



# SUN CITY FIRE & MEDICAL DEPARTMENT STRATEGIC PLAN

FY 2021 - 2023

Ronald R. Deadman, Fire Chief

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## **MESSAGE FROM THE FIRE CHIEF**

The Sun City Fire & Medical Department is at another crossroads in our history. We are being called to respond to over 16,000 calls for service each year with no relief in the foreseeable future. The Sun City Fire & Medical Department's Strategic Plan document was written to assist in the direction our organization needs to move towards. The future of the department is in meeting the increasing needs of the community. The Strategic Plan provides the key foundational document that serves to provide the direction required to sustain and enhance our future as an organization.

The Strategic Plan is a systematic process that is used to set the level of significance to each circumstance that we can anticipate in our future. This document provides a focus on our resources to ensure that all organizational members are working toward a common set of goals. Due to the current economic atmosphere fire districts throughout Arizona are required to operate under and the increasing demand for services in our community, establishing the traditional five-year strategic plan would not be effective. The Sun City Fire District needs a dynamic document to focus on the organization. To that end, this plan will span the calendar years 2021-2023.

This new Strategic Plan needs to be simple and concise in its design while incorporating best practices identified from other fire department strategic plans and based on open dialog from all stakeholders. This plan is the result of a collaborative effort between all members of our organization. Given the resources, this organization has continually exhibited professionalism, while providing the highest level of care to our residents. The foundational theme throughout the Strategic Planning Document is to address the increasing demand for service in a safe, efficient, and expedient manner.

This plan contains some principal goals that can be accomplished through a unified approach that engages the combined efforts of the Governing Board of Directors, Management Team, and Union Leadership. Collaboratively we are encouraged in this dynamic organization's ability to find new and creative ways to accomplish the stated goals.

Ron Deadman

Fire Chief

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# Demographics

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The following information about the Sun City Fire District is provided to help put the Strategic Plan initiatives into context and to provide the framework to help define the size and scope of the services provided by the members of the Sun City Fire & Medical Department (SCFMD). The SCFMD provides fire and emergency medical services to the residents and visitors in the first of its kind 55+ adult community.

## Sun City Fire District Facts

Area	17 Square Miles
Population	47,000
Operating Budget	\$14,539,537 (Fiscal Year 19-20)

## Cost of Ambulance Services

Total Transports	7,556
*ALS	\$965.67 + \$20.03/Mile
*BLS	\$860.19 + \$20.03/Mile
Average Collection	\$379.81 per transport
Transport Revenue	\$2,800,000 NET

## Staffing

Fire Stations	3
Battalion Chief	3
Engines	3
Ladder/LT	1
Medic Units (ambulance)	4

## Call Activity (Fiscal Year 19-20)

Total Calls	16,011
Fire	1,270
EMS	14,741
Aid Given	3,370
Aid Received	989
Overlapping Calls	13,010

*\*Advanced Life Support (ALS)*

*\*Basic Life Support (BLS)*

# Governance and Leadership

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## Governing Board of Directors

David Scott – Chairperson (2016-2020)

David Mann – Board Member (2018-2022)

Tim Wilmes – Board Member, Clerk (2018-2022)

Phil LaBarbera – Board Member (2020)

Stephen Arnold – Board Member (2020)

## Executive Staff

Ron Deadman, Fire Chief

Gabe Buldra, Finance Director

Jason Casey, Battalion Chief – Administration

Lisa Neubert, Administrative Manager

Liz Campos, Payroll Specialist

Theresa Perez, Administrative Assistant

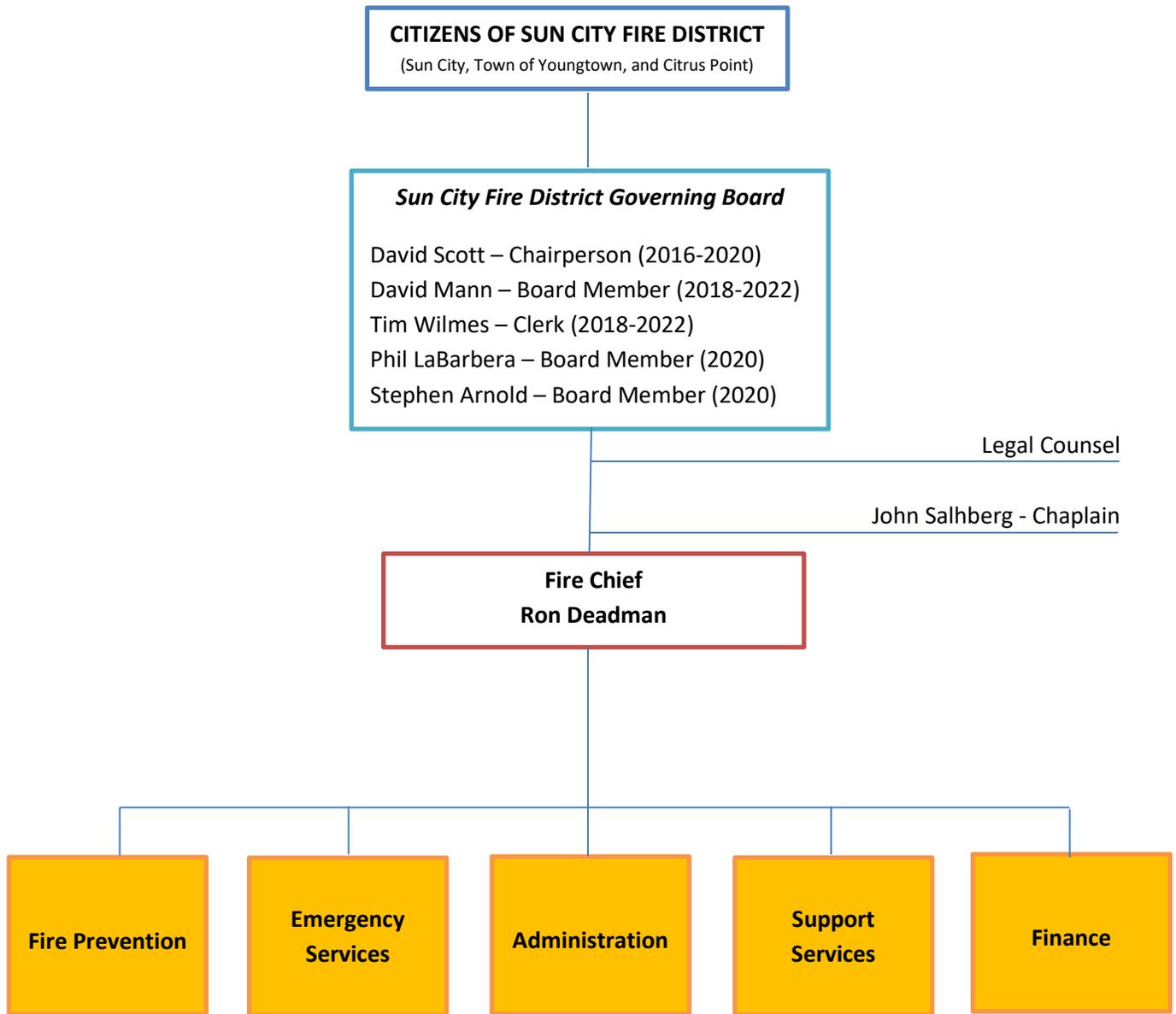
Cindy McCloe, Administrative Clerk

## Professional Association – IAFF 3573

Michael O’Farrell – Vice President

Adam Lombardo – Trustee

# Sun City Fire District Organizational Chart



# Mission Statement

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*“To professionally protect, prevent, and educate:*

- *Provide professional emergency fire, rescue, and medical services;*
- *Prevent fires before they start through an aggressive inspection program;*
- *Provide programs that educate and inform the public on fire safety and health matters;*

*We serve today to protect your tomorrow.”*

# Organizational Values

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- *To preserve the integrity, respect and personal honor of our members and the District;*
- *To maintain ethical standards of conduct;*
- *To obey the law;*
- *To develop good business relationships with the customers we serve;*
- *To pursue self-development, including the development of one's ability to improve their living and working conditions;*
- *To increase the knowledge and enlarge the experience of each member of the District;*
- *To support the interests, safety, and welfare of our fellow human beings as persons of equal value;*
- *To provide a fellowship and loyalty which promotes the common good of all;*
- *To provide for the economic welfare of the District's employees.*

# Organizational Expectations

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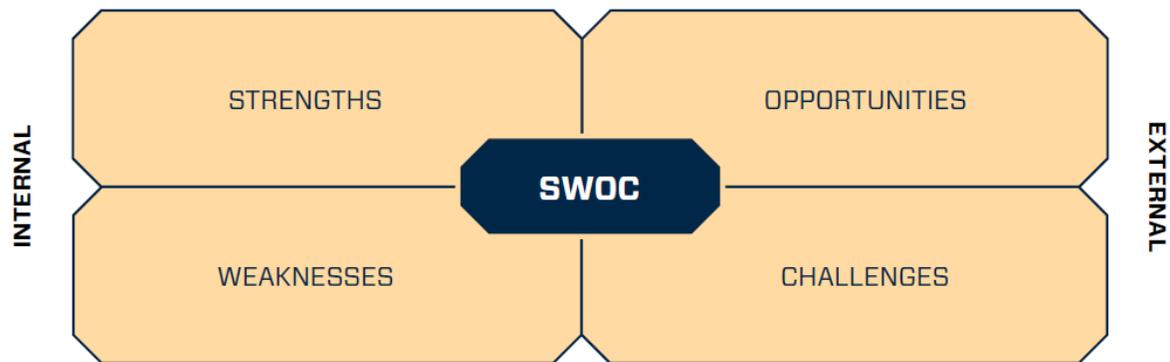
As Fire Chief, it is my responsibility to set and share my expectations of every member of the Sun City Fire & Medical Department. My expectations are in line with our stated philosophies and reinforce our core principles.

- Right Time, Right Place, Right Uniform
- Know your job, do your job
- See it, own it, solve it, do it  
= **Accountability**
  
- Clear, open, honest, and frequent communication  
= **Transparency**
  
- Do the right thing, even when it's not easy.  
= **Ethical behavior**
  
- Be productive in criticism, solution-oriented conversations.
- Make a decision; fully accept decisions made by others.
- Provide service beyond the expectations of all our customers, both internal and external.
- Set the example.
- Act as if you are already in the position you aspire to attain.  
= **Lead**
  
- Always be a student as well as a teacher... a true leader must learn how to follow before they can lead others.  
= **Learn**
  
- Adhere to our agreed-upon organizational values
- Be honest with people even when it's uncomfortable
- Have the fortitude to make the right and not the popular decision  
= **Courage**
  
- Face the challenges of today, while thinking beyond the moment.  
= **Vision**

# SWOC ANALYSIS

A scan of the internal and external environment is an important component of the strategic planning process. A SWOC Analysis (Strengths, Weaknesses, Opportunities, and Challenges) was utilized to meet the need. The strengths and weaknesses represent a measurement of the internal environment; opportunities and challenges, a measurement of the external environment.

## SWOC ANALYSIS



Any organization needs to identify its strengths to ensure that it is capable of providing the services requested by the community and that these strengths are consistent with the issues facing the organization. Often, identification of organizational strengths leads to the direction of efforts towards primary community needs that match those strengths. Programs that do not match organizational strengths or the primary functions of the organization should be seriously reviewed to evaluate the rate of return on staff time.

## STRENGTHS

- |  |                                   |                                 |
|--|-----------------------------------|---------------------------------|
| - Leadership ability   | - Equipment/apparatus             | - Core service delivery         |
| - Staffing: Four person Companies  | - Financial stewardship           | - Community trust               |
| - Employees have strong knowledge, skills and abilities: training and experience | - Strong safety culture           | - "Agility/Flexibility"         |
|  | - Hardware systems                | - Labor-management relationship |
|  | - Diversity                       | - Enthusiasm/energy             |
|  | - Good reputation/ Public support | - Phoenix Auto Aid System       |
|  | - Family culture                  | - Community oriented            |
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**WEAKNESSES**

- |   |   |   |
|---|---|---|
| - Phoenix Auto Aid System (also listed as a strength) | - Accountability (on the upswing)         | - Internal communication to members       |
| - Collaborative efforts                               | - Teamwork (on the upswing)               | - Succession planning                     |
| - Internal customer service                           | - Disconnected projects                   | - Lack of support staff                   |
| - Inconsistency in policies/procedures (improving)    | - Promoting and celebrating successes     | - Informational and operational silos     |
| - Comparison of service delivery with data            | - Engagement/focus; ability to prioritize | - Attitude of entitlement by some members |
| - Tax rate  | - Unfunded liability                      |   |
- 

**OPPORTUNITIES**

- |  |  |  |
|--|--|--|
| - Reconfiguration based on data driven results                                 | - Collaborative efforts  | - Grants   |
| - EMS educational services   | - Refine services via financial parameters (fine tune)                               | - Medical transports                             |
| - Utilize prevention volunteers to address community educational/service needs | - Recruit a workforce to reflect the dedication and skill set that we currently have | - Our position relative to the external customer |
|  |  | - Technology                                     |
|  |  | - Partnerships                                   |
- 

**CHALLENGES**

- |                                |   |                     |
|--------------------------------|---|---------------------|
| - Revenue diversity            | - Impact of economic legislation (tax rate) | - Pension reform    |
| - Some partner relationships   | - Affordable Care Act (the unknowns)        | - State legislation |
| - Location of Fire Station 132 |   | - Landlocked        |
| - Land valuation (NAV)         |   | - Age of work force |

## Five Strategic Initiatives

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A team approach is a key element in successful strategic planning. Part of developing realistic initiatives is having a clear understanding of the anticipated financial environment of the District in the next three years. Our Finance Director has provided an overview of the financial picture of the District. We conservatively expect an approximate 3% increase in tax revenue each of the next three years. Medical transport revenue is expecting the same 3% increase during the same period. As such, the District will continue to face significant financial challenges in an environment of increasing service demand.

The following five strategic initiatives are the foundation of the Sun City Fire District's Strategic Plan:

1. Emergency Service Delivery and Deployment Model
2. Comprehensive Training and Development
3. Analysis and Management of Data
4. Assess and Prioritize Fire Department Services, Programs, and Needs
5. Financial Stability and Sustainability

# Strategic Initiative 1

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## **Emergency Service Delivery and Deployment Model**

Description of Initiative:

The population density and geographical boundaries of the Sun City Fire District are substantially established, to include the communities of Sun City, Citrus Point, and the Town of Youngtown. In the fiscal year 2019-2020, SCFMD members responded to 15,550 emergency dispatches with only four first responding units. This volume demand has escalated all four SCFMD emergency responding units into one of the highest volume units within the Phoenix Regional Automatic Aid System.

The majority of those emergencies were medical. The increasing demand for emergency medical services has a significant impact on our service delivery. We are struggling with the challenges of an ever-increasing demand for non life threatening / low acuity services.

The purpose of this initiative is the comprehensive evaluation of the variety of ways that SCFMD delivers emergency and non-emergency service to our citizens and visitors.

Major Objective		Responsible Party	Completed By
1.A	Based on ongoing data analysis, identify the necessary engine, ladder, medic, and support companies, including staffing levels, that are necessary throughout the District to meet the current and future service delivery needs.	Operations	4 <sup>th</sup> Quarter Fiscal Year Annually
1.B	Create the process for Response Modeling	Operations	3 <sup>rd</sup> Quarter Fiscal Year 2021
1.C	Develop a plan for a community healthcare outreach program, that includes partnerships, alternative destinations, and alternate revenue.	EMS	2 <sup>nd</sup> Quarter Fiscal Year 2022

## **DESIRED OUTCOMES**

1. Deliver service that matches the community needs/risk assessment
2. Internal support service aligned with mission and identified core services
3. Strategically address the District's increasing demand for low acuity services
4. Strategically address the imbalance of demand for services in and outside the District.

## Strategic Initiative 2

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### Comprehensive Training and Development

Description of Initiative:

The Sun City Fire & Medical Department is experiencing a dramatic shift in leadership. During the previous five years, SCFMD experienced a 30% turnover in the leadership group. The development of our current and future leaders is essential to our continued ability to deliver a high level of service to the community. We must identify a method to improve and sustain our training process, as well as minimize the impact that on-going training has on our emergency response capabilities.

The purpose of this initiative is to develop a sustainable method for the comprehensive professional development of our members.

	Major Objective	Responsible Party	Completed By
2.A	Develop a sustainable delivery method for department wide training process and measurement.	Training	1 <sup>st</sup> Quarter Fiscal Year 2021
2.B	Enhance department strategic, tactical, and task level training through the collaborations of operations and training to ensure all training is related to the current work standards and environment.	Training	4 <sup>th</sup> Quarter Fiscal Year 2021
2.C	Develop a comprehensive internal EMS credentialing program targeted at the enhancement of operational readiness.	EMS Management	1 <sup>st</sup> Quarter Fiscal Year 2022
2.D	Enhance the technology and resources for the training and education programs	Training	2 <sup>nd</sup> Quarter Fiscal Year 2023

### DESIRED OUTCOMES

1. Effective succession plan in place through a customized professional development program.
2. Personnel effectively performing their roles and responsibilities
3. Institutional knowledge transfer and formally documented
4. Improve organizational processes to enhance operational readiness

# Strategic Initiative 3

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## Analysis and Management of Data

Description of Initiative:

The Sun City Fire & Medical Department manages a significant amount of data and several important statistics. The data we manage includes emergency response information, employee records, patient care reports, physical assets, financial, and budget. Program Managers utilize this data to evaluate employee and program performance. In addition, this data is vital to demonstrate how effectively our resources are managed.

The purpose of this initiative is to improve the systematic examination of the current service delivery to our citizens. It is critical that we use the data to successfully measure data, statistical information, and apply this information throughout our organization.

	Major Objective	Responsible Party	Completed By
3.A	Secure the resources and implement the program that enables SCFMD to become a data and technology driven organization.	Administration	3 <sup>rd</sup> Quarter Fiscal Year 2023
3.B	Apply concepts of business analytics to SCFMD programs and service delivery.	Administration	2 <sup>nd</sup> Quarter Fiscal Year 2021
3.C	Identify key performance indicators and data points.	Administration	1 <sup>st</sup> Quarter Fiscal Year 2021
3.D	Improve data collection and analytics to drive organizational measurements and decision making.	Administration	4 <sup>th</sup> Quarter Fiscal Year 2022
3.E	Identify the human and technical resources required to enable SCFMD to become a more technology-driven organization.	Administration	4 <sup>th</sup> Quarter Fiscal Year 2023

## DESIRED OUTCOMES

1. Accurately measure the effectiveness and efficiencies of the service provided to the community.
2. Strategical address the District's increasing demand for services.
3. Greater emphasis on IT Service in the decision-making process.
4. Establish a reporting system to continually evaluate performance.

# Strategic Initiative 4

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## **Assess and Prioritize Fire Department Services, Programs, and Needs**

Description of Initiative:

The Sun City Fire & Medical Department is a dynamic organization. Over the past five years, we have redefined and enhanced our service delivery to the community we serve. We are doing this with the lowest staffing levels within the Phoenix Regional Automatic Aid System while remaining vigilant to provide 24 hours a day, seven days a week service.

The purpose of this initiative is to conduct a comprehensive assessment of all programs and services of our organization.

	<b>Major Objective</b>	<b>Responsible Party</b>	<b>Completed By</b>
4.A	Assess the importance and sustainability of services currently provided by SCFMD.	Operations	3 <sup>rd</sup> Quarter Fiscal Year 2021
4.B	Develop programs to acquire, maintain, and replace equipment, facilities, and vehicles.	Fleet & Facility Management	4 <sup>th</sup> Quarter Fiscal Year 2021
4.C	Implement sustainable programs for the acquisition, maintenance, and replacement of equipment, facilities, and vehicles.	Administration / Finance	1 <sup>st</sup> Quarter Fiscal Year 2022
4.D	Assess current Fire Prevention / Public Education programs and explore community involvement opportunities.	Fire Prevention / Chaplain	2 <sup>nd</sup> Quarter Fiscal Year 2023
4.E	Analyze and plan for sustainable workforce development	Administration	4 <sup>th</sup> Quarter Fiscal Year 2023

## **DESIRED OUTCOMES**

1. Greater financial efficiencies identified and implemented in the delivery of external and internal support services.
2. Develop a dynamic plan that will forecast the future replacement capital assets.
3. Outcome bases review and restructuring of programs to accurately deliver services.
4. Develop an employee evaluation process to be used on an annual basis.

# Strategic Initiative 5

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## Financial Stability and Sustainability

### Description of Initiative:

The District's revenues are significantly impacted by 1) Arizona's legislative statutes, 2) the variability of the values of the properties within the District, and 3) the methods used to calculate the real and projected costs of the pension system. Significant legislative bills that impact the District's property tax revenue stream include:

Proposition 117: In the 2012 General election, voters passed Proposition 117 amending the Arizona Constitution by setting a limit on the annual percentage increase in property values used to determine property taxes to be no more than 5% above the previous year starting in the tax year 2015. Proposition 117 also established a single LPV as the basis for determining all property taxes on real property which took effect in FY 2016/2017. Personal Property, other than mobile homes, will be computed at FCV. Due to the passage of Proposition 117, the foundation for property tax calculations is the limited property value (LPV) of each property. The impact of Proposition 117 on the District's net assessed value (NAV) tax base remains significant.

SB 1421: Passed in 2009, limits the increase in the tax levy for fire districts to be no more than 8% over the prior year's actual levy.

A.R.S. 48-807: Caps the maximum tax rate per \$100 of assessed property tax value at \$3.25. House Bill 2001 (Jobs Bill): passed in 2011, reduced assessed valuation of class one commercial and centrally valued properties from 25% in 2006 to 18% by 2016, and reduced class two vacant land values by 1% a year through 2016 to 15%.

SB 1428: In 2016, the legislature passed Senate Bill 1428 into law which affects the PSPRS membership that includes new benefit provisions for existing and new members and, as a result of the intricate changes, the PSPRS *Matrix of Plan Provisions* was created to outline the differences between the Membership Tiers, eligibility, Member Benefits, options, and other System-related information.

The District relies almost entirely on tax revenue generated from its NAV to fund its emergency medical, fire suppression, fire prevention, and risk reduction services. The FY 2019/2020 Budget tax rate of \$3.24. Ground Ambulance Revenue derives its revenue from billings for the transportation of citizens to area hospitals via the District's ambulances. The District provides and bills for its Advanced Life Support (ALS) and Basic Life Support (BLS) ground transport services. The District bills insurance providers for its services, including Medicare, Medicaid, commercial insurance, auto insurance, and workers' compensation insurance carriers. The District is projecting handling 7,500 total transports originating within the District in FY 2019/2020, with 5,478 being ALS and 2,022 being BLS.

**SUN CITY FIRE & MEDICAL DEPARTMENT STRATEGIC PLAN  
FISCAL YEAR 2021 THROUGH FISCAL YEAR 2023**

The Sun City Fire & Medical Department is committed to providing the highest quality fire, emergency medical, and transport services to our community. The purpose of this initiative is to develop stable and sustainable revenue sources to meet the increasing demands of the community for emergency and non-emergency services.

Major Objective		Responsible Party	Completed By
5.A	Assess and project financial sustainability of funding alternative response models to offset increasing demands for services.	Administration / Operations	3 <sup>rd</sup> Quarter Fiscal Year 2023
5.B	Active participation in the financial stability of the Public Safety Personnel Retirement System.	Fire Board	2 <sup>nd</sup> Quarter Fiscal Year 2021
5.C	Research and development of methods to reduce the District's PSPRS unfunded liability	Fire Board / Administration	2 <sup>nd</sup> Quarter Fiscal Year 2023
5.D	Active pursuit of grants and alternative funding to support operational needs.	Administration	2 <sup>nd</sup> Quarter Fiscal Year Annually
5.E	Identify and develop working partnerships with other fire service agencies towards to goal of financial sustainability.	Administration	1 <sup>st</sup> Quarter Fiscal Year 2023
5.F	Review current capital replacement funding.	Administration / Finance Director	4 <sup>th</sup> Quarter Fiscal Year 2021

**DESIRED OUTCOMES**

1. Establish a sustainable financial plan to continue to provide the highest level of services possible.
2. Actively participate in the continued financial stability of the Public Safety Personnel Retirement System.
3. Active pursuit of capital asset replacement through grants.
4. Engage in partnerships, government, and private, that provide increased level of services to our internal and external customers.