	Check	10261	Xcel Energy	Acct# 52-4327326-9	52302 Utilities	-270.19	50,989.95
05/22/2024	Check	10260	T-Mobile	Acct #979154436	52302 Utilities	-179.32	50,810.63
05/22/2024	Check	10259	Midwest Natural Gas Inc	Acct #4-33-7028-00	52302 Utilities	-116.07	50,694.56
05/29/2024	Deposit				43100 Federal Grant	83,210.50	133,905.06
05/31/2024	Deposit	INTEREST		Interest Earned	48110 Interest Earned on Bank Accts	14.20	133,919.26
06/04/2024	Payroll Check	10262	Nicholas J Rieken	Pay Period: 05/13/2024-05/26/2024	-Split-	-68.34	133,850.92
06/04/2024	Check	10265	Code 3 Creative		52304 Office Supplies & Expenses	-1,872.00	131,978.92
06/04/2024	Check	10266	Northwest Communications		52302 Utilities	-157.72	131,821.20
06/04/2024	Tax Payment	6042024	IRS	Tax Payment for Period: 06/01/2024-06/30/2024	Payroll Liabilities:Federal Taxes (941/943/944)	-11.32	131,809.88
06/04/2024	Check	10264	Kwik Trip		52301 Vehicle & Equipment Gas\\Oil	-294.36	131,515.52
06/04/2024	Check	10263	Travis Belisle		52506 Fund Raising Expenses	-80.00	131,435.52
06/13/2024	Transfer			Fundraising activity transfer	11700 Royal Credit Unio- Fund Raising	773.06	132,208.58
06/18/2024	Check	10279	Xcel Energy		52302 Utilities	-278.30	131,930.28
06/18/2024	Payroll Check	10267	Nicholas J Rieken	Pay Period: 05/27/2024-06/09/2024	-Split-	-68.34	131,861.94
06/18/2024	Check	10278	T-Mobile		52302 Utilities	-179.35	131,682.59
06/18/2024	Tax Payment		IRS	Tax Payment for Period: 06/01/2024-06/30/2024	Payroll Liabilities:Federal Taxes (941/943/944)	-11.32	131,671.27
06/18/2024	Check	10277	Image Trend		52304 Office Supplies & Expenses	-141.12	131,530.15
06/18/2024	Check	10276	Northwood Technical College		52502 Training Expense-includeMileage	-347.15	131,183.00
06/18/2024	Check	10275	Travis Belisle		52506 Fund Raising Expenses	-171.22	131,011.78
06/18/2024	Check	10274	Minuteman Press		52506 Fund Raising Expenses	-2,695.51	128,316.27
06/18/2024	Check	10268	Business Card		-Split-	-1,560.38	126,755.89
06/18/2024	Check	10269	Menard's - Stillwater		-Split-	-237.17	126,518.72
06/18/2024	Check	10270	Finken Water Inc.		52302 Utilities	-8.25	126,510.47
06/18/2024	Check	10271	Hastings Air-Energy Control Inc.		52307 Purchase-New Firefighting Equip	-87,590.00	38,920.47
06/18/2024	Check	10272	Whiplash Designs & Graphics		52300 Operating Supplies & Equipment	-512.50	38,407.97
06/18/2024	Check	10273	Wisconsin State Firefighters Assc.		52504 Dues, Publications & Subscript.	-575.00	37,832.97
06/26/2024	Deposit				48120 Donations	1,450.00	39,282.97
06/26/2024	Deposit				48120 Donations	700.00	39,982.97
06/26/2024	Check	10280	Midwest Natural Gas Inc		52302 Utilities	-34.71	39,948.26
06/26/2024	Tax Payment		IRS	Tax Payment for Period: 07/01/2024-07/31/2024	Payroll Liabilities:Federal Taxes (941/943/944)	-11.32	39,936.94
06/26/2024	Deposit				-Split-	67,700.50	107,637.44
06/26/2024	Deposit				48120 Donations	1,185.00	108,822.44

Somerset Fire & Rescue

Balance Sheet Detail

As of June 30, 2024

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
06/30/2024	Payroll Check	10295	Danielle M Hogue	Pay Period: 06/01/2024-06/30/2024	-Split-	-361.10	108,461.34
06/30/2024	Payroll Check	10299	Thomas D Peterson	Pay Period: 06/01/2024-06/30/2024	-Split-	-119.59	108,341.75
06/30/2024	Payroll Check	10293	Jessica M Hartmann	Pay Period: 06/01/2024-06/30/2024	-Split-	-1,452.00	106,889.75
06/30/2024	Payroll Check	10283	Elizabeth A Belisle	Pay Period: 06/01/2024-06/30/2024	-Split-	-623.83	106,265.92
06/30/2024	Payroll Check	10301	Jason L Richter	Pay Period: 06/01/2024-06/30/2024	-Split-	-778.36	105,487.56
06/30/2024	Payroll Check	10284	Travis L. Belisle	Pay Period: 06/01/2024-06/30/2024	-Split-	-2,503.69	102,983.87
06/30/2024	Payroll Check	10296	Sarah D Kobs	Pay Period: 06/01/2024-06/30/2024	-Split-	-1,231.17	101,752.70
06/30/2024	Payroll Check	10286	Christopher T. Brunell	Pay Period: 06/01/2024-06/30/2024	-Split-	-923.12	100,829.58
06/30/2024	Payroll Check	10294	Joshua T Hecht	Pay Period: 06/01/2024-06/30/2024	-Split-	-14.64	100,814.94
06/30/2024	Payroll Check	10297	Timothy A. Kunze	Pay Period: 06/01/2024-06/30/2024	-Split-	-494.69	100,320.25
06/30/2024	Payroll Check	10303	Tim G Stickfort	Pay Period: 06/01/2024-06/30/2024	-Split-	-898.25	99,422.00
06/30/2024	Payroll Check	10302	Julie J. Richter	Pay Period: 06/01/2024-06/30/2024	-Split-	-857.85	98,564.15
06/30/2024	Payroll Check	10288	Jason A. Crotty	Pay Period: 06/01/2024-06/30/2024	-Split-	-1,884.19	96,679.96
06/30/2024	Payroll Check	10298	Matt R Nelson	Pay Period: 06/01/2024-06/30/2024	-Split-	-1,282.13	95,397.83
06/30/2024	Payroll Check	10300	Clinton G Pfluger	Pay Period: 06/01/2024-06/30/2024	-Split-	-304.76	95,093.07
06/30/2024	Payroll Check	10292	Kyle Guinn	Pay Period: 06/01/2024-06/30/2024	-Split-	-307.06	94,786.01
06/30/2024	Payroll Check	10290	Shyann M Erickson	Pay Period: 06/01/2024-06/30/2024	-Split-	-188.39	94,597.62
06/30/2024	Payroll Check	10287	Cora L Brunell	Pay Period: 06/01/2024-06/30/2024	-Split-	-628.94	93,968.68
06/30/2024	Check	10308	Brian F. Duggan		52506 Fund Raising Expenses	-314.64	93,654.04
06/30/2024	Check	10307	Northwood Technical College		52502 Training Expense-includeMileage	-80.00	93,574.04
06/30/2024	Check	10306	Ancom Communications		52300 Operating Supplies & Equipment	-240.00	93,334.04
06/30/2024	Deposit	INTEREST		Interest Earned	48110 Interest Earned on Bank Accts	24.02	93,358.06
06/30/2024	Check	10305	Wisconsin Dept. of Revenue		Payroll Liabilities:Continuous Levy	-911.07	92,446.99
06/30/2024	Transfer			Fund raising activity	11700 Royal Credit Unio- Fund Raising	-310.36	92,136.63
06/30/2024	Payroll Check	10282	Gary D Barger	Pay Period: 06/01/2024-06/30/2024	-Split-	-404.03	91,732.60
06/30/2024	Payroll Check	10289	Brian F. Duggan	Pay Period: 06/01/2024-06/30/2024	-Split-	-698.17	91,034.43
06/30/2024	Payroll Check	10285	Matthew K Boyd	Pay Period: 06/01/2024-06/30/2024	-Split-	-1,024.36	90,010.07
06/30/2024	Payroll Check	10304	Christopher A Terwedo	Pay Period: 06/01/2024-06/30/2024	-Split-	-1,426.08	88,583.99
06/30/2024	Deposit				48120 Donations	625.00	89,208.99
Total for 11111 RCU Operating Account -0729						**$23,468.29**	
11700 Royal Credit Unio- Fund Raising							
Beginning Balance							25,027.47
04/09/2024	Transfer			Sale of Chainsaws	11111 RCU Operating Account -0729	1,000.00	26,027.47
04/30/2024	Deposit			Interest	48110 Interest Earned on Bank Accts	8.47	26,035.94
05/31/2024	Deposit	INTEREST		Interest Earned	48110 Interest Earned on Bank Accts	8.85	26,044.79

Somerset Fire & Rescue

Balance Sheet Detail

As of June 30, 2024

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
06/12/2024	Deposit				-Split-	201.13	26,245.92
06/13/2024	Transfer			Fundraising activity transfer	11111 RCU Operating Account -0729	-773.06	25,472.86
06/13/2024	Deposit				48140 Fund Raising Earnings	5,770.92	31,243.78
06/30/2024	Transfer			Fund raising activity	11111 RCU Operating Account -0729	310.36	31,554.14
06/30/2024	Deposit	INTEREST		Interest Earned	48110 Interest Earned on Bank Accts	9.70	31,563.84
Total for 11700 Royal Credit Unio- Fund Raising						**$6,536.37**	
TOTAL ASSETS						**$30,004.66**	**$120,772.83**
LIABILITIES AND EQUITY							
Liabilities							
2100 Payroll Liabilities							
Beginning Balance							-206.18
04/17/2024	Check	EFTPS	RCU CREDIT UNION	Social Security Company	11111 RCU Operating Account -0729	-5.74	-211.92
04/17/2024	Check	EFTPS	RCU CREDIT UNION	Social Security Employee	11111 RCU Operating Account -0729	-5.74	-217.66
04/17/2024	Check	10237	Nicholas J Rieken	Social Security Company	11111 RCU Operating Account -0729	5.74	-211.92
04/17/2024	Check	10237	Nicholas J Rieken	Social Security Employee	11111 RCU Operating Account -0729	5.74	-206.18
04/17/2024	Check	10237	Nicholas J Rieken	Medicare Company	11111 RCU Operating Account -0729	1.34	-204.84
04/17/2024	Check	10237	Nicholas J Rieken	Medicare Employee	11111 RCU Operating Account -0729	1.34	-203.50
04/17/2024	Check	EFTPS	RCU CREDIT UNION	Medicare Employee	11111 RCU Operating Account -0729	-1.34	-204.84
04/17/2024	Check	EFTPS	RCU CREDIT UNION	Medicare Company	11111 RCU Operating Account -0729	-1.34	-206.18
05/05/2024	Check	10246	Nicholas J Rieken	Social Security Company	11111 RCU Operating Account -0729	4.59	-201.59
05/05/2024	Check	10246	Nicholas J Rieken	Medicare Employee	11111 RCU Operating Account -0729	1.07	-200.52
05/05/2024	Check	EFTPS	RCU CREDIT UNION	Medicare Employee	11111 RCU Operating Account -0729	-1.07	-201.59
05/05/2024	Check	EFTPS	RCU CREDIT UNION	Medicare Company	11111 RCU Operating Account -0729	-1.07	-202.66
05/05/2024	Check	EFTPS	RCU CREDIT UNION	Social Security Company	11111 RCU Operating Account -0729	-4.59	-207.25
05/05/2024	Check	10246	Nicholas J Rieken	Social Security Employee	11111 RCU Operating Account -0729	4.59	-202.66
05/05/2024	Check	EFTPS	RCU CREDIT UNION	Social Security Employee	11111 RCU Operating Account -0729	-4.59	-207.25
05/05/2024	Check	10246	Nicholas J Rieken	Medicare Company	11111 RCU Operating Account -0729	1.07	-206.18
05/16/2024	Check	EFTPS	RCU CREDIT UNION	Social Security Company	11111 RCU Operating Account -0729	-4.59	-210.77
05/16/2024	Check	10248	Nicholas J Rieken	Social Security Company	11111 RCU Operating Account -0729	4.59	-206.18
05/16/2024	Check	10248	Nicholas J Rieken	Medicare Employee	11111 RCU Operating Account -0729	1.07	-205.11
05/16/2024	Check	10248	Nicholas J Rieken	Medicare Company	11111 RCU Operating Account -0729	1.07	-204.04
05/16/2024	Check	EFTPS	RCU CREDIT UNION	Medicare Company	11111 RCU Operating Account -0729	-1.07	-205.11
05/16/2024	Check	EFTPS	RCU CREDIT UNION	Social Security Employee	11111 RCU Operating Account -0729	-4.59	-209.70
05/16/2024	Check	10248	Nicholas J Rieken	Social Security Employee	11111 RCU Operating Account -0729	4.59	-205.11
05/16/2024	Check	EFTPS	RCU CREDIT UNION	Medicare Employee	11111 RCU Operating Account -0729	-1.07	-206.18

Somerset Fire & Rescue

Balance Sheet Detail

As of June 30, 2024

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
Total for 2100 Payroll Liabilities						**$0.00**	
Continuous Levy							
06/30/2024	Check	10305	Wisconsin Dept. of Revenue	WTN: 1024173255 - Jason Green - Levy Proceeds	11111 RCU Operating Account -0729	-911.07	-911.07
06/30/2024	Payroll Check	10291	Jason M Green	Continuous Levy	11111 RCU Operating Account -0729	911.07	0.00
Total for Continuous Levy						**$0.00**	
Federal Taxes (941/943/944)							
06/04/2024	Payroll Check	10262	Nicholas J Rieken	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	11.32	11.32
06/04/2024	Tax Payment	6042024	IRS	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	-11.32	0.00
06/18/2024	Payroll Check	10267	Nicholas J Rieken	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	11.32	11.32
06/18/2024	Tax Payment		IRS	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	-11.32	0.00
06/26/2024	Tax Payment		IRS	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	-11.32	-11.32
06/30/2024	Payroll Check	10297	Timothy A. Kunze	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	86.62	75.30
06/30/2024	Payroll Check	10293	Jessica M Hartmann	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	402.65	477.95
06/30/2024	Payroll Check	10303	Tim G Stickfort	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	149.94	627.89
06/30/2024	Payroll Check	10283	Elizabeth A Belisle	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	103.34	731.23
06/30/2024	Payroll Check	10286	Christopher T. Brunell	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	154.22	885.45
06/30/2024	Payroll Check	10301	Jason L Richter	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	129.28	1,014.73
06/30/2024	Payroll Check	10284	Travis L. Belisle	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	755.81	1,770.54
06/30/2024	Payroll Check	10300	Clinton G Pfluger	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	50.48	1,821.02
06/30/2024	Payroll Check	10302	Julie J. Richter	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	142.96	1,963.98
06/30/2024	Payroll Check	10288	Jason A. Crotty	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	759.43	2,723.41
06/30/2024	Payroll Check	10298	Matt R Nelson	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	355.33	3,078.74
06/30/2024	Payroll Check	10296	Sarah D Kobs	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	340.17	3,418.91
06/30/2024	Payroll Check	10290	Shyann M Erickson	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	31.22	3,450.13
06/30/2024	Payroll Check	10294	Joshua T Hecht	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	60.72	3,510.85
06/30/2024	Payroll Check	10295	Danielle M Hogue	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	59.80	3,570.65
06/30/2024	Payroll Check	10292	Kyle Guinn	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	50.88	3,621.53
06/30/2024	Payroll Check	10299	Thomas D Peterson	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	19.82	3,641.35
06/30/2024	Payroll Check	10287	Cora L Brunell	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	129.47	3,770.82
06/30/2024	Payroll Check	10285	Matthew K Boyd	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	171.66	3,942.48
06/30/2024	Payroll Check	10282	Gary D Barger	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	66.94	4,009.42
06/30/2024	Payroll Check	10289	Brian F. Duggan	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	115.66	4,125.08
06/30/2024	Payroll Check	10304	Christopher A Terwedo	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	393.23	4,518.31
06/30/2024	Payroll Check	10291	Jason M Green	Federal Taxes (941/943/944)	11111 RCU Operating Account -0729	220.07	4,738.38
Total for Federal Taxes (941/943/944)						**$4,738.38**	
Federal Unemployment (940)							
06/30/2024	Payroll Check	10290	Shyann M Erickson	Federal Unemployment (940)	11111 RCU Operating Account -0729	1.22	1.22

Somerset Fire & Rescue

Balance Sheet Detail

As of June 30, 2024

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
Total for Federal Unemployment (940)						**$1.22**	
WI Income Tax							
06/30/2024	Payroll Check	10298	Matt R Nelson	WI Income Tax	11111 RCU Operating Account -0729	26.82	26.82
06/30/2024	Payroll Check	10284	Travis L. Belisle	WI Income Tax	11111 RCU Operating Account -0729	108.87	135.69
06/30/2024	Payroll Check	10301	Jason L Richter	WI Income Tax	11111 RCU Operating Account -0729	2.00	137.69
06/30/2024	Payroll Check	10293	Jessica M Hartmann	WI Income Tax	11111 RCU Operating Account -0729	45.91	183.60
06/30/2024	Payroll Check	10296	Sarah D Kobs	WI Income Tax	11111 RCU Operating Account -0729	43.41	227.01
06/30/2024	Payroll Check	10286	Christopher T. Brunell	WI Income Tax	11111 RCU Operating Account -0729	7.77	234.78
06/30/2024	Payroll Check	10303	Tim G Stickfort	WI Income Tax	11111 RCU Operating Account -0729	6.78	241.56
06/30/2024	Payroll Check	10302	Julie J. Richter	WI Income Tax	11111 RCU Operating Account -0729	5.17	246.73
06/30/2024	Payroll Check	10288	Jason A. Crotty	WI Income Tax	11111 RCU Operating Account -0729	72.38	319.11
06/30/2024	Payroll Check	10291	Jason M Green	WI Income Tax	11111 RCU Operating Account -0729	18.02	337.13
06/30/2024	Payroll Check	10287	Cora L Brunell	WI Income Tax	11111 RCU Operating Account -0729	5.35	342.48
06/30/2024	Payroll Check	10304	Christopher A Terwedo	WI Income Tax	11111 RCU Operating Account -0729	44.11	386.59
06/30/2024	Payroll Check	10285	Matthew K Boyd	WI Income Tax	11111 RCU Operating Account -0729	11.81	398.40
Total for WI Income Tax						**$398.40**	
Total for 2100 Payroll Liabilities with sub-accounts						**$5,138.00**	
Total Liabilities						**$5,138.00**	**$4,931.82**
Equity							
3000 Opening Bal Equity							
Beginning Balance							30,333.37
Total for 3000 Opening Bal Equity							
Retained Earnings						**$19,223.18**	**$19,223.18**
Net Income						**$66,284.46**	**$66,284.46**
Total Equity						**$85,507.64**	**$115,841.01**
Total Liabilities and Equity						**$90,645.64**	**$120,772.83**

SOMERSET FIRE AND RESCUE
Somerset, Wisconsin

DETAILED STATEMENT OF CASH RECEIPTS AND DISBURSEMENTS
GENERAL OPERATIONS FUND
BUDGET AND ACTUAL
For The Year Ended December 31, 2025
As of June 30, 2025

	2025 Original Budget	2025 Actual	2025 Variance Positive (Negative)	% to Budget	2024 Actual
RECEIPTS:					
Fire/Rescue Protection Contracts:					
2025 Contract - Operations:					
Village of Somerset	$ 114,644	$ 114,644	$ -	100%	$ 111,997
Town of Somerset	118,323	59,162	(59,162)	50%	118,884
2% Fire Dues:					
Village of Somerset	18,578	-	(18,578)	0%	18,578
Town of Somerset	31,905	-	(31,905)	0%	31,906
Total Receipts	283,450	173,806	(109,645)		281,365
DISBURSEMENTS:					
Personnel Services:					
Officers Salaries	31,000	15,500	15,500	50%	26,250
Firefighters Wages	57,500	33,522	23,978	58%	57,659
Secretary Wages	6,000	3,000	3,000	50%	6,000
Trainers Wages	3,000	1,000	-	33%	3,000
District Share of Social Security	7,500	4,056	3,444	54%	7,350
LOSA Contribution	16,000	18,140	(2,140)	113%	16,060
LOSA Life Insurance	4,000	-	4,000	0%	3,632
Total Personnel Services	125,000	75,218	47,782		119,951
Maintenance Services:					
Maintenance of Vehicles and Equipment	16,000	9,711	6,289	61%	20,107
Lease of Building	39,000	19,500	(19,500)	50%	39,000
Total Maintenance Services	55,000	29,211	(13,211)		59,107
Operating Supplies and Disbursements:					
Gas/Oil	4,000	1,568	2,432	39%	2,757
Emergency and Firefighting Supplies	32,000	18,128	13,872	57%	71,320
Utilities	13,000	5,127	7,873	39%	8,905
Office Supplies and Equipment	20,000	14,760	5,240	74%	23,554
Total Operating Supplies and Disbursements	69,000	39,583	29,417		106,536
Contractual Services:					
Workers Compensation Insurance	4,523	3,962	561	88%	4,208
Property and Liability Insurance	11,977		11,977	0%	11,612
Special Accounting and Auditing	3,250	-	3,250	0%	5,828
Contracted Fire Inspections	3,200	-	3,200	0%	3,204
Total Contractual Services	22,950	3,962	18,988		24,852
Miscellaneous Disbursements:					
Fire Prevention (Public Education)	1,500	457	1,043	30%	1,072
Training Expense (Including Mileage)	7,000	3,834	3,166	55%	8,990
Dues, Publications and Subscriptions	2,500	1,922	578	77%	1,623
Medical Exams, Tests and Vaccinations	500	-	500	0%	-
Total Miscellaneous Disbursements	11,500	6,212	5,288		11,685
Total Disbursements	283,450	154,186	129,264		322,131
EXCESS OF RECEIPTS OVER DISBURSEMENTS	-	19,620	19,620		(40,766)

Assigned for Future Uses:	
Insurance Recoveries	$ 1,129
Jr. Firefighter Program	400
Remaining Balance	$ 1,529

SOMERSET FIRE AND RESCUE
Somerset, Wisconsin

DETAILED STATEMENT OF CASH RECEIPTS AND DISBURSEMENTS
GENERAL OPERATIONS FUND
BUDGET AND ACTUAL
For The Year Ended December 31, 2025
As of June 30, 2025

	2025				
	Original Budget	Actual	Variance Positive (Negative)	% to Budget	2024 Actual
RECEIPTS:					
Fire/Rescue Protection Contracts:					
2025 Contract - Operations:					
Village of Somerset	$ 114,644	$ 114,644	$ -	100%	$ 111,997
Town of Somerset	118,323	59,162	(59,162)	50%	118,884
2% Fire Dues:					
Village of Somerset	18,578	-	(18,578)	0%	18,578
Town of Somerset	31,905	-	(31,905)	0%	31,906
Other:					
Federal Grants-FEMA	-	-	-	#DIV/0!	83,211
State Grants	-	12,398	12,398	0%	750
Interest Income	-	127	127	0%	370
Sale of Equipment and Other Items	-	-	-	0%	6,750
Donations	-	6,690	6,690	0%	7,197
Fund-Raisers	-	8,522	8,522	0%	14,148
Fire Reports	-	40	40	0%	20
Concert Protection Services	-	3,457	3,457	0%	17,930
Miscellaneous	-	400	400	0%	554
Total Receipts	283,450	205,440	(78,010)		412,295
DISBURSEMENTS:					
Personnel Services:					
Officers Salaries	31,000	15,500	15,500	50%	26,250
Firefighters Wages	57,500	33,522	23,978	58%	57,659
Secretary Wages	6,000	3,000	3,000	50%	6,000
Trainers Wages	3,000	1,000	-	33%	3,000
Concert Services Wages	-	2,863	(2,863)	#DIV/0!	13,482
District Share of Social Security	7,500	4,056	3,444	54%	7,350
District Share of Social Security - Concert	-	219	(219)	#DIV/0!	1,031
LOSA Contribution	16,000	18,140	(2,140)	113%	16,060
LOSA Life Insurance	4,000	-	4,000	0%	3,632
Total Personnel Services	125,000	78,300	44,700		134,464
Maintenance Services:					
Maintenance of Vehicles and Equipment	16,000	9,711	6,289	61%	20,107
Maintenance of Buildings	-	-	-	#DIV/0!	9
Lease of Building	39,000	19,500	(19,500)	50%	39,000
Total Maintenance Services	55,000	29,211	(13,211)		59,116
Operating Supplies and Disbursements:					
Gas/Oil	4,000	1,568	2,432	39%	2,757
Emergency and Firefighting Supplies	32,000	18,128	13,872	57%	71,320
Emergency and Firefighting Supplies - Grant	-	607	(607)	#DIV/0!	84,767
Utilities	13,000	5,127	7,873	39%	8,905
Concert Services	-	-	-	#DIV/0!	954
Office Supplies and Equipment	20,000	14,760	5,240	74%	23,554
Total Operating Supplies and Disbursements	69,000	40,190	28,810		192,257

SOMERSET FIRE AND RESCUE
Somerset, Wisconsin

DETAILED STATEMENT OF CASH RECEIPTS AND DISBURSEMENTS
GENERAL OPERATIONS FUND
BUDGET AND ACTUAL
For The Year Ended December 31, 2025
As of June 30, 2025

	2025				
	Original Budget	Actual	Variance Positive (Negative)		2024 Actual
DISBURSEMENTS: (CONTINUED)					
Contractual Services:					
Workers Compensation Insurance	$ 4,523	$ 3,962	$ 561	88%	$ 4,208
Property and Liability Insurance	11,977		11,977	0%	11,612
Special Accounting and Auditing	3,250	-	3,250	0%	5,828
Contracted Fire Inspections	3,200	-	3,200	0%	3,204
Total Contractual Services	22,950	3,962	18,988		24,852
Fund-Raising Disbursements	-	1,334	(1,334)		4,699
Miscellaneous Disbursements:					
Fire Prevention (Public Education)	1,500	457	1,043	30%	1,072
Training Expense (Including Mileage)	7,000	3,834	3,166	55%	8,990
Dues, Publications and Subscriptions	2,500	1,922	578	77%	1,623
Medical Exams, Tests and Vaccinations	500	-	500	0%	-
Other Miscellaneous	-	875	(875)		-
Total Miscellaneous Disbursements	11,500	7,087	4,413		11,685
Total Disbursements	283,450	160,083	123,367		427,073
EXCESS OF RECEIPTS OVER DISBURSEMENTS	-	45,356	45,356		(14,778)

		Assigned for Future Uses:	
Concert Revenues	$ 3,457	Insurance Recoveries	$ 1,129
Concert General Expenses	-	Jr. Firefighter Program	400
Concert Payroll	(2,863)	Remaining Balance	$ 1,529
Concert Payroll Taxes	(219)		
Total Concert Revenues/Expenses	$ 375		

Fund Raising Expenses:			
Apparel Purchases	$ 58		
Raffle License Renewal	51		
Pancake Breakfast Supplies	1,025		
Sign Results	200	**1,334**	-

CENTER FOR PUBLIC SAFETY MANAGEMENT, LLC

Proposal For

Fire Department Organizational Assessment and Strategic Needs

Somerset Fire/Rescue, WI

CPSM®

CENTER FOR PUBLIC SAFETY MANAGEMENT, LLC
475 K STREET NW STE 702 • WASHINGTON, DC 20001
WWW.CPSM.US • 616-813-3782

ICMA

Exclusive Provider of Public Safety Technical Services for
International City/County Management Association

June 3, 2025,

Somerset, WI Fire/Rescue Department
Attn: Travis Belisle, Fire Chief
748 Highway 35
Somerset, WI

In Re: Consulting Services: Fire Department Organizational Assessment and Strategic Needs Analysis.

Dear Chief Belisle:

The *Center for Public Safety Management, LLC, (CPSM),* as the exclusive provider of public safety technical assistance for the International City/County Management Association, is pleased to submit this *Fire Department Organizational Assessment and Strategic Needs Analysis* proposal to the Somerset, WI Fire/Rescue Department. On behalf of our firm, I thank you for considering CPSM for this consulting service. Through this introductory letter and proposal, I will explain why CPSM is the most qualified fire and emergency services consultancy firm to perform this evaluation and assessment for the Somerset Fire/Rescue.

Our Experience

CPSM specializes in public safety technical assistance to local governments including comprehensive evaluation and analysis of Fire and EMS agencies, Standards of Cover analysis, and Strategic/Service Level Planning services. Our foundational analysis principles include linking agency workload, performance, and response times to community risk, current and projected population and growth patterns, agency deployment models, station locations, and analysis of Fire and EMS service level deliverables. CPSM devotes substantial project analysis time to operational efficiencies (use of operational staffing and deployable resources), the effectiveness of the organizational structure in terms of managing and delivering organizational programs, and the impacts of operational workload, response times, and resiliency of operational resources on the overall effectiveness of the municipality's ability to provide Fire and EMS services to the community.

The above and other Standards of Cover/Service Level analyses components are staples in our Fire and EMS operational and strategic planning analysis projects, and link directly to operational staffing, apparatus deployment, and organizational issues and challenges. Additionally, these concepts will draw CPSM into a critical gap analysis of current and future Fire and EMS service levels, system issues and challenges, NFPA and ISO national benchmarking for fire protection services, and local, state, and national best practices for Fire and EMS service delivery.

Overall, CPSM has worked meticulously to develop client inclusive public safety consulting services that are non-biased, fact-based, and measured against national standards and best practices.

As an organization, CPSM has more than 15 years of experience performing these and similar projects for local government fire, rescue, police, and 911 departments nationwide using our unique methodology of aligning our comprehensive data analysis, industry standards and best practices, and recommendations and solutions with the issues and challenges faced by the Somerset Fire/Rescue Department. This includes our experience with more than 500 such public safety studies in 46 states and provinces and 450+ communities.

CPSM Key Strengths

Our overall project approach when conducting Fire and EMS analyses and assessments consistently includes:

Information and Data Collection – CPSM has developed several information gathering tools and techniques we utilize for our projects. These include information/data requests directed to the client, extraction, and forensic analysis of computer aided dispatch (CAD) and records management system data, and analysis of specific stakeholder meetings.

Inclusive Stakeholder Approach – As we do on every project, we will meet with and continuously communicate with the appropriate stakeholders for a wholistic understanding of the project scope, the jurisdiction, and any issues and challenges that may exist.

Fact Based Approach – CPSM is a fact based and data driven consultant organization, relying on information and data we receive from our clients, extract from our research, and as outlined in national standards and science/evidence based best practices.

CPSM offers a proven approach developed by combining the expertise of our fire, rescue, and EMS subject matter experts with our experience performing hundreds of similar studies for municipalities nationwide. Our operational assessments reflect lessons learned from the hands-on Fire and EMS department experience of our team.

ICMA has provided direct services to local governments worldwide for almost 100 years, which has helped to improve the quality of life for millions of residents in the United States and abroad. My colleagues at CPSM and I greatly appreciate this opportunity and would be pleased to provide consulting services to your organization.

Sincerely,

Joseph E. Pozzo
Senior Manager for Fire and EMS
Center for Public Safety Management. LLC
386-785-7282
jpozzo@cpsm.us

For CPSM,

Thomas J. Wieczorek, Director
Center for Public Safety Management. LLC
616-813-3782
twieczorek@cpsm.us

THE ASSOCIATION & THE COMPANY

International City/County Management Association (ICMA)

The International City/County Management Association (ICMA) is a 110-year-old, non-profit professional association of local government administrators and managers, with approximately 13,000 members located in 32 countries.

Since its inception in 1914, ICMA has been dedicated to assisting local governments and their managers in providing services to their citizens in an efficient and effective manner. ICMA advances the knowledge of local government best practices with its website, www.icma.org, publications, research, professional development, and membership.

Center for Public Safety Management

The ICMA Center for Public Safety Management (ICMA/CPSM) was launched by ICMA to provide support to local governments in the areas of law enforcement, fire, Emergency Medical Services (EMS), emergency management, and 911-Communication Centers. CPSM also represents local governments at the federal level and has been involved in numerous projects with the Department of Justice and the Department of Homeland Security. Further, CPSM provides training and research for ICMA members and represents ICMA in its dealings with public safety professional associations such as CALEA, PERF, IACP, IAFC, PSHRA, DOJ, BJA, COPS, and NFPA.

In 2014 as part of a restructuring at ICMA, CPSM spun out of ICMA as a separate company and is now the exclusive provider of public safety technical assistance for ICMA.

As an organization, CPSM has more than 15 years of experience performing fire, EMS, law enforcement, and 911 Communication Center agencies nationwide. Our overall experience includes more than 500 such public safety studies in 46 states and provinces and 450+ communities ranging in population size from 269 (Bald Head, NC) to 4.4 million (Maricopa County, AZ).

The CPSM project teams offer years of practitioner, first line supervisory, middle management, and senior leadership experience in the fire, rescue, EMS, emergency management, law enforcement, and 911-Center disciplines; and a record of research, academic, teaching and training. Our team comprises true industry subject matter experts, not research assistants, interns, or generic management consultants.

CPSM®
Center for Public Safety Management, LLC
www.cpsm.us

EXECUTIVE SUMMARY AND PROJECT APPROACH

CPSM understands the major focus of this organizational analysis and strategic needs analysis is to provide the Somerset Fire/Rescue Department with an independent and comprehensive assessment of the department's current organizational structure and future needs. CPSM understands our firm will be required to conduct in-person, onsite evaluations and engage directly with personnel across all staffing levels. CPSM further understands the goal of this project will be to develop a strategic and actionable plan that will guide Somerset Fire/Rescue in meeting both current and future service demands.

Project Management Approach

CPSM assigns a project manager to each project it performs. Our project manager is responsible for all aspects of project execution and contractual compliance. Chief Joe Pozzo will be the project manager for this project. He will serve as the main point of contact for the Fire-Rescue Department. Joe will lead our project team in performing the required scope of services in accordance with the contract scope of work, CPSM's quality standards, and the established project budget and schedule.

Project Kickoff and Communications

After the contract award, our Project Manager will arrange an initial virtual meeting with key project staff to discuss our approach to the project scope of work, as well as begin the stakeholder dialogue that will drive the project's success.

CPSM Project Work

Fundamentally, Fire/Rescue strategic planning services encompasses both a baseline gap assessment of an organization or program and a "road map" to develop and achieve a planned response to specific factors which will or potentially will affect an organization or program's mission, or in the case of public safety, service deliverables. A Fire/Rescue Strategic Plan also specifies baseline capabilities, real or potential constraints that may exist or be placed on the organization and delivers a set of goals and requirements to achieve identified objectives and desired outcomes.

The overall methodology for this master planning process includes concepts from the Customer-Centered Strategic Planning (CCSP) process. This planning process places a strong emphasis on understanding and meeting the needs of customers. In the case of a Fire-Rescue Department, this includes internal department members and external customers or users of the Fire Department system. The process is designed to align an organization's strategies and actions with the expectations and preferences of its members and customers.

CPSM's work will begin with establishing a close partnership with the Fire Chief, the command and administrative staff, and commission officials. Through our analysis work, we are natural collaborators and produce our best work when we better understand our client's organizational components and programs, internal and external forces, service delivery methodology, and desired outcomes while providing an external perspective. This will assist CPSM draft in-person stakeholder sessions with the members of the Fire-Rescue Department.

On an ongoing basis we will hold scheduled virtual meetings with the Fire Chief and staff to provide updates, review our progress, adjust our work as necessary, and discuss the next steps.

CPSM will specifically provide Fire/Rescue Planning Services which will lead to the creation of near-, mid-, and long-term strategic planning initiatives, goals, and objectives. The CPSM team will develop and facilitate:

- Focused on-site, in-person stakeholder sessions with uniform and non-uniform Fire-Rescue Department personnel to gather input that will assist CPSM in the development of strategic initiatives, goals, and objectives, and to integrate internal feedback into validating current Fire-Rescue Department mission, vision, and values.

- Conduct a baseline assessment of current conditions and service performance, centered around an organizational gap analysis. The purpose of this gap analysis is to assess emergency operations in comparison to industry standards and best practices, as well as (1) create a benchmark against which options for future service delivery can be measured; and (2) understand how the Fire-Rescue Department provides and coordinates system-wide service.

Fire/Rescue Planning Services with a Gap Analysis and Development of a Strategic Plan

The strategic planning process (work conducted during CPSM gap analysis and strategic planning meetings) that will lead to the development of a *Fire Department Organizational Assessment and Strategic Needs Analysis* and subsequent strategic planning initiatives will include:

- Initial preparatory meetings with Fire-Rescue leadership (virtual).
- 2-3 day site visit that will include:
  - Master Plan gap analysis meeting with Fire-Rescue leadership.
  - Internal stakeholder sessions (in-person) with identified Fire-Rescue staff.
  - Internal Stakeholder meeting(s) with commission members.
- Organizational Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis.
- Organizational and operational gap analysis to include:
  - A comprehensive response workload, response time, and resiliency data analysis of response resources.
  - A comprehensive review of all Fire-Rescue system components.
    - Fire and EMS Operations
    - Organizational Structure
    - Community Risk Reduction
    - Training and Education
    - Infrastructure (fleet and facilities)
  - Benchmarking against industry and national standards, and best practices.
  - A review of existing plans, guidelines, polices and other relevant documents.
  - Staffing and deployment assessment.
  - Analyze the community risk, incident demand, where the demand is occurring, and the fire-rescue system's ability to effectively respond to the community risk.
  - GIS mapping and analysis to support operational gap analysis, community risk assessment, and station location analysis.
  - Analysis of current demographics and population, land use and projected growth and associated impacts on the department.
  - Current Insurance Services Office (ISO) report analysis.
  - Analysis of current department deployment of resources and performance resiliency.
  - Linking the Community Risk Assessment to response assets and evaluating department capabilities to respond to these risks.
  - Resource concentration analysis: Analysis of the ability of the department to assemble an Effective Response Force benchmarked against national standards (NFPA, ISO) and department performance.

- Analysis of Critical Task Capabilities of the Fire and EMS department as benchmarked against national standards (NFPA, ISO, and CPSE), department performance, and best practices.
- Station distribution analysis: facility location analysis with regards to distribution and resource deployment.
- Development of near-med-and long-term strategic initiatives that focus on organizational and operational programs and service delivery.
- Provide analysis of fiscal impacts and resource implications.
    - Provide a cost-benefit analysis for proposed structural and staffing changes.
    - Include a breakdown of anticipated capital needs (apparatus, facilities, technology).
    - Suggest funding strategies (e.g., grants, partnerships, phased investment).

Our final document will include:

- Overview of the organization.
- Overview of the Strategic Planning Process.
    - CPSM Strategic Plan Methodology and results.
    - Overview of stakeholder meetings.
    - External survey.
    - Organizational Strengths, Weaknesses, Opportunities, and Threats.
- Gap analysis report sections.
- Vision and Mission Statements.
- Organizational Values.
- Strategic Initiatives with accompanying goals, objectives and implementation strategy.

EXPERIENCE AND TEAM QUALIFICATIONS

Producing high-quality Fire and EMS Operational Analyses, Strategic Plans, and Standards of Cover with an organizational gap analysis and community risk and growth analyses involves collaboration among stakeholders, accurate data provision by the client, in-depth gap analysis by CPSM, and a commitment to the established timelines. In the last eleven years, CPSM has delivered over two-hundred comprehensive Fire and EMS Analyses, Standards of Cover, and Fire Master/Strategic Plans that have provided local governments with alternatives and solutions to their Fire and EMS issues, challenges, and service deliverables, which have a focus on providing efficient and effective services as benchmarked against the agency's workload and response times, expectations, best practices, ability to fund, and national benchmarks.

In totality, CPSM has produced 450+ public safety analyses (this includes law enforcement), which include a comprehensive workload, response time, and reliability analysis.

The following outlines the wide range of Fire and EMS analyses, Standards of Cover, and Strategic Planning services we have completed or are engaged with in the most recent four-year period.

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- Pelham, AL (Fire & EMS)
- El Mirage, AZ (Fire, EMS & 911 Center)
- National City, CA (Fire, EMS & 911 Center)
- Petaluma, CA (Fire & EMS)
- Ukiah, CA (Fire & EMS)
- Rialto, CA, (Fire & EMS)
- Darien, CT (Fire, EMS & 911 Center)
- Evans, CO (Fire & EMS)
- Cocoa Beach, FL (Fire & EMS)
- Jupiter, FL (Fire & EMS)
- Chatham County, GA (Fire & EMS)
- Roswell, GA (Fire & EMS)
- Haverhill, MA (Fire & EMS)
- Northbridge, MA (Fire & EMS)
- Plymouth, MA (Fire, EMS & 911 Center)
- Biddeford, ME (Fire & EMS)
- Battle Creek, MI (Fire & EMS)
- Larkin Township, MI (Fire)
- Mt. Pleasant, MI (Fire & EMS)
- Midland, MI (Fire)
- Saline, MI (Fire & EMS)
- Northville-Plymouth, MI (Fire & EMS)
- Stearns County, MN (911 Center)
- Saline, MI (Fire & EMS)
- Sterling Heights, MI (Fire & EMS)
- Kalispell, MT (Fire & EMS)
- Prince George's County, MD (Fire & EMS)
- Minot, ND (Fire & EMS)
- Trenton, NJ (Fire)
- Canandaigua, NY (Fire & EMS)
- Haverford, PA (Fire & EMS)
- Upper Darby, PA (Fire & EMS)
- Celina, TX (Fire & EMS)
- Celina, TX (Fire & EMS)
- Garland, TX (Fire & EMS)
- Fair Oaks Ranch, TX (Fire & EMS)
- Richardson, TX (Fire & EMS)
- McGregor, TX (Fire)
- Tooele City, UT (Fire & EMS)
- Tooele County, UT (Fire & EMS)
- Augusta County, VA (Fire & EMS)
- Orange County, VA (Fire & EMS)
- Roanoke County, VA (Fire & EMS)
- Shenandoah County, VA (Fire & EMS)
- Altoona, WI (Fire & EMS)
- Baraboo, WI (Fire & EMS)

CPSM Key Personnel: Somerset, WI

CPSM DIRECTOR

THOMAS WIECZOREK

Director, Center for Public Safety Management; retired City Manager Ionia, MI; former Executive Director Center for Public Safety Excellence

BACKGROUND

Thomas Wieczorek is an expert in fire and emergency medical services operations. He has served as a police officer, fire chief, director of public safety and city manager, and is former Executive Director of the Center for Public Safety Excellence (formerly the Commission on Fire Accreditation International, Inc.).

He has taught numerous programs for the International City-County Management Association, Grand Valley State University, the National Highway Traffic Safety Administration (NHTSA), State of Michigan's Transportation Asset Management Council, and Grand Rapids Community College. He often testified for the Michigan Municipal League before the legislature and in several courts as an expert in the field of accident reconstruction and fire department management. He is the past president of the Michigan Local Government Manager's Association (MLGMA, now MME); served as the vice-chairperson of the Commission on Fire Officer Designation; served as ICMA's representative on the International Accreditation Service (IAS), a wholly owned subsidiary of the International Code Council (ICC); and currently serves on the NFPA 1710 and 1730 committee.

He worked with the National League of Cities and the Department of Homeland Security to create and deliver a program on emergency management for local officials titled, "Crisis

Leadership for Local Government Officials." It has been presented in 43 states and has been assigned a course number by the DHS. He represents ICMA on the Emergency Management Assistance Compact (EMAC) Board and other fire service participation areas. In 2022 he worked with ICMA to create a FEMA program on economic recovery from disasters for local government managers. It has been delivered via webinar and in person across the United States.

He received the Mark E. Keane "Award for Excellence" in 2000 from the ICMA, the Association's highest award and was honored as City Manager of the Year (1999) and Person of the Year (2003) by the Rural Water Association of Michigan, and distinguished service by the Michigan Municipal League in 2005.

Mr. Wieczorek has been with the firm since its inception and has completed and/or served as a corporate lead for several hundred Fire, EMS, and Law Enforcement projects.

SENIOR MANAGER: FIRE AND EMS – Project Manager

FIRE CHIEF, JOSEPH E. POZZO (RET.), MPA, CFOD

Former Director of Public Protection for Volusia County, Florida; Former Assistant Director of Human Resources, Volusia County, FL; Former Deputy Director, Volusia County Department of Public Protection; former Director and Fire Chief, Volusia County, Florida, former Fire Chief, Loudon County, Virginia, former Fire Chief Portsmouth, Virginia.

BACKGROUND

Joe Pozzo has a forty (40) year career in public service, and most recently served as the Director of Public Protection for Volusia County, Florida where he provided executive leadership to the Fire, EMS, Emergency Management, Corrections, Animal Control, and Beach Safety divisions. The Public Protection Department is the largest department in Volusia County and includes 945+ employees, an EMS Division that responds to 80,000 calls per year, an all-hazards Emergency Management Division, and a Fire Division that responds to 23,000 calls/year utilizing ALS staffed apparatus. Joe has also served as the Fire Chief for Volusia County and the Deputy Director of the Department of Public Protection for Volusia County where he was responsible for the day-to-day operations of all department divisions.

Prior to Chief Pozzo's appointment in Volusia County in 2010, he served as the Chief of the Loudoun County, VA Department of Fire and Rescue. Prior to his appointment with Loudoun County, Chief Pozzo served as Chief of the Portsmouth Fire, Rescue and Emergency Services Department. Chief Pozzo also served in the City of Virginia Beach, Va. Fire Department for 19 years, reaching the level of Deputy Fire Marshal and then Battalion Chief prior to embarking on his career as a Fire Chief/Director.

Joe holds a Master of Public Administration degree from Troy University, a B.A. in Public Administration from Saint Leo University, and numerous public safety technical certifications. Chief Pozzo also holds the ***Chief Fire Officer Designation*** from the Center for Public Safety Excellence.

SENIOR ASSOCIATE: FIRE SERVICES

CHIEF PETER J. FINLEY, JR. (RET.), BA, EFO

Retired Chief of Department City of Vineland Fire Department and Winslow Township Fire Department. Past President NJ Career Fire Chiefs Association.

BACKGROUND

Pete Finley's 36-year career in the fire and emergency services includes 28 in a career capacity with several different fire departments. He has served as Chief of Department for two New Jersey Fire Departments, most recently the Winslow Township Fire Department where, significant among other accomplishments, he was responsible for the planning, establishment, and initial deployment of the career component of the department as it transitioned from fully volunteer to combination status. Prior to that he served for more than 20 years with the City of Vineland Fire Department holding every operational rank (Firefighter, Fire Prevention Specialist, Captain, Deputy Chief, Fire Chief) including 4 ½ years as Chief of Department. In this position he initiated significant changes within the department including implementing numerous improved operational and safety initiatives, updating, and modernizing equipment, providing the department's first ever formal officer training and development program, and significantly increasing the capabilities of the regional hazardous materials and special operations response team. During his tenure, the department received more than one million dollars in various grants. He formerly commanded the Vineland Rescue Squad gaining significant EMS operations and command experience and completing a complete overhaul of that organization's operations.

Chief Finley currently serves as an Adjunct Professor in the Fire Science Program at Camden County College. In addition, since his retirement, he has been involved in conducting numerous fire department operational readiness and organizational evaluations including several under the auspices of the United State Coast Guard related to domestic port security assessments. He has also been involved in the development and administration of several fire service promotional examinations and assessment processes.

Chief Finley received his Associate in Applied Science degree from Atlantic Community College in New Jersey and earned his Bachelor of Science degree in Fire Science/ Administration from the University of Maryland. He is a 2003 graduate of the National Fire Academy's Executive Fire Officer Program earning an Outstanding Research Award for his 2002 paper titled, "Residential Fire Alarm Systems: The Verification and Response Dilemma".

He has earned more than two dozen state and national fire service certifications, most of them the highest level attainable. Chief Finley has been a member of several fire service organizations and served on numerous committees throughout his career.

In 2008 and 2009 he served as President of the New Jersey Career Fire Chiefs Association, a professional association that represents and advocates for the interests of the state's full-time professional fire chiefs and the fire service in general. From 2003–2005 he was a member of the Training and Education Committee of the Governor's Fire Service and Safety Task Force.

ASSOCIATE: FIRE AND EMS

CHIEF RONDALL L. EARLY, MPA, EFO, NREMT-P

Fire Chief, Wake Forest, North Carolina; Former Battalion Chief, Portsmouth VA.

BACKGROUND

Chief Early has more than 30 years of fire and EMS experience as a practitioner, middle manager, and Chief officer in the planning, organizing, delivering, and administration of fire and EMS department operations. Since 2008, Chief Early has commanded the Wake Forest Fire

Department. The Wake Forest Fire Department is a combination fire department that provides fire suppression, basic life support emergency medical services first response, hazardous material response, fire prevention, and fire and emergency medical services training programs to the Town of Wake Forest and surrounding unincorporated fire district.

Prior to his appointment in Wake Forest, Chief Early served the Portsmouth, VA Fire and EMS Department for twenty years. In Portsmouth, Chief Early rose through the ranks from firefighter to Battalion Chief, working in all areas of this department to include engine and ladder companies, EMS transport, and training. Chief Early's final assignment in Portsmouth prior to leaving for Wake Forest was as the Division Chief for Emergency Medical Services, where he oversaw the EMS transport operations, EMS billing, training, and administration of this departmental function.

Chief Early holds a Master of Public Administration degree from Troy University, is a 2011 graduate of the National Fire Academy's Executive Fire Officer Program, holds the certification of Nationally Registered Emergency Medical Technician-Paramedic, and holds the rank of 2nd Lieutenant with the North Carolina Civil Air Patrol in charge of Emergency Services.

ASSOCIATE: FIRE AND EMS

DEPUTY CHIEF MATT GUSTAFSON (RET.), B.S.

Former Deputy Fire Chief, Sonoma County, CA Fire District.

BACKGROUND

Deputy Chief Matt Gustafson has a 40-year career in public and private fire service, and most recently retired as a Deputy Chief with the Sonoma County, CA Fire District. Matt started his career as a volunteer firefighter for the City of Larkspur (CA). He was later hired at Lucasfilm LTD to help create a new fire, safety, and security division for the Skywalker Ranch / Lucasfilm complexes. Matt worked his way up to Assistant Fire Chief and Head of Safety/Security for the Skywalker Ranch complex.

In 1998, Matt was hired with Windsor Fire Protection District as a Battalion Chief / Fire Marshal. As Battalion Chief, Matt managed fire station crews and administrative staff and responded to greater alarm incidents ultimately for two fire districts under a Joint Powers Agreement (JPA). He managed employee performance and relations, facilities, and policy development. As Fire Marshal, Matt performed plan review and fire and life safety inspections for new building projects and events for a rapidly growing community. Matt managed fire investigations, public relations, and community risk reduction programs. Matt worked closely effectively with the public, building officials, planners, developers, other fire officials, city officials, and elected officials. He served as president of the Sonoma County Fire Prevention Officers and facilitated the "single-code" (one fire code for the entire county) project. Matt also managed a LEED/Green-certified new fire station project, added staffing, built employee relations, and created strategic plans, team building programs, fee schedules, mitigation revenues, and a career succession program.

Matt has an Associate's Degree in Fire Science Technology, a Bachelor of Science Degree in Fire Administration and Prevention (Magna Cum Laude), Fire Officer Certification, and is a Master Instructor within the California State Fire Service Training and Education System.

DATA ASSESSMENT TEAM – DATA TEAM MANAGER

DOV CHELST, PH.D.

Director of Quantitative Analysis

BACKGROUND

Dr. Chelst is an expert in analyzing public safety department workload and deployment. He manages the analysis of all public safety data for the Center. He participates in all phases of The Center's studies from initial data collection, on-site review, large-scale dataset processing, statistical analysis, and designing data reports.

Dr. Chelst has a Ph.D. Mathematics from Rutgers University and a B.A. Magna Cum Laude in Mathematics and Physics from Yeshiva University. He has taught mathematics, physics, and statistics, at the university level for 9 years. He has conducted research in complex analysis, mathematical physics, and wireless communication networks and has presented his academic research at local, national, and international conferences, and participated in workshops across the country.

PUBLIC SAFETY DATA ANALYST

XIANFENG LI, PH.D.

BACKGROUND

Dr. Xianfeng Li is a professional computational scientist and certified SAS programmer with a wealth of knowledge and research experience in Complex System Modeling, Data Analysis, and Statistical Physics. He is highly qualified in various coding programs and has earned numerous data science certifications. He previously worked as a Research Associate and Postdoctoral Fellow. Dr. Li earned his Ph.D. and master's degree in Polymer Science within the Institute of Chemistry from the Chinese Academy of Sciences in Beijing. He earned his Bachelor's Degree in Chemistry at Jilin University in Changchun.

PUBLIC SAFETY DATA ANALYST-GIS

MONICQUE LEE, MS, BS

BACKGROUND

Ms. Lee has extensive experience in the areas of data and geospatial analysis, hydrographic data processing, mapping platforms, and project management. She has worked as a GIS consultant, and with the U.S. Army Corps of Engineers where she received a U.S. Army commendation, and the United States Geological Survey, Grand Canyon Monitoring and Research Center. Ms. Lee has a Master of Science in Geographic Information Science & Technology.

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WORK PLAN AND TIMELINE

The CPSM work plan includes:

- Project kickoff meeting(s) to discuss/confirm the overall project scope.
- Workload, response time, reliability data analysis - CAD and NFIRS data collection.
- Document and information request regarding Fire/Rescue Department organizational, administrative, and operational information.
- GIS mapping information request regarding station location(s), mutual aid company locations, targeted hazards and other community risk, as well as other applicable gap analysis mapping needs.
- On-going virtual meetings to discuss project scope, solicit information, discuss specific project components.
- On-Site visit.
- Research and development of a separate workload, response time, reliability data analysis.
- Research and development of a *Fire Department Organizational Assessment and Strategic Needs Analysis/Strategic Plan.*

Site Visit

CPSM will conduct a site visit (2-3 days) for the purpose of conducting stakeholder interviews with key agency and department leadership and workforce members, as well as the commission to obtain information specific to the scope of work for the *Fire Department Organizational Assessment and Strategic Needs Analysis*. The site visit will also include a tour of the response district so CPSM can better understand the building, transportation, and environmental risk inherent to the district. Lastly, the site visit will include a tour of each fire facility and training grounds so that CPSM can better analyze service delivery infrastructure and observe operational readiness and response posture.

Project Timeline

CPSM proposes the following draft project timeline to deliver the final *Fire Department Organizational Assessment and Strategic Needs Analysis* document approximately 180 days from kickoff.

Project Component	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Project Kickoff	■					
Conduct *Organizational Assessment and Strategic Needs* Gap Analysis		■	■	■	■	
Operational Analysis Site Visit			■			
Workload, Response Time, and Reliability Analysis Development and Delivery		■	■			
Deliver Draft *Organizational Assessment and Strategic Needs Analysis*						■
CPSM-Client Meetings (Virtual)		■	■	■	■	■

REFERENCES

City of Altoona, WI

Mr. Roy Atkinson, Assistant City Administrator
715-839-6092
roya@ci.altoona.wi.us

CPSM completed a Fire and EMS assessment (2025) of the Altoona Fire Department and EMS ground transport service delivery system. CPSM provided recommendations and alternatives on service delivery, recruitment and retention of paid-call members, infrastructure, and organizational programs. ***Completed Project January 2025. Presentation May 2025.***

City of Baraboo, WI

Kevin Stieve, Fire Chief
608-355-2710
kstieve@cityofbaraboo.com

CPSM completed a Fire-EMS merger analysis for the City of Baraboo as well as a Operational Analysis (Standards of Cover) and Strategic Plan for a combined Fire and EMS agency. Merger Analysis completed January 2022. ***Strategic Plan with Standards of Cover completed September 2022.***

Shenandoah County, VA

Evan Vass, County Administrator
540-459-6165
evass@shenandoahcountyva.us

CPSM completed an organizational and operational service plan for the Shenandoah County Fire & EMS system (combination career and volunteer) in 2025. CPSM provided recommendations and alternatives on service delivery, recruitment and retention of career and volunteer members, infrastructure, and organizational programs. ***Service Plan and Presentation completed February 2025.***

Garland, TX

Chief Mark Lee, Garland, TX Fire Department
972-781-7101
MLee@garlandtx.gov

CPSM completed a Fire Master Plan for the Garland Fire Department. Our work included a comprehensive gap analysis that included an operational and administrative analysis of the department. This assessment included a community risk analysis, infrastructure analysis (fleet and facility), staffing analysis, growth analysis, station location feasibility analysis, program analysis (community risk reduction, training), workload and response time analysis, deployment analysis, and comprehensive analysis of the fire department EMS transport system. CPSM provided the city with a corresponding strategic plan that includes near-, mid-, and long-term goals and objectives and recommendations and solutions for station locations, fleet and resource deployment, staffing, and EMS deployment. ***Fire Master Plan Plan and Presentation completed July 2023.***

Tooele City, UT

Mayor Debra Winn
435- 843-2104
dwinn@tooelecity.org

CPSM conducted a comprehensive analysis of the Tooele City Fire Department (2022). This analysis included an all-hazards community risk analysis; workload and response time data analysis; organizational structure and culture review; analysis of organizational programs to include community risk reduction, training and education, operational response capabilities; fleet and facility asset analysis; and facility feasibility location analysis. During the analysis, CPSM interacted extensively with City staff, members and officers of the fire department, and key stakeholders involved with the project. CPSM provided the city with significant near, mid, and long term planning recommendations and alternatives focused on improving the organization and enhancing service delivery. ***Project and Presentation completed April 2022.***

Proposed Fees and Fee Payment Schedule Presented on the Next Page.

PROPOSED FEES

The quotation of fees and compensation shall remain firm for a period of 120 days from this proposal's submission as indicated below.

Somerset Fire/Rescue - Cost Sheet

Phase 1 Cost: $30,600 *Cost includes a Workload, Response Time and Reliability data analysis.*

- An evaluation of current staffing levels, departmental model (currently a combination department), and organizational structure to determine if Somerset Fire/Rescue is able to provide adequate fire and related emergency services based on fire industry standards.
- An assessment to project future staffing levels, models, and organizational needs based on population growth, concurrent/overlapping emergency capacity, and evolving service demands.
- An evaluation of asset deployment given current staffing levels, model, and structure to determine compliance with fire service industry standards.
- Identification of necessary improvements based on the staffing evaluation.

Phase 2 Cost: $10,150

- A comprehensive GIS-based analysis of response times throughout Somerset Fire/Rescue's service area.
- Identification of areas where response times exceed accepted fire industry standards.

Phase 3 Cost: $10,500

- Recommendations for the location(s) of additional fire station(s) required to meet fire industry response time benchmarks.
- Conceptual planning and layout for any proposed additional fire station(s).
- Assessment of current apparatus and identification of additional apparatus needed if new stations are recommended.

Phase 4 Cost: Presentations if same trip but multiple presentations over two days:
$3,000 plus travel for one CPSM staff (estimated to be $2,500 and billed at cost).

Presentation if separate trips (3 to 5 trips): $2,500 plus travel for each trip one CPSM staff (estimated to be $2,500 and billed at cost) for one CPSM staff.

- Presentation of findings, evaluations, and recommendations to Somerset Fire/Rescue leadership, town board, department personnel, and any participating municipal partners.
- Minimum of 3 and maximum of 5 in-person presentations.

Total Cost: For *Organizational Assessment and Strategic Needs Analysis*: $56,250 (*does not include presentation costs*).

- Project Research and Report Development: **$51,250.**
- Operational Site Visit Travel for 2 CPSM staff: **Not to exceed: $5,000 (billed at actual cost).**

Presentation Costs outlined above. CPSM is willing to discuss the presentation fees and schedule to minimize these costs.

Submitted by: Thomas J. Wieczorek, Director, Center for Public Safety Management, LLC.

Authorized Representative (Signature)

June 3, 2025

Date

Proposed Fee Payment Schedule: Fire Department Evaluation and Assessment

Task/CPSM Work	Billing Schedule
▪ Contract/Agreement Signed. ▪ Project kickoff meeting with client staff.	**40-percent** of *Fire Department Organizational Assessment and Strategic Needs Analysis* Report Development Fee.
▪ Delivery of Draft Comprehensive Workload, Response Time, and Reliability Data Analysis.	**40-percent** of *Fire Department Organizational Assessment and Strategic Needs Analysis* Report Development Fee.
▪ Delivery of *Fire Department Organizational Assessment and Strategic Needs Analysis* Draft Report.	**20-percent** of *Fire Department Organizational Assessment and Strategic Needs Analysis* Report Development Fee.
Total	**100-percent** of *Fire Department Organizational Assessment and Strategic Needs Analysis* Report Development Fee.

CONCLUSION

Report deliverables are as stated above, unless otherwise agreed upon between the client and the Project Manager. The fee quoted above is inclusive of the research and development of all elements of the draft and final reports. The quotation of fees and compensation shall remain firm for a period of 120 days from this proposal's submission.

CPSM will deliver all reports on computer readable material by email. Should the department and/or district municipalities desire additional copies of the final analysis report, CPSM will produce and deliver whatever number of copies is requested, which will be invoiced at cost.

Part of ICMA's mission is to assist local governments in achieving excellence through information and assistance. Following this mission, the Center for Public Safety Management, LLC acts as a trusted advisor, assisting local governments in an objective manner. CPSM's experience in dealing with public safety issues combined with its background in performance measurement, achievement of efficiencies, and genuine community engagement, makes CPSM a unique and beneficial partner in dealing with issues such as those being presented in this proposal. We look forward to working with you.

End of Proposal

Thank you for considering the Center for Public Safety Management

Proposal Summary: CPSM Fire Department Organizational Assessment & Strategic Needs Analysis

Submitted to:

Somerset, WI Fire/Rescue

Date:

June 3, 2025

Submitted by:

Center for Public Safety Management (CPSM), LLC

Total Base Cost:

$56,250 (excludes optional presentation costs)

Purpose of the Proposal

CPSM proposes to conduct an independent, comprehensive assessment of Somerset Fire/Rescues organizational structure, staffing, service delivery, and future needs to develop a strategic, actionable plan.

Scope of Work Includes:

Organizational Assessment & Gap Analysis

- Review of staffing, structure, asset deployment, and current service performance

- SWOT analysis, stakeholder interviews (in-person and virtual)

- Operational site visit (23 days)

Data & GIS Analysis

- CAD and NFIRS data review for workload, response time, and reliability

- GIS mapping for risk, demographics, growth, and station locations

Strategic Plan Development

- Short-, mid-, and long-term goals & initiatives

- Benchmarking against NFPA/ISO standards and best practices

- Cost-benefit and capital needs analysis

- Draft and final report production

Optional In-Person Presentations

- $2,500$3,000 per trip plus travel

- Up to five total presentations to department staff, board, and stakeholders

Key Personnel

- Joe Pozzo (Project Manager) Former Fire Chief and Public Protection Director, 40+ years experience

- Thomas Wieczorek (Director) Former City Manager & national fire expert

- Supporting Team: Retired fire chiefs, data scientists, and GIS analysts

Timeline

180 days total from project kickoff to final report

Ongoing virtual updates and meetings throughout

Cost Breakdown

Phase 1: Organizational Assessment & Staffing Review $30,600

Phase 2: GIS-Based Response Time Analysis $10,150

Phase 3: Station/Facility & Apparatus Planning $10,500

Phase 4: Presentation(s) (Optional) $3,000$12,500

Total (Excl. Presentations): $56,250

Proposal Summary: Five Bugle Training & Consulting Strategic Plan for Somerset Fire Department

Submitted to:

Somerset, WI Fire Department

Date:

June 2025

Submitted by:

Five Bugle Training and Consulting (FBTC)

Total Cost:

$12,000 (not to exceed)

Purpose of the Proposal

FBTC proposes a five-year strategic plan designed to guide Somerset Fire Department through sustainable growth, operational excellence, and stronger community alignment. The plan emphasizes innovation, stakeholder engagement, and performance metrics.

Strategic Focus Areas

1. Optimize Operational Efficiency

- Evaluate structure, leadership, and current ability to meet community needs
- Recommend based on data analysis, including EMS initiatives and fiscal impacts

2. Staffing & Training

- Assess adequacy of current staffing and training
- Project needs for future response capabilities

3. Strengthen Stakeholder Relationships

- Interview fire personnel, village leaders, business community, and others

4. Apparatus & Equipment Evaluation (optional)

- Review fleet for safety, adequacy, and alignment with NFPA standards

5. Mutual Aid & Revenue Sources

- Review MABAS/mutual aid agreements and explore partnerships
- Identify new or creative funding opportunities

Action Plan Phases

Phase 1: Complete strategic planning process

Phase 2: Prioritize implementation (Year 1-3)

Phase 3: Sustain goals in organizational culture (Years 4-5)

Performance Metrics

- Response effectiveness
- Firefighter retention and engagement
- Budget alignment or savings
- New partnerships formed

Key Personnel

- Bruce A. Fuerbringer, M.S., EFO Project Lead with decades of leadership in fire service

Terms

Cost not to exceed $12,000

Chief may adjust scope within proposal limits during project

Somerset Fire/Rescue

from the office of the fire chief

Somerset Fire / Rescue

Five Year Plan

Presented to the Boards of the:

Village of Somerset

And

Somerset Township

April 23rd, 2025

748 Hwy 35
Somerset, WI 54025
Station (715)247-5364 Fax (715)247-3194

The intention of this plan is to be a guide for the growth and development of Somerset Fire/Rescue.

The goals of Somerset Fire/Rescue are;

1. To serve, without prejudice or favoritism, all the community's citizens, to safeguard collectively and individually their lives against the death-dealing and injurious effects of fire, explosions and medical emergencies.
2. To safeguard the general economy and welfare of the community by preventing major conflagrations and the destruction by fire of large payroll, economically essential industries, businesses and institutions.
3. To serve all the community's citizens and property owners by protecting their individual material wealth and economic well-being against the destructive effects of fires and explosions.
4. To provide a hazard and mitigation service to the community with fire department personnel and equipment resources. Serious or imminent conditions posing threat to life and property shall require fire department service to cause rapid mitigation of the hazard and facilitate recovery in conjunction with other emergency services.
5. To perform services and/or emergency response as placed by the fire/rescue department as a matter of law, ordinance, or judicial direction of a court of law having jurisdiction.

In order to accomplish these goals, each element of the department must be addressed in a manner which provides fluidity and consistency with the other elements of the department. This planning process requires participation and involvement from all entities that are involved with Somerset Fire/Rescue, those being the Fire Commission, Village and Township Boards, and the Fire Department Officers and Members. We must collaboratively understand the needs of the community as they are currently, and what the needs will be in the future.

It is very difficult to predict the needs on a year to year basis and therefore each element of the department must be looked at individually. Vehicles and to some extent equipment can be planned to a certain degree, but what type and the cost are hard to predict due to expanding requirements that are changing each year. This plan is to address to some extent those elements of the department and what the needs are.

Equipment, from SCBA's to Ventilation Fans, is one of the hardest to predict based on usage, updates and requirements in the fire industry and NFPA, etc. The following updates, upgrades and equipment is what will be needing replacement in the next five years:

1. Portable and Mobile Radios
   St Croix County has decided to move to the 800mHz narrow band by the end of 2029/2030. We will be meeting with Terry Anderson from the county soon to discuss. Preliminary pricing from Ancom Communications puts the radio pricing at $8,168.35 per portable and $9,343.42 per mobile. With our needs being approx. 25 portables and 12 mobiles for a total initial cost of $316,329.79. This does not include annual maintenance, licensing and eventual replacement which at this time is being suggested at every 6 years.

2. 1998 Engine – Replace in 2029
   This truck will be 31 years old in 2029. With the growth in Somerset currently and in the foreseen future it would be best to replace this with a Quint or Aerial type device to protect both businesses and residences. Engines are 2-4 years out when ordered and current pricing has an engine near $1,000,000

Year	Project	Cost
2029	Replace 1998 Engine	$1,000,000+
2036	Replace 2006 Tender	$450,000+
2038	Replace 2008 Ford Brush	$85,000+

Somerset Fire/Rescue
from the office of the fire chief

Somerset Fire / Rescue

Long Range Plan

Presented to the Boards of the:

Village of Somerset

And

Somerset Township

April 23rd, 2025

748 Hwy 35
Somerset, WI 54025
Station (715)247-5364 Fax (715)247-3194

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2. To safeguard the general economy and welfare of the community by preventing major conflagrations and the destruction by fire of large payroll, economically essential industries, businesses and institutions.
3. To serve all the community's citizens and property owners by protecting their individual material wealth and economic well-being against the destructive effects of fires and explosions.
4. To provide a hazard and mitigation service to the community with fire department personnel and equipment resources. Serious or imminent conditions posing threat to life and property shall require fire department service to cause rapid mitigation of the hazard and facilitate recovery in conjunction with other emergency services.
5. To perform services and/or emergency response as placed by the fire/rescue department as a matter of law, ordinance, or judicial direction of a court of law having jurisdiction.

In order to accomplish these goals, each element of the department must be addressed in a manner which provides fluidity and consistency with the other elements of the department. This planning process requires participation and involvement from all entities that are involved with Somerset Fire/Rescue, those being the Fire Commission, Village and Township Boards, and the Fire Department Officers and Members. We must collaboratively understand the needs of the community as they are currently, and what the needs will be in the future.

It is very difficult to predict the needs on a year to year basis and therefore each element of the department must be looked at individually. Vehicles and to some extent equipment can be planned to a certain degree, but what type and the cost are hard to predict due to expanding requirements that are changing each year. This plan is to address to some extent those elements of the department and what the needs are.

One element we need to look at is facilities. Somerset Fire/Rescue is located in probably the best location to service both the Village and Township. We have quick access to the four lane highway and we are also centrally located for servicing areas both to the North and South of the station. There is a space issue as the trucks become larger to accommodate the growth of both residential and commercial buildings in Somerset. With the construction of our offices previously, we lost the training and meeting area that we once used. We have reverted back to using the Town Hall for meeting and training purposes and our access is limited to the exterior entrance door. This is a shared space with the Senior Center and Town Hall which limits our ability to set up as necessary to hold proper trainings in the space. An addition to the current station should be considered with the addition of a meeting/training room and additional bay space for equipment.

Another element to consider is that of apparatus. As seen below we have stated the approximate life expectancy of each vehicle and what the expectation is for replacement or upgrade. NFPA states that the life of a fire apparatus is 20 years. We have modified those recommendations and added additional years of life based on the use of the trucks in our department.

ENGINE #1 – 3511
2014 PIERCE VELOCITY RESCUE/PUMPER

11 YEARS OLD
Miles: 7,916
Hours: 949

Concerns:
1. Truck is in excellent condition
2. Truck is well suited for fire attack on single and two-story structures and smaller.

Recommendations:
1. Downgrade to Engine 2 in 2029
2. Replace in 2044

Current Value - $575,000

Engine #2 – 3512
1998 INTERNATIONAL /INTRA CAB/ PUMPER, 1500GPM

27 YEARS OLD
Miles: 18,551
Hours: 1,702

Concerns:
1. Truck is in good condition
2. Truck is well suited for fire attack on single and two-story structures and smaller.
3. Maintenance costs are rising each year, in 2011 a total pump rebuild was done on truck.

Recommendations:
1. Replace this truck in 2029, with current Engine 1 and replace Engine 1 to fit the needs of the town and the village of Somerset

Current Value - $250,000

Replace with Quint in 2029 - $1,000,000 current (3-5% increase each year)

Tender #1 – 3521

2025 Freightliner Tanker, 2000 gal, 500gpm pump

0 years old
Miles:

Concerns:

1. None, Tanker is brand new

Recommendations:

1. Downgrade in 2040 to tender 2
2. Replace in 2055

Current Value - $385,000

Tender #2 – 3522

2006 International Tanker 2000gal, 500gpm pump

19 Years old
Miles: 10,995

Concerns:

1. None, Tanker is in excellent condition and well stocked for fire fighting

Recommendations:

1. Downgraded in 2025 to tanker 2
2. Replace in 2036

Current Value - $350,000

Brush truck #1 – 3531
2019 Ford F350, 200 gal tank with portable pump

6 years old
Miles: 2,132

Concerns:
1. None at this time

Recommendations:
1. Downgrade in 2038 to Brush #2
2. Replace in 2049

Value - $80,000

Brush #2 – 3532
2008 Ford F250, 1 ton, 200 gal poly tank w/ new pump in 2004

17 Years old
Miles: 8,736.7

Concerns:
2. None at this time

Recommendations:
3. Downgraded in 2019 to Brush #2
4. Replace in 2038

Value - $70,000

Brush Truck/Medical Response Truck – 3533
2009 Ford F-450, 200 gal tank and pump

16 years old

Miles: 21,151

Concerns:
1. Truck is a dually and does not handle well in the winter
2. See recommendations

Recommendations:
1. Rebuild the back of the vehicle removing the wildland firefighting equipment and reconfigure to make it a true medical/small rescue vehicle
2. Consider starting from scratch to replace the dually and rebuild the back of the vehicle

Value - $95,000

Utility Vehicle – 3550
2023 Ford F-150 Lightning

2 years old
Miles: 0

Concerns:
1. None

Recommendations:
1. None

Value - $75,000

Boat
2007 G3 Boat

17 Years Old

Concerns:
1. None at this time.

Recommendations:
1. None at this time.
2. Purchase items as needed based on usage of boat over time and needs that are discovered.

Trailer
2011 United Trailer

14 Years Old

Concerns:
1. None at this time

Recommendations:
1. Organize equipment so that it is accessible and contained when trailer is moving.

Polaris Ranger
2009 Polaris off road EMS emergency vehicle

16 Years Old
Miles: 1,467
Hours: 288.6

Concerns:
1. None at this time.

Recommendations:
1. None at this time.
2. Upgrade as needed for run volume and growth
3. Converted to a EMS Only response UTV in 2023

Value - $13,000

Somerset Fire/Rescue

from the office of the fire chief

Polaris Ranger

2021 Polaris off road Fire emergency vehicle

4 Years Old
Miles: 15.7
Hours: 19.9

Concerns:

2. None at this time.

Recommendations:

4. None at this time.

Value - $35,000

748 Hwy 35
Somerset, WI 54025
Station (715)247-5364 Fax (715)247-3194

Current Vehicle Replacement Timeline

2029/2030 – 1998 Pierce Engine 2 (31/32 years old)

2036 – 2006 Pierce Tender 2 (30 years old)

2038 – 2008 Ford Brush Truck 1 (30 years old)

2039 – 2009 Ford Medical Truck (30 years old)

2044 – 2014 Pierce Engine 1 (30 years old)

2049 – 2019 Ford Brush Truck (30 years old)

2053 – 2023 Ford F-150 Lightning (30 years old)

2055 – 2025 Pierce Tender 1 (30 years old)

748 Hwy 35
Somerset, WI 54025
Station (715)247-5364 Fax (715)247-3194

ORGANIZATIONAL ASSESSMENT & STRATEGIC NEEDS ANALYSIS

for the

Town of Somerset Wisconsin

of the

Somerset Fire & Rescue

Submitted By:

McGrath Consulting Group, Inc.

June 2025

June 6, 2025

Chief Travis Belisle
Somerset Fire/Rescue
748 Highway 35
Somerset, WI 54025

McGrath Consulting Group, Inc. is pleased to submit a proposal to perform an Organizational Assessment and Strategic Needs Analysis for the Town of Somerset of the Somerset Fire/Rescue Department. We are confident we can develop and provide a quality report that addresses the four components identified in the RFP:

Objective 1: Analysis of Current Organization Structure
Objective 2: Assessment of Future Growth and its Impact on Staffing and Organization Structure
Objective 3: Future Staffing and Organization Recommendations
Objective 4: Fiscal Impact and Resource Implications

With the additional components listed in the Scope of Objectives within this document. This proposal outlines the project work plan, methodology, consulting team assigned to this project, and other information.

McGrath Consulting Group, Inc., utilizes consultants who are highly skilled individuals with both educational credentials and work experience in the areas outlined in this proposal. Our consultants have an extensive understanding of the Fire/rescue service and utilize proven study methodologies. Our project manager will communicate regularly with your designated individual to ensure a timely response to issues, questions, or requests you might have. Our project team will remain intact during the duration of this project.

Our firm will partner with our subsidiary company McGrath Human Resources Group to address opportunities/issues related to Human Resource matters (i.e., job descriptions). McGrath Human Resources Group brings their expertise in dealing with the human element of the project, federal and state compliances, and compensation issues. Our Human Resource division has been involved in past fire/rescue studies since the inception of our corporation.

We understand the importance of this project and look forward to the opportunity of working with the Town officials, fire department leadership and members, and other identified stakeholders. We have conducted numerous fire/EMS assessments and look forward to working with you on this project.

Sincerely,

Tim McGrath, Ph.D.

Tim McGrath

Table of Contents

Firm Profile

McGrath Consulting Group, Inc. is an organization that specializes in public sector consulting predominately in the fields of fire, emergency medical services (EMS), law enforcement, communications, and human resources. The principals of the company have over 50 years of public sector experience.

There are two distinct divisions within the corporation: Public Safety – overseen by Dr. Tim McGrath and Human Resources – overseen by Dr. Victoria McGrath. The McGrath Consulting Group Inc. believes the value of our services directly correlates to the extensive research conducted and years of consulting experience.

McGrath interviews a wide range of stakeholders for every project. We want to gain an understanding of your current and future needs, opportunities, and learn the culture of your organization.

Company Name	McGrath Consulting
Parent Organization	McGrath Consulting Group, Inc.
Established	May 1, 2000
Years of Business	25
Type of Firm	Private Corporation
Company Mailing Address	P.O. Box 865, Jamestown TN. 38556
Website	www.mcgrathconsulting.com
CEO/Authorized Representative	Dr. Tim McGrath
Email Address	tim@mcgrathconsulting.com
Office Phone	(815) 728-9111
Fax Number	(815) 331-0215
Insurances	Erie Insurance: Auto, General Liability, and Workers Compensation Mount Vernon: Professional Liability Chubb: Cyber Security Liability

Firm Experience

McGrath Consulting Group, Inc., has 700 clients in 41 states. Our firm currently employs 30 full-time or independent contractors to assist with projects. A lead consultant will be assigned to the project who is responsible for meeting the proposal's scope of objectives, communicating status of the project, and ensure the consulting team is addressing the needs of the client.

Understanding the Project

The Somerset Fire/Rescue Department (SFRD) leadership supported by the Town officials are requesting a comprehensive data driven non-bias independent professional consulting firm to conduct an organizational structure assessment and needs analysis of the SFRD. The consultants shall conduct a complete assessment of the current fire/EMS services including operations, administrative, organizational structure, staffing options recommendations based on recommended phased implementation strategy (short term (1-2 years) and long term (3-5 years).

There are 762 fire departments in the State of Wisconsin and more than 92.5% of these fire departments are volunteer or mostly volunteer staffed. However, within the last three decades, the number of volunteer firefighters has declined, hitting a record low today. Nationwide fire/EMS providers are facing staffing issues (recruitment & retention), budget constraints and funding issues, while experiences rising call volumes; unfortunately, SFRD is not exempt from these issues. In addition, the Town is experiencing economic development and an increased population with changing needs.

The consultant's study will provide options for various fire/EMS service levels with recommendations that are relevant to the best practices, benchmarks and accepted standards for Fire and EMS services. The project is expected to evaluate strengths and gaps in the current delivery system and assess resources needed to meet the current and future demands for the performance of services to the community. The project will evaluate aspects of service delivery including fire suppression, emergency medical services fire prevention, inspections, and public safety education.

Stakeholders Input

Our firm's 25 years of consulting services have proven the importance of communicating directly with stakeholders. It allows our consulting team the ability to learn from governance, administration, department leadership, department members, involved stakeholders, their perspective. Stakeholder input is critical to the project's success; therefore, a considerable amount of time will be dedicated to this endeavor. These meetings and interviews will provide the consulting team with the ability to identify the culture of the organization, opportunities to improve existing services, identify service delivery options; and explore opportunities for more cost-effective service delivery.

The consulting team will schedule interviews with, but not be limited to, the following stakeholders:

- *Town elected officials.*
- *Town administration.*
- *Fire Department leadership and leadership team.*
- *Fire Department officers, members.*
- *Appropriate other Town department head.*
- *Other identified stakeholders.*

To allow for the free flow of information between stakeholders and the consulting team all stakeholders' interviews will be kept confidential. The consultants will summarize the major themes discovered without the identification of a specific stakeholder.

Data Importance

One of the main challenges Fire/Rescue leadership faces is to identify the need for resources that will ensure the highest level of emergency service and safety for those who receive and provide such service, as well as to justify the fiscal dollars needed for their resource requests. Good data is essential in accomplishing this mission. Data will quantify the need separating *wants from needs.*

Scope of Objectives

The list below provides a general workplan and scope of objectives for this study. All studies are dynamic and from time to time need to be modified as information and data is uncovered. Often additional interviews are needed, and work plans modified based on what is learned working through the process. In all aspects of this project, the consultants will engage the client and listen to stakeholders with a focus on the unique current and future needs of the SFRD.

Develop Project Work Plan

- Develop a project work plan based on the scope of work.

- Gain an understanding of the organization's background, goals, and expectations for the project.
- Establish working relationships, make logistical arrangements, determine communication process, and finalize contract arrangements.
- Identify work plan specifics.
  - Primary tasks to be performed.
  - Person(s) responsible for each task.
  - Resources to be utilized.
  - Possible obstacles or problem areas associated with the accomplishment of each task.

Objective 1: Analysis of Current Organization Structure

Background Data/Information

- Review and analyze pertinent information, data, maps, and previous studies
- Assess and evaluate the information provided to the consultant by the board officials, fire department
- Utilize the appropriate information, data, maps, and other information in the development of the fire/rescue future recommendations and service delivery plan

Overview Operations/Data

- Evaluate the organization structure
- Assess the current overall department operations for efficiency and effectiveness – information used as the basis for recommendations
- Gain an understanding of the history and culture of the organization
- Evaluate the department's operations for compliance with commonly accepted standards
- Analyze the department's organizational structure
- Review and evaluate the fire department's critical issues and future challenges
- Review of current trends in emergencies and non-emergencies demands
- Data collection for the last three years to determine trends in:
  - Emergency responses
    - Fire
    - EMS
- Analysis of current emergency operation data:
  - Types of emergency incidents
  - Response times
  - Time of emergency alarms
  - Day of the week of emergency
  - Calls by month
  - Simultaneous/overlapping call data
- Assessment of existing department strategic plan
- Assessment of current mutual aid and automatic response agreement(s)

Leadership Management

- Examine management structure and chain of command
- Determination of the managerial leadership philosophy:
    - Alignment with the Town's strategic initiatives
    - Best practices to ensure a unified department team in providing services
    - Assess the cooperation between other public safety departments
- Gain an understanding of past management practices and impact on the culture of the organization
- Evaluate the department's leadership and management team structure
- Review existing policies and procedures of the department – evaluate against industry best practice:
    - Standard Operating Guidelines/Procedures – both emergency and non-emergency services
- Examine fire/EMS department's leadership effectiveness
- Review and assess the fire/EMS department policies and/or procedures
- Evaluate the effectiveness of both internal and external communication processes

Objective 2: Assessment of Future Growth and its Impact on Staffing and Organization Structure

Community Demographic Changes

- Future geographic growth potential
- Current demographics and future projections
- Future land usage plans
- Assessment of zoning maps
- Future transportation implications
- Vision of future emergency responses
    - Response times
    - Adequate staffing
    - Adequate resources
- Comparison to like communities
- Assessment of future disaster preparedness challenges
- Governance – political influence, stability, change

Future Fire/EMS Protection

- Evaluate efficiency of the current planning process
- Review of the Town's strategic plan
- Assessment of existing department strategic plan

- Assessment of future emergency service needs
- Impact of national emergency response trends
- Significance of national, state, and local fire service standards
- Vision of future emergency responses
    - Response times
    - Adequate staffing
    - Adequate resources
- Comparison to like communities
- Assessment of future disaster preparedness challenges
  (Most of these objectives will be covered in other sections)

Objective 3: Future Staffing and Organization Recommendations

Staffing

- Assess staffing levels to meet current and future service demands
- Evaluation of existing staffing philosophy
- Appropriateness of staffing methods, numbers, and distribution of personnel
    - Administrative and support staff
    - Suppression/EMS staff
    - Fire Prevention staff
- Evaluate the responsibilities and activity levels of personnel
- Assess span of control of officers
- Safety and productivity as related to staffing
- Determination of future staffing needs and associated fiscal impact
    - Career
    - Part-time
    - Paid on Call
    - Volunteer
    - Contractual

Personnel Management

- Employees employee's compliance with federal and state regulations
    - Fair Labor Standards Act (FLSA)
    - Equal Employment Opportunity Commission (EEOC)
- Audit of fire department human resource policies and practices
- Assessment of employees' record management systems.
- Assessment of management/labor relationship
- Examination of recruiting and hiring practices
- Assessment of employee retention programs
- Appraisal of the promotional process
- Assessment of employee demographics
- Review existing ranks and titles of the leadership team

Standard Comparison

- Impact of national emergency response trends
- Significance of national, state, and local fire service standards:
  - National Fire Protection Association (NFPA) (includes NFPA 1710)
  - Insurance Service Offices, Inc (ISO) rating significance to the community
  - Occupational Safety and Health Administration (OSHA)
  - Center for Public Safety Excellence (CPSE) – formerly the Commission of Fire Accreditation International (CAFI)
  - Wisconsin SPS 330 – Fire Department Safety and Health Standards
  - Commission on Accreditation of Ambulance Services
  - International City & County Management Association (ICMA)
  - EMS industry standards

Facilities Apparatus

- Evaluation of the current facility and their limitations – both support and emergency appropriateness
- Illustrate time/distance GIS mapping from existing facility
- Compliance of existing facilities to industry safety standards (i.e., ADA)
- Identify future facility needs (including additional, relocation, or elimination of stations)
- Evaluate current facilities for safety, efficiency, and environmental issues.
- Current condition and limitations of apparatus and equipment
- Appraisal of types of apparatus, age, and appropriateness for the protection area
- Appraisal of apparatus replacement plan
- Identification of current apparatus and equipment needs
- Identification of future apparatus and equipment needs

Fire Prevention Public Safety Ed

- Review the current general fire prevention and fire inspection programs
  - Types of inspections
  - History of inspections
  - Number and types of re-inspections
  - Code enforcement activities
  - Trends in inspection demands and permits
  - Trends in permits
  - New construction and involvement
  - Department's sharing of information and resources
- Assess existing or future impact of fire codes
- Evaluation of the fire investigation programs and activities
- Review pre-incident planning program

- Evaluate the department’s public safety education activities
- Assess the department’s cooperative efforts in public safety education
- Review the department’s public safety data

Objective 4: Fiscal Impact and Resource Implications

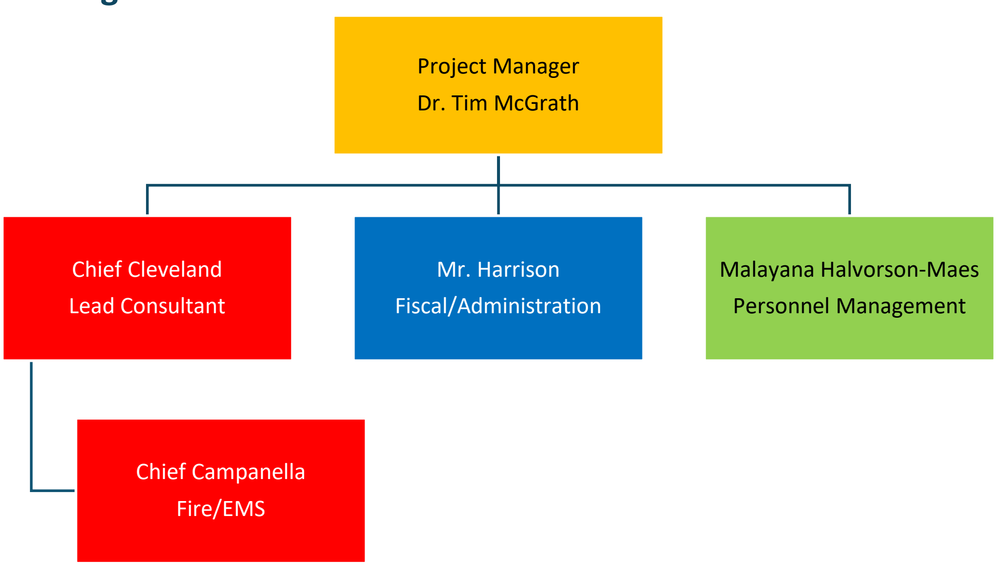
Cooperative Opportunities

- Interview neighboring service providers seeking their interest in greater cooperative efforts.
- Identify opportunities to create or expand on existing interagency partnerships or intergovernmental agreements.

Fiscal Analysis

- Analyze the department's current fiscal condition
- Evaluate the operational and capital budgets.
- Analyze the department 's fiscal efficiency.
- Review historical data (3-years) of the department revenue and expenses.
- Review funding, fees, taxation and other financial resources.
- Review current capital assets and analyze future usage based on existing conditions.
- Identify potential savings and costs both short and long term.
- Identify future (short and long term) capital programs.
- Identify fiscal implications for recommendations made in the study.
- Identify methods for financing capital needs.
- Identify funding methods for apparatus/vehicle replacement.

Consulting Team



Project Consulting Team Members

Project Manager / CEO

Dr. Tim McGrath – Project Manager

As CEO of McGrath Consulting Group, Inc. Dr. Tim McGrath is the visionary of the organization. His 33 years of experience in Fire and EMS as well as his ability to develop innovative solutions makes McGrath Consulting different than other firms. Dr. McGrath started his career as a volunteer firefighter and went through the transition of an informal group of civic-minded individuals to an integral department within the Village of Gurnee, IL. During his tenure with Gurnee, the Village rapidly grew from a small bedroom community to one that hosts a Six Flag Great America, and at the time, the world's largest shopping center – 2.2 million square feet under one roof. Dr. McGrath was in administrative positions during both of the ventures, so he understands the opportunities and challenges growth brings to the fire service.

Dr. McGrath was part of the first paramedic pilot program in the State of Illinois. Through his leadership, he brought in the first non-education-based paramedic training program in the City of Brookfield fire department. Thus, the City of Brookfield Fire Department became a profit center training all paramedic personnel for Waukesha County, WI.

Dr. McGrath's passion is in consolidation of services. This can entail a wide range of relationships from simply sharing resources to full consolidation and integration of services. Thus, conducting an analysis of each department, Dr. McGrath is able to identify the areas for greater cooperative efforts that continue to provide quality services in a cost-efficient manner.

Through his experience and innovative mind set, Dr. McGrath is able to identify and address key issues – current and future. It is through this combination of education and work experience, as well as working with over 170 organizations in 39 states, he brings a vast amount of first-hand knowledge to the assessment of emergency services.

Education Background

Walden University
- Doctorate – Administrative Management
- Dissertation: Attitudes on Consolidation in the Fire Service

Webster University
- Master of Arts – Public Administration & Management

University of Wisconsin – Stout
- Bachelor of Science – Industrial Education

College of Lake County
- Associate Degree – Fire Science Technology

Fire/EMS Consulting Team

Chief Gregg Cleveland – Fire/EMS Consultant

Chief Cleveland recently retired from the La Crosse Fire Department (LCFD) Wisconsin. He became a career Fire Chief in a combination fire department and retired with nearly 40 years of experience. La Crosse fire is a career fire/EMS department consisting of 4 stations, 110 personnel, and an 11-million-dollar budget.

While Fire Chief of the LCFD the department received International Accreditation from the Center for Public Safety Excellence – Commission on Fire Accreditation International. Chief Cleveland also merged the City's Building Inspections department into the fire department.

Chief Cleveland is the past Chairman of the Wisconsin Fire Sprinkler Coalition, and member of the Emergency Responder Advisory Committee for the National Fire Protection Association (NFPA). He is currently the Chairman for the National Fire Protection Association's Fire Service Executive Board and former President of the Wisconsin State Fire Chiefs Association. He has served on the fire service advisory board for Factory Mutual Insurance and as technical panel member for the Fire Protection Research Foundation of NFPA. Chief Cleveland has also served as a peer reviewer for the Assistance to Fire Fighter Grant program.

Chief Cleveland worked with numerous state and local legislative councils, boards, and committees on a variety of fire and EMS related issues and worked extensively to adopt Wisconsin's first fire prevention code.

Chief Cleveland has a passion for data; using a variety of performance measures to develop, implement, and evaluate public policy for fire and EMS agencies.

A strong proponent of cooperation and collaboration allowed him to create Central Wisconsin's 1st municipal paramedic service covering approximately 13 different municipalities encompassing 360 square miles while the fire chief in Marshfield, WI. He has utilized this approach in the development and implementation of numerous other programs that include a dive rescue, hazardous materials, and neighborhood services teams, and to address issues such as the opioid crisis, homeless, and maintain safe and affordable housing to communities.

Educational Background

University of Wisconsin Oshkosh

Masters, Public Administration

Lakeland College

Bachelor of Art, Business Administration

Fox Valley Technical College

Associate Degree in Applied Science – Fire Protection

National Fire Academy

Graduate of Executive Fire Officer program

Chief Rocco Campanella

Chief Campanella has 29 years of fire/EMS service. Chief Campanella is currently an active part-time Fire Chief who brings his expertise in management of employees of all types whether it be volunteer, paid on call, paid on premise or full-time. His part-time municipality covers the largest freshwater marina in the Great Lakes. Experience at the part time level includes assisting with a federal FLSA lawsuit against the municipality, ensuring the department is OSHA compliant, and an overhaul of the fleet maintenance division. Chief Campanella was awarded multiple grants including a $215,000 FEMA Assistance to Firefighter Grant for new portable and mobile radios. The department is an all-hazards organization whether it be dive rescue, technical rescue, or hazardous materials. Chief Campanella is often referred to as having to rebuild the department from the ground up developing a training division, Fire Prevention Bureau, and fleet management.

He also holds the rank of Battalion Chief in a career fire/rescue department. At the full-time level, Chief Campanella rose through the ranks. He served as union president, negotiator during a time when the city was in a 1.5 million deficit. He was instrumental in developing the 24/72 work cycle with the goal of improving recruitment and retention. Chief Campanella has oversaw the fleet management program for 14 years, this position is responsible for preventative maintenance, scheduling repairs, and creating specifications for new apparatus.

Outside the fire service he is continually active with his children's sports teams and donating his time at his church.

Education Background

National Fire Academy
    Graduate of Managing Officer Program
Southern Illinois University
    Bachelor of Fire Science Management
College of Lake County
    Associates in Arts
Concordia University
    Masters in Organizational Leadership
Illinois State Fire Marshal
    Chief Fire Officer

Fiscal/Administration Consultant - Advisory

Mr. Robert Harrison – Fiscal Analysis/Administration

Mr. Harrison is a consultant with McGrath Consulting, which brings an Administrator/Fiscal perspective to our studies. Mr. Harrison has over 20 years of experience in municipal management. Mr. Harrison is currently the City Administrator of Issaquah, WA, which is a full-service City that has grown from a population of 4,000 15 years ago to 31,500 today. He served as City Manager of Wyoming, Ohio for 12 years, which is a full service residential suburban city on the border of Cincinnati, Ohio. In addition, he has served in City management positions with the City of Mosinee, WI and City of Wauwatosa, WI.

Through the introduction of the Balanced Score Card evaluation, Mr. Harrison has effectively developed strategic plans that have resulted in economic growth for the community, as well as accountability within the organization. He has received GFOA awards as well as the State Auditors Award for excellence in financial reporting. He has implemented a successful LEAN initiative in the City of Issaquah directed at improving service and reducing costs.

Education Background

University of Wisconsin-Milwaukee
    Master of Arts – Public Administration
Marquette University
    Bachelor of Arts

Human Resources

Malayna Halvorson Maes, Human Resources Consultant

Malayna Halvorson Maes has served as a human resource professional in both the private and public sectors for over 20 years. She worked previously in health care human resources, then as the Human Resources Director and senior advisor for a large county in northern Wisconsin. Thus, she has direct experience with the many challenges facing municipal employers.

During her time in county government, Ms. Maes advised the organization on significant changes in the State. This included the most sweeping change which reduced the legal authority of organized labor in the public sector. This resulted in a reduction from five (5) collective bargaining units to one (1) unit in her County.

As a change agent, she facilitated the development of significant policy changes for the organization. This included conducting a complete evaluation of the compensation system for the county which resulted in a rewrite of all job descriptions and the implementation of a pay for performance evaluation system. This system was created through the work of a combined employee – manager committee and included the implementation of a performance management software system to streamline the 360-evaluation process. Thus, she brings a practical understanding to the development and implementation of pay-for-performance compensation systems.

As a former municipal Human Resources Director, she is knowledgeable of all facets of local government, including police, public works, engineering, health services, and more. She has been active in a number of professional organizations including SHRM, Chippewa Valley Society of Human Resource Management; WIPFLE Senior HR Forum; Wisconsin Association of County Personnel Directors, and the National Public Employer Labor Relations Association. In addition, she has served on the WACPD training Committee, Chair of the Legislative Affairs Committee, a member of the Board of Director as well as a member of the Services Committee for WPELRA; thus, she takes an active role in defining the profession.

References

Northfield Township, MI
Contact: Mark Lloyd, Township Manager 734-449-2882 ext. 122 email: lloydm@northfieldmi.gov
Project: Assessment of the fire department to examine staffing needs and options. The project is expected to evaluate strengths and gaps in the current delivery system and assess the method used to meet the current and future service demands and the ability of the MFD to provide these resources. Marach 2024

Newburg Fire Department, Inc.
Contact: Board of Directors – Capt. Ryan Haeuser 262-483-4929 email rthaeuser@newburgfirerescue.com
Project: Comprehensive assessment of the fire and EMS department with special emphasis placed on personnel management and emergency service delivery. July 2022

City of Silvis, IL
Contact: Chief John Winters 309-792-4815 email: jwinters@silvisfd.org
Project: Operational audit of operations and services with focused attention on long-range planning for EMS services. Analysis of EMS operations and recommendations for changes based on the current private ambulance service delivery model. February 2023

Town of Lawrence, WI
Contact (@ time of study)**:** Mr. Patrick Wetzel Town Administrator 920- 336-9131, email: patrickw@townoflawrence.org
Project: Fire Department & Emergency Medical Services Review and Future Needs Analysis – completed in January 2021

Dewitt Charter Township, MI
Contact: Adam Cramton – Town Clerk -517-668-0270 email: acramton@dewitttwp.org
Project: Staffing Study for both Fire and Police Departments involved data analysis of frequency of incidents, response times, staffing level, and department efficiency. August 2024

Town of Ledgeview, WI
Contact (@ time of study)**:** Sarah Burdette, Administrator – 920- 336-3360 ext. 108 email: sburdette@ledgeviewwisconsin.com
Project: Audit/Assessment & Future Staffing Methodology. Addressed need for augmenting existing paid-on-call members during critical service demand times. January 2021

Previous Wisconsin Clients

Previous Clients in Wisconsin - Fire /EMS Departments	
Arcadia-Glencoe Fire Board	Fire Department Audit
Richfield Volunteer Fire Company, Inc.	20 Year Master Plan, EE Handbook
Town of Delavan	Apparatus Need Assessment
Burlington Rescue Squad	Assessment of EMS Delivery and Fiscal Analysis
North Shore Fire Department	Assessment of the Consolidation
City of South Milwaukee	Assessment Testing –Police & Fire Chiefs Search
Mazomanie & Black Earth Fire Departments	Consolidation - 2 Departments
Town of Vernon	Creation of a Fire Department
Town of Plymouth	Creation of a Public Works Department
Village of West Milwaukee	DC Assessment Center, Compensation & Performance
Froedtert Hospital	Emergency Preparedness Training
Elmbrook Hospital	Emergency Preparedness Training
City of Burlington	EMS Review/Staffing
Oregon-Area Fire/EMS District	Executive Search - Fire Chief
Stevens Point	Executive Search – Fire Chief
Sun Prairie VFD Company, Inc.	Executive Search - Fire Chief
City of Sun Prairie	Executive Search EMS Director
City of Marshfield	Executive Search Fire Chief
South Shore Fire Department	Executive Search Fire Chief

Previous Clients in Wisconsin - Fire /EMS Departments	
Arcadia-Glencoe Fire Board	Fire Department Audit
City of Wisconsin Rapids	Executive Search Fire Chief
City of Ashland	FD Audit, Compensation Study, Handbook, Job Description
Town of Salem	FD Consolidation of 3 FDs, Executive Search: Fire Chief
City of Delavan, Village of Darien, Town of Darien	FD Consolidation
Towns of Linn, Geneva, & Village of Williams Bay	FD Consolidation
Mt. Pleasant & Sturtevant (South Shore)	FD Consolidation
Village of Darien	FD Needs Assessment
City of Oak Creek	FD Station Location & Resource Deployment
Town of Richfield	FD. Railroad Crossing Impact – FD Audit
Town of Fremont	Fire & 1st Responder Assessment
City of Sun Prairie	Fire & EMS Funding Formula
City of Ashland	Fire Chief Assessment Testing
City of Greenfield	Fire Chief Executive Search
City of Wisconsin Rapids	Fire Chief Executive Search, Executive Search Police Chief
City of Eau Claire	Fire Department Assessment Testing
Edgerton Fire Protection District	Fire Department Audit
Town of Maine	Fire Department Audit
City of Rice Lake	Fire Department Audit & Master Plan
City of Sun Prairie	Fire Department Audit and Staffing Study
Village of Grafton	Fire Department Audit, Staffing
City of Lake Mills	Fire Department Staffing Study
Newburg Fire Department Inc.	Fire/EMS Assessment
Lawrence Town of	Fire/EMS Assessment
Town of Ledgeview	Fire/EMS Audit
Village of Pleasant Prairie	Fire/EMS Department Assessment
City of Burlington, Town of Burlington, Burlington Rescue Squad	Greater Cooperative Opportunities
Waukesha County Technical College	Hospital Emergency Incident Command System
Village of Winneconne	Station Location

Project Timeline

A project of size and scope will be completed in five (5) months from signing the contract.

Task	1st Month	2nd Month	3rd Month	4th Month	5th Month
Contract Completion/Signing	■				
Data Request to Service Provider	■				
-Usually Takes 2 to 3 Weeks to Acquire	■				
First Site Visit		■			
-Data Review on Site		■			

Task	1st Month	2nd Month	3rd Month	4th Month	5th Month
-Key Stakeholder Interviews					
-Village Governance					
-Village Administration					
-Fire Department Leadership					
-Fire Department Stakeholders					
-Other Stakeholders					
-On Site Observations					
Overview Operations					
Data Analysis					
Leadership/Management					
2nd Site Visit					
-Stakeholder Interviews					
-Service Providers					
- Other Providers Officials					
-PSAP (dispatch)					
Future Options for Service					
Develop Report Components					
Write Draft Report					
3rd Site Visit – (if needed)					
-Stakeholder Meetings for Clarification					
Submit Draft Report					
Address Draft Report Clarifications					
Compose Final Report					
Proofreader					
Submit Final Report					
- Presentation of Final Report					

Exception: Study Costs

Page three (3) of the RFP states "The final report must include the following components" listing four components (highlighted in blue). In the pricing section the same four components are listed but are different in what should be addressed. Attempting to list price for each phase separately would need to include a duplication of expenses, i.e., consultants travel, resulting in a total price for the four phases far exceeding a single not to exceed price for the project. Therefore, I chose to list the study cost as a single do not exceed.

Study Costs

The study cost for the Organizational Assessment and Strategic Needs Analysis of the Somerset Fire/Rescue Department is guaranteed not to exceed **34,250.00,** which includes all aspects as outlined within this proposal, consulting team time and travel. The Town will be invoiced in four (4) payments:

15% ($5,137.50) – upon signing of the contract
20% ($6,850.00) – upon the first site visit
55% ($18,837.50) – upon submission of the draft report
10% ($3,425.00) – submission of the final report and presentation if desired

The proposal price is good for 60 days from submittal. Payment is due within 30 days of receipt of the invoice.

Draft Report

At the conclusion of the study, an electronic version of the draft report will be provided for technical review by the client.

Final Report

An electronic PDF final report will be provided to the client for distribution as desired. A final presentation is available on request from the client.

Final Word

Our company will develop recommendations that ensure high quality services within the fiscal capabilities of the Town of Somerset. We approach each project as a new opportunity to identify opportunities for the service provider to improve services and prepare for long-range future service needs. The consulting team consists of fire, rescue, and EMS professionals who have years of experience in career, volunteer, and combination fire and EMS departments. The expertise of our human resource professionals will integrate the abilities of the personnel into the opportunities identified.

Sincerely,

Tim McGrath

Tim McGrath, Ph.D. CEO

Proposal Summary: McMahon Fire Department Organizational Assessment & Strategic Needs Analysis

Submitted to:

Somerset, WI Fire/Rescue

Date:

June 5, 2025

Submitted by:

McMahon Associates, Inc. in collaboration with RW Management Group

Total Cost:

$43,000 (fixed fee; includes all travel and expenses)

Purpose of the Proposal

McMahon and RW Management propose a collaborative and data-driven approach to evaluate Somerset Fire/Rescue's organizational structure and strategic needs, offering realistic, cost-effective recommendations to guide the department's future.

Scope of Work Includes:

Phase 1: Data Collection & Community Engagement

- Collect historical data, conduct stakeholder interviews, review previous reports
- Includes community survey, staff focus groups, and public meetings

Phase 2: Organizational and Operational Assessment

- Analyze service levels, staffing, station locations, mutual aid, and response times
- Evaluate SOGs, safety practices, and compliance with NFPA, ISO, and state standards

Phase 3: Strategic Recommendations

- Develop staffing, station, apparatus, and service delivery recommendations
- Identify long-term facility, resource, and intergovernmental partnership strategies

Deliverables

- Community profile and benchmark comparison
- GIS response mapping
- Draft and final reports with prioritized action plans
- Presentation to governing body and key stakeholders

Key Personnel

- Mike Romenesko (Project Manager, McMahon) 25+ years in municipal planning
- Chief Randy Pickering (RW) 35+ years, fire chief and strategic planning expert
- RW Management Group: Former public safety leaders and HR professionals

Timeline

120 days from notice to proceed (4 months)

Includes phased milestones, regular progress meetings, and presentations

Cost & Terms

Fixed fee: $43,000

Includes all travel and expenses

Invoiced monthly based on project progress

TIMOTHY SCHABBEL tshabbel@mcmgrp.com

PROPOSAL

June 4, 2025

PUBLIC SAFETY & MUNICIPAL MANAGEMENT
PROFESSIONAL CONSULTING SERVICES

ORGANIZATIONAL ASSESSMENT & STRATEGIC NEEDS ANALYSIS

ST. CROIX COUNTY, WI

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McMAHON
ENGINEERS ARCHITECTS

June 4, 2025

Somerset Fire/Rescue
Attn: Travis Belisle, Fire Chief
748 Highway 35
Somerset, WI 54025

Re: Somerset Fire/Rescue
Organizational Assessment and Strategic Needs Analysis

Dear Chief Belisle,

We are pleased to submit a Proposal for a Fire Organizational Assessment and Future Needs Analysis for Somerset Fire/Rescue. Our Team's passion for Public Safety and working with fire and emergency medical services agencies provides the basis for our interest in submitting this Proposal. Municipal Consulting projects have become a major focus for McMahon Associates, Inc. (McMahon). Similar work in the past has included departments such as the Villages of Somers, Mukwonago, Germantown, and Waunakee.

McMahon's Public Safety & Municipal Management Group's focus is on national and international public management consulting services. Most of our clients are public sector entities: municipalities, counties, tribes, or special districts. We have a Team of 10 consultants, who are all senior level staff and are either current or former municipal management practitioners. An important component of our approach is frequent communication with the Municipal Administration.

Our extensive operational and strategic experience in the public safety area uniquely qualifies us for a project of this nature. The Team has management, operational, technical, and consulting experience with all types of municipal and public safety operations experience. Several members of the Team that will be assigned this project have vast experience in agencies serving multiple municipalities like Somerset Fire/Rescue.

Thank you for the opportunity to submit this Proposal. If you have any questions or desire to schedule a meeting where we can present our Proposal in more detail and answer any questions, please feel free to contact me at 574-274-4626 or by email at tschabbel@mcmgrp.com. We look forward to working with you on this important project!

Respectfully,
McMahon Associates, Inc.

Timothy Schabbel
Timothy Schabbel
SENIOR PUBLIC SAFETY SPECIALIST

Mark A. Rohloff
DIVISION MANAGER

PROPOSAL

ORGANIZATIONAL STRUCTURE ASSESSMENT & FUTURE NEEDS ANALYSIS

QUALIFICATIONS

McMahon provides public management consulting that delivers professional, high quality public management consulting, project management, and other related services to organizations throughout the United States and abroad. Our consultants have served the needs of numerous municipalities throughout the United States and remain very active with several public safety and government related organizations including:

- Wisconsin State Fire Chiefs Association
- International Association of Fire Chiefs
- International Association of Fire Chiefs – Great Lakes Division
- Indiana Fire Chiefs Association
- Professional Ambulance Association of Wisconsin
- Wisconsin City/County Management Association
- International City/County Management Association
- International Association of Police Chiefs
- Association of Public Safety Communications Officials
- National Emergency Number Association
- National Police Protection Association
- Wisconsin Society of Certified Public Managers
- Wisconsin State Police Chiefs Association
- Wisconsin Association of Public Safety Communications Officials

Our consultants possess in-depth knowledge of relevant aspects of public service, which includes administration, communications, organization, labor relations, human resources, economics, and standards. This knowledge allows us to provide clients with an intellectual and objective analysis of the information received. This information is then presented in an easily understood format, allowing policy boards to make knowledgeable and informed decisions.

Project progress is measured against an established work plan, timetables, budget, and list of deliverables. Project methodology includes frequently scheduled progress meetings to discuss progress as well as new or unanticipated issues. The work plans are focused, coordinated, and logical. Project Team members are also available throughout the duration of the project.

METHODOLOGY

Our approach to this project requires a clear understanding of the current fire and emergency medical services operations, staffing, and administration within Somerset Fire/Rescue. The key elements of our methodology include:

- A clear understanding of the project background, complex issues involved, and the goals and objectives.
- A work plan that is comprehensive, well designed, practical, and provides for ample opportunity for client input.
- Sufficient resources and a commitment to successfully completing the project within the desired time frame and at a reasonable cost.

CLIENT INPUT

To develop a comprehensive Organizational Assessment and Future Needs Analysis and make specific recommendations, it is critical that we receive quality information from officials, staff, and members of the organization. Accordingly, our approach includes regular meetings with the Department.

PRACTICAL RECOMMENDATIONS

Our goal is to provide you with realistic recommendations for the administration and management of the fire department. These recommendations need to be based on sound practical standards and legal considerations.

PROJECT MANAGEMENT

A successful assessment and the provision of effective recommendations requires a special effort to ensure that all levels of the project receive adequate attention, and those findings and recommendations are thoroughly coordinated. This is accomplished by the development and adherence to a project work plan, clear management team assignments, and frequent communications with Somerset Fire/Rescue.

SCOPE OF WORK

PROJECT KICKOFF

- Develop a Project Team of appropriate users and stakeholders to oversee and participate in the project. The Project Team will coordinate project schedules, evaluate findings and recommendations, and review and present the final documents.
- Prepare for and conduct Project Planning Meeting with McMahon Project Manager, the Project Team, and key project personnel. The purpose of the meeting will be to define scope and mission, discuss the work plans, establish liaison responsibilities, coordinate project schedules, and confirm other general arrangements.

INITIAL ASSESSMENT & OBSERVATIONS

- Obtain and review documentation pertaining to this project, such as existing fire department documentation, policies and procedures, job descriptions, detailed call volume statistics, community development plans, service contracts, surveys, capital improvement plans, and previous studies.
- Conduct on-site observation of fire department operations to gain a better understanding of future fire department needs.

CONTINUED ASSESSMENT & DOCUMENTATION

- Assess the current fire operations and begin to assess future needs by conducting interviews and on-site observations with representatives of all ranks in the municipalities and agency. The interviews and observations will be held in both group and individual settings with personnel from the following areas:
    - Fire Department
        - Administration
        - Fire Officers
        - Fire Fighters
        - Fire Inspectors

  Interviews and observations will primarily focus on the following issues:
    - Current Fire-EMS operations, staffing, and levels of service.
    - Workload call volume and activity.
    - Fire operations and service expectations.
    - Current and anticipated staffing and budget issues.
    - Major equipment needs.
    - Economic development plans.
    - Facilities.
- Prepare for and facilitate a project status meeting to discuss the results of the interviews and on-site observations and to review the next steps of the project.

ANALYSIS, PERFORMANCE REVIEW & RECOMMENDATIONS

- Review present Fire-EMS workflows and processes to analyze and develop potential organizational requirements. This review will be based on the Commission of Fire Accreditation International categories and criteria. The performance indicators that will be examined include the following:
  - Governance and Administration
  - Assessment and Planning
  - Goals and Objectives
  - Financial Resources
  - Community Risk Reduction Programs
  - Physical Resources
  - Human Resources
  - Training and Competency
  - Essential Resources
  - External Systems Relationships
  - Health and Safety
- Determine any changes, or future trends, for public safety industry standards related to operational and organizational requirements. During the development of all recommendations, McMahon will consider many factors and standards as a basis for recommendations, including:
  - State of Wisconsin Statutes and Administrative Code
  - National Highway Safety Traffic Administration (NHSTA)
  - Federal Emergency Management Agency (FEMA)
  - Local Related Ordinances
  - Commission on Fire Accreditation International (CFAI)
  - National Fire Protection Association (NFPA)
- Prepare for and facilitate a Recommendations Meeting to present preliminary findings and obtain feedback from the Project Team.
- Develop a comprehensive detailed Fire/EMS Department Organizational Assessment and Strategic Needs Analysis (Analysis), utilizing the information provided by the documentation received, the interviews, and on-site observations. The projected growth and level of service needs will be considered during the development of these recommendations to include:
  - Review of the current organizational structure to include recommendations for changes.
  - Comparison of the current organizational structure to similar sized districts/municipalities that offer the same level of service and industry standards such as NFPA.
  - Evaluation of current job descriptions and draft job descriptions for newly proposed positions.
  - Evaluation of the current organizational staffing model and its ability to provide for future projected higher service demands in future years.
  - Operational gaps that may emerge for the Department.
  - Phased implementation plan.

ANALYSIS, PERFORMANCE REVIEW & RECOMMENDATIONS

- ▶ Recommendations of an optimal organizational staffing model/organizational chart that effectively meets the current and future service demands based on the consulting Team's analysis.
- ▶ Evaluation of the financial impact of all recommended staffing structure modifications.
- ▶ Cost-benefit analysis of proposed staffing and organizational structure modifications.
- ▶ Evaluation of the financial impact of recommended staffing structure modifications to apparatus or fleet, equipment, and capital demands.
- ▶ Examples of funding strategies for the proposed changes.

DOCUMENT PREPARATION & REVIEW

- List and describe the findings and recommendations with regards to organizational structure and strategic needs of the Department.
- Prepare budget impact estimates by implementation recommendations, identifying initial and recurring costs in a separate category for each resource.
- Assemble the Analysis document by performing a detailed quality assurance review of the document to ensure that the document meets the expectations of the Project Team and conforms to McMahon's standards.
- Prepare, produce, and deliver the draft Analysis to the Project Team for review. Facilitate a Report Delivery Meeting to review content as well as schedules and expectations for the remaining project steps.
- Facilitate an Analysis Review Meeting with the Project Team approximately one week after initial delivery to answer questions regarding the content of the Analysis. Make any changes to the Analysis based on the discussions at the Analysis Review Meeting. Produce and deliver final document copies to the Project Team.
- Facilitate an Analysis review presentation for the Somerset Fire/Rescue leadership, municipal partners and stakeholders (up to five in-person presentations included).

PROJECT FEE & SCHEDULE

PROJECT FEE

McMahon proposes to provide the Scope of Services described in this Proposal for the Fire Department Organizational Structure Assessment and Future Needs Analysis as shown below:

Time & Expense: $58,000 – not to exceed, all inclusive. The cost breakdown is as follows:

Phase 1 Cost: $36,000

- An evaluation of current staffing levels, departmental model, and organizational structure to determine if Somerset Fire/Rescue is able to provide adequate fire and related emergency services based on fire industry standards.
- An assessment to project future staffing levels, models, and organizational needs based on population growth, concurrent/overlapping emergency capacity, and evolving service demands.
- An evaluation of asset deployment given current staffing levels, model, and structure to determine compliance with fire service industry standards.
- Identification of necessary improvements based on the staffing evaluation.

Phase 2 Cost: $ 7,000

- A comprehensive GIS-based analysis of response times throughout Somerset Fire/Rescue's service area.
- Identification of areas where response times exceed accepted fire industry standards.

Phase 3 Cost: $5,000 (excludes conceptual planning and layout)

- Recommendations for potential location(s) of additional fire station(s) required to meet fire industry response time benchmarks.
- Assessment of current apparatus and identification of additional apparatus needed if new stations are recommended.

Phase 4 Cost: $ 10,000

- Presentation of findings, evaluations, and recommendations to Somerset Fire/Rescue leadership, village and town boards, department personnel, and any participating municipal partners.
- Cost for up to 5 in-person presentations.

Total Cost: $ 58,000

Upon acceptance of this Proposal, McMahon will prepare an Agreement incorporating the Scope of Services and terms outlined here. All services will be provided in accordance with our General Terms & Conditions, dated May 10, 2024, which will be incorporated into the Agreement for reference.

Invoices will be sent every month based on the previous months' time and expenses. Total invoices will not exceed the amount referenced above.

PROJECT SCHEDULE

McMahon has the staff available to begin this project no later than September 30, 2025. Based on our prior experience, it is estimated that this analysis will take approximately four months to complete. This timeline is contingent upon data being readily available and in a format that facilitates analysis.

McMahon has included three on-site meetings and interview/observation visits and three virtual meetings in the proposed cost for the project (this does not include the final presentations).

Phase 1: Estimated time to complete is 60 days.
Phase 2: Estimated time to complete is 30-45 days if data is available from the agency with lat/longs of historical calls for service.
Phase 3: Estimated time to complete is 15 - 20 days (excludes any fire station conceptual planning and layout services).
Phase 4: Time to complete depends on number of presentations and schedule of those presentations.

McMAHON PROJECT TEAM

Select McMahon staff are assigned to complete the project. The Project Manager supervises the Project Team and clerical personnel support the Team. The combined resources ensure that the client receives the best possible combination of professional attention.

TIMM SCHABBEL – PUBLIC SAFETY TEAM LEADER

Timm will serve as the Project Manager. He has nearly 40 years of service in the emergency services, including over 25 years as the executive chief of an internationally accredited fire department. As Fire Chief, he Initiated and led two successful fire department mergers, and transitioned from a traditional Township Fire Department to a Fire Territory that currently serves five separate governmental entities. He also served on the International Association of Fire Chiefs Board of Directors and the Indiana Fire Chief Association Board of Directors.

ROBERT WHITAKER – SENIOR PUBLIC SAFETY SPECIALIST

Robert will assist with the project team with review of documentation, data and governance documents. He has over 30 years of experience in the fire, emergency medical, and emergency management field. He currently works as a Fire & EMS Chief/Administrator of a consolidated fire and emergency services department in Wisconsin. Before his position as Chief, he worked as a Deputy Chief of Administration, Battalion Chief, and Training Chief. Robert has worked as a consultant on a variety of public sector management projects, including multiple projects on fire service consolidation and shared service initiatives.

KEVIN BIERCE – PUBLIC SAFETY SPECIALIST

Chief Bierce has been the Fire Chief for the City of Pewaukee Fire Department since 2008 where he oversees all emergency operations. Prior to becoming Chief, he worked in various positions to include Assistant Chief, Division Chief of Prevention, Captain, and Lieutenant. As Division Chief of Inspections, Kevin worked to combine the building inspection department of two communities under the authority of the Fire Department to create the Building Services Division overseeing building, zoning, and plan review of all structures in the Village and City of Pewaukee. He is a licensed building official and serves by appointment of the Governor of Wisconsin on the Wisconsin Commercial Building Code Council, responsible for the oversight and review of the Wisconsin Building Codes.

GERALD W. KUDEK – PUBLIC SAFETY SPECIALIST

Gerald is an experienced and dedicated public safety professional with over 38 years of experience in the fire service. Starting as a paid-on-call firefighter, he advanced to a full-time career and has served in every aspect of the fire department, from firefighter/EMT, Motor Pump Operator, Lieutenant in charge of Training, Battalion Chief, and to his last 10 years as Fire Chief. His strong leadership and relationship building skills were key as the department gained City Council approval of 9 new firefighter positions (without grant or referendum), as well as moving forward with new station construction and a station remodel. His areas of expertise include fiscal responsibility, problem solving, and innovative thinking.

JEFFREY R. ROEMER – PUBLIC SAFETY MANAGER

Jeff has over 35 years of experience in public safety and is currently Public Safety Manager of the Public Safety & Municipal Management Group for McMahon. He is a certified public manager and has been providing full-time public safety management consulting for the last 24 years. He worked as a Fire Chief, Police Chief, EMS Director, and Emergency Management Director before moving into public management consulting. He has worked with over 300 public safety clients nationwide and internationally.

MARK A. ROHLOFF - DIVISION MANAGER

Mark is a successful, results-oriented public manager with over 40 years of diverse experience in strategic planning, budgeting, finance, continuous improvement, personnel, public works and utilities, economic development, and intergovernmental relations. He has served as a manager and administrator for 3 different Wisconsin cities and towns and has worked in cities and towns ranging from 5,000 to 450,000 in population in Wisconsin, California, and Colorado. Mark has held leadership positions with the Wisconsin City-County Management Association, the League of Wisconsin Municipalities, and League Mutual Insurance, and has been a member of the adjunct faculty at UW Oshkosh.

REFERENCES

VILLAGE OF WAUNAKEE
Fire Organizational Review & Future Needs
Todd Schmidt, Village Administrator
500 W. Main Street
Waunakee, WI53597
608-850-5227

VILLAGE OF GERMANTOWN
Fire Management Counsel Services
Steven Kreklow, Village Administrator
skreklow@germantownwi.gov
N112W1701 Mequon Road
Germantown, WI 53022
(262) 250-4775

VILLAGE OF SOMERS
Fire Department Needs Analysis
Kevin Poirier, Asst. Administrator
7511 12th Street
Kenosha, WI 53144
262-859-2822

VILLAGE OF MUKWONAGO
Fire Organizational Analysis
Village Administrator
440 River Crest Ct
Mukwonago, WI 53149
(262) 363-6420

HOLMEN FIRE DISTRICT
Fire Department Sustainability and Fire Management Counsel
710 South Main Street,
Holmen, WI 54636
(608) 526-9363

VILLAGES OF MOUNT PLEASANT, STURTEVANT, AND CALEDONIA
Shared Services Feasibility Study
Village Administrator
8811 Campus Drive
Mount Pleasant, WI 53406
(262) 664-7818

CITY OF WAYZATA
Fire Organizational Analysis
Kevin Klapprich, Fire Chief
Kklapprich@wayzata.org
600 Rice Street East
Wayzata, MN 55391
(952) 404-5338

CITY OF LAKE ELMO
Fire Organizational Analysis
Kristina Handt, City Administrator
khandt@lakeelmo.org
3880 Laverne Avenue, Suite 100
Lake, Elmo, MN 55042
(651) 747-3905

Fire Department
Organizational Analysis Report

Mukwonago
Fire Department
Waukesha County, WI

Prepared for the
MUKWONAGO FIRE DEPARTMENT

April 24, 2020

McM. No. M0413-4-20-00102.00

JRR:lam

RW MANAGEMENT
- A McMahon Associates, Inc. Company -

Fire Department
Organizational Analysis Report

Mukwonago
Fire Department

Waukesha County, WI

Prepared for the

MUKWONAGO FIRE DEPARTMENT

April 4, 2020
McM. No. M0413-4-20-00102.00

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Fire Department
Organizational Analysis Report

Mukwonago
Fire Department

Waukesha County, WI

Prepared for the

MUKWONAGO FIRE DEPARTMENT

April 4, 2020
McM. No. M0413-4-20-00102.00

I. INTRODUCTION

A. Project Overview

RW Management Group, Inc. was retained by the Mukwonago Fire Department to conduct an organizational analysis of the Fire Department.

The Study will provide recommendations and options for the fire department to use now and in the future, when assessing department needs. Based upon the proposal submitted by RW Management Group, Inc. (RW) in August 2019, the scope of the project was to perform a Fire Department Organizational Analysis and Staffing Study to assist the Fire Department, the Village and the Town. This study was designed to have an independent third-party review current department administration, operations, rules, regulations, personnel procedures, operating procedures, and provide recommendations on future departmental needs.

The findings and recommendations are related to the MFD operations, administration, and response times for services rendered, related human resources, and equipment and program review. The review included the following categories:

- Governance and Administration
- Assessment and Planning
- Goal and Objectives
- Financial Resources
- Programs
- Physical Resources
- Human Resources
- Essential Resources
- Training
- External Systems Relations
- Staffing

B. Project Work Tasks

To complete the objectives set forth by the Fire Department, RW evaluated the operations of the Fire Department. RW met with and gathered the needs and concerns of Fire Department personnel. RW also met with Village and Town administration to further understand the growth potential of both communities and the relationship between the projected growth and needs of the Department.

The following presents an overview of the work tasks completed by RW during the project.

1. Developed a project team of appropriate users and stakeholders to oversee and participate in the project.

2. Conducted a Project Planning Meeting with RW Project Manager, the Project Team and key project personnel. Defined scope and mission, discussed work plans, established liaison responsibilities, coordinated project schedules and confirmed other general arrangements.

3. Obtained and reviewed documentation provided by the project team pertaining to the project.

4. Conducted interviews and on-site observation to evaluate the current, and future, needs and standards of performance of the Department internally and in relation to other surrounding departments. In conducting this study, we met with representatives from the following agencies:

    - Mukwonago Fire Department
    - Village of Mukwonago
    - Town of Mukwonago
    - Neighboring Fire Departments

Interviews and observations primarily focused on the following:

- Current Fire/EMS operations, staffing and levels of service
- Fire/EMS workload, call volume and activity
- Administrative Organizational Structure
- Department Policies and Procedures
- Analysis of intergovernmental agreement, regulations and rules of the Department
- Facilities
- Major Equipment

5. Prepared for and facilitated a project status meeting to discuss the results of the interviews and on-site observations with the Project Team.

6. Reviewed the present Fire/EMS workflows and processes to analyze and develop potential organizational and operational requirements. This review was based on the Commission of Fire Accreditation International (CFAI) categories and criteria. The performance indicators that were examined include the following:

   - Governance and Administration
   - Assessment and Planning
   - Goals and Objectives
   - Financial Resources
   - Programs
   - Physical Resources
   - Human Resources
   - Essential Resources
   - Training
   - External System Relations

7. Determined any public safety industry standards and trends related to the Department's operational requirements. During the development of all recommendations, RW considered many factors and standards as a basis for recommendations, including:

   - National Highway Safety Traffic Administration (NHSTA)
   - National Fire Service Accreditation Program (NFSAP)
   - National Fire Protection Association (NFPA)
   - Federal Emergency Management Association (FEMA)
   - National Fire Administration (NFA)
   - Occupational Safety and Health Administration (OSHA)
   - Insurance Services Office (ISO) Rating Schedule
   - Local Fire Protection Ordinances
   - State of Wisconsin Statutes and Administrative Code

8. Developed a comprehensive Fire/EMS organizational analysis, utilizing the information provided by the documentation received, the interviews and on-site observations. The projected growth and level of service needs were considered during the development of these recommendations. Recommendations included:

    - Effectiveness, efficiency and performance of current Fire/EMS operations
    - Governance
    - Administrative growth and organizational structure
    - Review of Department policies and procedures
    - Analysis of Personnel and staffing needs

9. Facilitated a Recommendations Meeting to present preliminary recommendations and obtain feedback from the Project Team.

10. Listed and described the findings and recommendations on the Fire/EMS governance and administration, assessment and planning, goals and objectives, financial resources, programs, physical resources, human resources, essential resources, training, and external system relations, and all other items evaluated and analyzed during the project.

11. Assembled the Study document. Performed a detailed quality assurance review of the document to ensure that the document meets the expectations of the Project Team and conforms to RW's standards.

12. Prepared and delivered the draft Study to the Project Team for review.

13. Facilitated a Study Review Meeting with the Project Team one (1) week after initial delivery to answer questions regarding the content of the Plan. Made any changes to the Plan based on the discussions at the Study Review Meeting. Produced and delivered the final document copies to the Project Team.

14. Presented the findings and recommendations of the Study to the Village Board, Town Board and Joint Fire Commission. This was not completed due to the COVID-19 stay at home rules.

C. Overview of the Current Demographics and Environment

The Village of Mukwonago has a population of approximately 8,137 and encompasses approximately 8.32 square miles. The Town of Mukwonago has a population of approximately 8,016 and is approximately 32 square miles. The Town effectively surrounds the Village. The Town and Village operate a joint fire department under an intergovernmental agreement. The Village and Town are located in Waukesha County, 30 miles southwest of Milwaukee and 12 miles southwest of the City of Waukesha. Both the Village and Town have experienced significant development in the past several years. The service area for the Department has a diverse landscape with rural lands, subdivisions, commercial establishments, industrial parks and municipal buildings. The Department is a member of the Mutual Aid Box Alarm System (MABAS) Division 106, which encompasses all of Waukesha County. MABAS is an extensive mutual aid network that not only exists throughout the State of Wisconsin, but in several surrounding states. The joint fire department was organized in 1962. At the present time, the department has approximately 45 members which include seven full-time members, three cadets and 35 paid-on-premise and paid-on-call firefighters. The Fire Chief is one of the seven full-time members. The Department operates out of two fire stations. The current ISO rating is 4/4Y.

D. Fire Department Organizational Analysis

To present the findings and recommendations that resulted from the engagement, RW has prepared this document; commonly referred to as the ***Fire Department Organizational Analysis***.

The remainder of this report is structured as follows:

- Section II – Operational Recommendations: This section lists the findings and presents recommendations on the current and future issues associated with organizational aspects of the Department. This section is outlined in the following sections:

  A. Operational Overview and Recommendations
  B. Governance and Administration
  C. Assessment and Planning
  D. Goals and Objectives
  E. Financial Resources
  F. Programs
  G. Physical Resources
  H. Human Resources
  I. Essential Resources
  J. Training
  K. External System Relations
  L. Staffing

- Section III – Implementation Plan: This chapter contains a phased implementation for the recommendations made in the Analysis.

- Section IV – Budget Estimate: This section contains budget estimates and benefits for the recommendations implemented.

- Section V – Management Summary: A summarized version of the Analysis is presented, highlighting the projects objectives and recommendations.

- Section VI – Glossary of Terms: A glossary of terms is presented for reference.

II. OPERATIONAL RECOMMENDATIONS

A. Operational Overview and Recommendations

As stated earlier, the objectives of this project were to evaluate the Mukwonago Fire Department (Department) and make recommendations for the Department's short/long term organizational and administrative needs. The Report includes findings and recommendations relating to the Governance and Administration, Assessment and Planning, Goals and Objectives, Financial Resources, Programs, Physical Resources, Human Resources, Essential Resources, Training, External System Relations and Staffing of the Fire Department. This section evaluates the Department's present Fire/EMS organizational and administrative needs, and makes recommendations relating to the categories listed above. This review was based on the Center for Public Safety Excellence (CPSE), formerly the Commission of Fire Accreditation International (CFAI) categories and criteria.

The Mukwonago Fire Department overall is doing a very good job of maintaining high standards in providing fire and emergency medical services. Department personnel displayed professionalism and were very cooperative throughout the review.

B. Governance and Administration

1. Findings

The Mukwonago Fire Department is an organization established by an intergovernmental agreement between the Village of Mukwonago and Town of Mukwonago. The governing authority is a Joint Fire Commission made up of seven members, five of which have voting authority. The five voting members are appointed by the Village President and Town Chairman. The voting members serve three-year rotating terms. The two non-voting members consist of one Village Board Member and one Town Board Member. The Fire Chief is responsible to submit a proposed budget to the Village and Town Boards and receive approval of such budget annually. Costs for the Department are split evenly between the Village and the Town. The intergovernmental agreement gives authority to the Village President and Town Chairman to provide direction to the Fire Chief on issues not addressed in the intergovernmental agreement.

Chapter 37 of the Village of Mukwonago Municipal Code establishes that the joint fire department provides services to the Village. Chapter 38 of the Village Code establishes fire prevention ordinances within the Village. Chapter 30 of the Town Ordinances addresses fire prevention and protection within the Town.

The intergovernmental agreement that forms the Department does not currently include the option for the member municipalities to exempt increases in charges from the joint fire department from the tax levy as is allowed in Wisconsin Statutes 66.0602.

2. Recommendations

a. RW recommends the non-voting members of the Joint Commission be retitled as "liaisons" to the Joint Fire Commission and not identify them as members of the Joint Fire Commission. This ensures the Joint Fire Commission complies with requirements of State Statutes.

b. The intergovernmental agreement that forms the Department should be amended to allow for the option of the member municipalities to exempt increases in charges from the joint fire department from the municipal tax levy as is allowed in Wisconsin Statutes 66.0602.

c. Begin posting agendas and minutes of the Joint Fire Commission on either the Department's Website or the Village/Town Websites.

d. The intergovernmental agreement requires semi-annual fire inspections of all buildings, premises and thoroughfares within the Town and Village. The Department is currently unable to complete semi-annual inspections of all these properties. RW recommends the intergovernmental agreement be updated to match the fire inspection requirements of State Statutes which allows some occupancies to be inspected annually. Even with amending the intergovernmental agreement to reflect current Statutes, the Department will likely require additional staff to complete the requirement.

e. Chapter 37 of the Village Ordinances should be updated to reflect the current organizational structure of the fire department.

f. In 2015, the State of Wisconsin passed Act 270 that prohibits a municipality from adopting fire prevention codes that are more stringent than the currently adopted State Fire Prevention Code. Municipalities could grandfather fire prevention codes/ordinances at the time if approved by the State. Chapter 30 of the Town Ordinances includes requirements that do not appear to have been approved by the State in the grandfathering process. The Ordinances should be updated. It appears the Village did receive approval to grandfather some ordinances/codes in 2015 when Act 270 was adopted.

g. RW finds that the Department is heavily reliant on fees for service to support its budgetary needs. The Department should diversify its revenue source and transition costs resulting from this report to tax levy or other annual revenue sources.

C. Assessment and Planning

RW reviewed area characteristics, fire and non-fire risk assessments and response strategies, and planning within the Department. The following findings and recommendations are based on planning concerns and risk management criteria that will impact outcomes and provide for the basic needs to complete the mission of the Department.

1. Findings

The Village of Mukwonago has a population of approximately 8,137 and encompasses approximately 8.32 square miles. The Town of Mukwonago has a population of approximately 8,016 and is approximately 32 square miles.

The Department has approximately 45 members which include seven full-time members, three cadets and 35 paid-on-premise and paid-on-call firefighters. The Fire Chief is one of the seven full-time members. The Department operates out of two fire stations. The current ISO rating is 4/4Y.

The Department operates 2 fire stations, one located in the Village and one in the Town. Station 1, located in the Village, was built in 2002 with a recent addition. The building has sleeping quarters in the station. The station is located in the southeast corner of the service area which results in long response times to some portions of the protection area.

Station 2, located in the Town, was an addition to the Town Hall approximately 20 years ago. The station is staffed by paid-on-call members who respond from home. There are a limited number of paid-on-call members who live near this station which presents challenges to the Department. Station 2 is not currently designed for in-house staffing of personnel.

The Department's current Insurance Services Office, Inc. (ISO) rating is a 4/4Y. The ISO Rating Schedule measures the major elements of a municipalities' fire suppression system. These measurements then are developed into a Public Protection Classification number on a relative scale from 1 to 10, with 10 representing less than the minimum recognized protection. The schedule is a fire insurance rating tool used to determine property insurance premiums that property owners pay to their insurance carrier.

The Department responded to 264 fire incidents and 1,970 EMS incidents in the year 2019. The number of fire incidents was up 7% from 2010. Total calls for service have increased 75% since the year 2000.

The Department does not have a "standard of cover" for emergency deployment, which outlines response time, pumping capacity and apparatus and equipment deployment objectives. Both the Town and Village have aggressive development and planning processes in place which support the fire department.

The service area has a mix of areas supplied by a municipal water supply system and other areas that do not have municipal water. The water supply in most of the hydranted areas is capable and adequate. Water supply is reviewed as part of planning efforts as it relates to Village development. The Department operates with water tenders to support water supply needs in non-hydranted areas. Additional water tenders are available from neighboring departments through the MABAS System. The Department takes an active role in promoting fire protection suppression and detection systems as part of the development and planning process.

The MFD inspection program attempts to achieve semi-annual inspections as required by the intergovernmental agreement between the Town and the Village. Currently, the Department is unable to complete all required inspections. The inspection records system is adequate.

The Department does have a strategic plan in place that is approved by the Joint Fire Commission and Village and Town Boards.

There are no current annexation issues or concerns with neighboring communities.

2. Recommendations

a. A standards of cover study should be completed and documented for the Department.

b. A fire risk assessment and response strategy listing the nature and magnitude of the hazards within the Village and Town should be completed. The fire risks in each planning zone, including required fire protection resources and special, routine and isolated hazards need to be identified (pre-plans) so an accurate "standard of cover" strategy can be established. The risk assessment and the recommendations and implementation plan in this report will provide the basis for additions to the strategic plan.

D. Goals and Objectives

RW performed an evaluation of the Village, Town and Department goals and objectives and has made recommendations for future documentation.

1. Findings

The Department has a mission and vision statement in place. Written goals and objectives for the fire department are included in the Department's Strategic Plan.

The Department does have standard operating guidelines (SOGs), but they need to be updated. Chapter 37 of the Village's Ordinances require a SOG Committee to be in place. It does not appear this Committee is in place in the Department. The Ordinance is unclear as to the authority of this Committee. Additionally, this section of the ordinance gives the Joint Fire Commission authority to approve SOGs. The Fire Commission does not have optional powers in accordance with State Statues and should not have authority to approve operating guidelines.

2. Recommendations

a. RW recommends that the goals and objectives of the Department included in the Strategic Plan be regularly reinforced with Department members and reported on to the Joint Fire Commission, Village and Town Boards.

b. Department SOGs need to be updated to provide guidance on current operational activities. It is recommended a SOG Committee be put in place to assist the Department in this on-going process.

c. Chapter 38 of the Village Ordinances should be updated to remove authority of the Joint Fire Commission over operating guidelines since the Commission does not have optional powers.

d. RW recommends filling vacant officer positions on the current organizational chart. As part of filling out vacant officer positions, RW recommends the Department create promotional opportunities to Chief Officer ranks for full-time employees so the chief officers of the Department are eventually filled by full-time employees.

E. Financial Resources

RW reviewed how the Department handled financial issues including budget development and administration.

1. Findings

Fire Administration is charged with development of an annual budget for the Department. The draft budget is presented to the Village President and Town Chairman no later than September 15 of each year by the Fire Chief. The draft budget is jointly considered by the Village and Town Board in workshop session(s). Once those sessions are completed, each governing body takes action on the budget for the following year.

The Village of Mukwonago is identified as the fiscal agent of the joint fire department. Financial reports are provided to the Chief by the Finance Director who reviews them periodically. The Department also has an independent audit conducted annually.

The Fire Department charges fees for emergency medical calls. Authority to charge these fees is commonly given to agencies by ordinances or in code language adopted by municipal governing bodies. The Village and Town adopt ordinances/resolutions regarding charging of fees for fire department related services.

The Department is responsible for processing fees and submitting them to a third-party billing agency. Given the complexity of medical billing, especially as it relates to Medicare billings, most EMS departments use the services of a third-party biller.

2. Recommendations

a. RW recommends the Village and Town Boards amend the intergovernmental agreement that forms the joint department to allow the municipalities to utilize the levy limit exception for joint fire departments in State Statute 66 in 2024.

F. Programs

This area is defined as the services, activities and responses provided by the department for the community, and supported by the mission, goals and objectives of the Mukwonago Fire Department.

1. Findings

The fire suppression performed by the MFD is supported by 3 Engines, 1 Ladder, 3 Ambulances, 1 Grass Truck, 1 Water Tender, 1 Boat, 1 Utility Vehicle, 3 Cars and 1 Special Utility. All responding personnel are familiar with the Incident Command System (ICS), and seem to work well with their MABAS neighbors.

The Department responded to 264 fire responses in 2019. As a result of the Department's current staffing model, limited personnel resources are available for fire suppression operations.

The Department has a code enforcement program in place, however, as mentioned earlier in this report, the Department struggles to complete the inspections required to complete the code enforcement program due to staffing challenges. There are currently 491 occupancies that require inspection. The automated records process relating to inspections is automated and meets the needs of the Department. The Department does plan reviews of new construction, however fees charged for these services are not directed to the Department, rather the General Fund of the Village.

A public education program is in place that includes education for school children on fire prevention topics. The Department also offers fire extinguisher training and cardiopulmonary resuscitation (CPR) training for interested parties. There is currently not a program in place to evaluate the effectiveness of these programs.

The MFD has limited ability to investigate fire cause and origin or provide fire investigation services. The Department currently performs initial cause and origin investigation and receives assistance of local police departments and the State Department of Criminal Investigation-State Fire Marshal's Office as needed.

Technical Rescue covers several disciplines that are traditionally provided by fire/emergency service agencies. The department provides auto extrication, water-ice rescue and initial response to other technical rescue incidents.

Hazardous materials services are provided by the department up to awareness level, with technician and operational level services provided by the Cities of

Waukesha and Milwaukee. This is a practical approach to hazardous materials for a department this size.

Elevated rescue, trench rescue and confined space rescue services are provided by the City of Waukesha Fire Department under contract. Again, this is a practical approach to these types of responses.

Emergency medical services are a core function of the Department. The Department provides care at the Advanced Life Support-Critical Care Level under licensure by the State of Wisconsin and under the authority of a medical director as is required. In addition to customary 911 responses, the Department also provides paramedic intercepts to several surrounding communities and interfacility transports for the Pro Health Care Hospital in Mukwonago. In 2020, the Department is receiving a negotiated payment from Pro Health Care since the number of transports out of the facility is expected to decrease, thus impacting the Department's revenue. The Department may elect to attempt to get a payment in 2021 through additional negotiation with Pro Health Care.

Pre-arrival and emergency medical dispatch services are not provided to 911 callers that are taken at the Mukwonago Police Department Public Safety Answering Point (PSAP).

The Fire Chief is the Emergency Management Director for the Town and Village. Both municipalities have an emergency plan in place. Staff participates in NIMS and related emergency management training. The Village is currently updating the emergency operations center (EOC) located at the Village Hall.

2. Recommendations

a. The Fire Department should conduct periodic appraisals for all programs to ensure consistency and compliance with the Department's mission.

b. Upon completion of the standards of cover study and risk assessment, the Department should review the long-range capital plan to ensure Department equipment meets the needs of the agency.

c. The Department should identify those pieces of equipment that could be purchased jointly with neighboring communities that could effectively be utilized under a shared services agreement as a method to contain costs.

d. A joint effort with neighboring communities should be considered to assist in providing adequate on-duty personnel and reduce capital equipment needs/costs.

e. The Department should add fire suppression resources to its initial dispatch to a structure fire to provide adequate and timely resources in order to meet response recommendations of NFPA 1720. The lack of dedicated dispatch resources to the fire department in the Mukwonago 911 PSAP appears to be a significant factor in the requesting enough resources in a timely manner.

f. The Department should schedule staff to complete fire inspections as required by the intergovernmental agreement and in accordance with State Statues.

g. RW recommends the intergovernmental agreement be amended to match State Statutes regarding the number of required annual fire inspections since the Department is currently unable to meet the requirement of the intergovernmental agreement.

h. The public education program should be documented to detail the programs being utilized, goals and target audiences.

i. A written assessment of the public education program should be completed each calendar year and provided to the Joint Fire Commission and the Village and Town Boards.

j. Procedures and guidelines should be developed that detail the Department's fire cause and origin investigation programs and processes.

k. The Department should include as part of its annual training program, the roles and responsibilities of initial responding agencies in identification of fire cause and origin.

l. RW recommends the Department contract with the Waukesha County Communications Center (WCC) to provide fire/EMS dispatch services. WCC can provide staffing to meet the Department's needs for fire/EMS dispatch.

m. Elected officials should complete NIMS training/certification programs offered through the Federal Emergency Management Agency (NIMS Overview for Senior Elected Officials).

G. Physical Resources

This section evaluates the Department's fixed facility, apparatus and maintenance and related personnel needs.

1. Findings

The Department currently has two (2) stations. Station 1, in the Village, has facilities for overnight staffing, is adequate and well maintained. While the station is in good condition, it is located in the southeast corner of the district which can result in long response times to portions of the district.

Station 2, located in the Town, is adjacent to the Town Hall and Police Department. There are no facilities for overnight staffing at this station. Paid-on-call staff provide services from this station. The Department roster has a limited number of paid-on-call staff that live within a reasonable distance to this station to provide adequate response. The Department has lost space in this facility over time due to expansion of other services in the building.

The ideal standards of coverage for fire and emergency medical responses are 4-6 minutes from the time that the call is dispatched until the unit arrives on the scene. This standard is consistent with the standards of the following agencies;

- Occupational Safety and Health Administration (OSHA)
- National Highway Traffic Safety Administration (NHTSA)
- National Fire Protection Association (NFPA)
- American Heart Association Guidelines for Defibrillation and CPR
- National Standard of Care for EMS Response
- Journal of American Medical Association
- Commission on Accreditation of Ambulance Services (CAAS)
- American Ambulance Association (AAA)

These established national standards for response have proven to be valid and will be utilized in legal cases as being the benchmark to which services will be judged. Response time data provided by the Department shows the Department responds to fire incidents in the Village in about 9 minutes 90% of the time. Response times in the Town are approximately 12 minutes 90% of the time. Longer response times in the Town are generally related to the fact that the Town is more geographically spread out and that a vast majority of the responses come from Station 1 rather than Station 2 since there are no on-duty staff at Station 2.

The apparatus is fully equipped for structural firefighting. Water supply is adequate in areas served by municipal water systems. The vehicles are checked on a regular basis and have adequate maintenance provisions (certified vehicle maintenance). The current Department apparatus are well designed and meet the Department’s goals and objectives. The Department has 3 engines, 1 ladder, 3 ambulances, 1 water tender, 1 grass truck, 1 boat, 1 utility vehicle, a special utility and 3 staff cars.

The Department provides for a certified vehicle maintenance service and emergency repair for all apparatus. A schedule is established and appears to meet the need for service and reliability of emergency apparatus. The Department equipment resources were adequate and well maintained. There was regular preventive maintenance and repairs on the equipment and an inventory control system was in place.

There is a capital Improvement program set up which outlines the replacement schedule for the apparatus, although the station maintenance or replacement is not part of that plan.

2. Recommendations

a. A physical facilities/resource plan should be developed that provides a strategic direction for the Department in regard to facilities

b. As the Town continues to grow, Station 2 will need improvements to include living facilities for on-duty personnel in order to respond to calls in a timely manner.

H. Human Resources

RW reviewed the development and utilization of human resources for the Department. The Department's organizational chart, policies and standard operating guidelines were examined to provide a basis for the completion of this section.

1. Findings

Human resource polices are included in the Village's Personnel Manual. Job descriptions for all positions are in place. The collective bargaining agreement between the Department and the unionized firefighters covers wages, hours and working condition issues specific to the career personnel, except for the Fire Chief. The Department's standard operating guidelines need to be reviewed and updated. There were concerns identified by some employees that the Personnel Manual for the Village does not appropriately address issues related to the fire department.

Recruitment, selection, discipline, probationary period, and promotion policies are in place. Currently the Joint Fire Commission holds the responsibility for these areas with the Fire Chief providing input. A limited career development program is in place.

The Department has a written new member orientation program.

A written physical fitness program is not in place. The Department does not have a written risk management program in place either.

The Department does conduct exit interviews when members of the department resign.

2. Recommendations

a. The Department, in conjunction with the Village, needs to ensure the Personnel Manual appropriately addresses issues related to the fire department. The Village's Personnel Manual is applied to the fire department because the department contracts with the Village for human resources and financial services.

b. RW also recommends that the Department develop a career development program and a written health and fitness program for the Department.

c. Develop a written risk management process that will provide the Department and member communities with an analysis of community risk using real world factors. The risk assessment will include determining and defining the differences in risk between single family, multiple family, and commercial dwellings within the service area.

I. Training

Training supports safety and is the backbone for all fire departments when it comes to providing services to their communities in a safe and efficient manner. The Mukwonago Fire Department has a good training system in place.

1. Findings

An annual training calendar is in place, however a full written training program with lesson plans related to job performance requirements (JPRs) should be developed.

Training records are maintained electronically, however the software being used to maintain the records are no longer supported by the vendor.

Adequate training facilities are in place.

2. Recommendations

a. A written training plan using JPRs should be developed and maintained. The training plan should include training goals and objectives, a list of mandatory training that is needed and a schedule to meet the training needs, goals and objectives.

b. RW recommends the Department transition entry of training records to a currently supported records management system.

J. Essential Resources

RW interviews and document review provided a basis for the completion of this section.

1. Findings

The water supply in most areas served by municipal fire hydrants is adequate. The Department has one water tender for areas of the communities not serviced by municipal water. The Department relies on the Mutual Aid Box Alarm System (MABAS) for additional water tenders which is appropriate.

A county wide trunked 800-megahertz radio system is in place. This system provides interoperability with mutual aid departments. The police departments servicing the Village and Town utilize a different radio system, requiring multiple radios to be installed in vehicles to ensure interoperable communications.

The Department continues to be challenged by the limited resources that can be provided by the Mukwonago Police Department PSAP. Limited staffing results in delays in call processing, responding to radio requests from units in the field and limits the ability of the fire department to effectively utilize mutual aid resources in a timely manner. Mutual aid resources are critical for the Department's services due to limited staffing levels within the fire department. Additionally, the current PSAP is unable to provide pre-arrival medical instructions as is provided in a majority of Waukesha County.

The current National Fire Protection Association (NFPA) Standard for call processing of fire/EMS calls for service by PSAPs states that 90% of all calls should be processed in 64 seconds or less and not more than 106 seconds for at least 95% of the calls. Data from 2019 shows that only 21% of calls were processed in 60 seconds or less and 65% of calls were processed in 120 seconds or less.

There is no administrative support staff for the Department.

The Department currently uses two different records management systems to keep records for responses, training, maintenance and inspections.

The Department has a Safety Committee that meets regularly.

The Department does not have an employee assistance program (EAP) as is mandated by State of Wisconsin Administrative Chapter SPS 330.

2. Recommendations

a. RW recommends the Department contract with the Waukesha County Communications Center for fire/ems dispatching services.

b. The Safety Committee should be retitled to the Health and Safety Committee to ensure employee health is also a part of the Committee's function.

c. An employee assistance program (EAP) should be implemented to meet SPS 330.

d. Administrative support staff should be added to the department to assist staff with the administrative functions of the Department.

K. External System Relations

This section of the report covers external department relations for fire, EMS and police coverage and their effect on the station and staffing needs of the Department.

1. Findings

The Department has a strategic plan in place that assists in educating stakeholders in the needs of the Department.

Based on interviews with neighboring departments, the MFD maintains good relationships with adjoining departments, however limited discussion has occurred between MFD and neighbors regarding shared services or potential service consolidation options.

2. Recommendations

   a. The Department should consider engaging a project manager with shared service experience to develop additional shared service agreements and options for consideration.

L. Staffing

Provision of emergency services is heavily reliant on staffing of personnel to provide those services. This section of the report looks at current staffing and provides recommendations on needs of the Department.

1. Findings

The Department has 45 members, seven of which are full-time, three are cadets and 35 paid-on-call and paid-on-premise. The Fire Chief works an administrative schedule, generally Monday through Friday during typical business hours.

Of the six full-time firefighters, three are the rank of Lieutenant and three are firefighters. All six are licensed as paramedics. One Lieutenant and one firefighter are assigned to one of three shifts that work a 24 hour on/48 hour off schedule, thus providing two full-time on duty personnel at all times.

Two paid-on-premise personnel work weekdays from 6 AM – 6 PM. On weekends, two paid-on-premise personnel work from 8 AM – 6 PM and one additional person works 6 AM – 6 PM.

The full-time and paid-on-premise staff all work from Station 1.

Paid-on-call members are assigned to one of three companies. Each company is on call once every three days from 6 PM – 6 AM. Paid-on-call members are assigned to both Station 1 and Station 2. Paid-on-call members who do not live within the required distance to a station can stay overnight at Station 1 in order to provide a timely response.

2. In 2019, the Department responded to 264 fire calls. Between 2015 and 2018 approximately 9% of fire calls were for structure fires. The Department also responded to 1,970 EMS calls in 2019 of which 729 (37%) were inter-facility transfers.

3. The current staffing levels of the Department presents challenges to the Department's ability to provide desired service levels to the community based on their call volume. In 2019, 37% of the current call volume was driven by inter-facility transfers. The percentage of interfacility transfers of total EMS calls has been higher in previous years.

The current lower staffing levels during evening/overnight hours presents additional challenges to the Department's ability to respond to requests for service, both emergency medical and fire related. Simultaneous calls for service not only stress current staffing levels but put the Department in a position of not having sufficient resources to respond to subsequent calls for service.

While paid-on-premise staff are less expensive from a pay standpoint, paid-on-premise staff present many challenges since these members are generally not long-term employees and are generally less experienced and have more training and mentoring needs than full-time staff. Many Departments, including Mukwonago, also have challenges filling shifts with paid-on-premise staff since most have other jobs that limit their ability to work.

Current Staffing by Hours/Day

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Lieutenant/Medic FT	24	24	24	24	24	24	24
Firefighter/Medic FT	24	24	24	24	24	24	24
Paid on Premise	12	12	12	12	12	12	12
Paid on Premise	10	12	12	12	12	12	10
Paid on Premise	10						10
TOTAL	80	72	72	72	72	72	80

*The Fire Chief works a Monday-Friday administrative schedule and is considered the on-call Duty Chief after work hours. The Duty Chief position is filled by the part-time chief officers on weekends.

2. Recommendations

a. The Department provides interfacility transfers to area medical facilities. The call volume that results from providing this service does stress the Department's ability to service 911 calls. If the Department continues to provide inter-facility transfers, the Department should begin transitioning staffing to more reliance on full-time positions as opposed to paid-on-premise and paid-on-call. The current call volume, which is substantially driven by inter-facility transfers support the need for additional on-duty staff. Significant reliance for daily minimum staffing on paid-on-premise positions cannot be sustained and should not be relied upon to provide a majority of on-duty staff moving forward.

b. The Department should maintain a minimum daily staffing of five full-time positions (see Recommended Staffing by Hours/Day Chart below). With five fulltime positions the reliance on paid-on-premise positions could be limited to covering for time-off of full-time staff.

c. Upon transition to WCC for dispatch services, the Department should seek automatic aid agreements with neighboring communities to ensure enough resources are immediately dispatched upon a report of a structure fire in order to meet response requirements outlined in the standards of cover document that is developed.

d. The Department should increase its interfacility transfer fees.

Recommended Staffing by Hours/Day							
	Sun	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**
Lieutenant/Medic FT	24	24	24	24	24	24	24
Firefighter/Medic FT	24	24	24	24	24	24	24
Firefighter/Medic FT	24	24	24	24	24	24	24
Firefighter/Medic FT	24	24	24	24	24	24	24
Firefighter/Medic FT	24	24	24	24	24	24	24
TOTAL	120	120	120	120	120	120	120

The staffing described in the chart above requires a significant increase in financial commitment towards the fire department. Several factors support this staffing recommendation including on-going call demand, the risk that exists within the communities served, the desired service level and the reduced availability of paid-on-call and paid-on-premise personnel.

Funding this staffing model may require a referendum to fund this service model. A carefully and strategically designed referendum process would provide a one-time boost in funding to provide enough operating funds to support this model.

The communities could also elect to phase-in this staffing model over a number of years, however, a phased approach likely requires continued reliance on paid-on-call and paid-on-premise personnel during the phasing period which presents the same on-going challenges that the Department faces today with those positions and doesn't necessarily guarantee the recommended staffing level during the transition period since the Department, even today, struggles to fill daily staffing positions with paid-on-premise staff.

III. IMPLEMENTATION PLAN

A. Implementation Plan by Priority

To properly and successfully implement the recommendations made for department operations, administrative services, policies, and other related recommendations, certain key components must be addressed. Without the implementation of these components, overall services, productivity and organizational buy-in will be tempered and system performance will suffer.

The following implementation plan lists, by priority, those requirements that satisfy the principles of comprehensive delivery of fire service protection. The plan has been developed also considering the benefits that have a high overall return to the residents, the Department, and the communities served. Using this approach, the Department will not only be moving toward sound fire department services, practices and systems, but they will also be implementing changes in operations, services and technology that yield the highest returns first. The exact details and dates for some of these changes are left up to the project team to determine the specifics of how the current corporate culture is, and the immediate need.

1. Fiscal Year 2020

    a. The goal for the first year of implementation should be to begin planning for the comprehensive implementation of the recommendations. The following areas are to be implemented during the remainder of this year include:

    b. Define a Project Team made up of members from the Department, Village and Town. This team will provide oversight of the Fire Department Organizational Analysis Study recommendations and of the planned organizational changes to occur with internal and external resources to coordinate efforts.

    c. Provide for project management to oversee the entire project for the next five (5) years. The project manager will be responsible for keeping the project on track and moving ahead. This should be the Fire Chief.

    d. Retitle the two non-voting members of the Joint Fire Commission as “liaisons” to the Joint Fire Commission and not identify them as members of the Joint Fire Commission. This ensures the Joint Fire Commission complies with requirements of State Statutes.

    e. Begin posting agendas and minutes of the Joint Fire Commission on either the Department’s Website or the Village/Town Websites.

    f. RW recommends filling vacant officer positions on the current organizational chart and providing a mechanism for full-time employees to fill those positions.

g. Update the Intergovernmental Agreement to match the fire inspection requirements of State Statutes which allows some occupancies to be inspected annually. Even with amending the intergovernmental agreement to reflect current Statutes, the Department will likely require additional staff to complete the requirement.

h. Chapter 37 of the Village Ordinances should be updated to reflect the current organizational structure of the fire department.

i. A fire risk assessment and response strategy listing the nature and magnitude of the hazards within the Village and Town should be completed. The fire risks in each planning zone, including required fire protection resources and special, routine and isolated hazards need to be identified (pre-plans) so an accurate "standard of cover" strategy can be established. The risk assessment and the recommendations and implementation plan in this report will provide the basis for additions to the strategic plan.

j. Department SOGs need to be updated to provide guidance on current operational activities. It is recommended a SOG Committee be put in place to assist the Department in this on-going process.

k. Chapter 38 of the Village Ordinances should be updated to remove authority of the Joint Fire Commission over operating guidelines since the Commission does not have optional powers.

l. The Town Board should adopt an ordinance to authorize the Fire Department to charge for fire and EMS services to avoid potential legal challenges to said fees.

m. Procedures and guidelines should be developed that detail the Department's fire cause and origin investigation programs and processes.

n. RW recommends the Department begin the process of contracting with the Waukesha County Communications Center (WCC) to provide fire/EMS dispatch services.

o. The Department, in conjunction with the Village, needs to ensure the Personnel Manual appropriately addresses issues related to the fire department. The Village's Personnel Manual is applied to the fire department because the department contracts with the Village for human resources and financial services.

p. The Safety Committee should be retitled to the Health and Safety Committee to ensure employee health is also a part of the Committee's function.

q. An employee assistance program (EAP) should be implemented to meet SPS 330.

2. Fiscal Year 2021

a. The Department should add a part-time administrative support person for 20 hours per week to assist with general administrative tasks.

b. The Town should update its Fire Prevention Ordinance to comply with State Statutes specific to Wisconsin 2015 Act 270.

c. A standards of cover study should be completed and documented for the Department.

d. Upon completion of the standards of cover study and risk assessment, the Department should review the long-range capital plan to ensure Department equipment meets the needs of the agency.

e. The Department should identify those pieces of equipment that could be purchased jointly with neighboring communities that could effectively be utilized under a shared services agreement as a method to contain costs.

f. A joint effort with neighboring communities should be considered to assist in providing adequate on-duty personnel and reduce capital equipment needs/costs.

g. The Department should add fire suppression resources to its initial dispatch to a structure fire to provide adequate and timely resources in order to meet response recommendations of NFPA 1720. The lack of dedicated dispatch resources to the fire department in the Mukwonago 911 PSAP appears to be a significant factor in the requesting enough resources in a timely manner.

h. Procedures and guidelines should be developed that detail the Department's fire cause and origin investigation programs and processes.

i. The Department should include as part of its annual training program, the roles and responsibilities of initial responding agencies in identification of fire cause and origin.

j. A written training plan using JPRs should be developed and maintained.

k. The Department should transition entry of training records to a currently supported records management system.

l. Increase fee charges for inter-facility transfers.

3. Fiscal Year 2022

a. The public education program should be documented to detail the programs being utilized, goals and target audiences.

b. A written assessment of the public education program should be completed each calendar year and provided to the Joint Fire Commission and the Village and Town Boards.

c. RW also recommends that the Department develop a career development program and a written health and fitness program for the Department.

d. Make needed adjustments, changes and updates to the Department strategic plan.

4. Fiscal Year 2023/2024

a. Re-evaluate staffing needs of Fire Station 2 and consider a plan for meeting those staffing needs.

b. A physical facilities/resource plan should be developed for the Department based on the evaluation of the needs for Fire Station 2.

5. Fiscal Year 2025

a. During future union contract negotiations, RW recommends that a concerted effort be made to eliminate the requirement that staffing shortages be filled with fulltime personnel to reduce overtime expenses.

6. On-Going

a. RW finds that the Department is heavily reliant on fees for service to support its budgetary needs. The Department should diversify its revenue source and transition costs resulting from this report to tax levy or other annual revenue sources.

b. RW recommends that the goals and objectives of the Department included in the Strategic Plan be regularly reinforced with Department members and reported on to the Joint Fire Commission, Village and Town Boards.

c. The Fire Department should conduct periodic appraisals for all programs to ensure consistency and compliance with the Department's mission.

IV. ESTIMATED BUDGET

A. Project Budget

This section presents budget estimates and costs associated with future short/long term organizational and administrative recommendations. The budget has been developed considering the recommendations presented throughout this document.

As with any project, these estimates were developed anticipating that the Department would implement the plan as presented, and in the timeframes specified. Should the project timeframes be lengthened, or the scope or direction of the project be changed, the budget estimates would need to be adjusted accordingly. The costs for these recommendations are approximate estimations and can be adjusted at any time by the project team.

The budget is presented to provide the basis for the continuing project efforts should the Department adopt the recommendations and begin implementation of the recommendations. The budget is characterized by the following major components:

a. Operational Expenses – Expenses associated with project management and related costs. Project management should include but is not limited to these areas within the village/department; team development, high-level plan, choosing the best people, assigning responsibilities, and setting goals and objectives. These costs are based on external project management and may or may not be lower if the project management is handled internally.

b. Capital Expenses - Major Equipment Purchases – Cost associated with the replacement of apparatus according to the included replacement schedule.

1. Benefits

As a result of implementing RW's recommendations, the Department and the citizens living in the service area should realize significant tangible benefits, mitigate liabilities, and justify the recommended investment. The following tangible and intangible benefits should be realized as a result of implementation of the study recommendations:

a. Improve the confidence and abilities of emergency response personnel to handle emergency incidents, by improving the MFD support network; updated operations and administration policies and procedures.

b. Provide a long-term approach to operational needs for the Department to use as a planning guide for budgetary and operational considerations. This approach improves efficiencies and provides for a structured management plan.

c. Mitigate liability in instances where accepted national standards are not being met. These standards are nationally recognized in a court of law and will serve to protect the Department.

d. Provide a pro-active approach to planning for the future development of the community by detailed evaluation of the fire department services, which is then revisited periodically.

e. Provide a well-defined, coordinated plan for the proper implementation of a fully functional Fire Department, supported by department and Department goals and objectives.

f. Improve the confidence and abilities of emergency response personnel to handle emergency incidents, by providing the appropriate facilities, management, organizational structure and technology.

g. Improve coordination and productivity during major incidents and disasters with all involved agencies, including the on-scene command posts, Emergency Management and the Emergency Operations Center.

h. Increase quality improvement through a continuous self-assessment capable of identifying and correcting deficiencies and building on strong points. This will also foster pride within the Department and national recognition by the community and peers. This will also assure that the Department is utilizing best practices and instills community pride.

i. The improvement and retention of the overall fitness and health of the Department members should be given a higher priority. This should contribute to the mitigation or work accidents, occupational exposure, hazard awareness and the reduction of loss time injuries and legal actions.

The cost to implement the recommendations is shown in the budget projections on the below:

	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Total		Hours/Year	Hourly Rate	Loaded Wage Rate	Annual Cost
Current													
Full Time	48	48	48	48	48	48	48	336		17,472	$25.51	$35.71	$623,995.01
POP	32	24	24	24	24	24	32	184		9,568	$18.00	$21.18	$202,621.54
													$826,616.54

	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Total		Hours/Year	Hourly Rate	Loaded Wage Rate	Annual Cost
Recommended													
Full Time	120	120	120	120	120	120	120	840		43,680	$26.00	$36.40	$1,589,952.00
POP	0	0	0	0	0	0	0	0		0	$18.00	$21.18	$0.00
													$1,589,952.00

Added FF Wages/Benefits	$763,335.46
Health Insurance Costs	$180,000.00
Admin Assistant	$23,530.00
Project Manager	$40,000
POP Wages for FT Off-Time	$80,060
WCC Transition	$15,000
TOTAL CHANGE	**$1,101,925.86**

By implementing the recommendations found in this report, the Mukwonago Fire Department will be able to meet the current service demands provided by the community using a planned approach that allows for fiscal planning by the Department, Village and Town.

V. MANAGEMENT SUMMARY

The management summary is a concise version of the full report. It contains an overview of the project, the operational recommendations and the benefits of implementing the recommendations.

A. Project Overview

RW Management Group, Inc. was retained by the Mukwonago Fire Department to conduct an organizational analysis of the Fire Department.

The Study will provide recommendations and options for the fire department to use now and in the future, when assessing department needs. Based upon the proposal submitted by RW Management Group, Inc. (RW) in August 2019, the scope of the project was to perform a Fire Department Organizational Analysis and Staffing Study to assist the Fire Department, the Village and the Town. This study was designed to have an independent third-party review current department administration, operations, rules, regulations, personnel procedures, operating procedures, and provide recommendations on future departmental needs.

The findings and recommendations are related to the MFD operations, administration, and response times for services rendered, related human resources, and equipment and program review. The review included the following categories:

- Governance and Administration
- Assessment and Planning
- Goal and Objectives
- Financial Resources
- Programs
- Physical Resources
- Human Resources
- Essential Resources
- Training
- External Systems Relations
- Staffing

B. Operational Recommendations

1. RW recommends the non-voting members of the Joint Commission be retitled as “liaisons” to the Joint Fire Commission and not identify them as members of the Joint Fire Commission. This ensures the Joint Fire Commission complies with requirements of State Statutes.

2. The intergovernmental agreement that forms the Department should be amended to allow for the option of the member municipalities to exempt increases in charges from the joint fire department from the municipal tax levy as is allowed in Wisconsin Statutes 66.0602.

3. Begin posting agendas and minutes of the Joint Fire Commission on either the Department’s Website or the Village/Town Websites.

4. The intergovernmental agreement requires semi-annual fire inspections of all buildings, premises and thoroughfares within the Town and Village. The Department is currently unable to complete semi-annual inspections of all these properties. RW recommends the intergovernmental agreement be updated to match the fire inspection requirements of State Statutes which allows some occupancies to be inspected annually. Even with amending the intergovernmental agreement to reflect current Statutes, the Department will likely require additional staff to complete the requirement.

5. Chapter 37 of the Village Ordinances should be updated to reflect the current organizational structure of the fire department.

6. In 2015, the State of Wisconsin passed Act 270 that prohibits a municipality from adopting fire prevention codes that are more stringent than the currently adopted State Fire Prevention Code. Municipalities could grandfather fire prevention codes/ordinances at the time if approved by the State. Chapter 30 of the Town Ordinances includes requirements that do not appear to have been approved by the State in the grandfathering process. The Ordinances should be updated. It appears the Village did receive approval to grandfather some ordinances/codes in 2015 when Act 270 was adopted.

7. RW finds that the Department is heavily reliant on fees for service to support its budgetary needs. The Department should diversify its revenue source and transition costs resulting from this report to tax levy or other annual revenue sources.

8. A standards of cover study should be completed and documented for the Department.

9. A fire risk assessment and response strategy listing the nature and magnitude of the hazards within the Village and Town should be completed. The fire risks in each planning zone, including required fire protection resources and special, routine and isolated hazards need to be identified (pre-plans) so an accurate "standard of cover" strategy can be established. The risk assessment and the recommendations and implementation plan in this report will provide the basis for additions to the strategic plan.

10. RW recommends that the goals and objectives of the Department included in the Strategic Plan be regularly reinforced with Department members and reported on to the Joint Fire Commission, Village and Town Boards.

11. Department SOGs need to be updated to provide guidance on current operational activities. It is recommended a SOG Committee be put in place to assist the Department in this on-going process.

12. Chapter 38 of the Village Ordinances should be updated to remove authority of the Joint Fire Commission over operating guidelines since the Commission does not have optional powers.

13. RW recommends filling vacant officer positions on the current organizational chart. The Department should consider creating additional career path steps for current full-time Lieutenants in the Department that provide those positions opportunity to promote to chief officer positions.

14. RW recommends the Village and Town Boards amend the intergovernmental agreement that forms the joint department to allow the municipalities to utilize the levy limit exception for joint fire departments in State Statute 66 in 2024.

15. The Fire Department should conduct periodic appraisals for all programs to ensure consistency and compliance with the Department's mission.

16. Upon completion of the standards of cover study and risk assessment, the Department should review the long-range capital plan to ensure Department equipment meets the needs of the agency.

17. The Department should identify those pieces of equipment that could be purchased jointly with neighboring communities that could effectively be utilized under a shared services agreement as a method to contain costs.

18. A joint effort with neighboring communities should be considered to assist in providing adequate on-duty personnel and reduce capital equipment needs/costs.

19. The Department should add fire suppression resources to its initial dispatch to a structure fire to provide adequate and timely resources in order to meet response recommendations of NFPA 1720. The lack of dedicated dispatch resources to the fire department in the Mukwonago 911 PSAP appears to be a significant factor in the requesting enough resources in a timely manner.

20. The Department should schedule staff to complete fire inspections as required by the intergovernmental agreement and in accordance with State Statues.

21. RW recommends the intergovernmental agreement be amended to match State Statutes regarding the number of required annual fire inspections since the Department is currently unable to meet the requirement of the intergovernmental agreement.

22. The public education program should be documented to detail the programs being utilized, goals and target audiences.

23. A written assessment of the public education program should be completed each calendar year and provided to the Joint Fire Commission and the Village and Town Boards.

24. Procedures and guidelines should be developed that detail the Department's fire cause and origin investigation programs and processes.

25. The Department should include as part of its annual training program, the roles and responsibilities of initial responding agencies in identification of fire cause and origin.

26. RW recommends the Department contract with the Waukesha County Communications Center (WCC) to provide fire/EMS dispatch services. WCC can provide staffing to meet the Department's needs for fire/EMS dispatch.

27. A physical facilities/resource plan should be developed that provides a strategic direction for the Department in regard to facilities

28. As the Town continues to grow, Station 2 will need improvements to include living facilities for on-duty personnel in order to respond to calls in a timely manner.

29. The Department, in conjunction with the Village, needs to ensure the Personnel Manual appropriately addresses issues related to the fire department. The Village's Personnel Manual is applied to the fire department because the department contracts with the Village for human resources and financial services.

30. RW also recommends that the Department develop a career development program and a written health and fitness program for the Department.

31. Develop a written risk management process that will provide the Department and member communities with an analysis of community risk using real world factors. The risk assessment will include determining and defining the differences in risk between single family, multiple family, and commercial dwellings within the service area.

32. A written training plan using JPRs should be developed and maintained. The training plan should include training goals and objectives, a list of mandatory training that is needed and a schedule to meet the training needs, goals and objectives.

33. RW recommends the Department transition entry of training records to a currently supported records management system.

34. RW recommends the Department contract with the Waukesha County Communications Center for fire/ems dispatching services.

35. The Safety Committee should be retitled to the Health and Safety Committee to ensure employee health is also a part of the Committee's function.

36. An employee assistance program (EAP) should be implemented to meet SPS 330.

37. Administrative support staff should be added to the department to assist staff with the administrative functions of the Department.

38. The Department should consider engaging a project manager with shared service experience to develop additional shared service agreements and options for consideration.

39. The Department should begin transitioning its staffing to more reliance on full-time positions as opposed to paid-on-premise and paid-on-call. The current call volume and service requirements supports the need for additional on-duty staff.

40. Beginning in 2021, the Department should always schedule five firefighter/paramedics every day.

41. Upon transition to WCC for dispatch services, the Department should seek automatic aid agreements with neighboring communities to ensure enough resources are immediately dispatched upon a report of a structure fire in order to meet response requirements outlined in the standards of cover document that is developed.

42. The Department should ultimately plan to remodel Fire Station 2 to allow for on-duty staffing as development in the Town continues.

43. The Department should plan to add on-duty staff to Fire Station 2 after completion of the staffing transition included in this report. Development in the Town continues and the availability of paid-on-call staff to supplement the on-duty staff of the Department will likely continue to dwindle throughout time.

C. Benefits

As a result of implementing RW's recommendations, the Department and the citizens living in the service area should realize significant tangible benefits, mitigate liabilities, and justify the recommended investment. The following tangible and intangible benefits should be realized as a result of implementation of the study recommendations:

1. Improve the confidence and abilities of emergency response personnel to handle emergency incidents, by improving the MFD support network; updated operations and administration policies and procedures.

2. Provide a long-term approach to operational needs for the Department to use as a planning guide for budgetary and operational considerations. This approach improves efficiencies and provides for a structured management plan.

3. Mitigate liability in instances where accepted national standards are not being met. These standards are nationally recognized in a court of law and will serve to protect the Department.

4. Provide a pro-active approach to planning for the future development of the community by detailed evaluation of the fire department services, which is then revisited periodically.

5. Provide a well-defined, coordinated plan for the proper implementation of a fully functional Fire Department, supported by department and Department goals and objectives.

6. Improve the confidence and abilities of emergency response personnel to handle emergency incidents, by providing the appropriate facilities, management, organizational structure and technology.

7. Improve coordination and productivity during major incidents and disasters with all involved agencies, including the on-scene command posts, Emergency Management and the Emergency Operations Center.

8. Increase quality improvement through a continuous self-assessment capable of identifying and correcting deficiencies and building on strong points. This will also foster pride within the Department and national recognition by the community and peers. This will also assure that the Department is utilizing best practices and instills community pride.

9. The improvement and retention of the overall fitness and health of the Department members should be given a higher priority. This should contribute to the mitigation or work accidents, occupational exposure, hazard awareness and the reduction of loss time injuries and legal actions.

VI. GLOSSARY OF TERMS

ALS	Advanced Life Support – An emergency medical response unit with EMT-Paramedic personnel and equipment. This unit is equipped to provide emergency cardiac and drug intervention care.
AUTOMATIC AID	Automatic Aid is a type of mutual aid in which resources from another department/agency are dispatched to an incident in another jurisdiction by protocol rather than by verbal request from the incident commander in the jurisdiction where aid is needed.
APPARATUS	Apparatus is commonly used to describe multiple types of fire trucks or emergency response vehicles like ambulances.
BLS	Basic Life Support – An emergency medical response unit with EMT personnel and equipment. This unit is equipped to provide basic emergency medical care.
CAAS	Commission on Accreditation of Ambulance Services – An evaluation process developed to measure emergency medical service providers to established and accepted national standard criteria.
CIP	Capital Improvement Plan - A short-range plan, usually four to ten years, which identifies capital projects and equipment purchases, provides a planning schedule and identifies options for financing the plan
CFAI	Commission of Fire Accreditation International – National Fire accreditation process, which has become a part of the Center of Public Safety Excellence.
CPSE	Center for Public Safety Excellence - Evaluation process that measures fire departments to established and accepted national standard criteria. The International City /County Management Association and the International Association of Fire Chiefs were both committed to the development of these standards.

EMS	Emergency Medical Service - This term is utilized to cover the multiple tiers of emergency medical response, from first responder to Paramedic.
EOC	Emergency Operations Center - is a central command and control facility responsible for carrying out the principles of emergency preparedness and emergency management, or disaster management functions at a strategic level during an emergency, and ensuring the continuity of operation of a company, political subdivision or other organization.
EOP	Emergency Operations Plan - Describes how a facility will respond to and recover from all hazards.
EVT	Emergency Vehicle Technician – A mechanic or other service person with Certification indicating they have specialized knowledge pertaining to Emergency Vehicles
FEMA	Federal Emergency Management Agency – A federal government agency responsible for the regulation of disaster management, planning and training.
IAP	Incident Action Plan – A plan for mitigating an incident.
ICS	Incident Command System – Nationally accepted system for the management of personnel and resources at large Public Safety incidents.
ISO	Insurance Services Office Rating Schedule – System used to rate fire departments for insurance rating purposes.
LEXIPOL	Lexipol is a private provider of risk management policies and resources for organizations, delivering services through a unique, web-based development system. Lexipol offers state-specific policy manuals that are integrated with scenario-based daily training on high-risk, low-frequency events.
MABAS	Mutual Aid Box Alarm System – A Wisconsin statutory system in place for the coordination of fire and EMS mutual aid throughout the State of Wisconsin.
MUTUAL AID	Mutual aid is utilized frequently in fires that exceed the capabilities of a department's equipment or available manpower to appropriately fight a large fire. Mutual aid requires a specific request for assistance by the incident commander.
NFPA	National Fire Protection Association - An association organized to reduce the burden of fire on the quality of life by advocating scientifically based consensus codes and standards, research and education for fire and related safety issues
NIMS	National Incident Management System – Nationally accepted program for the management of personnel, resources and equipment at major disaster related incidents.
PFC	Police and Fire Commission.

POC	Paid-On-Call - Firefighters that are paid based on responding to call. Generally, POC Firefighters do not stay at a fire station while awaiting a call to respond to.
PAID-ON-PREMISE	Firefighters that are paid on a part-time basis to be working in a fire station while waiting for a call for service to respond to.
PRE-PLANS	The documentation fire departments use to plan building response and incident management for target threats or specific hazardous locations.
RMS	Records Management Systems.
SOG	Standard Operating Guidelines - Department developed document that establishes parameters for firefighting operations and other department functions.

Fire Services Review

Fire Department Operations Study
& Staffing Needs Assessment

FINAL REPORT

Prepared for

SOMERS FIRE AND RESCUE DEPARTMENT

KENOSHA COUNTY, WISCONSIN

January 21, 2025

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McM. No. S0403-04-24-00511

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I. INTRODUCTION

McMahon Associates, Inc. (McMAHON) was retained by the Village of Somers to conduct an operational study and staffing needs assessment of the Somers fire and rescue department. Included in this analysis was a review of current organizational structure, service levels and operations to make effective recommendations included in this study.

This Study reviewed fire department efficiency, effectiveness, compliance with accepted standards, the organizational structure and staffing of the Somers fire and rescue department. This study provides recommendations and options for the municipality to use now and in the future, when assessing Fire Department needs.

II. PROJECT WORK TASKS

To complete the objectives set forth in the Study RFP, McMAHON evaluated the operations of the Somers fire and rescue department to provide recommendations to improve its operations.

In conducting this study, McMAHON consulting staff met with the Village/Town Administrator, Village President, Fire Chief, Fire Department Officers and individual fire fighters and EMS personnel. The Department was also requested to provide a wide range of documentation to McMahon including budgets, call data, policies, procedures, etc.

The following presents an overview of the work tasks completed by McMAHON during the project.

1. Developed a project team of appropriate users and stakeholders to oversee and participate in the project. This included the Fire Chief, Deputy Fire Chief and a group of Captains.
2. Conducted a Project Planning Meeting with McMAHON Project Manager, the Project Team and key project personnel. Defined scope and mission, discussed work plans, established liaison responsibilities, coordinated project schedules, and confirmed other general arrangements.
3. Obtained and reviewed documentation provided by the project team pertaining to the project.
4. Conducted interviews and on-site observation to evaluate the current, and future, needs and standards of performance of the Fire Department. In conducting this study, we met or conducted telephone interviews with the following personnel:

   - Somers Fire Chief
   - Village/Town Administrator and Village President
   - Somers Fire and Rescue Department Officers and groups of fire fighters

Interviews and observations primarily focused on the following:

- Current department operations, staffing and levels of service
- Fire personnel workload, call volume and activity
- Administrative organizational structure
- Budget and capital needs
- Department policies and procedures
- Facilities and Major Equipment
- Fire Inspections
- Department training

5. Prepared for and facilitated a project status meeting to discuss the results of the interviews and on-site observations with the Project Team.
6. Reviewed the present fire workflows and processes to analyze and develop potential organizational and operational changes to improve efficiency and effectiveness. This review was based on the Commission of Fire Accreditation International (CFAI) categories and criteria. The performance indicators that were examined include the following:

- Governance and Administration
- Assessment and Planning
- Goals and Objectives
- Financial Resources
- Community Risk Reduction Programs
- Physical Resources
- Human Resources
- Training and Competency
- Essential Resources
- External System Relations
- Health and Safety

7. Determined any public safety industry standards and trends related to the Department's operational requirements. During the development of all recommendations, McMAHON considered many factors and standards as a basis for recommendations, including:

- National Highway Safety Traffic Administration (NHSTA)
- U.S. Department of Transportation – Federal Railroad Administration
- National Fire Protection Association (NFPA)
- Federal Emergency Management Association (FEMA)
- U.S. Fire Administration (USFA)

- Commission on Fire Accreditation International (CFAI)
- Occupational Safety and Health Administration (OSHA)
- Insurance Services Office (ISO) Rating Schedule
- Local Fire Protection Ordinances

8. Developed a comprehensive Fire Department operational and staffing needs analysis, utilizing the information provided by the documentation received, the interviews, national standards, and on-site observations. The projected growth and level of service needs were considered during the development of these recommendations. Recommendations included:

    - Effectiveness, efficiency, and performance of current fire operations
    - Efficient utilization of station resources
    - Administrative growth and organizational structure
    - Review of Department policies and procedures
    - Analysis of personnel and staffing needs
    - Recommended an effective implementation plan

9. Facilitated a recommendation meeting to present preliminary recommendations and obtain feedback from the Project Team.
10. Listed and described the findings and recommendations on the Fire Department governance and administration, assessment and planning, goals and objectives, financial resources, programs, physical resources, human resources, essential resources, training, and external system relations, and all other items evaluated and analyzed during the project.
11. Assembled the study report. Performed a detailed quality assurance review of the document to ensure that the document meets the expectations of the Project Team and conforms to McMAHON's standards.
12. Prepared and delivered the draft Report to the Project Team for review.
13. Received feedback from the Project Team regarding the content of the draft recommendations. Made any changes to the analysis based on the returned comments, as were deemed appropriate. Produced and delivered copies of the final document to the Project Team.
14. Presented the findings and recommendations of the analysis to the Village Board.

III. SOMERS FIRE AND RESCUE DEPARTMENT OVERVIEW

The Somers Fire and Rescue Department provides fire and emergency medical services to the Village and Town of Somers, which have a geographic area of 29 square miles.

Population Projection: The Department provides fire and emergency medical services to approximately 9,368 residents. The Village of Somers has several developments in the planning stages or underway that will increase the population of the community over the next several years. Under a boundary agreement with the City of Kenosha, areas of the Town of Somers will incorporate into the City of Kenosha in 2035. The population of those areas was 992 people at the 2020 Census.

Equalized Value Comparison: The Village and Town of Somers have an equalized value of approximately $1.7 Billion. The table below shows the current equalized value that the Somers Fire Department is tasked to protect. The Wisconsin Department of Revenue data indicates moderate growth in property values in 2020 compared to 2019.

Village and Town Of Somers				
Equalized Value Analysis				
Municipality		2024 EAV	2020 EAV	% Change from 2020
Village of Somers		$1,583,579,000	$940,358,100	68.40%
Town of Somers		$126,443,000	$92,841,300	36.19%
Kenosha County		$27,124,862,500	$17,968,070,600	50.96%
Source: State of Wisconsin Department of Revenue				

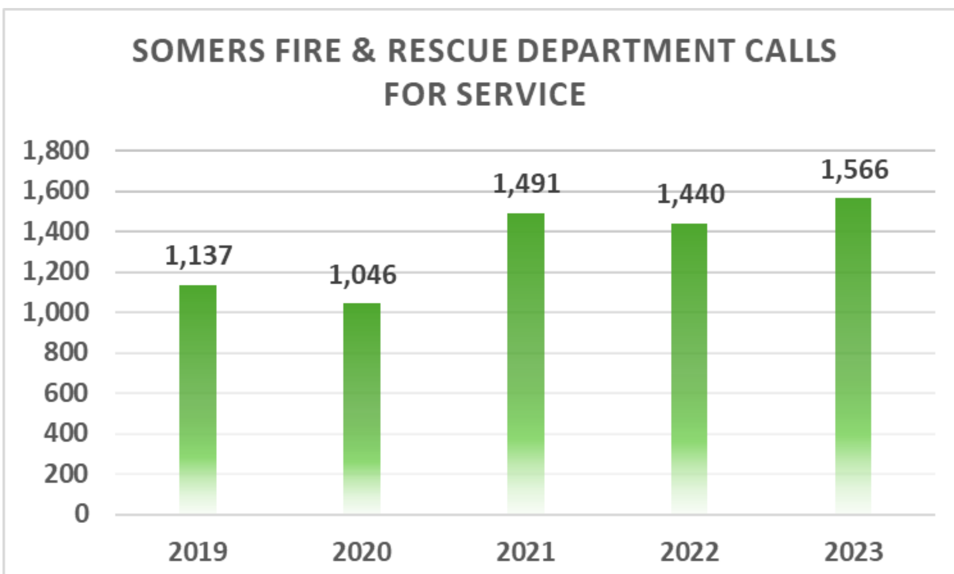
Per Capita Spending: An apples-to-apples comparison of municipal spending can be challenging due to differences in development types, development density, service levels, etc. However, an analysis of per capita spending conducted by the Wisconsin Policy Forum provides perspective of the Village of Somers cost per capita for fire and emergency medical services.

Per Capita Spending Fire & EMS			
Municipality	2022	2020	Rank in 2022 of 604 Municipalities
Village of Somers	$229	$187	62
City of Kenosha	$233	$224	59
Village of Mount Pleasant	$351	$240	16
Village of Sturtevant	$207	$199	85
Village of Pleasant Prairie	$206	$179	88
Source: Wisconsin Policy Forum			

Department Organizational Structure: The Department currently operates out of two stations with a staff of sixty personnel including command officers (nine members on the roster did not have any certifications as of October 6, 2024). Fourteen of the sixty personnel are full-time. The remaining staff are part-time, paid-on-call or paid-on-premise. The organizational structure is shown in the organization chart below.

- 1 Fire Chief (full-time)
- 1 Deputy Chief (full-time)
- 5 Captains (full-time)
- 2 Lieutenants (full-time)
- 5 Firefighters (full-time)
- 46 Paid-On-Call/Paid-On-Premise/Part-Time

Call Volume Analysis: The primary purpose of a fire department is to protect persons and property in its service area. The number and type of calls along with other services provided often determines the type of fire department a municipality operates. One measure of this aspect of service is annual call volumes. An analysis of the Department's call volume showed an increase of 38% for the past five years. Call volume increases have outpaced population increases in the community which, while not uncommon in the industry, demonstrates an increased workload on the workforce as the size of the Department has only slightly increased over those five years.



IV. SOMERS FIRE & RESCUE DEPARTMENT OPERATIONAL ANALYSIS

A. Department Overview, Demographics and Environment

The Village of Somers Fire and Rescue Department is a municipal fire department operated by the Village of Somers. The Department also protects the Town of Somers. The total protection area is approximately 29 square miles with a 2024 estimated population of 9,368.

Chapter 5 of the Village's Municipal Code establishes the Fire and Rescue Department and provides the organizational structure. The Village Board is the governing authority of the Department. A Fire Commission made up of five (5) citizens is appointed by the Village president. The citizens must be residents of either the Village or Town of Somers. The Commission appoints the Fire Chief and performs other duties as identified in the Municipal Code and State Statutes.

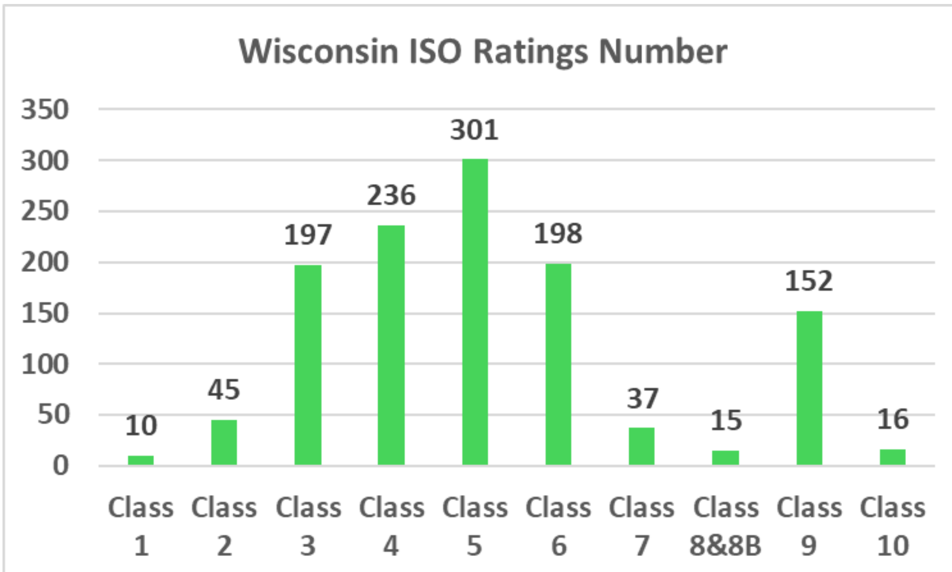
The Town of Somers Ordinances also detail the organization of a Town Fire Department and Fire Commission. While the authors of this study understand this is likely the result of the transition to the incorporation of the Village, **it is recommended the Town Ordinances be updated to reflect that the Village of Somers Fire and Rescue provides services to the Town of Somers.**

The Department operates from two fire/EMS stations. Stations are located at:

- Station 1: 7511 12th Street
- Station 2: 818 12th Street

The Department operates a paramedic level EMS service and has an Insurance Services Office (ISO Rating) of Class 4.

The ISO rating schedule measures the major elements of the Village and Town's fire suppression system. These measurements then are developed into a Public Protection Classification number on a relative scale from 1 to 10, with 10 representing less than the minimum recognized protection. The schedule is a fire insurance rating tool used to determine property insurance premiums that property owners pay to their insurance carrier. The chart below demonstrates the number of departments with various ISO Ratings in Wisconsin.



Source: Insurance Services Office (ISO)

B. Governance and Administration

Governance of the agency is outlined in the Village's Municipal Ordinances. As referenced earlier in the report, it is recommended the Town's Ordinances be updated to reflect that the Village Fire and Rescue Department provides fire and rescue services to the Town.

The Department has an approved organizational structure and set of administrative policies and standard operating guidelines in place.

The Department's standard operating guidelines (SOG) were last updated in October 2021. These are dynamic documents and need to be continually updated and adjusted. **It is recommended a plan be developed to ensure each SOG is reviewed for needed updates on a cycle of approximately once every three years.**

The organizational structure of the Department's Command Staff was closely analyzed as part of the study. The organizational structure of the Department has undergone changes as the Department has transitioned from a department that was primarily composed of a small number of full-time with paid-on-call to a combination of full-time and part-time/paid-on-call/paid-on-premise members. **It is recommended the structure of the fire and rescue department's command staff structure be transitioned from a fire chief, a deputy chief, 5 captains and 3 lieutenants to a fire chief, a deputy chief, 4 captains and 3 lieutenants as positions are vacated through attrition.**

Somers Fire and Rescue Department Command Staff Structure		
Rank	**Current**	**Recommended**
Fire Chief	1	1
Deputy Chief	1	1
Captain	5	4
Lieutenant	3	3

Under the current command staff structure, the roles and responsibilities of the Deputy Chief are unclear to not only the Deputy Chief himself, but members of the Department. The current job description for the position primarily just indicates that the Deputy Chief "assists" the fire chief. Specific areas of the organization that the Deputy Chief is responsible for managing and oversee should be documented in the job description and in a formal chart of the organization. **MCMAHON recommends that the department consider transitioning the responsibilities for day-to-day operations to the Deputy Chief to allow the chief to concentrate on administrative responsibilities. Once the specific roles and responsibilities for the position are identified, the Fire Chief should ensure they are documented, communicate those responsibilities to the entire Department and monitor performance through the annual performance evaluation process.**

From a longer term perspective, moving the captain position that oversees fire prevention and inspections from a twenty-four hour shift schedule to a Monday thru Friday schedule and replacing that position with a firefighter on shift will support service demands placed on the Department as development in the community will likely continue leading to increased demand for inspections and prevention services.

C. Assessment and Planning

An important component of community fire and emergency medical service provision is to establish the community's expectation of services in relation to the risks that exist in the community. This allows the Department to develop programs to meet community needs and expectations, prioritize those programs based on available financial resources and to utilize data to measure the impacts of the programs.

The first step towards establishing community expectations of service is to complete an all-hazards risk assessment of the response area. **MCMAHON recommends the fire department complete an all-hazards risk assessment.** A risk assessment is a process for identifying potential hazards/risk exposures and their relative probability of occurrence;

identifying assets at risk; assessing the vulnerability of the assets exposed; and quantifying the potential impacts of the hazard/risk exposures on the assets.

Developing the community expectation of service and program outcomes is also an important component of assessment and planning for fire and emergency medical services. A document describing those expectations is called a Standard of Cover (SOC) Study. SOC includes response time goals and analysis of capabilities of the Department based on critical task analysis.

The SOC should go beyond only identifying response time goals for first arriving units. While this is an important component of grading services, it is also important to measure the response times for entire response packages that are needed to mitigate the incident. **MCMAHON recommends that the fire department develop a Standard of Cover that includes response time goals and measure and report on performance to the Village Board.**

D. Goals and Objectives

Establishing a strategic plan for the organization is an important way to not only set goals for the organization, but to inform stakeholders about the Department and the direction it is moving. **MCMAHON recommends that a strategic plan be developed for the Department that is consistent with the community master plan.** It is important that Department leadership involves the organization and community in the development of the strategic plan and then report on progress towards achieving goals and objectives cited in the strategic plan to all stakeholders.

E. Financial Resources

The financial resources of an organization impact every category evaluated as part of this report. Resources must be adequate to maintain the various programs to which the Department commits to provide to the citizens.

Planning, management and ensuring stability of the financial resources of the Department is a shared responsibility of the Fire Chief, Village Administrator and governing body of the Department. The budget for the fire department is an expression of agency programs and priorities. Therefore, it is important that the budget be developed with involvement from the Village Board.

The Village Board is active in discussing fire and rescue department needs and the impacts of those needs on the fire and rescue department’s budget.

F. Programs

This section of the report covers the delivery of services directly to the community. The primary service provided by the Department is emergency response. Communities often grade fire department service delivery based on response times. While response times should not be the sole method to evaluate service delivery, it is an important part. The Department measures its response times from the time the call is answered by the 911 Dispatch Center until the arrival of the first fire department unit to the scene. MCMAHON supports this method of measurement for response times.

Two common methods exist to evaluate compliance with goals for response times:

1) Measuring compliance for 90% of the calls for service
2) Measuring average response time

The first method of measurement provides a more accurate portrayal of response time (9 out of every 10 calls), whereas the second method shows the average, which can generally be considered 5 of out of every 10 calls).

The Department has historically reported its response time performance using the average response time method. The chart below details average response times and 90% fractile response times for a five-year period. As expected, the response time data shows longer response times since this data point looks at 9 out of 10 calls, whereas the average response time method is evaluating the mean of the data set. **It is recommended that the Department start evaluating response times using both the average and 90% method rather than just the average method.**

Somers Fire & Rescue Department Response Time Analysis							
	2019	2020	2021	2022	2023	Average	Median
Average Fire/Rescue/Service	7:50	7:42	6:07	7:13	5:14	6:49	
Average Medical	7:50	7:38	7:26	6:58	7:11	7:24	
90% Fire/Rescue/Service	12:30	11:05	10:34	9:36	9:10		10:34
90% Medical	8:16	10:33	10:17	9:37	9:40		9:40

	3 Year Average Response Time (2021-2023)
Bristol	8:35
Paris	9:44
Somers	6:41
Pleasant Prairie	6:22

G. Response Reliability Evaluation

The staffing model the department currently utilizes provides for on-duty staff that can respond to two simultaneous emergency medical services calls by having one response crew available in each station. An evaluation of the reliability of the current response model is to evaluate the frequency of calls with occur simultaneously, in other words, they overlap each other.

This assessment assists in providing a gauge of response reliability of the resources on-duty and whether sufficient resources/personnel are on duty in each station/response area to handle the regular volume of calls for service.

The consultant team looked at response data provided by the fire department to evaluate the frequency of overlapping calls. Generally, if more than two calls occur simultaneously, the Department relies on either callback of off-duty personnel or mutual aid to handle these calls. The analysis demonstrated that the percentage of simultaneous calls to total calls for service has increased from approximately 3.4% in 2019 to 12.2% in 2024.

The data demonstrates that scheduling sufficient staffing for an ambulance or engine response of three people in each station is currently needed, however, it is expected the frequency of simultaneous calls will grow as total calls for service grow. As total call volume and the frequency of simultaneous calls increases a fourth person should be added to the daily staffing at Station 1 to allow for a third ambulance crew on-duty. The Staffing Needs Assessment of this report provides additional detail on staffing recommendations.

H. Prevention & Public Education

The Department has an active prevention and public education program in place. The program is overseen by one of the five captains on the Department. The Department is active with both fire prevention programming and has an active social media presence.

The State's requirements for fire prevention and inspection programming are detailed in Administrative Code – Safety and Professional Standards #314 (SPS 314). Fire inspections of all public buildings and places of employment within the territory of a fire department are required to be performed by the fire department to be eligible for the State's 2% Dues Grant Program. The Somers Fire and Rescue Department is a recipient of the 2% Dues, thus is required to conduct fire inspections and provide various fire prevention programming.

Chapter 5 of the Village and Town Ordinances addresses the fire and rescue department and fire code enforcement. Both the Village and Town Ordinances require fire inspections to be conducted semi-annually. The semi-annual inspection cycle is included in SPS 314, however, SPS 314 does allow for an exception for certain occupancy types to be inspected less frequently. Many communities across the State have utilized this exception to assist in managing the workload related to fire inspections. **It is recommended that the Village and Town evaluate an exception in State Administrative Code SPS 314 that allows for a specific set of occupancy types to be inspected at least once per calendar year provided the interval between inspections does not exceed 15 months (SPS 314.01(13)(b)5) and update the Village and Town Ordinances if changes to the current inspection frequency are acceptable to the Village and Town Boards.**

SPS 314 also adopts a State Fire Code - National Fire Protection Association (NFPA) Standard #1 – 2012 edition. This code is considered the uniform fire code for the entire State based on the State's adoption of 2013 Act 270 which established a uniform commercial building and fire code for the entire State. Act 270 basically prohibits any municipality from adopting building and fire code language that is more restrictive than the state adopted code. A "grandfather" exception was made for municipalities to submit fire code that was more restrictive than the code adopted by the State in 2013. A list of grandfathered codes, by municipality is listed on the State Department of Safety and Professional Standards Website. In reviewing Chapter 5 of the Village's Ordinances, the Village has adopted NFPA Standard #1 – 2015 edition. The 2015 edition is considered a more restrictive code than the 2012 edition. In reviewing the list of grandfathered codes by municipality, there are no grandfathered fire codes listed for the Village of Somers. **It is recommended the Fire Chief review current code adoption with the State's Department of Professional Standards to ensure adoption of NFPA #1 – 2015 edition is allowed to be adopted by the Village under current State Statute.**

I. Fire Cause and Origin Investigations

Investigations of fire cause and origin is the responsibility of the fire department according to State Statute. The Department maintains a team of staff members that are trained in fire investigation. The members trained in fire investigation participate in a county-wide fire investigation team. This is an efficient and effective method of providing fire cause and origin investigations.

J. Domestic Preparedness/Emergency Management

Emergency management was not evaluated as part of this study.

K. Fire Suppression

The vast majority of fire and rescue department staff are dual-role providers, in other words, they provide both fire suppression/rescue and emergency medical services.

Call volume for the fire department is generally separated in two categories: Fire/Rescue and Emergency Medical Services. In the United States, fire departments that perform emergency medical services and fire/rescue response generally have a call volume for emergency medical services that is at least 65% of total call volume. In Somers, emergency medical services calls account for 80% of total call volume.

2022 Incident Data Comparison					
Incident Type	**Somers**		**Wisconsin Average**		**National Average**
Fire	3%		4%		4%
Rupture/Explosion	0%		<1%		<1%
Rescue and Emergency Medical Services Incidents	80%		72%		65%
Hazardous Condition (No Fire)	2%		3%		3%
Service Call	7%		7%		8%
Good Intent Call	4%		7%		11%
False Alarm & False Call	4%		7%		8%
Severe Weather & Natural Disaster	0%		<1%		<1%
Special Incident Type	0%		<1%		<1%
Source: US Fire Administration Data					

While most calls for service are related to emergency medical services, the Department needs to maintain service capacity for fire/rescue calls for service. In other words, the Department cannot solely staff for emergency medical services calls. While the frequency of fire calls is lower, they provide a high level of risk for both the community and members of the department and they generally require more resources than emergency medical service calls, so managing resource availability is important to ensure public safety.

The Department has effective operating guidelines in place for response to fire incidents, however, at times, the resources available to suppress fire incidents are very limited. The Department has placed a significant reliance on calling off-duty personnel to maintain sufficient staffing for fire and emergency medical responses when on-duty staff is busy with other calls for service.

While the process of using off-duty personnel to back-fill stations was effective in past times, the process of relying on off-duty or paid-on-call personnel to staff fire and rescue stations has become less and less effective over the last decade. Off-duty personnel are not compensated for being on-call during their off hours, so there is no way for the Department to ensure personnel are available to respond to callbacks. As the Department's call volume has increased, so have the number of times off-duty personnel are called in. The Department, like Department's across the Country, has experienced a significant reduction in the number of off-duty firefighters responding to off-duty call-backs. This trend is likely the result of a change in the attitude of younger members of the workforce regarding work/life balance and the increased frequency of those callbacks. With those changes in the environment, the Department needs to consider that off-duty responses will continue to become less reliable thus increasing the need to rely on sufficient on-duty staff to respond to day-to-day call volume and reserve off-duty call-backs for major incidents.

Recommendations for additional staffing for both fire and emergency medical services are included in the Staffing Needs Assessment of this Report.

L. Emergency Medical Services

The Department operates a paramedic level service that is licensed by the State of Wisconsin. The medical director is actively involved in the Department. A system for quality assurance of patient care is in place and active. Significant emphasis is placed on the quality of emergency medical services provided by the Department. This emphasis should be applauded.

Emergency medical services produces significant revenue for the Village. Revenues are used to offset the costs of providing such services. The Village has a fee schedule that charges users of the service. The intent of the fees is to charge users the cost of providing the service.

M. Technical Rescue

The Department responds to technical rescue incidents. All members are trained to perform auto extrications. Several members of the Department are also trained as hazardous materials team and as dive team members. The hazardous materials and dive teams are county-wide teams. Support for the county-wide hazardous materials team is provided by the regional response network coordinated by the State Department of Emergency Management. The State also provides an urban search and rescue task force for incidents involving urban hazard mitigation, search and rescue and stabilization. As with hazardous materials response, local capability to respond to less complicated urban hazard mitigation and search and rescue is required. The resources available for technical rescue incidents are appropriate for the Department.

N. Physical Resources

The Department has two (2) stations. A separate study of the fire and rescue department facilities was completed by McMahon in 2024. Recommendations for fire and rescue facilities are included in that report. Staffing recommendations for the fire and rescue department are included in the Staffing Needs Assessment Section of this report.

Apparatus and Vehicles

Apparatus and vehicles are in very good condition. The fleet is of appropriate size and has sufficient resources. Maintenance is performed by a mix of in-house and contract service providers and is coordinated by Department Administration. Annual pump and ladder testing is performed and documented.

Records Management

The Department currently utilizes Imagetrend Records Management Software as its primary record keeping system. The software is appropriate for the Department’s needs.

O. Human Resources

The Department and Village Administration coordinate efforts for human resource support of the Department. Full-time fire captains, lieutenants and firefighters are covered by a collective bargaining agreement between the Village and the Firefighter's Union. The Village has a Personnel Manual that covers non-represented fire department employees.

Job Descriptions for all positions should be in place and updated regularly to provide for requirements of positions and provide a basis for job performance evaluation. Currently, the Deputy Chief position is the only position with a job description in place. **It is recommended that job descriptions be adopted for all positions and reviewed regularly.**

P. Training and Competencies

Training for full-time members is primarily accomplished while personnel are on-duty. Training for part-time/paid-on-call/paid-on-premise is conducted while they work shifts in the stations. Training of personnel is overseen by the Training Captain. The captain does rely on resources from within and outside the Department to provide training programs. The training program is well-managed and covers applicable topics. A target of at least 16 hours of training per month for full-time members is recommended.

Q. Essential Resources

Water supply is a critical need for fire suppression operations. Many areas of the Village and Town are served by the Somers Water Utility. In areas without fire hydrants, the department must rely on support of water tenders to ferry water to a fire scene. As the Village develops, expansion and maintenance of the municipal water system will be important.

Two-way radio communications occur on a county-wide public safety radio system that allows for interoperability with fire and law enforcement in the County. The County is responsible for system infrastructure.

911 Dispatch services are provided by Kenosha County Joint Services. The 911 Telecommunicators utilize emergency medical dispatch (EMD) protocols to prioritize calls for service and provide pre-arrival instructions to callers. Interviews with members of the department identified concern of the members with the time it takes for Kenosha County Joint Services – 911 to process calls for emergency medical services. This is a common concern that the consulting team hears in communities that utilize EMD protocols. While not in the scope of the study to review performance of Kenosha County Joint Services – 911, the use of EMD protocols is recognized as the "gold standard" in emergency medical dispatching. The EMD protocol system does provide for recognition of patients with life-threatening, time sensitive needs and prioritizes timely dispatch of those calls and should be supported in conjunction with a robust quality assurance process.

R. External System Relationships

The Fire Department relies on other Village Departments and neighboring fire departments to provide effective public safety. Maintaining relationships with these various departments is important component of the Somers Fire and Rescue Department being an effective organization. The Department has effective working relationships with other Village Departments and the Kenosha County Sherriff's Office, the primary provider of law enforcement in the Village and the Town.

MCMAHON recommends the Department continue to seek additional automatic aid agreements with neighboring departments for initial response to high acuity/high-risk incidents such as structure fires. Automatic aid agreements allow for response of mutual aid partners at time of dispatch as opposed to traditional mutual aid agreements that require an incident commander to request assistance. Somers Fire and Rescue Department would benefit from entering into automatic aid agreements with neighboring Departments such as South Shore Fire Department, Kenosha Fire Department and Paris Fire Department for assistance at time of dispatch of structure fires. Currently, only Somers resources are dispatched for a structure fire and mutual aid is requested by the incident commander. Securing automatic aid agreements provides quicker response of resources that are needed to mitigate high acuity/high-risk events such as structure fires. Securing automatic aid agreements will require that Somers commit to staffing of stations so that reciprocal automatic aid can also be provided. Additional detail on this recommendation is included in the Staffing Needs Assessment Section of this Report.

S. Health and Safety

The State Department of Professional Standards Administrative Code SPS 330 requires that the Department have a Safety Committee. SPS 330 requires the Committee include representatives of fire department management and firefighters or representatives of firefighter organizations or other persons. The fire chief is responsible for appointing members of the committee. Meetings of the committee are required to be held at least twice per year. Minutes of meetings are required to be maintained. The Department does not currently have a Safety Committee. **It is recommended that a Safety Committee be established in accordance with SPS 330.**

A wellness/fitness program exists in the Department also. Each station has fitness equipment that is accessible to all members of the Department. The fitness facility at Station 2 is not adequate and in need of upgrades – this issue is addressed in the facilities report previously issued. Department members actively participate in the wellness/fitness program and in a physical fitness evaluation.

Other health and safety concerns regarding facilities are addressed in the facilities report previously issued.

V. STAFFING NEEDS ASSESSMENT

The Somers Fire and Rescue Department is composed of sixty personnel. The make-up of the Department is:

- 1 Fire Chief (full-time)
- 1 Deputy Chief (full-time)
- 5 Captains (full-time)
- 2 Lieutenants (full-time)
- 5 Firefighters (full-time)
- 46 Paid-On-Call/Paid-On-Premise/Part-Time

The Fire Chief and Deputy Chief work a Monday-Friday 40 hour per week schedule. The twelve other full-time members are divided among three shifts and work a rotating schedule of 24 hours on – 48 hours off. All full-time members also respond to callbacks of personnel while off-duty.

Paid-On-Call Personnel respond to callbacks when calls for service require additional personnel to either respond to the actual call or backfill stations. Paid-On-Premise personnel work shifts in stations to supplement full-time staffing. Paid-On-Premise Personnel are required to work forty-eight hours in one of the stations per month.

The Department maintains a minimum staffing of three personnel at Station 1 and two personnel at Station 2. State Administrative Code requires a minimum of two personnel to operate an ambulance. There are no minimum mandated requirements for staffing of fire apparatus other than for mutual aid calls for service, which generally require at least three or four personnel (depending on where the call occurs). The three personnel at Station 1 allow for staffing of a fire engine or ambulance, whereas the two personnel at Station 2 can staff an ambulance or fire engine for calls in the Village or Town of Somers only.

MCMAHON recommends the Department staff Fire Station 1 with four personnel per day and Fire Station 2 with three personnel each day. This allows for a total of seven licensed/certified personnel to be on duty. This staffing level allows both Station 1 to respond to either two simultaneous EMS calls or a fire call and for Station 2 to handle either a fire or an EMS call. This recommended staffing goal provides:

1) Staff to handle an additional EMS call (total of three as opposed to two).
2) Provides for a three-person fire engine at Station 2 compared to a two-person fire engine, thus enhancing fire suppression and rescue operations when compared to current staffing levels.

Recommended Daily Staffing Goal	
Station 1	**Station 2**
Captain	Lieutenant
Firefighter	Firefighter
Firefighter	Firefighter
Firefighter	

Current budgetary funding allows for staffing of only five personnel per day. *Funding seven personnel per day requires a significant investment and will likely either take several years or a referendum to fund this increase in staff.* Staffing the Department with a minimum of seven personnel per shift day will require a total of twenty-one full-time positions assigned to twenty-four-hour shifts. Currently the Department has twelve full-time positions assigned to twenty-four-hour shifts. The recommended model will require an addition of nine full-time positions. Vacation and sick leave will likely result in one of the seven firefighters on each shift being “off” most of the year, resulting in six remaining firefighters on duty. Part-time staff will be needed to fill vacancies resulting from vacation and other leaves to maintain a staffing of seven personnel.

Maintaining the part-time staff provides for mechanism to recruit future full-time staff, has a cost benefit as opposed to adding another full-time position on each shift and provides flexibility to the Department as it transitions to a larger full-time staff. Maintaining a non-full-time fire and EMS staff is challenging and will likely get even more challenging in the years ahead. Even with the nine new recommended positions, **the Department should, from a long-term perspective, continue to plan for a reduction in reliance on non-full-time staff in the future, especially as the community continues to grow.** The recommendation is not to suggest non-full-time fire and EMS personnel don’t have a commitment to protecting the community, however the recommendation comes from a viewpoint that the available workforce of non-full-time fire and EMS staff is less than it has been in the past, that it will likely continue to get smaller and demand for service will increase as the community grows.

While the Department continues to rely on the part-time/paid-on-premise and paid-on-call staff, the consultancy team has developed several recommendations to maintain an effective staff. **While the Village considers methods to fund additional full-time personnel, McMahon recommends the following changes be made to the fire department:**

1) **Top pay for part-time/paid-on-premise and paid-on-call personnel be increased to up to $25 per hour for firefighter and paramedic certification/licensure. This will allow Somers to be competitive with other area fire departments for part-time/paid-on-premise and paid-on-call personnel.**
2) **A maximum number of paid-on-premise personnel paid to be on-duty should be set for the fire and rescue department. Currently paid-on-premise personnel are allowed to work anytime, resulting in a varying staffing level, which, at times, is more than is necessary.** Setting a maximum staffing level will allow for budgeted funds to be maximized. The primary use of funds for the part-time/paid-on-premise staff should be to maintain the minimum on-duty staffing. The minimum staffing number will likely change as funding allows for hiring new full-time firefighter

positions. Consideration should be given during this period of transition to utilize the part-time/paid-on-premise staff to increase staffing during day-time hours when calls for service are at its highest. Calls for service from 8 AM to 8 PM consistent nearly 70% of all calls.

3) **The Department should review the practice of compensating personnel who are not certified or licensed to function as a firefighter or emergency medical services provider to work at the fire station, attend training and respond to calls and alternatively reserve these funds to staff additional certified/licensed personnel.**

Once a consistent staffing of, at minimum, three personnel in each station can be achieved, MCMAHON recommends Somers re-engage neighboring departments in seeking opportunities for automatic aid responses for structure fires and other major emergencies. The current initial response to a report of structure fire does not provide sufficient reliable resources to meet critical tasks that need to be accomplished at a structure fire. Much of the current structure fire response from Somers Fire Department relies on paid-on-call personnel which is becoming more unreliable. **It is recommended that at least 16 personnel be dispatched to a report of a structure fire by the National Fire Protection Association Standard.** Sixteen personnel provide sufficient personnel to perform search and rescue, fire suppression and support operations required at a structure fire. A response package of at least sixteen personnel should be developed using automatic aid agreements for response to structure fires and other major incidents to ensure effective emergency operations and safety of responders.

VI. SUMMARY OF RECOMMENDATIONS

The Somers Fire and Rescue Department currently operates a service-oriented department whose members are committed to providing high level service to the Village and Town of Somers. The nineteen recommendations included in this study, if implemented, can make the Fire and Rescue Department more effective and efficient and improve public safety in the communities served.

The on-going growth in Somers will continue to increase service demand. As the community continues to grow, it is imperative the impact of growth on the service demands of the fire and rescue department be considered and funding be identified to support those needs.

While service demand has increased, changes in the employment market for fire and emergency medical services personnel also continues to challenge the Somers Fire and Rescue Department. The fire and emergency medical services industry faces significant challenges in recruiting and retaining a sufficient number of people to meet employment demands. These recruitment and retention issues have put significant strain on the part-time/paid-on-premise/paid-on-call workforce. What was once a method to gain experience over a course of several years for future full-time employment in a very competitive employment market, the part-time/paid-on-premise/paid-on-call workforce is literally now being considered for full-time employment within months of completing minimum licensure and certification requirements. For decades, the Somers Fire and Rescue Department has relied on the part-time/paid-on-premise/paid-on-call workforce to support staffing its fire and rescue department. The availability of that workforce has gotten smaller in the last several years while demand for workers has increased, leaving a challenge in recruiting and retaining workers and forcing fire and rescue departments across the Country to evaluate how they staff and compensate their first responders.

Summary of Recommendations	
1	It is recommended the structure of the fire and rescue department's command staff structure be transitioned from a fire chief, a deputy chief, 5 captains and 3 lieutenants to a fire chief, a deputy chief, 4 captains and 3 lieutenants as positions are vacated through attrition.
2	MCMAHON recommends the Department set a long-term staffing goal of four personnel on duty at Station 1 and three personnel on duty at Station 2. This allows for a total of seven licensed/certified personnel on duty per day. This will require a total of twenty-three full-time positions in the Fire and Rescue Department. Currently, there are fourteen full-time positions in the Department.
3	MCMAHON recommends that the department consider transitioning the responsibilities for day-to-day operations to the Deputy Chief to allow the chief to concentrate on administrative responsibilities. Once the specific roles and responsibilities for the position are identified, the Fire Chief should ensure they are documented, communicate those responsibilities to the entire Department and monitor performance through the annual performance evaluation process.
4	The Department should continue to plan for a reduction in reliance on part-time/paid-on-premise and paid-on-call staff in the future expecially as the community continues to grow. Until such a time that additional full-time staff can be funded and hired, Recommmendations 5, 6 and 7 (below) regarding part-time/paid-on-premise and paid-on-call personnel should be implemented.
5	MCMAHON recommends pay rates for part-time/paid-on-premise and paid-on-call personnel be raised to between $20 and $25 per hour depending on qualifications to remain competitive with other area departments.
6	A maximum number of paid-on-premise personnel paid to be on-duty should be set for the fire and rescue department. Currently paid-on-premise personnel are allowed to work anytime, resulting in a varying staffing level, which, at times, is more than is necessary.
7	The Department should review the practice of compensating personnel who are not certified or licensed to function as a firefighter or emergency medical services provider to work at the fire station, attend training and respond to calls and alternatively reserve these funds to staff additional certified/licensed personnel. Additionally, personnel who are not licensed or certified as firefighters and EMS providers should be transitioned to an unpaid intern program that is thoroughly vetted by legal counsel before implementation.
8	MCMAHON recommends the fire department complete an all-hazards risk assessment.

9	MCMAHON recommends that the fire department develop a Standard of Cover that includes response time goals and measure and report on performance to the Village Board.
10	MCMAHON recommends that a strategic plan be developed for the Department that is consistent with the community master plan.
11	It is recommended that the Department start evaluating response times using both the average and 90% method rather than just the average method.
12	It is recommended the Town Ordinances be updated to reflect that the Village of Somers Fire and Rescue Department provides services to the Town of Somers.
13	It is recommended that the Village and Town evaluate an exception in State Administrative Code SPS 314 that allows for a specific set of occupancy types to be inspected at least once per calendar year provided the interval between inspections does not exceed 15 months (SPS 314.01(13)(b)5) and update the Village and Town Ordinances if changes to the current inspection frequency are acceptable to the Village and Town Boards.
14	It is recommended the Fire Chief update local ordinances to ensure the ordinance(s) reflect fire code currently enforced in the communities served.
15	It is recommended that job descriptions be adopted for all positions and reviewed regularly.
16	It is recommended that a Safety Committee be established in accordance with SPS 330.
17	Once a consistent staffing of, at minimum, three personnel in each station can be achieved, MCMAHON recommends Somers re-engage neighboring departments in seeking opportunities for automatic aid responses for structure fires and other major emergencies.
18	It is recommended that at least 16 personnel be dispatched to a report of a structure fire by the National Fire Protection Association Standard.
19	It is recommended a plan be developed to ensure each Standard Operating Guidelines is reviewed for needed updates on a cycle of approximately three years.

Fire District Organizational Review & Future Needs Analysis

Prepared for

VILLAGE OF WAUNAKEE & WAUNAKEE AREA FIRE DISTRICT

DANE COUNTY, WISCONSIN

August 19, 2024

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I. INTRODUCTION

MCMAHON Associates, Inc. (MCMAHON) was retained by the Village of Waunakee to conduct an organizational review of the Waunakee Area Fire District (District) and to develop a future needs analysis for service by the District. Included in this analysis was a review of current organizational structure, staffing, operational effectiveness, funding methodology and governance structure.

This Study provides a review of the District and an analysis of future needs for fire protection in the service area.

II. PROJECT WORK TASKS

To complete the objectives set forth in the Study RFP, MCMAHON evaluated the operations of the District to provide recommendations to improve its current operations. The MCMAHON Team also studied future growth in the communities to develop a future needs analysis for the District and the communities served by the District.

In conducting this study, MCMAHON consulting staff met with the Fire Chief and members of the Department, members of the District Board, the Waunakee Village Administrator and Village Department Heads, the Waunakee Village President and chiefs of fire and emergency medical service agencies that service the Waunakee Area or provide mutual aid to the Waunakee Area. The Chief was also requested to provide a wide range of documentation to MCMAHON including budgets, call data, policies, procedures, etc.

The following presents an overview of the work tasks completed by MCMAHON during the project.

1. Developed a project team of appropriate users and stakeholders to oversee and participate in the project.
2. Conducted a Project Planning Meeting with the MCMAHON Project Manager, the Project Team and key project personnel. Defined scope and mission, discussed work plans, established liaison responsibilities, coordinated project schedules, and confirmed other general arrangements.
3. Obtained and reviewed documentation provided by the project team pertaining to the project.
4. Conducted interviews and on-site observation to evaluate the current and future needs and standards of performance of the District. In conducting this study, we met or conducted telephone interviews with the following personnel:

    - Waunakee Fire Chief and Chief Officers
    - Waunakee Village Administrator, Village President, and members of the Village Board
    - District Board Members representing other communities served by the District
    - District Officers and groups of fire fighters

Interviews and observations primarily focused on the following:

- Current fire operations, staffing and levels of service
- Fire personnel workload, call volume and activity
- Administrative organizational structure
- Governance structure
- Budget and capital needs
- Department policies and procedures
- Analysis of regulations and rules of the Department
- Facilities and Major Equipment
- Department training

5. Prepared for and facilitated a project status meeting to discuss the results of the interviews and on-site observations with the Project Team.

6. Reviewed the present fire workflows and processes to analyze and develop potential organizational and operational changes to improve efficiencies and effectiveness. This review was based on the Commission of Fire Accreditation International (CFAI) categories and criteria. The performance indicators that were examined include the following:
   - Governance and Administration
   - Assessment and Planning
   - Goals and Objectives
   - Financial Resources
   - Community Risk Reduction Programs
   - Physical Resources
   - Human Resources
   - Training and Competency
   - Essential Resources
   - External System Relations
   - Health and Safety

7. Determined any public safety industry standards and trends related to the Department's operational requirements. During the development of all recommendations, MCMAHON considered many factors and standards as a basis for recommendations, including:

   - National Highway Safety Traffic Administration (NHSTA)
   - National Fire Service Accreditation Program (NFSAP)
   - National Fire Protection Association (NFPA)
   - Federal Emergency Management Association (FEMA)
   - National Fire Administration (NFA)

- Occupational Safety and Health Administration (OSHA)
- Insurance Services Office (ISO) Rating Schedule
- Local Fire Protection Ordinances

8. Developed a comprehensive Fire District organizational review and future needs analysis, utilizing the information provided by the documentation received, the interviews, review of national standards, and on-site observations. The projected growth and level of service needs were considered during the development of these recommendations. Recommendations included:

   - Effectiveness, efficiency, and performance of current fire operations
   - Efficient utilization of station resources
   - Administrative growth and organizational structure
   - Review and analysis of organizational culture
   - Review of Department policies and procedures
   - Analysis of personnel and staffing needs
   - Analysis of current governance structure
   - Recommended an effective implementation plan

9. Facilitated a recommendation meeting to present preliminary recommendations and obtain feedback from the Project Team.

10. Listed and described the findings and recommendations on the Fire District governance and administration, assessment and planning, goals and objectives, financial resources, programs, physical resources, human resources, essential resources, training, and external system relations, and all other items evaluated and analyzed during the project.

11. Assembled the study report. Performed a detailed quality assurance review of the document to ensure that the document meets the expectations of the Project Team and conforms to MCMAHON's standards.

12. Prepared and delivered the draft report to the Project Team for review.

13. Received feedback from the Project Team regarding the content of the draft report. Changes to the analysis based on the returned comments were made, as were deemed appropriate. Produced and delivered the final document copies to the Project Team.

14. Presented the findings and recommendations of the analysis to the Village Board.

III. WAUNAKEE AREA FIRE DISTRICT OVERVIEW

The District provides fire and emergency services to the Village of Waunakee and the Towns of Westport, Springfield, and Vienna. The Fire District was formed in 1933. Total geographic area of District is approximately 45 square miles.

Population Projection: The District provides fire and emergency services to approximately 21,000 residents. The Village of Waunakee is rapidly growing. The Wisconsin Department of Administration (DOA) issued a report with population projections in 2013 for municipalities in the State. The report projected the Village of Waunakee would have a population of 13,850 in 2020. The 2020 Census identified the population of the Village to be 14,879. The DOA projects the population of the Village will be 17,530 by 2040. Small increases in population are projected for the three towns served by the District in the next fifteen years.

	Waunakee Fire District Service Area			
	Population Analysis**			
Municipality	**2020 Census**	**2023 Final Estimate**	**2030 Estimate**	**2040 Estimate**
Village of Waunakee	14,879	16,165	15,940	17,530
Town of Springfield	2,929	2,919	2,830	2,790
Town of Westport	4,191	4,357	4,555	4,745
Town of Vienna	1,666	1,670	1,670	1,720
Service is provided to portions of the Town of Springfield and Vienna. Population data for entire town.				
Source: Wisconsin Department of Administration				

Equalized Value Comparison: The service area of the District had a value of approximately $3.7 Billion in 2022. The table below shows the equalized value that the District is tasked to protect.

Waunakee Fire District Service Area				
Equalized Value				
Municipality	**2019**	**2020**	**2021**	**2022**
Village of Waunakee	$2,070,712,380	$2,150,021,500	$2,306,924,000	$2,643,080,557
Town of Springfield	$161,500,753	$177,597,655	$187,216,234	$213,679,256
Town of Westport	$634,138,530	$650,853,487	$699,896,413	$817,430,561
Town of Vienna	$28,931,647	$30,913,933	$32,318,276	$36,073,706
Service is provided to portions of the Town of Springfield and Vienna. Value data for areas protected only.				
Source: Wisconsin Department of Revenue				

District Organizational Structure: The District currently operates out of one station. The District has one full-time employee: a battalion chief/inspector. Volunteers/paid-per-call personnel are not considered to be employees of the Fire District, but rather members of the Volunteer Fire Department. At the time of the study, the Volunteer Department had 36 members. The organizational structure is shown below.

- 1 Fire Chief
- 1 Deputy Chief
- 1 Battalion Chief (full-time employee of the Waunakee Area Fire District)
- 1 Captain
- 3 Lieutenants
- 29 Firefighters

Call Volume Analysis: The primary purpose of a fire department is to protect persons and property in its service area. The number and type of calls along with other services provided often determines the type of fire department a municipality operates. One measure of this aspect of service is annual call volume. Incident response data was reviewed by the MCMAHON Team for 2021, 2022 and 2023.

Calls for service rose 29% in 2022 compared to 2021. A slight decrease of total calls for service occurred in 2023 in comparison to 2022. Emergency medical services (EMS) calls account for the greatest number of calls when breaking calls for service down by National Incident Reporting System (NFIRS) Categories. In many departments in the United States, EMS accounts for nearly 75% of calls for service.

Incident Type	2021			2022			2023	
	Calls	%		Calls	%		Calls	%
Fire	24	7%		22	5%		42	9%
Rupture/Explosion	0	0%		0	0%		0	0%
Rescue and Emergency Medical Services Incident	139	39%		199	43%		161	36%
Hazardous Condition (No Fire)	30	8%		23	5%		43	9%
Service Call	23	6%		22	5%		26	6%
Good Intent Call	63	18%		84	18%		71	16%
False Alarm & False Call	81	23%		113	24%		109	24%
Severe Weather & Natural Disaster	0	0%		0	0%		0	0%
Special Incident Type	0	0%		0	0%		1	0%
TOTAL	**360**	100%		**463**	100%		**453**	100%

IV. WAUNAKEE AREA FIRE DISTRICT OPERATIONAL ANALYSIS

Department Overview, Demographics and Environment

The District is an organization created through an intergovernmental cooperation agreement under Section 66.30 of the Wisconsin Statutes. The entire geographic area of the Village of Waunakee and portions of the Towns of Vienna, Springfield and Westport are protected by the Fire District. The response area of the Fire District is approximately 45 square miles and has an approximate population of 21,000.

The District was established in 1933 with the same partners that it has today. The intergovernmental agreement that establishes the District was last updated in 2012. Each of the member municipalities establish the services and authority of the District in their respective ordinances/codes.

The District is governed by a five-member Board. All five members must be elected officials in the respective community they represent on the Fire District Board (Village or Town Board). The

Village of Waunakee appoints two members to the Board. Each of the towns that are members of the Fire District appoints one member to the Fire District Board.

A Chairperson and Vice Chair are appointed by the Fire District Board from their five members. A Secretary/Treasurer is also appointed by the Board; however, this position does not necessarily need to be a member of the Fire District Board.

Section 2.02 of the Waunakee Area Fire District Operating Agreement outlines the responsibilities of the Fire District Board.

The District operates from one Fire Station. The station and land parcel are owned by the Village of Waunakee. The District rents the station and land from the Village. The lease is scheduled to end December 31, 2037, unless terminated earlier for other reasons cited in the lease agreement. The station is located at 401 W. Second Street in the Village of Waunakee.

The Department has an Insurance Services Office (ISO Rating) of 03/3Y. ISO published its latest rating report for the District in March 2024.

The ISO rating schedule measures the major elements of the City's fire suppression system. These measurements then are developed into a Public Protection Classification number on a relative scale from 1 to 10, with 10 representing less than the minimum recognized protection. The schedule is a fire insurance rating tool used to determine property insurance premiums that property owners pay to their insurance carrier.

According to ISO, of the 1,208 fire departments rated in Wisconsin, 251 of them are rated as a 3 or better.

Governance and Administration

Governance of the agency is outlined in the Fire District Operating Agreement.

Parties to the Operating Agreement are the Village of Waunakee, the Towns of Vienna, Westport and Springfield and the Waunakee Volunteer Fire Department. The Agreement is drafted pursuant to Wisconsin Statute 66.30 which is titled "Intergovernmental Cooperation."

The current Operating Agreement is not effective in providing sufficient oversight and direction to the provision of fire protection and other emergency services for the Village of Waunakee.

The relationship between the District and the Volunteer Fire Department does not provide effective control of the District. The Volunteer Fire Department elects the Fire Chief and officers of the Department, however the Fire District Board or the communities serviced by the District have no input as to who is elected. **MCMAHON recommends that the Fire District Operating Agreement be updated immediately to include a Fire Commission that appoints the Fire Chief and confirms appointment of officers and subordinates of the Fire Chief to conform with State Statutes. The Department should also transition to a full-time fire chief after the Agreement is updated.**

The Operating Agreement provides authority to the Board to hire personnel and establish qualifications, schedules and regulations for firefighters, however it appears the Board only exercises hiring authority over one full-time employee of the District. The Volunteer Fire Department, which is more like a firefighter's association, selects people to join the Department. While the Volunteer Fire Department has been effective in recruiting people to join the Department, appointment of members should be confirmed by a governing body such as a Fire Commission.

Oversight of the finances of the District is the responsibility of the Board. As part of this responsibility, the Agreement calls for an annual financial audit of the District by an independent certified public accountant in accordance with the standards that will allow the municipalities the ability to include the information in their respective audited financial statements. It does not appear an audit of the District has occurred in several years. **MCMAHON recommends an annual financial audit of the District by an independent certified public accountant and the audit report be presented for review by the District's Board.**

Cost share between the municipalities that participate in the District is determined by dividing the equalized valuation of all property within the geographic area of each municipality served by the District by the total equalized value of property in the District. The 2024 municipal contributions to the Department are detailed in the table below:

Equalized Values	2022 (for 2024 Budget)	
Municipality	**Equalized Value**	**% Allocation**
Springfield	$213,679,256	5.76%
Vienna	$36,073,706	0.97%
Westport	$817,430,561	22.03%
Waunakee	$2,643,080,557	71.24%
TOTAL	$3,710,264,080	100.00%

Equalized value is a common method to share costs under an intergovernmental agreement. School districts that serve multiple municipalities almost exclusively use this method. Other methods to share costs under intergovernmental agreements generally involve a funding formula that takes various factors into account in addition to equalized value such as a population, square miles of area protected and calls for service.

Below is a table demonstrating the equalized value of area protected by the Waunakee Area Fire District for the past four budget years. Readers should be aware that the equalized value data used to calculate a budget is always two years behind the actual budget year the data is used for (example: 2022 data is used for 2024 budget).

Waunakee Area Fire District Service Area					
Equalized Value					
Municipality	2019 (FY2021)			2020 (FY2022)	
	Equalized Value	% of Total		Equalized Value	% of Total
Village of Waunakee	$2,070,712,380	72%		$2,150,021,500	71%
Town of Springfield	$161,500,753	6%		$177,597,655	6%
Town of Westport	$634,138,530	22%		$650,853,487	22%
Town of Vienna	$28,931,647	1%		$30,913,933	1%
TOTAL	$2,895,283,310	100%		$3,009,386,575	100%
Municipality	2021 (FY2023)			2022 (FY2024)	
	Equalized Value	% of Total		Equalized Value	% of Total
Village of Waunakee	$2,306,924,000	72%		$2,643,080,557	71%
Town of Springfield	$187,216,234	6%		$213,679,256	6%
Town of Westport	$699,896,413	22%		$817,430,561	22%
Town of Vienna	$32,318,276	1%		$36,073,706	1%
TOTAL	$3,226,354,923	100%		$3,710,264,080	100%

The percentage of the total equalized value, when split by municipality, remained very consistent for the four-year period. Based on the current method to share costs between municipalities, the consistent equalized values mean a generally stable proportionate sharing of the municipal contributions to the District.

Distribution of costs between municipalities is commonly a point of contention in shared service agreements such as fire districts. The Waunakee Fire District utilizes equalized value of the area protected to distribute costs between member municipalities.

MCMAHON evaluated other common factors used in sharing of costs in fire districts/departments that are organized under intergovernmental cooperation agreements in Wisconsin. Some of the most common factors used in cost sharing formulas in addition to equalized value are population, calls for service and square miles protected.

The charts below demonstrate examples of other cost share formulas based on the 2024 Waunakee Area Fire District Budget. The cost sharing utilizing the various formulas demonstrated below remains consistent despite the changing variables in the formula. **MCMAHON recommends maintaining the current equalized value method to share costs for the Waunakee Area Fire District.**

Waunakee Fire District Cost Distribution Percentage Analysis - 2024 Budget				
	Springfield	Vienna	Waunakee	Westport
Current Cost Distribution (Equalized Value)	5.76%	0.97%	71.24%	22.03%
Population, Eq. Value, Calls for Service*	6.15%	1.37%	72.41%	20.08%
Population, Eq. Value, Calls for Service**	6.15%	1.39%	71.80%	20.66%
* Each factor weighted at 33.33%				
** Population and Eq. Value weighted at 30%, Calls for Service weighted at 40%				

Waunakee Fire District Cost Distribution Dollar Analysis - 2024 Budget				
	Springfield	Vienna	Waunakee	Westport
Current Cost Distribution (Equalized Value)	$59,387	$10,026	$734,575	$227,183
Population, Eq. Value, Calls for Service*	$63,412	$14,083	$746,652	$207,024
Population, Eq. Value, Calls for Service**	$63,379	$14,373	$740,408	$213,011
* Each factor weighted at 33.33%				
** Population and Eq. Value weighted at 30%, Calls for Service weighted at 40%				

While the percentage of cost share is important, it is also pertinent to evaluate total dollars contributed. You will note the total municipal charges from the District to the member municipalities varied over the last five years.

Waunakee Area Fire District Municipal Charges				
2020	FY2021	FY2022	FY2023	FY2024
$841,024	$860,331	$902,525	$1,047,183	$1,031,171
Annual Change	2%	5%	16%	-2%

The largest increase in charges during the period reviewed by MCMAHON occurred in 2023. In that year, the District budgeted for wages and benefits for an additional fire inspector. That position was never filled. It appears most likely that the funds budgeted for the additional fire inspector in 2023 were put towards fund balance after they went unused that year.

In the 2024 Budget, the additional fire inspector position was removed from the budget. Total municipal contributions reduced by only $10,000 that year even though most of the funds that were designated for the additional fire inspector remained as part of the municipal charges. The funds that remained in the budget were distributed between various accounts, with the most going to an increase in vehicle maintenance.

MCMAHON believes that intergovernmental cooperation agreements are very effective methods to provide services, especially fire protection. However, the current Waunakee Area Fire District Intergovernmental Agreement needs to be updated to address governance, legal and management/oversight concerns.

While the most effective method to address governance, legal and management concerns would be for the Village to propose amendments to the Fire District Operating Agreement, the current Agreement has no provision for amending the Agreement.

Making an initial offering of amendments to the parties would be the most prudent thing for the Village to do. If the other parties to the Agreement aren't open to amendments, the Village is left with one option – to provide the required 18-month notice of withdrawal from the District and start its own fire department or purchase services from another fire department.

If the Village were to withdraw from the District, the Village would receive a distribution of net assets in accordance with Section 6.02 of the District's Operating Agreement.

> *6.02 Distribution of Assets upon Termination. Upon termination of the District, its net assets, including those acquired by gift or donation, shall be liquidated and the money remaining after payment of all of its obligations shall be distributed to the Municipalities as provided for in Section 4.02.*
>
> *4.02* Interest of Municipalities. *Each Municipality shall have an interest in the net assets of the District in proportion to the total equalized value of the District when compared to the equalized value of such Municipality, determined on the basis of the latest equalized value of such property.*

To provide perspective, if equalized value data from 2022 were to be used to determine distribution of net assets, the Village of Waunakee would own 71.24% of the net assets of the Department.

Equalized Values Per FD Documentation	2022 (for 2024 Budget)	
	Equalized Value	% Allocation
Springfield	$213,679,256	5.76%
Vienna	$36,073,706	0.97%
Westport	$817,430,561	22.03%
Waunakee	$2,643,080,557	71.24%
	$3,710,264,080	100.00%

With proper notice, the Village would also be able to gain control of the fire station and property it sits on. The lease agreement between the Village and District provides for a twelve (12) month termination notice. The lease agreement specifically states one reason for termination of the lease would be if the Village decides to establish its own fire department.

While an audit was not available for the consulting team to review the specific values of assets to determine what the Village would be awarded upon termination of the District, the consulting team is confident the Village would have sufficient assets to provide fire protection services.

MCMAHON recommends a full review of the District Agreement should be completed by a municipal law attorney and the following issues be considered for change/update in the Waunakee Area Fire District Agreement:

1) The Waunakee Volunteer Fire Department should not be a party to an intergovernmental agreement. While the group of volunteer firefighters provide significant service to the communities serviced by the District, the volunteer fire department is an association of firefighters and should not be a party to an intergovernmental agreement since they are not a municipality.
2) A Fire Commission must be established in accordance with Wisconsin Statutes Chapter 61. The Commission should have the authority to appoint the chief and confirm promotions and appointments of members of the District. Once created, the Fire Commission and the Chief should create processes to allow input from members of the Department on recommendations for promotion and appointment to the Commission.
3) Village of Waunakee should either have a greater proportion of votes on the Fire District Board and Commission or additional language should be added to the Intergovernmental Agreement to require four affirmative votes to pass issues such as the annual budget and major purchases.
4) A Finance Sub-Committee of the Fire District Board should be created that includes representatives of Village and Town Administrative Staff and the Town Clerks to assist in providing recommendations to the District Board regarding fiscal issues impacting the District such as the annual budget and major purchases.
5) Consideration should be given to add language to allow for the member municipalities to have the ability to exempt charges (annual contributions) from their state required property tax levy cap in accordance with Wisconsin Statute 66.0603(3)(h) if the annual increase does not exceed CPI+2%.
6) The Agreement references in Section 7.06 that no employer-employee relationship between the Volunteer Fire Department and the municipalities exists, however, the firefighters received compensation for their work and are covered by the worker's compensation insurance provided by the District. If a Fire Commission is formed as is recommended, this employer-employee relationship and Section 7.06 should be updated so that the District is the employing entity.
7) A dispute resolution section should be added to the Agreement that details a process to resolve disputes regarding terms of the District Agreement. The current agreement has no such language. The only current method to deal with a dispute is for a party to withdraw from the Agreement.
8) A provision for a process to consider and adopt amendments to the Agreement should be added.

Assessment and Planning

An important component of community fire and emergency service provision is to establish the community's expectation of services in relation to the risks that exist in the community. These expectations allow the District to develop programs to meet community needs, prioritize those programs based on available financial resources and to utilize data to measure the impacts of the programs.

The first step towards establishing community expectations of service is to complete an all-hazards risk assessment of the response area. **MCMAHON recommends the District complete a community risk assessment once a full-time chief is brought on board.** A risk assessment is a process for identifying potential hazards/risk exposures and their relative probability of occurrence; identifying assets at risk; assessing the vulnerability of the assets exposed; and quantifying the potential impacts of the hazard/risk exposures on the assets. Vision 20/20, a group dedicated to national strategies for fire loss prevention has a resource for how to develop a community risk assessment that is available at www.riskassessment.strategicfire.org.

Developing the community expectation of service and program outcomes is also an important component of assessment and planning for fire and emergency medical services. A document describing those expectations is called a Standard of Cover (SOC) Study. SOC includes response time goals and analysis of capabilities of the District based on critical task analysis and the community risk assessment.

The SOC should go beyond only identifying response time goals for first arriving units. While this is an important component of grading services, it is also important to measure the response times for entire response packages that are needed to mitigate the incident. **MCMAHON recommends the District create a SOC that outlines service expectations once a full-time chief is hired and annual reporting be provided to the District Board detailing current service against those expectations.**

Both the community risk assessment and the SOC can be created by the full-time chief that is hired with assistance from part-time staff. This process will likely take a year to complete.

Goals and Objectives

Establishing a strategic plan for the organization is an important way to not only set goals and objectives for the organization, but to inform stakeholders about the Department and the direction it is moving. **MCMAHON recommends that a strategic plan be developed for the District that is consistent with growth plans for the member communities once a full-time chief is hired.** It is important that Department leadership involve the organization and community in the development of the strategic plan and then report on progress towards achieving goals and objectives cited in the strategic plan to all stakeholders. This is also a project the full-time chief can take on in his/her first year.

Financial Resources

The financial resources of an organization impact every category evaluated as part of this report. Resources must be adequate to maintain the various programs to which the Department commits to provide.

Planning, management and ensuring stability of the financial resources of the District is the responsibility of the Board of Directors according to the Fire District Operating Agreement.

Through interviews with the Chief, it was learned that annually, the Chief proposes a budget to the Board and the Board acts on the proposed budget. **MCMAHON recommends the District adopt a policy on budget adoption and management of the budget to include purchasing and approval authority of the fire chief.** This will provide the Board with additional needed input on programmatic and spending priorities of the District.

Programs

This section of the report covers the delivery of services directly to the community. Communities often grade fire department service delivery based on response times. While response times should not be the sole method to evaluate service delivery, it is an important part.

Response time data is reported in a variety of manners in the fire and emergency service industry. It is best practice to report response time as the elapsed time between the time the call is answered by the 911 Dispatch Center until the arrival of the first fire department unit to the scene. This is the actual time the caller waits for emergency services to arrive.

The Department can gather data points needed to report response time in MCMAHON's recommended fashion. **MCMAHON recommends that reports on the number of responses with response time to calls for service be regularly provided to the Fire District Board as part of the fire chief's report to the Board. Reports should include response time of the first unit on scene and the first staffed fire suppression unit on scene.**

MCMAHON was able to utilize data provided by the Department and the Dane County 911 Public Safety Answering Point to evaluate average response times.

As with many volunteer fire departments, a single responder who may come from home in a personal or district vehicle is often the first arriving responder in an emergency. This provides a rapid response; however, it does not provide for a sufficiently staffed fire engine to initiate suppression of a fire.

In reviewing the Waunakee Area Fire District data, a single responder was most often the first arriving unit on the scene of a call for service, thus stopping the response time clock.

Average Response Time - All Calls - First Arriving Unit			
	2021	2022	2023
Average Response Time	3:40	3:28	3:54

The challenge with recording response times of a single responder, is that a single responder cannot start a life-safety rescue and suppression effort on his/her own. A structure fire is a high acuity call for service that a rapid response by an effectively staffed fire suppression unit is needed. MCMAHON reviewed Waunakee Area Fire District responses to reported structure fires in 2021, 2022 and 2023. As part of that review, MCMAHON not only looked at response times from the time of call, but also evaluated response times from the time the fire department was alerted of the call by the Dane County 911 Dispatch Center and then from the time the first fire suppression unit went enroute to the scene. As you will note, these provide a dramatically different picture of response time than the response time of a first arriving unit with a single responder.

Average Response Time - Structure Fires - 1rst Arriving Fire Suppression Unit			
	2021	2022	2023
From Time of Call	11:41	12:16	13:27
From Time Assigned	10:24	9:42	9:30
From Time Enroute	4:20	3:47	4:16

There are no mandated requirements for response times in the State of Wisconsin. The National Fire Protection Association (NFPA) does, however, publish industry standards that provide recommended response times. Again, these are not laws or mandates, they are recommended standards.

To provide perspective specific to the Waunakee Area Fire District against a national standard, MCMAHON evaluated two structure fires with significant dollar loss that occurred in 2020 and 2023 and compared response times against the NFPA 1720 Standard. NFPA 1720 is a standard for volunteer fire departments. In both instances evaluated by MCMAHON, the fires occurred in a Rural Demand Zone. In both cases, the Waunakee Area Fire District met the response time standard detailed in NFPA 1720.

NFPA 1720 Table 4.3.2 Staffing and Response Time				
Demand Zone	Demographics	Minimum Staff to Respond	Response Time (minutes)	Meets Objective (%)
Urban	>1000 people/sq. mile	15	9	90
Suburban	500-1000 people/sq. mile	10	10	80
Rural	<500 people/sq. mile	6	14	80
Remote	Travel distance > 8 mi	4	Dependent	90

Source: NFPA 1720, Standard for Organization and Deployment of Fire Suppression Operations, Emergency Medical Operations, and Special Operations to the Public by Volunteer Fire Departments

Waunakee Area Fire District responds to many other types of calls for service other than structure fires. While the District is not the primary provider of emergency medical services for the geographic areas covered by the Fire District, it does provide support to Waunakee Area EMS in the following situations:

- A Waunakee EMS Ambulance is not available and Waunakee Area Fire is dispatched to provide the first response.

- Patient condition reported at time of dispatch indicates EMS will need additional assistance on scene.
- Motor vehicle accident and/or extrication services will be required.
- Waunakee EMS is on scene already and patient condition requires that both Waunakee EMS Paramedics are needed to care for the patient during transport to a hospital, resulting in the need for a person to drive the ambulance to the hospital.

Some fire department members cited internal frustration over the increase in requests from Waunakee Area EMS to drive an ambulance to the hospital during interviews conducted with consultants as part of this study. The consulting team evaluated the number of calls which the fire district was dispatched because of the need for firefighters to drive the ambulance from the scene to a hospital. On average, over the first four months of 2024, fire was called 3.75 times each month. It should be clear that there are other calls in which the fire department is called to assist EMS – 3.75 times per month is the number of times Waunakee Area Fire is called only to provide personnel to drive the ambulance to the hospital. The frequency of these requests appears reasonable.

MCMAHON recommends that in order to reduce burden on the District of providing personnel to drive a Waunakee Area EMS Ambulance, the District implement the following changes:

- Expand the number of members the Fire District allows to drive ambulances for Waunakee Area EMS. Currently only some members of the Fire District are allowed to drive an ambulance.
- Create duty groups to allow for smaller groups within the District to be responsible for these calls and assign each duty group a period of time they are on call for these responsibilities. If members are not on the assigned duty group for that period of time, they do not need to respond to the call. Duty groups may assist the District in other responses also. A duty group plan that was created by the District's Command Staff in 2023 provides an effective outline for creation of such duty groups. Consideration will need to be given to compensate the members assigned to a duty group when they are "on-call" since they will be required to be available for calls. The plan submitted by the Command Staff in 2023 suggested an on-call hourly compensation rate of approximately $2.60 per hour. This hourly compensation is provided because the on-call members are required to remain readily available to the Fire District during their on-call hours. If $2.60 is used as an hourly rate and six members of the Fire District are on call each day, the estimated cost of the duty group program is $140,000 per year.
- Charge Waunakee Area EMS for each occurrence where Waunakee Area Fire provides a driver to the hospital. In these cases, Waunakee EMS can bill the patient and get reimbursed for these charges.

<u>Prevention & Public Education</u>

The Department has an active prevention and public education program in place.

A major component of risk reduction in the fire service is a public education program. The Waunakee Area Fire District's public education program includes school programs and community prevention activities.

A second critical component of prevention and public education programs is a fire inspection program. The State of Wisconsin requires fire inspections be completed in commercial and some multi-family residential buildings. The State provides funding assistance for completion of these inspections through the 2% Dues Program. The municipalities that participate in the District receive funding from the State under this program. A condition of receiving funding through the 2% Dues Program is to successfully pass an audit of the fire inspection and public education program conducted by the State. The District passed its most recent audit of the program. The primary job of the District's Battalion Chief/Fire Inspector is to complete these inspections and follow-up on code enforcement issues identified during these inspections.

Fire Cause and Origin Investigations

Investigations of fire cause and origin is the responsibility of the fire department according to State Statute. Commonly, law enforcement will assist in determination of cause and origin of a fire to identify if any criminal action led to the cause of the fire. The Waunakee Area Fire District will engage local law enforcement and utilize the services of the Madison Area Fire Investigation Team, a regional group, as needed.

Domestic Preparedness/Emergency Management

The Waunakee Area EMS Director serves as the emergency manager for the Village and surrounding communities. Evaluation of emergency management services was not within the scope of this engagement.

Fire Suppression

The Department effectively provides fire suppression operations for a volunteer/paid-on-call Department, however improvements to the process of requesting mutual aid to high-risk calls for service can be improved. **MCMAHON recommends the Waunakee Area Fire District implement automatic aid response agreements with neighboring departments to improve mitigation of structure fires and other major emergencies.** Currently, the District generally waits to request mutual aid until after Waunakee Fire is dispatched to a call. Automatic aid would allow for simultaneous dispatch of neighboring departments to assist in providing a rapid response of an effective force of firefighters to rapidly mitigate a fire or other emergency. Several other Departments in Dane County have effective automatic aid dispatch protocols that could be mirrored for Waunakee Area Fire.

Effective standard operating guidelines are in place to provide direction to the department members for fire suppression activities. The District has a fleet of well-maintained apparatus to support personnel in providing effective fire suppression services.

Emergency Medical Services

The District provides services to assist Waunakee Area EMS, but the District is not licensed as a provider of EMS services in Wisconsin.

Technical Rescue

The District responds to technical rescue incidents. All members are trained to perform auto extrications. The Department utilizes the City of Madison Fire Department Lake Rescue Team to assist with water rescue responses. Dane County Sherriff's Office has a dive team for sub-service rescue/recovery. Regional support for hazardous material response is provided by the regional response team, located in the City of Madison.

The resources available for technical rescue incidents are appropriate for the District.

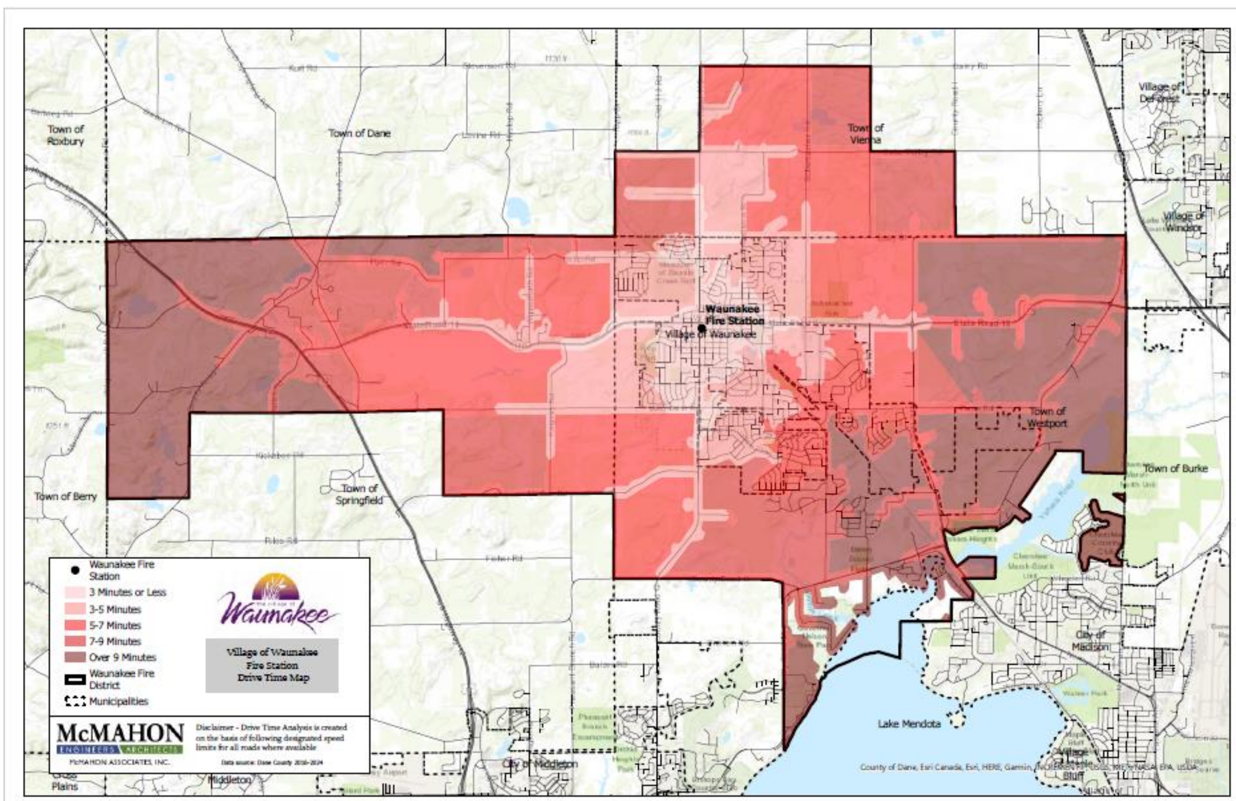
Physical Resources

Fire Station

The District has one (1) station. The station is owned by the Village of Waunakee and leased to the District. The facility is in good condition. The members of the District do an excellent job in maintaining the facility and providing financial support for upgrades of the facility. A day room was recently added to the station to provide a place for members staffing the station to take a break between calls and other activities required of the District. **As service demand increases over the next decade, MCMAHON recommends the District begin planning to make improvements to the facility to accommodate staff that would eventually work twenty-four hour shifts at the station. This would most likely involve expansion of the current facility as sufficient space for sleeping rooms and other accommodations required for twenty-four-hour staffing is not available in the current facility.** Estimated cost is $500,000 to $900,000.

The consulting team did evaluate the need for additional stations within the fire district. Additional stations would reduce response times to some areas of the fire district. The majority of the calls for service are in the Village of Waunakee, where the current fire station is located. The Town of Westport produces just over a quarter of the demand for service, however, there does not appear to be a strong need or desire for a second fire station that would be closer to the Town of Westport.

The map below shows drive-times from the current fire station.



In addition to beginning planning for fire station facilities to provide twenty-four-hour staffing, **MCMAHON recommends the District install an exhaust removal system in the fire station.** The vast majority of the District's fleet of vehicles have diesel engines. Diesel engines produce emissions with particulate and gases that can cause cancer and respiratory illnesses. To counteract the transmission of these hazards, direct capture exhaust extraction systems are regularly installed in fire stations. Direct capture systems utilize hoses that are connected to the exhaust of apparatus. These hoses then vent the exhaust particulate and gases to a fan that pushes the dangerous particulate and gases outside of the building. The Federal Emergency Management Agency's Assistance to Firefighters Grant Program regularly supports installation of these systems in fire stations through the grant program. This grant funds 90% of the cost of purchase and installation of a direct capture exhaust system. Funding for this grant program is authorized by the United States Government. Applications are generally taken yearly. The estimated cost of installation of such a system is $170,000.

Apparatus and Equipment

Apparatus and other equipment required to provide effective services are in good condition. The District has a strong capital improvement program in place that ensures vehicles and equipment are replaced when needed. There is no apparent need for additional apparatus and equipment. The funding of this capital improvement plan should be maintained.

Records Management

Maintaining reports and records for incident response, personnel matters, training documentation, vehicle and equipment maintenance, and fire inspection functions is an important function of fire department administration. The District is currently in the process of transitioning its records management software from Firehouse Records Management System (RMS) to Imagetrend Records Management System. Firehouse RMS is no longer supported by the vendor. The State of Wisconsin provides a basic version of Imagetrend RMS at no cost. During this transition period, the Department was delayed in entering its records into Imagetrend. The Department is now up to date on entering incident response records into Imagetrend RMS, however there is significant work required to transition fire inspection records. Currently, the full-time Battalion Chief is responsible for entering records into the records management system.

MCMAHON makes the following recommendations regarding the District's records management use:

- The District purchase a full-featured version a records management system. The estimated cost is $30,000 with additional annual support fees.
- It is recommended the District train additional personnel to enter incident response reports, personnel/training and injury records, maintenance and fire inspection records into the records management system to provide additional depth in performing these tasks.
- Records of training for all personnel should be maintained in the records management system. Currently, documentation of training is maintained on paper records. A record of training should, at minimum, include the following data:
    - Date of the training
    - Training topic
    - Objectives of the training
    - Total length of the training
    - Instructor names(s)
    - Attendee(s)

Human Resources

The District has an Employee Policy and Procedure Manual. The document is dated July 28, 2003. **MCMAHON recommends this Manual be updated to reflect all types of employees (full-time, part-time, paid-on-call and volunteer) and applied to all members of the District.**

Training and Competencies

The State of Wisconsin requires firefighters to have minimum training levels. Members of the Waunakee Area Fire District generally meet the minimum training requirements set by the State.

In 2019, the State amended its training requirements to require that newly promoted/appointed fire officers (Chiefs, Captains, Lieutenants) and apparatus operators receive specific training before they can be assigned duties as fire officers and apparatus operators. Personnel who had already held positions as fire officers and apparatus operators were grandfathered. **MCMAHON recommends the District create job descriptions for all positions within the organization that detail minimum training requirements for individuals to be placed in those specific positions that meet State required minimum training requirements. These requirements should be applied to all personnel applying to fill future vacancies in fire officer and apparatus operator roles.**

Continuing education and training are primarily accomplished on training nights on the first and third Monday evenings. Training of personnel is overseen by several officers of the District. MCMAHON found the department is generally well trained, however, there should be a training plan developed annually to ensure all critical competencies are trained on and reviewed annually. There is also a need to improve documentation of training. **MCMAHON recommends the District develop an annual training plan each year and maintain records of training for all personnel in the records management system.** Currently, documentation of training is maintained on paper records. A record of training should, at minimum, include the following data:

- Date of the training
- Training topic
- Objectives of the training
- Total length of the training
- Instructor names(s)
- Attendee(s)

Essential Resources

The Village of Waunakee maintains a municipal water supply system. The Village's Water Utility maintains the water system and fire hydrants. The areas of the Towns of Springfield, Vienna and Westport protected by the Fire District do not have a municipal water system.

Two-way radio communications occur on a county-wide trunked public safety radio system that allows for interoperability with fire and law enforcement in the County. The County is responsible for system infrastructure.

911 Dispatch services are provided by the Dane County 911 Dispatch Center.

External System Relationships

The Fire District relies on the Village to maintain its apparatus through an established and effective agreement and on neighboring fire departments to provide effective public safety. Maintaining relationships with these various departments is important component of the District being an effective organization.

The MCMAHON consulting team interviewed neighboring fire chiefs as part of the consulting engagement. Neighboring chiefs were supportive of the Waunakee Area Fire District. Several commented that there is a need to do additional inter-agency training and expressed interest in expanding automatic aid agreements with the Waunakee Area Fire District.

Health and Safety

Wisconsin Department of Safety and Professional Standards requires the District have an occupational safety and health committee to advise the fire chief on occupational safety and health issues within the organization (SPS330.05). The committee should be composed of representatives of the command staff and firefighters and meet at least biannually. Minutes of meetings should be maintained. **MCMAHON recommends the District establish an Occupational Safety and Health Committee to comply with SPS 330.**

V. STAFFING NEEDS OF THE DISTRICT

The Village of Waunakee and surrounding areas growth will result in an increased demand for service from the District. The Towns of Springfield, Vienna and Westport are growing, but not at the pace of the Village. The increase in service demand includes not only emergency response demand, but demand for fire inspection/prevention services and for related administrative services.

In order to meet these demands, MCMAHON recommends that, after a Fire Commission is established, the Waunakee Area Fire District employ a full-time fire chief to lead the agency. The fire chief should report to the Board and Fire Commission and be responsible for the day-to-day management of the organization, its personnel and provide administrative support for the Fire Board and Fire Commission. The Fire Chief should also be a primary contact for the village administrator, town administrator, and town clerks for day-to-day issues related to the District. The estimated cost of adding a full-time chief is $150,000 per year (includes wages and benefits).

The current full-time battalion chief should maintain current responsibilities for fire inspections, coordinating apparatus and equipment maintenance and provide support for the Fire Chief.

Currently, staffing for response to emergencies is adequate. The members of the District are dedicated to responding when emergencies occur. Like most paid-on-call/volunteer fire departments across the Country, the District, at times, has challenges in response of members during weekday/day-time hours. The District receives significant support from area employers, including the Village of Waunakee, who allow members of the District to leave their full-time job responsibilities to respond to calls for service. In the case of the Village, seven members of the

Department of Public Works (DPW) are also members of the District and allowed to respond to calls while working for the Village. During these responses, the Village continues to pay the employees. The availability of the Village employees and those members of the District who are allowed to leave their full-time jobs to respond to calls is of significant value to the Village and Towns serviced by the Waunakee Area Fire District.

As the Village expands, the demands and responsibilities placed on the Village's DPW will likely expand as will the frequency in calls for service for the District. At some point, the frequency of fire calls will likely impact the DPW's ability to effectively service the community if the cross-trained DPW employees are leaving their DPW assignment to respond to fire calls. Similar challenges may come to local employers who currently allow their employees who are firefighters for the District in the future also. If the Village or other area employers elect to no longer allow their employees to respond to calls for service, the District will need to initiate a day-time staffing program. This program could initially be supported by a mix of full-time and part-time employees who provide service primarily on weekdays during day-time hours. **Based on current growth in demand for service MCMAHON recommends that the District plan to implement a day-time staffing program by 2029.**

A day-time staffing program should consist of a full-time fire officer and apparatus operator and two part-time firefighters working ten hour shifts during day-time hours. These positions are in addition to the full-time chief and full-time battalion chief/fire inspector. Utilzing current comparable compensation and benefit programs, the total cost of implementing such a program today is approximately $350,000 a year. This is assuming none of the part-time employees are or become eligible for participation in the Wisconsin Retirement System or for health insurance benefits.

DAY-TIME STAFFING MODEL FOR WAUNAKEE AREA FIRE DISTRICT			
Monday - Friday			
Target Implementation: 2029			
Position	**No.**	**Full-Time/Part-Time**	**Hours**
Fire Chief	1	Full-Time	8A-4P
Battalion Chief/Inspector	1	Full-Time	8A-4P
Fire Officer	1	Full-Time	7A-5P
Equipment Operator/Firefighter	1	Full-Time	7A-5P
Firefighter	2	Part-Time	7A-5P
Paid-On-Call/Volunteers	20-30	Part-Time	On-Call

MCMAHON recommends the District plan for full-time staffing of the fire station by 2039. It is recommended that the Department plan for four firefighters to be on-duty at all times. This will require a total of fifteen full-time employees plus the full-time fire chief and battalion chief. In today's dollars, the total additional personnel costs to the District for these personnel reduced by the day-time staffing cost from the 2029 implementation will be $1.5 million. Adjustments in the District budget will also need to be made to reflect costs related to ongoing equipment and training needs of these additional personnel.

The District will continue to need to rely on volunteer/paid-per-call members even after full-time staff are hired. It is imperative in the transition from a mostly volunteer/paid-per-call model to a full-time model that the District ensure that the volunteer/paid-per-call model is supported within the organization.

TWENTY-FOUR HOUR STAFFING MODEL FOR WAUNAKEE AREA FIRE DISTRICT		
7 DAYS PER WEEK/24 HOURS PER DAY		
Target Implementation: 2039		
Position	**No.**	**Full-Time/Part-Time**
Fire Chief	1	Full-Time
Battalion Chief/Inspector	1	Full-Time
Fire Officer	3	Full-Time
Equipment Operator/Firefighter	3	Full-Time
Firefighter	9	Full-Time
Paid-On Call/Volunteers	20-30	Part-Time

VI. SIMILAR SIZED FIRE DISTRICTS/MUNICIPAL FIRE DEPARTMENTS

As part of the analysis, MCMAHON sought information on similarly sized fire districts and municipal fire departments in Wisconsin. The chart below compares the Waunakee Area Fire District with six fire districts/departments in the State.

Wisconsin Comparable Fire/EMS Agencies						
Agency	**Approx. Population**	**2023 Calls for Service**	**Fire**	**EMS Transport**	**Stations**	**Current Staffing**
Deforest Windsor Fire/EMS	13,000	1,770	Yes	Yes	1	Full Time: Chief, Assistant Chief, 7 Firefighter/Paramedics/EMTS, 3 LTE Paramedics, Fire Inspector and Office Manager. Part-time: paid-on-call.
Fox Crossing Fire Department	19,000	1,407	Yes	No	2	Full Time: Chief, Assistant Chief, Division Chief, Fire Marshal, Fire Prevention Educator. Part-Time: 66 part-time/paid-on-call
Howard Fire Department	20,000	2,132	Yes	Yes	1	Full Time: Chief, Assistant Chief, 4 Battalion Chiefs, 3 Lieutenants, 9 Firefighter/EMTs. Part-Time: 30 paid-on-call
Middleton Fire District	34,000	862	Yes	No	2	Full Time: Chief, Assistant Chief, 2 Battalion Chiefs, Firefighter/Office Manager, Fire Inspector. Volunteer: 100-125 people
Oregon Area Fire District	26,000	485	Yes	Yes	1	Full-Time: Chief, Division Chief, 3 Captains and 3 Firefighter/Paramedics work 24 hour shifts. Part-Time: Staff of paid-on-call and paid-on-premise.
Verona Fire Department	14,000	1,193	Yes	No	1	Full Time: Chief, 2 Deputy Chiefs. 3 Lieutenants, 3 Firefighters work 24 hour shifts. Part-Time: Staff of Assistant Chiefs and Paid-On-Premise, Paid-On-Call and Interns.
Waunakee Area Fire District	21,000	453	Yes	No	1	Full Time: Battalion Chief. Part-Time: Chief, Chief Officers, and Firefighters

VII. SUMMARY OF RECOMMENDATIONS

The Waunakee Area Fire District has operated with four municipalities and in partnership with the Waunakee Volunteer Fire Department since 1933. The members of the Volunteer Fire Department are undoubtingly committed to serving their community. The members respond to calls for service at all hours of the day.

The District has been successful in providing fire protection services since its inception. Growth in the communities served, a reduction in citizens seeking opportunities to be volunteer firefighters, changes in demands for service and increases in qualifications and standards for members of the organization have previously and continue to impact the District.

The Village of Waunakee proactively retained MCMAHON to conduct an organizational review of the District and to develop a future needs analysis for service by the District. Included in this analysis was a review of current organizational structure, staffing, operational effectiveness, funding methodology and governance structure. The Village clearly wants to be prepared for a time when, most likely, a volunteer fire department will no longer effectively service the Village simply because of increased demand in calls for service and a decrease in the population seeking opportunities to be volunteer firefighters.

Through its analysis, MCMAHON was impressed with the commitment of the current members of the Volunteer Fire Department to serve the community using a volunteer/paid-per-call model. The District will however be challenged to continue utilizing a volunteer/paid-per-call model in the next ten years. A plan to begin slowly transitioning the District to an organization that relies more on career, full-time staffing to be prepared for a decrease in members of the community willing to volunteer as firefighters is included in the report.

Transitioning to a model that relies on more career staff will result in increased costs for the District’s member municipalities. This analysis should provide the municipalities with a means to prepare for those upcoming changes in costs to provide fire protection.

MCMAHONS recommendations also highlight the need to amend the governance structure of the District. Amending the governance is imperative as costs will grow with a transition over the next decade to more full-time employees. Seven recommendations are included in the Analysis specific to governance of the Fire District. Two of the most significant governance recommendations are:

- The member municipalities need to have direct control over who is appointed as the Fire Chief. Currently, the Fire Chief and his/her officers are elected by the Volunteer Fire Department, which functions as an association of firefighters. MCMAHON recommends that a Fire Commission be established in accordance with State Statutes. A Fire Commission has broad authority under the statues with the most important being the authority to appoint a fire chief and confirm appointments of his/her officers and subordinates. Moving the authority to appoint the chief to a fire commission does not necessarily mean firefighters cannot have input to the Commission on who is appointed as Fire Chief, but it provides final decision-making authority in the hands of the Fire Commission in accordance with State Statues.

- The creation of a Fire Commission should not only provide the municipalities governance over appointing the fire chief, but it should also ensure all firefighters are brought under the Fire District as employees.

The Village of Waunakee pays just over 70% of the municipal contributions to the District. The Town of Vienna, the smallest financial contributor, pays less than 1% of the municipal contributions to the District. MCMAHON recommends either additional board member positions be added for the Village on the District Bord or specific issues such as the annual budget and major purchases require at least four affirmative votes of the District Board. An alternative, if additional board seats or supermajority voting cannot be achieved in the governance, is for the Village of Waunakee to leave the District and create a municipal fire department with the assets it obtains. The Village's Fire Department could then contract with interested townships for service and ultimately have full control of the financial and operational issues in the fire department.

The Analysis includes an estimated ten-year timeline for the District to prepare to move to a more career-based staffing model as opposed to the current volunteer/paid-per-call model. It is recommended that after the District forms a Fire Commission, a full-time fire chief be hired for the District. The Chief will be responsible for providing administrative and operational oversight for the District, reporting to the Fire District Board and Commission. This should include developing a strategic plan, community risk assessment and standards of cover for the District. It is imperative the new Fire Chief ensure the current model of utilizing volunteer/paid-per-call response remains effective as long as possible and prepares the organization and its infrastructure for what is most-likely a transition to a career based, full-time model over the next ten years.

SUMMARY OF WAUNAKEE AREA FIRE DISTRICT ANALYSIS RECOMMENDATIONS	
Category	**Recommendation**
Governance and Administration	MCMAHON recommends that the Fire District Operating Agreement be updated immediately to include a Fire Commission that appoints the Fire Chief and confirms appointment of officers and subordinates of the Fire Chief to conform with State Statutes. The Department should transition to a full-time fire chief after the Agreement is updated.
Governance and Administration	MCMAHON recommends an annual financial audit of the District by an independent certified public accountant and the audit report be presented for review by the District's Board.
Governance and Administration	MCMAHON recommends maintaining the current equalized value method to share costs for the Waunakee Area Fire District.
Governance and Administration	MCMAHON recommends a full review of the District Agreement should be completed by a municipal law attorney and the following issues be considered for change/update in the Waunakee Area Fire District Agreement:
	1) The Waunakee Volunteer Fire Department should not be a party to the Agreement. While the group provides signficiant service to the communities served, the group is more of an association of firefighters and shouldn't be party to an intergovernmental agreement.
	2) A Fire Commission must be established in accordance with Wisconsin Statutes.
	3) The Village of Waunakee should either have a greater proportion of votes on the Fire District Board and Commission or additional language should be added to the Agreement to require four affirmative votes to approve items such as the annual budget and major purchases.
	4) A Finance Sub-Committee of the District Board should be created that includes representatives of Village and Town Administrative Staff and the Town Clerks to assist in providing recommendations to the District Board regarding fiscal issues impacting the District such as the annual budget and major purchases.
	5) Consideration should be given to add a provision to the Agreement to allow the member municipalities to exempt contributions to the District from the state required property tax levy cap if the increase in contributions to the District do not exceed CPI plus 2% annually.

	6) Remove the statement in Section 7.06 that states "no employer-employee relationship between the Volunteer Fire Department and the municipalities exist."
	7) A dispute resolution section should be added to the Agreement that details a process to resolve disputes regarding terms of the District Agreement. The current agreement has no such language. The only current method to deal with a dispute is for a party to withdraw from the Agreement.
	8) A provision for a process to consider and adopt amendments to the Agreement should be added.
Assessment and Planning	MCMAHON recommends the District complete a community risk assessment once a full-time chief is brought on board.
Assessment and Planning	MCMAHON recommends the District create a Standard of Cover that outlines service expectations once a full-time chief is hired and annual reporting be provided to the District Board detailing current service against those expectations.
Goals and Objectives	MCMAHON recommends that a strategic plan be developed for the District that is consistent with growth plans for the member communities once a full-time chief is hired.
Financial Resources	MCMAHON recommends the District adopt a policy on budget adoption and management of the budget to include purchasing and approval authority of the fire chief.
Programs	MCMAHON recommends that reports on the number of responses and response time to calls for service be regularly provided to the Fire District Board as part of the fire chief's report to the Board. Reports should include response time of the first unit on scene and the first staffed fire suppression unit on scene.
Programs	MCMAHON recommends that in order to reduce burden on the District of providing personnel to drive a Waunakee Area EMS Ambulance, the District implement the following changes:
	1) Expand the number of members the Department allows to drive ambulances for Waunakee EMS by updating the minimum requirements to drive ambulances.
	2) Create duty groups for response to calls for service.
	3) Charge Waunakee EMS for providing fire personnel to drive an ambulance to the hospital.

Fire Suppression	MCMAHON recommends the Waunakee Area Fire District implement automatic aid response agreements with neighboring departments to improve mitigation of structure fires and other major emergencies.
Physical Resources	As service demand increases over the next decade, MCMAHON recommends the District begin planning to make improvements to the facility to accommodate staff that would eventually work twenty-four hour shifts at the station. This would most likely involve expansion of the current facility as sufficient space for sleeping rooms and other accommodations required for twenty-four-hour staffing is not available in the current facility.
Physical Resources	MCMAHON recommends the District install an exhaust removal system in the fire station.
Physical Resources	MCMAHON makes the following recommendations regarding the District's records management use:
	1) The District purchase a full-featured version of a records management system.
	2) Train additional personnel to enter incident response reports, personnel/training and injury records, maintenance and fire inspection records.
	3) Ensure training records are maintained and updated in the records management system.
Human Resources	MCMAHON recommends the Personnel Manual be updated to reflect all types of employees (full-time, part-time, paid-on-call and volunteer) and applied to all members of the District.
Training and Competencies	MCMAHON recommends the District create job descriptions for all positions within the organization that detail minimum training requirements for individuals to be placed in those specific positions that meet State required minimum training requirements. These requirements should be applied to all personnel applying to fill future vacancies in fire officer and apparatus operator roles.
Training and Competencies	The District should create an annual training plan that ensures all critical competencies are trained on and reviewed annually.

Health and Safety	MCMAHON recommends the District establish an Occupational Safety and Health Committee to comply with SPS 330.
Staffing Needs	Based on current growth in demand for service MCMAHON recommends that the District plan to implement a day-time staffing program by 2029.

McMAHON Public Safety & Municipal Management

December 12, 2022

SHARED FIRE/EMS SERVICES

VILLAGES OF CALEDONIA, MT. PLEASANT AND STURTEVANT

RACINE COUNTY, WISCONSIN

Project Scope

- Expansion of current service sharing arrangements
- Expansion of current South Shore Fire/EMS Department contract with Caledonia
- Consolidation of South Shore Fire/EMS Department with Caledonia
- Creation of new South Shore Fire/EMS Department to include all three municipalities

Current Conditions

Mt. Pleasant operates South Shore Fire/EMS and provides service to Sturtevant

Caledonia operates their own Fire/EMS agency

Racine County is 911 PSAP & Dispatch for both agencies

McMAHON
ENGINEERS ARCHITECTS

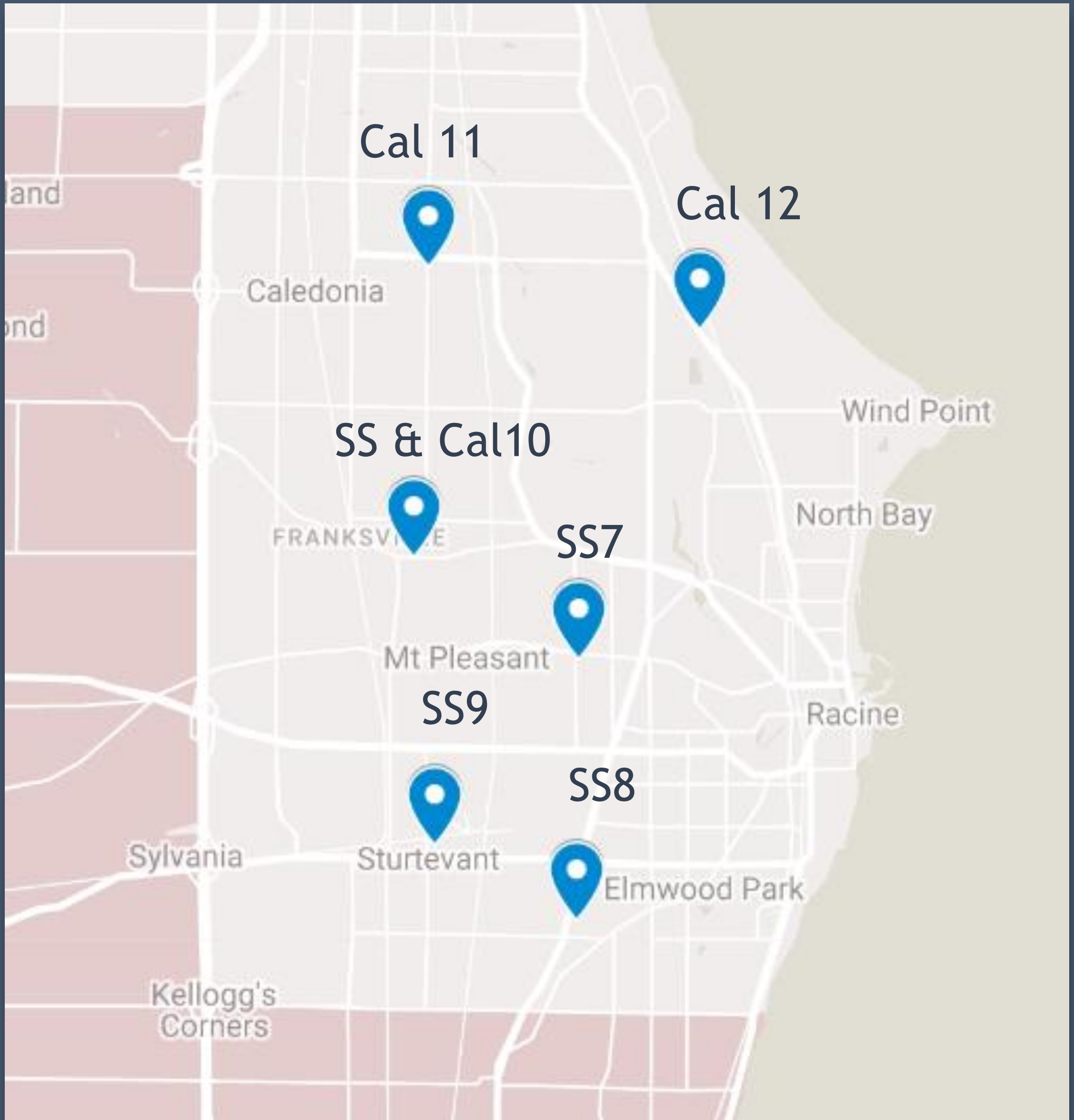
Department Summaries

	Square Miles	Population	2022 Operating Budget	
Mt Pleasant	36.04	27,361	$6,470,754.00	52.49%
Sturtevant	4.11	6,506	$1,375,790.00	11.16%
Caledonia	45.52	25,391	$4,482,050.00	36.35%
TOTAL	85.67	59,258	$12,328,594.00	100.00%

	Stations	Sq Miles/Station	FTE	FTE/1,000 Pop*	2022 Calls	Calls/FTE
Mt Pleasant Sturtevant	4	10.04	67	1.95	5,308	80
Caledonia	3	15.17	47	1.68	3,175	69
TOTAL	7		114		8,483	

* NFPA 2019 Survey FFs per 1,000 = 1.63

Station Locations



McMAHON
ENGINEERS ARCHITECTS

Department Summary

- South Shore
  - Adequately staffed
  - Data-driven deployment
  - Facilities in very good condition
  - Apparatus in very good condition
  - Organizational culture is very good
  - Significant investment in technical rescue and hazardous materials response

Department Summary

- Caledonia
  - Needs to retain grant funded positions and likely add several positions to appropriately staff its fire stations
  - Station 11 and 12 need major capital improvements (current plan to replace Station 12)
  - Apparatus in good condition
  - Provides service to Wind Point and North Bay under contract

Current Status

Career Positions By Rank		
Rank	Caledonia	South Shore
Fire Chief	1	1
Division/Assistant Chief	0	2
Battalion Chief	3	3
Captain	0	0
Lieutenant	9	21
Firefighter	33	39
Civilian	1	1
TOTAL	47	67

Current Status

Apparatus Inventory		
Vehicle Type	Caledonia	South Shore
Engine	3	4
Truck/Quint	2	2
Ambulance	5	8
Tender	2	0
Wildland	1	1
Technical Rescue	0	1
UTV	1	1
Boat	0	1
Battalion Chief	1	1
Staff/Utility	3	5

Current Status

South Shore Fire/EMS Incident Type Analysis								
	2021			2020			2019	
	#	%		#	%		#	%
Fire (100)	119	2%		106	2%		100	2%
Overpressure Rupture, Explosion, Overheat (200)	0	0%		0	0%		3	0%
Rescue & Emergency Medical Services (300)	3,986	75%		3,589	78%		3,448	77%
Hazardous Condition (400)	98	2%		85	2%		91	2%
Service Call (500)	479	9%		312	7%		236	5%
Good Intent Call (600)	336	6%		275	6%		261	6%
False Alarm & False Call (700)	286	5%		243	5%		326	7%
Severe Weather & Natural Disaster (800)	0	0%		2	0%		1	0%
Special Incident Type (900)	4	0%		1	0%		10	0%
TOTAL	**5,308**	**100%**		**4,613**	**100%**		**4,476**	**100%**

Current Status

Caledonia Fire/EMS Incident Type Analysis								
	2021			2020			2019	
	#	%		#	%		#	%
Fire (100)	71	2%		54	2%		58	2%
Overpressure Rupture, Explosion, Overheat (200)	4	0%		2	0%		4	0%
Rescue & Emergency Medical Services (300)	2,507	79%		2,252	76%		2,083	75%
Hazardous Condition (400)	64	2%		74	2%		62	2%
Service Call (500)	345	11%		363	12%		273	10%
Good Intent Call (600)	14	0%		69	2%		92	3%
False Alarm & False Call (700)	163	5%		152	5%		199	7%
Severe Weather & Natural Disaster (800)	3	0%		1	0%		1	0%
Special Incident Type (900)	4	0%		2	0%		1	0%
TOTAL	**3,175**	100%		**2,969**	100%		**2,773**	**100%**

Current Status

Sworn Positions By 1,000 Population	
Caledonia	South Shore
1.68	1.95

Sworn Positions By Square Mile Coverage Area	
Caledonia	South Shore
0.98	1.64

Calls for Service Per Sworn Position	
Caledonia	South Shore
69.02	80.42

Current Status

Caledonia Response Time				
	2019	2020	2021	3 Year
Average of Total Response Time	07:28	08:05	07:43	07:46
	2019	2020	2021	3 Year
90th Percentile Total Response Time	11:18	11:37	11:09	11:24

South Shore Average Reponse Time				
	2019	2020	2021	3 Year
Average of Response Time: Alarm to Arrival	06:20	06:08	06:10	06:12
	2019	2020	2021	3 Year
90th Percentile Total Response Time	9:36	9:15	9:05	9:17

Interview Summaries

- South Shore
  - Members of the fire department feel valued by the municipalities and communities they serve.
  - Some South Shore FFs do not want to consolidate with Caledonia.
  - Different organizational cultures – they feel their culture is much better than Caledonia.
  - Several former Caledonia members now work at South Shore and are concerned about the Village's lack of investment in the fire department.
  - South Shore FFs feels Caledonia is understaffed.
  - Uncertain political will toward further consolidate in both Mt Pleasant and Sturtevant.
  - Mt. Pleasant would like some changes to current South Shore Agreement.

Interview Summaries

- Caledonia
  - Caledonia FFs are not opposed to consolidation with South Shore.
  - Caledonia FFs are concerned that the Village will not continue to fund six FTEs that have been funded under a federal grant that expires at the end of 2022.
    - Village has elected to continue to fund three of the six positions in 2023
  - Uncertain political will for consolidation of fire department.

Staff Compensation

- Employee compensation usually accounts for between 85% and 95% of fire department operating budgets.
- On average South Shore Firefighter's Salaries are 1.65% higher than Caledonia Firefighters.

- Other Employee Compensation Differences:
  - Caledonia provides uniforms whereas South Shore provides uniform allowance
  - All South Shore Firefighters can utilize unused sick leave towards retiree health insurance whereas in Caledonia, firefighters hired before 2019 can utilize their unused sick leave in a similar fashion, but after 2019, there is no similar benefit.

Full Consolidation

- Option A:
  - Mt. Pleasant continues to provide service under a consolidation agreement to Sturtevant and add Caledonia
  - Mt. Pleasant Police and Fire Commission continue to oversee Department

- Option B:
  - Create a stand-alone fire/EMS department governed by a Board of Directors made up of:
    - Village Presidents (3 total)
    - One trustee from each community (3 total)
    - One trustee appointed by one of the communities each year on a rotating three-year basis (1 total)
  - Stand alone Fire Commission

Full Consolidation – Staff

Career Positions By Rank						
Rank	Caledonia - 2022	South Shore - 2022	Total - 2022	Budget - 2023	Full Consolidation	Difference
Fire Chief	1	1	2	2	1	-1
Assistant Chief	0	0	0	0	1	1
Division/Battalion Chief	3	5	8	8	6	-2
Captain/Lieutenant	9	21	30	30	33	3
Firefighter	33	39	72	69	72	3
Civilian	1	1	2	2	3	1
TOTAL	47	67	114	111	116	5
				Reduced by 3 for Caledonia		

Full Consolidation - Staff

Resource Deployment		
Staffing	2023 - Separate Departments	Full Consolidation
Station 7	2 - Med	2 - Med
Station 8	6- Engine, Quint/Med, BC	5 - Engine, Med
Station 9	6- Engine/Med, Quint	6 - Quint, Engine/Med
Station 10	6- Engine/Med, Quint/Med	6 - Quint, Med, BC
Station 11	4 - Engine/Med (Tender), BC	5 - Engine, Med (Tender)
Station 12	3 - Engine/Med/Tender	5 - Engine, Med (Tender)
TOTAL	27	29
	105 assigned to shift 35 per shift 8 off per day = 27	108 assigned to shift 36 per shift 7 off per day = 29

Currently each Department has a Battalion Chief on duty (2 total). Consolidated Department would have 1 total.

Full Consolidation – Budget

- Current cost share formula in the South Shore Agreement divides cost by equal weights (33%) of total equalized value (EQV), population and calls for service. (TIF 5 excluded from Mt. Pleasant EQV)

- There is room for the parties to negotiate on the formula based on Caledonia's potential cost avoidance – consider freezing Mt. Pleasant and Sturtevant contribution?

	Current			Full Consolidation		Stand Alone	
	2022			2022		2022	
Mt. Pleasant	$6,470,754	52.49%		$6,634,077	48.87%	$6,470,754	46.44%
Sturtevant	$1,375,790	11.16%		$1,509,082	11.12%	$1,375,790	9.87%
Caledonia	$4,482,050	36.35%	Includes SAFER	$5,431,789	40.01%	$6,088,517	43.69%
TOTAL	$12,328,594			$13,574,948		$13,935,061	
	114 FTE			116 FTE		127 FTE	
	No Finance, HR, IT Positions			Includes Finance, Admin Assistant and Inspector		No Finance, HR, IT Positions	
South Shore Operating Budget/Employee: $141,000 (used in Full Consolidation Option)							
Caledonia Operating Budget/Employee: $123,574							

McMAHON ENGINEERS ARCHITECTS

Full Consolidation - Fleet

Apparatus Inventory				Joint Department			
Vehicle Type	Caledonia	South Shore		Front Line	Reserve		Difference
Engine	3	4		3	2		-2
Truck/Quint	2	2		2	1		-1
Ambulance	5	8		6	3		-4
Tender	2	0		2	0		0
Wildland	1	1		2	0		0
Technical Rescue	0	1		1	0		0
UTV	1	1		1	0		-1
Boat	0	1		1	0		0
Battalion Chief	1	1		1	1		0
Staff/Utility	3	5		10	0		2

$3.58 million less in fleet value under consolidated department

• Full Consolidation - Capital

- Caledonia Station 11 needs significant improvements
- Caledonia Station 12 in process of being replaced
- South Shore Station 9 need improvements to sleeping and fitness spaces.
- Shore Shore/Caledonia Station 10 presents multiple options for future administrative offices and training area.
- Other current capital investments will likely remain similar whether consolidation or no consolidation.

• Full Consolidation - Thoughts

- If the Green Bay Packers offensive line never practiced with the quarterback and wide receivers and only played together on game day they likely wouldn't be as good as a team as they could be if they practiced together.

- Caledonia and South Shore Fire Departments respond to calls together on a regular basis but joint training is minimal.

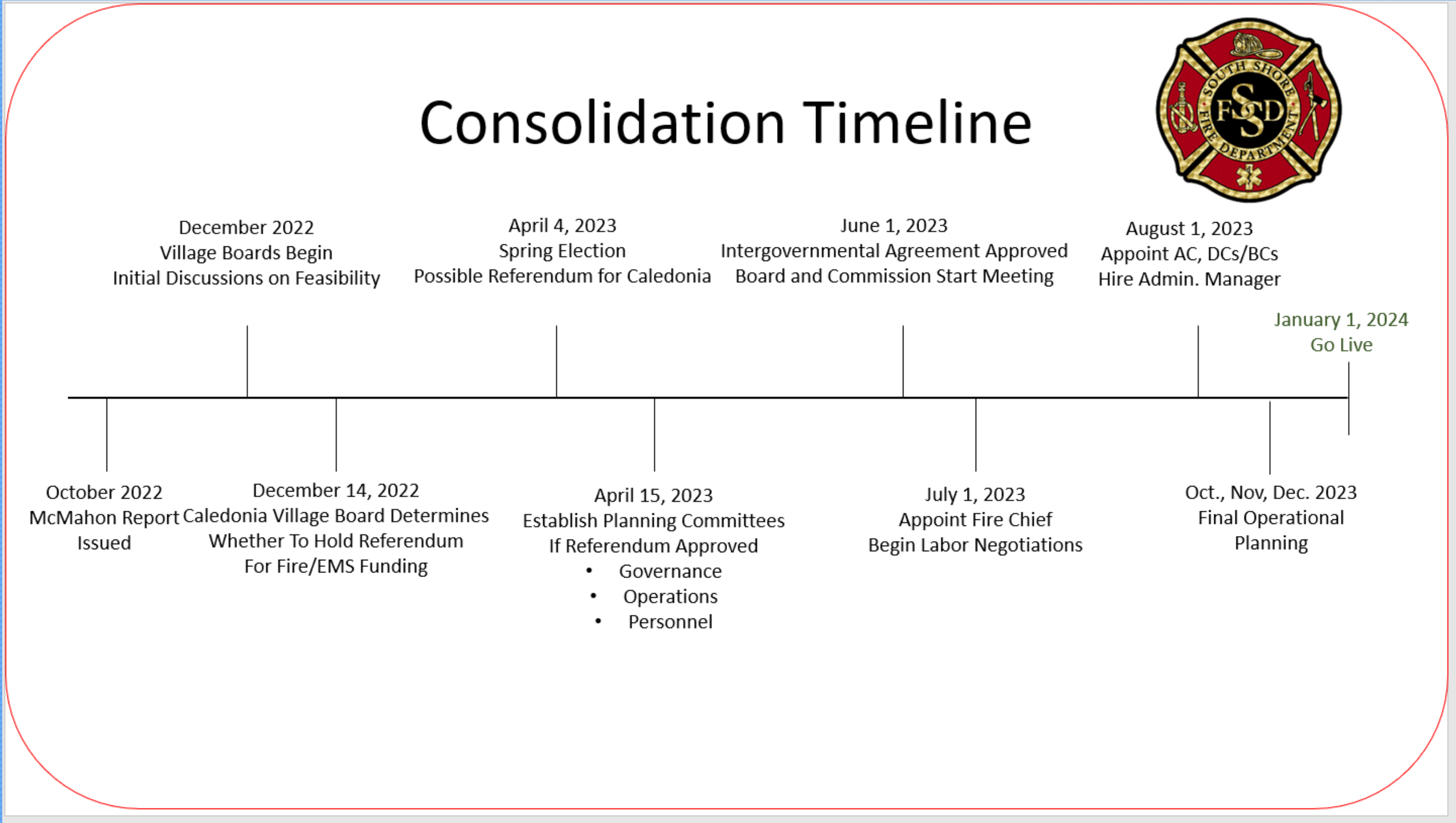
- Responder and resident safety would be improved under a full consolidation scenario.

- South Shore Fire Department is currently much better positioned than Caledonia Fire Department in all areas.

• Full Consolidation - Thoughts

- A successful full consolidation would be heavily reliant on Caledonia agreeing to invest additional dollars in its fire and EMS services.
- Caledonia likely requires referendum to increase operating costs to required level.
- Upfront investments in facilities should be required by each municipality prior to a full consolidation.
- Other issues that would require agreement:
  - Who owns stations?
  - Value of apparatus brought into a joint department
  - Employee benefits (health, retiree health, etc.)

• Timeline


Consolidation Timeline
December 2022
Village Boards Begin
Initial Discussions on Feasibility
April 4, 2023
Spring Election
Possible Referendum for Caledonia
June 1, 2023
Intergovernmental Agreement Approved
Board and Commission Start Meeting
August 1, 2023
Appoint AC, DCs/BCs
Hire Admin. Manager
January 1, 2024
Go Live
October 2022
McMahon Report
Issued
December 14, 2022
Caledonia Village Board Determines
Whether To Hold Referendum
For Fire/EMS Funding
April 15, 2023
Establish Planning Committees
If Referendum Approved
• Governance
• Operations
• Personnel
July 1, 2023
Appoint Fire Chief
Begin Labor Negotiations
Oct., Nov, Dec. 2023
Final Operational
Planning

Summary

- Caledonia needs to add staff for fire/EMS services – this is the biggest question that will determine feasibility of full consolidation
- South Shore currently in a good position
- Full consolidation with recommended staffing is about $360,000 per year less in operating costs than if Caledonia were to operate with recommended staffing levels without joining a consolidated department.
- Full Consolidation results in $300,000 annual savings in apparatus/vehicle costs compared to status quo with two departments.
- Opportunities other than full consolidation:
  - Share positions at Station 10 (about 1.5 FTE reduction per Department)
  - Share a full time Emergency Vehicle Technician/Mechanic
  - Share reserve fleet of vehicles

Evaluation Criteria	Weight	CPSM Score
Qualifications and Relevant Experience	25%	10.0
Project Approach and Methodology	25%	9.0
Timeline and Work Plan Feasibility	15%	9.0
References and Work Samples	10%	9.0
Cost Effectiveness and Overall Value	20%	8.0
Compliance with Proposal Format and Instructions	5%	10.0
Total	100%	

CPSM Weighted	McGrath Score	McGrath Weighted	McMahon Score
2.5	9.0	2.3	9.0
2.3	9.0	2.3	9.0
1.4	8.0	1.2	8.0
0.9	9.0	0.9	9.0
1.6	8.0	1.6	7.0
0.5	10.0	0.5	10.0
9.1		**8.7**	

McMahon Weighted	FBTC Score	FBTC Weighted
2.3	8.0	2.0
2.3	7.0	1.8
1.2	8.0	1.2
0.9	6.0	0.6
1.4	10.0	2.0
0.5	7.0	0.4
8.5		**7.9**

Somerset Fire/Rescue Proposal Scoring Summary

Criteria	Weight	CPSM	McGrath	McMahon	FBTC
Qualifications and Relevant Experience	25%	10	9	9	8
Project Approach and Methodology	25%	9	9	9	7
Timeline and Work Plan Feasibility	15%	9	8	8	8
References and Work Samples	10%	9	9	9	6
Cost Effectiveness and Overall Value	20%	8	8	7	10
Compliance with Proposal Format and Instructions	5%	10	10	10	7
Total Score (Weighted)		**9.10**	**8.70**	**8.50**	**7.90**

Proposal for a Strategic Plan

Building a Sustainable Path Forward

Executive Summary

In today's evolving fire service, organizations must adopt a forward-thinking approach to ensure sustainability, growth, and resilience. This proposal outlines a comprehensive strategic plan designed to position our organization for long-term success by fostering innovation, enhancing operational efficiency, and aligning with our core values. The plan focuses on three pillars: organizational excellence, community needs, and the recommendations' impact on the community.

Introduction

The need for a structured strategy has never been more critical for the fire service, what with the challenges presented in recruitment, retention and budgetary impacts of meeting both current and future needs. This proposal seeks to serve as a roadmap for your organization over the next five years, anchoring our actions to measurable goals and clear priorities. By leveraging data-driven insights and collaborative efforts, this plan will help the Sommerset Fire Department navigate challenges while capitalizing on emerging opportunities.

Mission and Vision

Update current Mission and Vision statements. If desired. For example:

Mission

To provide unparalleled value to our stakeholders by delivering excellent services, fostering meaningful partnerships, and maintaining a commitment to ethical and sustainable practices.

Vision

To preserve life, protect property, and safeguard our community through high quality, professional emergency services.

Key Strategic Objectives

1. Optimize Operational Efficiency/Budgetary Considerations

To ensure long-term sustainability, we will focus on streamlining processes, reducing waste, and adopting cutting-edge technologies to enhance productivity. Key initiatives include:

- Evaluate organizational structure for efficiency and leadership effectiveness.
- Analyze the department's current ability to meet community needs and make recommendations based on data-driven analysis.
- Review current economic conditions, potential development, and population trends as they impact the type and number of fire department calls.
- Include any potential EMS initiatives or expansion of current service.
- Determine budgetary impacts of all recommendations.

2. Staffing

- Review current staffing levels for adequacy for current response needs.
- Review training levels for adequacy for current response levels.
- Project what changes will be required to meet desired future response levels.

3. Strengthen Stakeholder Relationships

Long-term success of the strategic plan depends on strong relationships with both internal and external stakeholders. To achieve this, we will:

- Enhance Internal Stakeholder input through interviews with:
    - fire department personnel.
    - Village leadership (as appropriate)
- Enhance External Stakeholder input through interviews with:
    - Local business leaders
    - Other entities as desired (ie: Chamber of Commerce, etc.)

4. Current Apparatus and Equipment Evaluation (upon request)

- Review current fleet for safety (NFPA industry standards) and response adequacy.

5. Review Current Mutual Aid/MABAS Contracts and Consider other potential arrangements for economic and functional purposes.

6. Review Revenue Sources and Creatively Seek New Paths.

Action Plan

Phase 1: Complete Strategic Planning Process

Phase 2: Determine which components to be implemented in Year 1, Year 2, Year 3.

Phase 3: Sustainability (Years 4-5)

Ensuring the longevity of our initiatives by embedding them into the organizational culture and operations.

Performance Metrics

To measure the success of this strategic plan, we will track the following metrics:

- Number of calls met with 100% response needs.
- Firefighter retention and engagement rates.
- Balanced budget achieved, or reduction in operational costs.
- Number of new partnerships formed.

Additional needs of the Sommerset Fire Department will be considered as they are either discovered during the process or brought up by the Fire Chief.

Material can be deleted or requested added by the Fire Chief at any time during the process.

PENDING that we remain within reasonable margins of the proposal as written, Five Bugle Training and Consulting proposed completing the Strategic Plan for the Sommerset Fire Department for an amount not to exceed **$12,000.00**

__Bruce A. Fuerbringer__

Bruce A. Fuerbringer, M.S., EFO
FBTC
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Mondovi, WI 54755
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bfuerbringer@gmail.com

REQUEST FOR PROPOSALS
SOMERSET FIRE/RESCUE
ORGANIZATIONAL ASSESSMENT AND STRATEGIC NEEDS ANALYSIS

Contact Person:
Travis Belisle
Fire Chief
Direct: (715)760-2182
somfire@somtel.net

PROPOSALS DUE
June 6th, 2025
NO LATER THAN 4:30 P.M.

1. Summary

Somerset Fire/Rescue is inviting proposals from qualified consulting firms to conduct a comprehensive Organizational Structure Assessment and Strategic Needs Analysis. This independent study will evaluate Somerset Fire/Rescue's current organizational structure and provide forward-looking, data-driven recommendations for staffing, operations, and structure to ensure the agency continues to meet growing service demands. These recommendations must account for ongoing economic development, increasing call volume, and the evolving needs of the community.

The final deliverable shall be a detailed, actionable report that includes recommendations supported by data, industry benchmarks, stakeholder input, and projected trends.

2. Background

Established in 1933, Somerset Fire/Rescue serves the Village of Somerset, Somerset Township, and parts of the regional area through auto and mutual aid agreements as well as MABAS. As the community continues to grow and diversify—with a mix of residential neighborhoods, commercial enterprises, agricultural lands, and expanding infrastructure—there is an increasing demand for high-quality fire protection and emergency response services.

The department currently operates out of a single fire station staffing model that is comprised of paid-on-call/volunteer firefighters. Over recent years, Somerset Fire/Rescue has seen a significant increase in call volume and complexity of incidents, prompting a need for strategic planning to ensure future readiness.

Services provided include fire suppression, rescue (including specialized operations), fire prevention and inspections, public education, and emergency medical response.

3. Scope of Work and Deliverables

Somerset Fire/Rescue is seeking proposals from qualified consulting firms to conduct an independent and comprehensive assessment of the department's current organizational structure and future needs. The selected consultant will be required to perform in-person, onsite evaluations and engage directly with personnel across all staffing levels. The goal is to develop a strategic and actionable plan that will guide Somerset Fire/Rescue in meeting both current and future service demands.

Upon completion, the selected firm shall prepare a detailed, data-driven report of findings and recommendations, and present it to Somerset Fire/Rescue leadership, municipal partners, and relevant stakeholders.

The final report must include the following components:

Analysis of Current Organizational Structure

- Evaluate the current org chart, command structure, and reporting hierarchy.
- Compare Somerset Fire/Rescue's structure to similar-sized departments (please list 2–3 peer communities as benchmarks).
- Assess current job descriptions for clarity and alignment with responsibilities.

Please describe your methodology for benchmarking, including which industry standards (e.g., NFPA, ISO) will guide your comparisons.

Assessment of Future Growth and Its Impact on Staffing and Organizational Structure

- Use local data (we will provide access to recent development and census projections) to evaluate how anticipated growth may affect call volume and service capacity.
- Identify operational gaps that could emerge based on projected service demands.

We encourage you to include specific modeling tools or projections your team uses to conduct future-service assessments.

Future Staffing Strategy and Organizational Recommendations

- Recommend a revised organizational structure and staffing model.
- Draft job descriptions for proposed new positions.
- Suggest a phased implementation plan (1-, 3-, and 5-year options preferred).

Proposals should include examples of similar strategic staffing recommendations you have developed for fire or EMS departments.

Fiscal Impact and Resource Implications

- Provide a cost-benefit analysis for proposed structural and staffing changes.
- Include a breakdown of anticipated capital needs (apparatus, facilities, technology).
- Suggest funding strategies (e.g., grants, partnerships, phased investment).

Please include any examples of fiscal planning tools or templates you use to project cost impact over time.

4. Proposal Format & Submission Instructions

Your proposal should be structured as follows:

A. Executive Summary & Project Approach

- Summarize your team's qualifications and understanding of this project.
- Describe your overall approach, methodology, and how you will tailor it to our department's unique needs.

Please highlight any previous success stories from fire or emergency service departments.

B. Experience & Team Qualifications

- Identify all key team members and include resumes.
- Provide brief bios with specific roles and relevant experience.
- Identify any subcontractors and describe their role and qualifications.

We are especially interested in consultants who have worked with departments similar in size, funding model, and governance.

C. Detailed Work Plan & Timeline

- Submit a detailed project plan, including key milestones, site visits, stakeholder engagement sessions, and report delivery dates.
- Indicate how many in-person vs. virtual engagements you propose.

Please identify any potential challenges you anticipate and how you will mitigate them.

D. References & Work Samples

Provide at least five (5) references from comparable projects completed within the past four (4) years, including:

- Organization name and location
- Contact person (name, title, phone, email)
- Project scope and completion date
- Summary of deliverables and outcomes

Work samples are strongly encouraged and may be submitted as PDFs or links.

E. Cost Proposal

Complete the attached Cost Sheet with:

- Phase-by-phase breakdown
- Total "not-to-exceed" price
- Any optional or value-added services (clearly marked as such)

Please ensure all costs (travel, interviews, printing, etc.) are included. If applicable, identify costs associated with out-of-scope services.

F. Proposal Submission

Submit one (1) bound hard copy and one (1) electronic copy (via email or flash drive) to:

Travis Belisle, Fire Chief
Somerset Fire/Rescue
748 Highway 35
Somerset, WI 54025

Email: **somfire@somtel.net**
Subject Line: RFP – Strategic Plan Development

Deadline: June 6th, 2025, by 4:30 PM CST. Late submissions will not be accepted.

5. Evaluation Criteria

Proposals will be evaluated based on:

- Qualifications and relevant experience
- Project approach and methodology
- Clarity and feasibility of timeline
- Quality of references and work samples
- Cost effectiveness and overall value

Interviews may be conducted with finalists. Final selection is not based solely on cost, but on best value and alignment with project goals.

6. Questions Regarding the RFP

Please direct all questions to:

Travis Belisle, Fire Chief
Phone: 715-760-2182
Email: somfire@somtel.net

7. Somerset Fire/Rescue - Terms and Conditions

Acceptance and Rejection

Somerset Fire/Rescue reserves the right to reject unqualified or non-conforming proposals, to reject all proposals, to accept the proposal most advantageous to Somerset Fire/Rescue, to waive any technicalities in any submission, or to select the most qualified proposal and negotiate a contract. Somerset Fire/Rescue is not obligated to accept the lowest-cost proposal but will instead select the one that best meets its operational needs. The organization reserves the right to reissue any requests for proposals as needed.

Contract

Prior to contract execution, Somerset Fire/Rescue requires the successful Consultant to provide proof of adequate and ongoing insurance coverage appropriate to the scope of work.

Clarification of Proposals

Somerset Fire/Rescue reserves the right to request clarification on any part of a proposal or to seek additional information.

Waiver

Somerset Fire/Rescue may waive any formalities, defects, or irregularities in any proposal if deemed to be in the organization's best interest.

Disqualification

Somerset Fire/Rescue reserves the right to disqualify any proposal based on evidence of collusion, fraud, or other illegal practices.

Public Records Access Statement

Both parties acknowledge that Somerset Fire/Rescue is subject to Wisconsin Public Records Law. All RFP and contract terms are subject to Wis. Stat. 19.21 et. seq. The Consultant agrees to assist in the production and retention of public records. Failure to comply may result in breach of contract. Records must be retained for seven years after final payment.

Assignment Language

No rights or obligations under this contract may be assigned or delegated without prior written approval from Somerset Fire/Rescue.

Applicable Law and Compliance

This contract is governed by the laws of the State of Wisconsin, and disputes shall be resolved in St. Croix County Circuit Court. Consultants must comply with all relevant federal, state, and local laws and ordinances during the contract period.

Cancellation

Somerset Fire/Rescue reserves the right to cancel the contract, in whole or part, without penalty due to non-appropriation of funds or failure to comply with contractual terms and conditions.

Proprietary Information

Any proprietary data must be clearly labeled within the proposal. Such information will be treated in accordance with Wisconsin procurement regulations and Public Records Law. The Consultant bears the responsibility to defend any proprietary designation.

Opening Proposals

Proposals will not be opened publicly.

Disqualification of Non-Responsive Proposals

Proposals that fail to meet the material requirements of the RFP will not be considered.

8. Tax Exemption

Somerset Fire/Rescue is exempt from payment of federal, state, and local taxes related to this contract.

9. Somerset Fire/Rescue - Cost Sheet

Phase 1 Cost: $______________________

- An evaluation of current staffing levels, departmental model (currently a combination department), and organizational structure to determine if Somerset Fire/Rescue is able to provide adequate fire and related emergency services based on fire industry standards.
- An assessment to project future staffing levels, models, and organizational needs based on population growth, concurrent/overlapping emergency capacity, and evolving service demands.
- An evaluation of asset deployment given current staffing levels, model, and structure to determine compliance with fire service industry standards.
- Identification of necessary improvements based on the staffing evaluation.

Phase 2 Cost: $______________________

- A comprehensive GIS-based analysis of response times throughout Somerset Fire/Rescue's service area.
- Identification of areas where response times exceed accepted fire industry standards.

Phase 3 Cost: $______________________

- Recommendations for the location(s) of additional fire station(s) required to meet fire industry response time benchmarks.
- Conceptual planning and layout for any proposed additional fire station(s).
- Assessment of current apparatus and identification of additional apparatus needed if new stations are recommended.

Phase 4 Cost: $______________________

- Presentation of findings, evaluations, and recommendations to Somerset Fire/Rescue leadership, town board, department personnel, and any participating municipal partners.
- Minimum of 3 and maximum of 5 in-person presentations.

Total Cost: $______________________

Submitted by:

____

Authorized Representative (Signature)

____

Date