

Fire District of Sun City West



FY 2011/2012

ADOPTED

Annual Budget & Operational Plan



ADOPTED – AS PRESENTED DURING THE JUNE 21, 2011 SPECIAL MEETING – ADOPTED

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GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished
Budget Presentation
Award*

PRESENTED TO

**Fire District of Sun City West
Arizona**

For the Fiscal Year Beginning

July 1, 2010

A stylized, handwritten signature in black ink, likely belonging to the President of the GFOA.

President

A handwritten signature in black ink that reads "Jeffrey R. Snow".

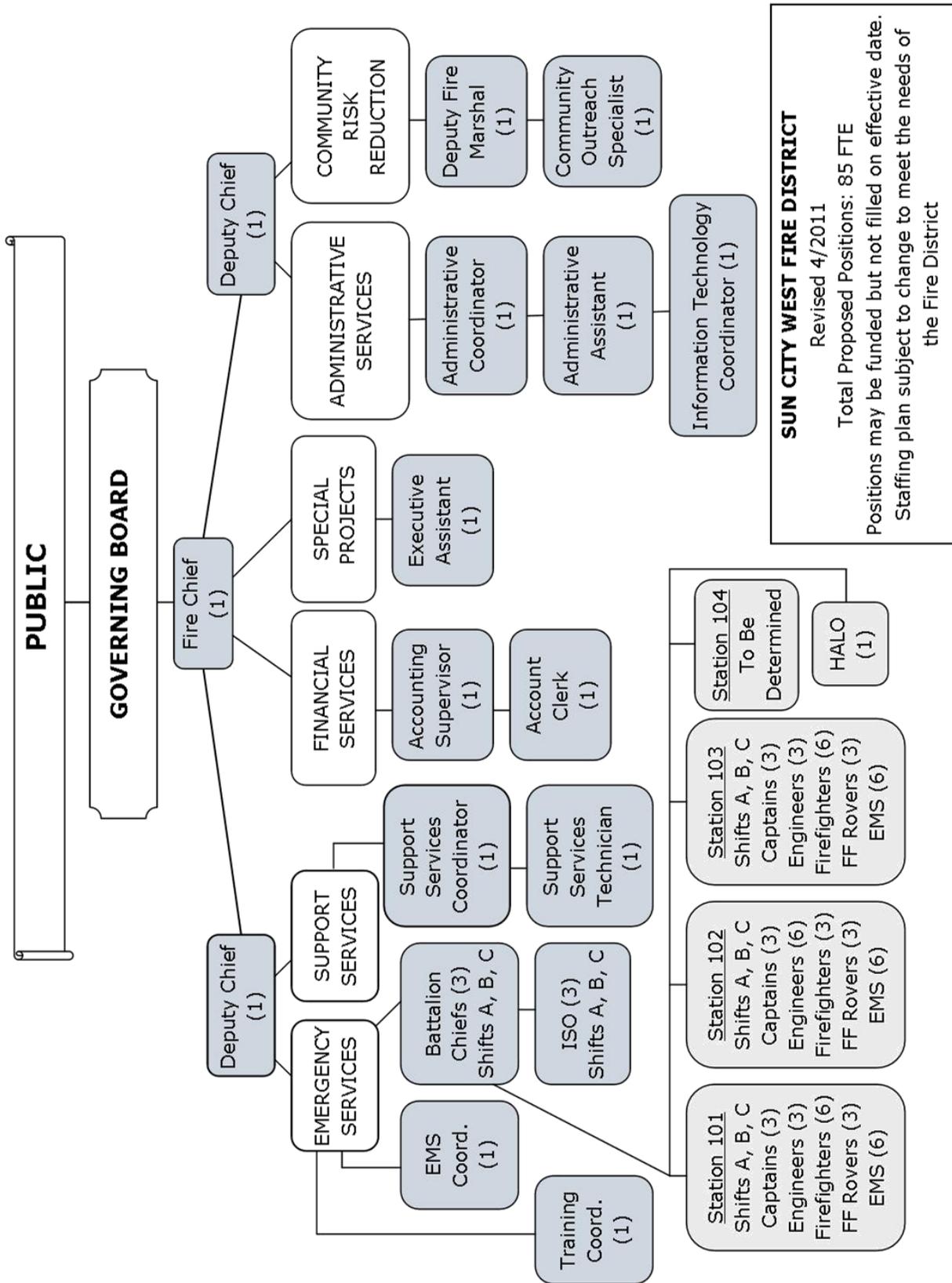
Executive Director

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District Organizational Chart



District Profile

The District operates under Arizona Revised Statutes (ARS) § Title 48, Chapter 5. The District is a community service organization funded through secondary assessed value property taxes. It is governed by a five member Board of Directors comprised of a Board Chairman, a Board Clerk and three Directors. The Board hires a Fire Chief/Administrator to manage the day-to-day operations of the District. The Fire Chief, in turn, hires other key managers and employees to support the District.

The community of Sun City West was established in 1978 as an unincorporated master planned area for active adults 55 years of age or older by the Del E. Webb Corporation. Sun City West was initially, and continues to be, comprised mainly of residents 55 and older. As an unincorporated community in Maricopa County, Sun City West property owners did not receive emergency services from either the county or a municipal based fire department. Prompted by a large house fire in 1981, a group of Sun City West residents formed a committee to address the specific needs of their community regarding emergency services. Subsequently, the Sun City West Fire District was formed.

On April 17, 1981, an election pursuant to ARS §48-261 was held for the purpose of creating the Sun City West Fire District. At a duly noticed meeting on May 12, 1981, the Maricopa County Board of Supervisors resolved that the Sun City West Fire District be organized and established based on the results of the April election. Shortly thereafter, the newly appointed Governing Board voted to hire the private “for profit” fire protection services provider known as Rural Metro Corporation to supply fire and emergency medical service for the District’s estimated 9,000 residents. The original contract for service included five firefighters and a mini-pumper. These original firefighters worked out of a temporary structure located near the intersection of Meeker and RH Johnson Boulevard.

The Fire District built and opened its first fire station in 1982 (Fire Station 101 – RH Johnson Boulevard and Camino Del Sol). An ambulance was then stationed in Sun City West and two fire pumpers were purchased.

The Fire District built and opened its second fire station in 1990 (Fire Station 102 - RH Johnson Boulevard and Stardust Boulevard). A second ambulance was added to the contract with Rural Metro and the total number of firefighters working within the Fire District increased to twenty. The estimated Sun City West population climbed to approximately 19,000 that year.

In 1992, the Del E. Webb Corporation expanded the community of Sun City West. This expansion added another two square miles and brought the total area protected by the Fire District to roughly twelve square miles. In 1993, the contract with Rural Metro was scheduled for renewal. Rural Metro proposed a ten year contract with no additional personnel or services to be added to support the recently expanded District boundaries. As a result, the Governing Board voted to end the contract and hire its own employees.

In July of 1994, the Sun City West Fire District began operations with its own personnel (most of the Rural Metro employees that had been working in the community remained during this transition). Computer aided dispatching services and recruit fire training was contracted through the Phoenix Fire Department and the Fire District established mutual-aid agreements with nearly all of the Phoenix Metropolitan area fire departments.

In 1998, the U.S. Department of Labor's Occupational Safety and Health Administration (OSHA) issued the "2 in 2 out" regulation which led to the addition of nine new firefighters and construction on the third Sun City West fire station began. By 1999, Fire Station 103 (135th Avenue and Deer Valley Road) was in operation and the population of the Fire District was well over 30,000.

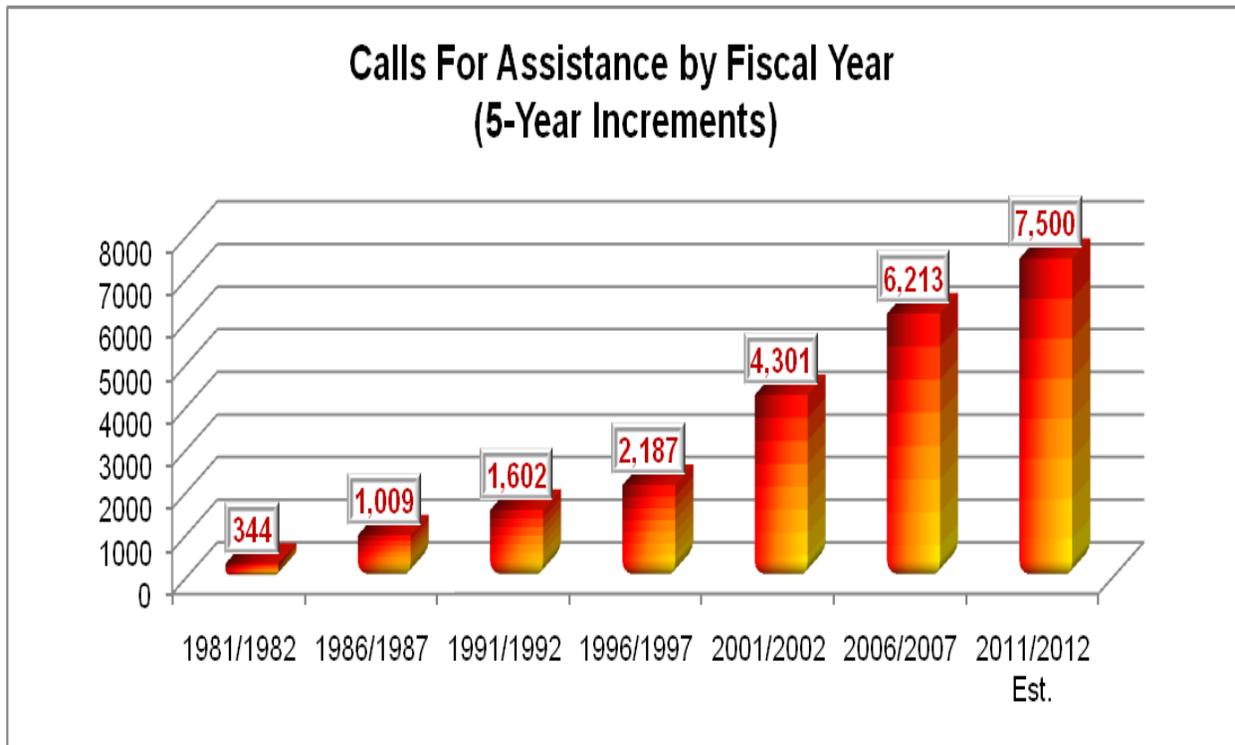
In September of 2001, the Fire District began the transition from sworn firefighters manning its ambulances to non-sworn EMS personnel. Over the course of the next several years, the District successfully transitioned permanent positions on District ambulances to non-sworn EMS personnel. The Fire District boundaries continued to expand and approximately ten square miles of state trust land and private property were annexed.

In 2003, the Fire District completed a comprehensive evaluation from the Insurance Services Office (ISO), and as a result, the District's rating was reduced from a Class 5/9 to a Class 2 Public Protection Classification, with class 1 being the best rating on a scale of 10. The District is one of only ten fire departments in the state rated as ISO Class 2 or better.

In 2010, the Fire District completed the process to annex an additional ten square miles of property to the north and east of the current District boundaries. The completion of this annexation increased the size of the District to roughly thirty-five square miles with a population of approximately 45,000 residents.

In August of 2010, the District was awarded one of the most prestigious certifications a fire protection agency can obtain. After several years of self-evaluation, adopting, following and refining policies and procedures to govern District operations, the District submitted to outside scrutiny and evaluation by a peer assessment team from the Commission on Fire Accreditation International of the Center for Public Safety excellence. As a result of this peer assessment, the Commission validated that the District has adhered to the relevant standards to become an internationally accredited fire agency. This status verifies that the District has met the standards for effectiveness and efficiency in responding to emergencies and makes the District among a select few entities nationally that have recognized the importance of aligning their programs with national industry best practices for providing fire and emergency services. There are fewer than 150 accredited agencies out of approximately 33,000 fire protection entities throughout the country and less than a dozen accredited agencies in Arizona.

Since the District's inception, one of the driving forces in determining the District's service requirements has been the ever-increasing calls for assistance received from the public. Each time a citizen calls 9-1-1 in need of assistance, the District's personnel are called to action and one or more pieces of apparatus respond to that call. As the District's boundaries have grown, the population has increased and the need for assistance has compounded. The following chart outlines the calls for assistance generated between the formation of the District in 1981 through June of 2012 (estimated for FY 2011/2012), in five year increments. This represents an average escalation in call volume of approximately 12.3% annually.



The main source of the District's funding is derived from an ad valorem tax on real property. The District levies the amount of property tax revenue necessary to fund its maintenance and operations within statutorily imposed limitations. The property tax system within the State of Arizona is a function of legislative mandate and the District is required to operate within a complex property tax arrangement. Arizona fire districts are prohibited from levying a tax that exceeds \$3.25 per \$100.00 of assessed property valuation. In addition, the 49th Arizona Legislature enacted a law to strictly limit the total amount of a fire district's year-over-year secondary property tax levy. This law establishes a secondary property tax levy limit cap of 8%, plus growth, over the previous year's total levy and further inhibits an Arizona fire district's ability to fund improvements and or additions to the emergency response system. Other Sun City West Fire District funding sources include ambulance transportation fees; various state, federal, and private grants; and fees generated from state wildland firefighting and other contracts. ARS §48-805 and §48-807 outline most of the Arizona fire district statutory funding processes and requirements.

Board Member Introduction

The Fire District of Sun City West is administered by a five member elected Board of Directors in accordance with Arizona Revised Statute §48-803. The District's Governing Board members serve without compensation and are elected to four year terms of office. The terms of three board members are scheduled to expire in November of 2012, and the remaining two board members' terms will expire in November 2014.

Some of the responsibilities of the Board of Directors include:

- Electing a Board Chairman and Clerk.
- Holding public meetings at least once each calendar month.
- Hiring a Fire Chief to manage the District's operations.
- Adopting an Annual Budget

The following paragraphs provide a short biography of each of the District's board members:



David Wilson, Board Chairman:

Elected: November 2004

Completed Terms: 1

Current Term Expires: November 2012

Board Chairman Wilson has lived in Sun City West since retiring in 1998. Previously, he was employed by the State of Colorado working as a Parole/Probation Officer for over twenty years. During the last several years of his career, he was the Administrative Officer in charge of federal funding for the Division of Youth Services, Department of Human Services. During Board Chairman Wilson's career, he served on numerous community boards and commissions. He takes pleasure in working with his fellow citizens to ensure responsive and cost effective management of governmental programs and resources.



William Hamel, Board Clerk:

Elected: November 2002

Completed Terms: 2

Current Term Expires: November 2014

Board Clerk Bill Hamel spent 1947-50 in the U.S. Navy as an electronics technician, then three years at Hill Air Force Base in Utah installing radar equipment in B-29 bombers. He then moved to California where he worked for thirty-five years for General Dynamics. Board Clerk Hamel held several positions with this company including Senior Missile Flight Test Engineer, Project Engineer, and Project Manager of Naval Weapons Stations Missile Test

Equipment. The Project Manager position included preparation, negotiation, and then managing many contracts/budgets involving several million dollars each. The last contract proposed and negotiated with the Navy Department of Defense was a \$58 million contract.

During Board Clerk Hamel's years at General Dynamics, he moved to a small desert community in California where he served as the Vice President of the Chamber of Commerce, was a volunteer firefighter, served three terms as honorary mayor, and was selected to serve on the San Bernadino Urban Development Advisory Board. In this position, Board Clerk Hamel was able to secure a federal grant for a community center and a "fast" response fire engine for the local fire department. Board Clerk Hamel also served on the California Volunteer Draft Board. He moved to Sun City West in June of 1990 and was initially elected to the Fire Board in 2002.



Dusty Rhodes, Board Member:

Elected: November 2004

Completed Terms: 1

Current Term Expires: November 2012

Board Member Rhodes' Fire Board campaign theme was "Give Me Your Trust and I Won't Disappoint You." With this theme, he was first elected as a director to the Fire Board in 2004. Since arriving in Sun City West in 1994, Board Member Rhodes has served the community with honesty and integrity in many capacities. He was president of the Volunteer Bureau, served on the Interfaith Community Care Board, and was a Board Member and

Officer of PORA for eight years. As Membership Chairman for PORA, Board Member Rhodes personally increased PORA's membership by 2,000 members. Board Member Rhodes feels the Fire Board offers him the opportunity to continue to serve the taxpayers of the community with the same integrity.

Board Member Rhodes' background is working with the public in his positions in sales, management, and purchasing for thirty-eight years. He has served on condominium boards for twenty years and was head of the Illinois Condo Association for two years. In Buffalo Grove, Illinois, he was a member of the Planning Commission and when he moved from there, he received an award for outstanding service to the community.

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Jack Meyer, Board Member:

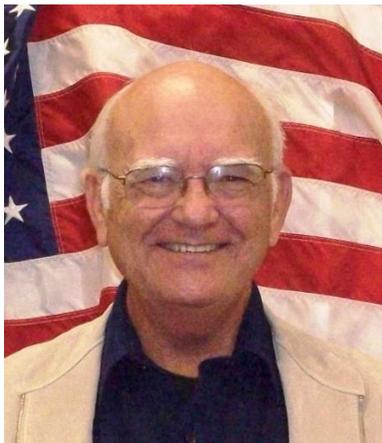
Elected: November 2006

Completed Terms: 1

Current Term Expires: November 2014

Board Member Jack Meyer was born and raised in Michigan. He attended Delta College and Saginaw Valley State University in Michigan and later the University of Maryland (USAFI) pursuing a business curriculum. He spent four years active duty in the United States Air Force serving in the elite Strategic Air Command (SAC) under the famed General Curtis LaMay. He also served with Colonel Paul Tibbets, the famed pilot of the Enola Gay who is credited with ending World War II when he flew the B-29 which dropped the bomb on Hiroshima. Board Member Meyer was also an avid basketball player and played on the opposing team of the Harlem Globetrotters basketball show. He was a member of the Saginaw Fire Department in Saginaw, Michigan until he joined the General Motors Corporation Plant Protection Department where he worked until his retirement in 1998. Plant protection was the arm of the General Motors Corporation that supplied the in-house emergency response for fire and medical services, as well as protection of the employees and the corporate owned property of General Motors.

Jack and his wife, Marcia, had been coming to Sun City West annually and were renting until his retirement. In 1999 they purchased their home in Sun City West, returned to Michigan, sold their home there, and have been year-round residents since.



Dennis Lake, Board Member:

Elected: November 2008

Completed Terms: 0

Current Term Expires: November 2012

Board Member Lake attended District Board workshops and meetings as a member of the public for over a year before deciding to run for a seat on the Board. He was sworn in on November 26, 2008 as the newest member of the Board. Board Member Lake believes that the Tuesday Workshops are very valuable for anyone interested in what is going on in the District. He vows to do his best to be a strong, independent voice on the Board in order to represent the residents of Sun City West effectively.

Board Member Lake was born in Bowling Green, Ohio in 1940. He moved to San Diego, California in 1953 where he graduated from San Diego State University in 1975, majoring in Philosophy with minors in English, Political Science, and Public Administration. He worked as a Janitorial Contract Specialist for the County of San Diego for more than 30 years. He became a full time resident of Sun City West in 2003.

He was a Member of Toastmasters International for ten years, the San Diego County and Imperial County District 5 New Club Chairman and Organizational Lieutenant Governor. He retired as a United States Soccer Federation Soccer Referee after sixteen years, during which time he also served as the Assignment Secretary for eight years. He also has previously held the position of President of the Sun City West Men's Social Club in 2009.

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Budget Process

The Sun City West Fire District's budget process is very detailed and relies on numerous participants to generate this vital document. Participants include the Governing Board, Fire Chief, administrative staff, division and program managers, partner agencies such as the Phoenix Fire Regional Dispatch Center, state and local governmental agencies [i.e., the Arizona Property Tax Oversight Commission (PTOC) and the Maricopa County Assessor's Office] and District residents and property owners. Additionally, the budget process encompasses the service goals outlined in the Strategic Plan. The budget may also be influenced by capital outlays approved in the Capital Improvement Plan (CIP), which is contained in the District's Business Plan. The Strategic Plan is revised and approved every five years. The Business Plan is revised and approved annually. Together with the Annual Budget and Operational Plan, these three instruments comprise the District's Core Documents. The Strategic and Business Plan documents are approved by the Board prior to budget adoption. These documents are important components in the ongoing management of District resources to accomplish its designated service goals.

The Fiscal Year (FY) 2011/2012 budget development process includes approximately ten public meetings scheduled with the Governing Board, staff, and residents to conduct a detailed review of recommended line-item expenditures and proposed capital outlay expenditures. These meetings take place between January and June. After completing the public budget hearings, the Board publishes and adopts a final budget and tax levy consistent with Arizona state law. As depicted on the District's Budget Development Schedule, the FY 2011/2012 final budget adoption is planned for June 21, 2011.

The annual budget process began with a Budget Process Overview in the January Board Workshop. During that time, the Governing Board outlined its expectations and identified critical priorities for the coming fiscal year. The Board uses this opportunity to provide key policy directives and goals for consideration during the budget process. After the January workshop, the Board approves the Budget Development Schedule and the budget process officially begins.

The Financial Services Section disseminates the Budget Development Schedule to all stakeholders in the budget process with direction from the Board and Fire Chief regarding expectations and critical priorities as previously identified. Budget submission deadlines are reinforced and guidelines provided for managers to use in the preparation of base and supplemental budget requests. Division and program managers develop their budgets at the line-item level with input from the Accounting Supervisor and from employees within their respective sections. Upon submission, the proposed line-item budgets are reviewed by the Fire Chief, the Accounting Supervisor, and the responsible individual. If necessary, modifications are made, reviewed, and finalized in the line-item budgets before inclusion in the draft tentative budget. Throughout this process, the Board is updated monthly on the budget's progress and informed of any items that may have a significant variance over the previous year's budget. Additional direction may be issued by the Governing Board regarding these issues at any time.

Upon compilation of the tentative budget, the Annual Budget and Operational Plan is presented in detail by District staff to the Board and the public over the course of one to four days of public workshops during the last week of April. During these hearings, each responsible division and program manager presents their proposed line-item budgets in detail. The Board and public attendees are encouraged to ask questions and discuss the tentative budget and its contribution to supporting the District's established service levels. Upon completion of this thorough examination of the tentative budget, any modifications are assimilated into the document for finalization.

Once final changes are integrated into the tentative budget and prior to adoption, the proposed budget is also made available to the general public. This requires a public notice to be published in a newspaper of general circulation, and posted in three public locations at least thirty days prior to the public hearing held at a meeting called by the Governing Board for adoption. Once adopted, copies of the budget can be found on the District's website (www.scwfire.org) and at the RH Johnson Library. Printed copies are also made available to members of the public upon written request to the District. Following the public hearing, the Governing Board adopts the Annual Budget and Operational Plan for the ensuing fiscal year. The adoption of the budget sets the maximum appropriation for the fiscal year. The adopted budget is then submitted to the Maricopa County Board of Supervisors, the Maricopa County Assessor, and the Maricopa County Treasurer in accordance with state law. The Board of Supervisors' office works with the Assessor's office to create the tax levy and generate the millage rate to be used for the new fiscal year. Amendments to the operating budget which do not increase the bottom line appropriation for the overall operating budget can be processed in accordance with District policy. Revenues received over expenditures resulting in general fund savings from one budget year to the next, by Board policy, are transferred into the Capital Improvement Plan and kept in reserve for future capital projects.

The FY 2011/2012 Annual Budget and Operational Plan approved Budget Development Schedule is presented on the following pages:

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Fiscal Year 2011/2012 Budget Development Schedule



Thursday, October 21, 2010

- Adopted Tax Year 2011 Boundary Changes (Annexation: Resolution # 10-1021-7 Parcel #:503-53-984, Resolution # 10-1021-8 Parcel #'s:503-53-034K, 503-53-034L, 503-53-034M, 503-53-034N). Submitted to the Maricopa County Assessor's Office for Valuation & Certification. Officially became part of the District November 21, 2010

Friday, October 29, 2010

- Obtained an extension of the November 1st, 2010 deadline for Tax Year 2011 Boundary Changes & Annexations from the Maricopa County Assessor's Office (Deadline February 15, 2011).

Tuesday, November 30, 2010

- Received DRAFT Preliminary Secondary Levy Limit Worksheet from the Arizona Property Tax Oversight Committee (PTOC) for Fiscal Year 2011/2012 (\$11,946,977)

Friday, January 14, 2011

- Official deadline to file Tax Year 2011 Boundary Changes & Annexations with Maricopa County Assessor's Office for inclusion in the FY 2011/2012 Secondary Levy Limit Worksheet issued by the Property Tax Oversight Commission to be issued February 10th, 2011

Tuesday, January 18, 2011 – Regular Board Workshop (9 A.M. – Fire Administration)

- Fiscal Year 2011/2012 Operational Budget & Capital Improvement Plan Process Overview
- Board of Director's initial budget process requests

Monday, January 24, 2011

- Report Certified Tax Year 2011 Boundary Changes & Annexations to the Property Tax Oversight Commission for inclusion in the Secondary Levy Limit Worksheet (Deadline February 10th, 2011)

Thursday, February 10, 2011

- Obtain Finalized Secondary Levy Limit Worksheet from Maricopa County Assessor's Office and the Arizona Property Tax Oversight Committee

Tuesday, March 1, 2011

- Fire District Division Manager & Section Head Budget Request Deadline

Tuesday, March 15, 2011 – Regular Board Workshop (9 A.M. – Fire Administration)

- Fiscal Year 2011/2012 Operational Budget & Capital Improvement Plan Process Update

Tuesday, April 19, 2011 – Regular Board Workshop (9 A.M. – Fire Administration)

- Draft Operational Budget & Capital Improvement Plan Progress Update

Tuesday, April 26, 2011 – SPECIAL Board Meeting (9 A.M. – Fire Administration)

- Fiscal Year 2010/2011 Budget Review Year-End Projections - Accounting Supervisor Poland
- Fiscal Year 2011/2012 Draft Budget Presentations

Wednesday, April 27, 2011 – SPECIAL Board Meeting (9 A.M. – Fire Administration)

- Fiscal Year 2011/2012 Draft Budget Presentations Continued (*If Needed*)

Thursday, April 28, 2011 – SPECIAL Board Meeting (9:00 A.M. – Fire Administration)

- Fiscal Year 2011/2012 Draft Budget Presentations Continued (*If Needed*)

Tuesday, May 17, 2011 – SPECIAL Board Meeting (9:00 A.M. – Fire Administration)

- Fiscal Year 2011/2012 Public Operational Budget Hearing
- Fire Board Proposed Fiscal Year 2011/2012 Operational Budget & Capital Improvement Plan Approval for Public Posting (Saturday, May 21st through Monday, June 20th, 2011)



Fiscal Year 2011/2012 Budget Development Schedule



Tuesday, June 14, 2011 – Regular Board Workshop (9:00 A.M. – Fire Administration)

- Fiscal Year 2011/2012 Final Operational Budget & Capital Improvement Plan Review

Tuesday, June 21, 2011 – SPECIAL Board Meeting (9:00 A.M. – Fire Administration)

- Fiscal Year 2011/2012 Public Operational Budget Hearing
- Fire Board Final Fiscal Year 2011/2012 Operational Budget & Capital Improvement Plan Adoption

Wednesday, June 22, 2011

- Submit Certified Adopted Fiscal Year 2011/2012 Operational Budget and Affidavit of Publication to Maricopa County's Board of Supervisor's and Department of Finance (Deadline August 1st, 2011)

Friday, July 1, 2011

- Begin Operations under the Adopted Fiscal Year 2011/2012 Operational Budget & Capital Improvement Plan

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Budget Introduction

The Fire District of Sun City West is proud to present the FY 2011/2012 Annual Budget and Operational Plan document. This document is anticipated to provide the public with in depth information regarding the District's annual revenues and expenditures over the course of the next fiscal year. The document is structured in accordance with recommendations of the Government Finance Officers Association (GFOA) Distinguished Budget Awards Program which are designed to provide the layperson with a broad view of the contents included in the budget, its processes, issues and anticipated results.

The Government Finance Officers Association of the United States and Canada (GFOA) established the Distinguished Budget Presentation Awards Program (Budget Awards Program) in 1984 to encourage and assist state and local governments in preparing documents of the very highest quality that reflect both the guidelines established by the National Advisory Council on State and Local Budgeting and the GFOA's best practices on budgeting and then to recognize individual governments that succeed in achieving that goal.

The GFOA presented a Distinguished Budget Presentation Award to the District for the FY 2010/2011 Annual Budget and Operational Plan. This award is valid for a period of one year. The District believes its FY 2011/2012 Annual Budget and Operational Plan will continue to conform to program requirements, and will be submitting it to the GFOA to determine its eligibility for the annual award.

The Fiscal Year (FY) 2011/2012 Budget and Operational Plan represents the Fire District's projections for expected expenditures and operations for the coming fiscal year. It also identifies the means by which those expenditures will be paid. The annual Budget and Operational Plan represents the most significant policy document that the Fire District Governing Board creates each year. This document sets the work plan and the service levels for the operating divisions of the District. Many of the outlined goals and objectives are based on the District's new Business Plan which was developed and adopted prior to the construction of the Budget and Operational Plan. The Budget and Operational Plan is balanced and typifies the District's ongoing commitment to contain expenditures to necessary and reasonable levels.

The annual budgeting and operational activities of the Fire District are determined with the ultimate goal of accomplishing the Fire District's mission which is:

“As a team of highly trained and dedicated professionals, it is our mission to provide the highest standard of service to all those who may seek our help. We are a service provider and we stand ready to provide fire suppression, fire prevention and education, rescue services and emergency medical care, and transport. We will faithfully provide these vital services, promptly and safely, to any person that resides in, works in, or visits the Fire District. As a family of individuals committed to serving

others, we will always provide for the welfare of our personnel through a healthy and rewarding work environment. We are dedicated to respect, integrity, compassion, and leadership amongst ourselves so that we may proudly serve others.”

The District currently uses the zero-based, line-item form of budgeting. In this type of budget, expenditure types are identified and grouped in general categories. Within the categories, specific line items are detailed. Each line item begins with a zero-based budget and expenditures are detailed to determine the required funding necessary to operate during the coming fiscal year. The District’s budgeting system is linked directly to the District’s computerized accounting system.

This document is developed to serve as the financial / operational plan required to accomplish the goals and objectives for the ensuing year. Performance measurements have been integrated into the various sections. These performance objectives have been created to highlight certain annual priorities and goals for each program and the organization as a whole.

Financial Assessment:

The Fire District has an important responsibility to its citizens to carefully account for public funds, to manage its finances wisely, and to plan for the adequate funding of services desired by the public. In these times of economic uncertainty and limited or negative growth in the District’s tax base, the District needs to ensure that it is capable of adequately funding and providing those core services desired by the community. Ultimately, the District’s reputation and success will depend on the public’s awareness and acceptance of the management and delivery of these services.

Financial Goals

The development of guidelines for the District’s overall fiscal planning and management should foster and support the continued financial strength and stability of the Sun City West Fire District and its financial goals. Through the establishment of sound financial policies, the District seeks to:

- Deliver quality services on an affordable, efficient and cost-effective basis providing full value for each tax dollar.
- Maintain an adequate financial base to sustain the current level of fire and emergency medical response.
- Have the ability to withstand local and regional economic fluctuations and respond to changes in funding affecting District operations.

Financial Policies:

Establishing and following sound fiscal policies enhances the District’s financial health as well as its image and credibility with its residents and the public in general. The

Board is charged with establishing financial policies and the staff is responsible for implementing those policies in the day-to-day management of District finances. The financial vision of the District is also an integral component of the District's Strategic and Business Plans.

The District's budget is closely aligned with the financial policies established by the Governing Board. These policies serve to strengthen the current and long-term financial health of the organization and are visited, at a minimum, on an annual basis to ensure they represent the most current and realistic framework for decision-making. A balanced budget is the foundation of the District's financial policies. The Board and District staff members define a balanced budget as one that matches required expenditures necessary to provide the District's established service goals with available, sustainable resources. The Board and the staff spend an extensive period of time detailing expenditures and identifying and verifying the revenue sources that are available to support those expenditures. As revenues fluctuate, so must expenditures. However, the Board and staff must strive to ensure that these fluctuations do not negatively impact emergency service levels.

Fund Balance: During the beginning months of each fiscal year, generally between July and October, the District receives little or no property tax revenues. This is a direct result of the State of Arizona's property tax billing and collection cycle. Property taxes are levied and billed to taxpayers annually and payments are due in two installments. The first installment is due during October and the balance is due in April of each fiscal year. The Board and administrative staff are charged with determining, on a monthly basis during these times of revenue shortfalls, if the District should borrow from the capital projects fund or make use of Register Warrants obtained through the Maricopa County Treasurer's Office. A combination of both options has been used in recent years. During times of low earnings interest rates, it is generally more beneficial for the District to use the capital projects fund balance than to pay the interest costs associated with registered warrants. During times where the District can invest funds to earn higher interest rates, short-term borrowing (Registered Warrants) usually results in lower costs when compared against the high interest revenues produced from the investment of funds.

Capital Improvement Plan: The purpose of the Capital Improvement Plan (CIP) is to systematically identify, plan, schedule, finance, track capital assets, and to monitor capital projects to ensure cost effectiveness as well as conformance with established policies and priorities. The CIP is a component of the District's Business Plan and is reviewed and updated annually, at a minimum. The CIP outlines direct costs associated with recommended capital projects and asset purchases. Required ongoing operational costs are identified and presented as a part of each project allowing the Board the opportunity to determine the feasibility of each project. Funding sources for each project or purchase are acknowledged within the plan.

Long Range Forecasting: The District has utilized consultants, data from the Maricopa County Assessors' Office and internal studies to assist in the development of long range

financial forecasting systems. District staff reviews and updates these programs based on identified legislative and economic factors and their potential impact on the District's financial and strategic goals for the future. The District's Business Plan is a five-year, long range forecast of planned service levels for the District. The Business Plan is reviewed and revised annually and is based on the broad based vision of the District's Strategic Plan. During the annual revision, input from financial forecasting systems will be a vital tool used to help shape and define the District's vision for the future, to identify critical issues, and to seek out revenue sources to support services and outline future service priorities.

Fiscal Planning and Budgeting: The Fire District's policy concerning fiscal planning and budgeting is to govern the preparation, monitor the expenditures, and analyze the effectiveness of the Annual Budget and Operational Plan. Part of this process includes incorporating a long-term perspective and a system of identifying available and sustainable resources and allocating those resources among competing purposes. The District presents an annual operating budget that is balanced, meaning that planned expenditures are equal to or less than current revenues and ongoing expenditures will only be paid for with ongoing revenues. The District will not postpone expenditures, use one-time (non-recurring) revenue sources to fund ongoing (recurring) uses, or use external borrowing for operational requirements. The District identifies and allocates funding resources among various service needs. It is increasingly important to incorporate a long-term perspective and to monitor the performance of programs competing to receive funding.

The District's audited financial statements are presented using the modified accrual basis of reporting; therefore, District budgeting is also done on a modified accrual basis. Under the modified accrual basis, expenditures are recorded when goods or services are actually received rather than when the invoices are paid. The exception to this general rule is interest on general long-term debt which is recognized when due. Revenues are recorded in the accounting period in which they become measurable and available.

Expenditure Control: The District has established policies which govern the compliance of the legally adopted budget by instituting processes for setting and modifying appropriation and expenditure limits and safeguarding the organization from possible "overspending". The operating budget is controlled at the organizational level but the Capital Improvement Plan is controlled at the project level.

Revenues: District policy encourages diversification of the District's revenue base and regular monitoring of all revenues. The ultimate goal of the District is to ease the burden to District taxpayers while maintaining established services. The District estimates its annual revenues utilizing an objective, analytical process whenever possible and makes every effort to forecast revenues by individual category for subsequent years. This process is completed annually.

Grants: District policies establish under what conditions grants will be pursued and with

what administrative or legislative approvals. The District shall apply for those grants that are consistent with the objectives and needs of the District. The potential for incurring ongoing costs, including the support for grant-funded positions from local revenues, will be considered prior to applying for a grant. The District shall attempt to recover all allowable costs, direct and indirect, associated with the administration and implementation of programs funded through grants. The District may waive or reduce indirect costs if doing so will significantly increase the effectiveness of the grant. All grant submittals shall be reviewed for their cash requirements, their potential impact on the operating budget, and the extent to which they meet the District's objectives.

User Fee Cost Recovery and Indirect Cost Allocations: District policy encourages full cost recovery of most publically provided services that benefit specific individuals or organizations and the utilization of user fees to augment general tax revenues. The District has established user fees and charges for certain services provided to users receiving a specific benefit. Examples of these services fees include Cardio Pulmonary Resuscitation (CPR), Heart Saver Adult/First Aid Training, and Heart Saver Automated External Defibrillator (AED) Training Certification classes and Plan Review and Permit issuances provided by the District. Fees and charges are established by specific action of the Governing Board in an attempt to recover the full cost of service. User fees are reviewed on a regular basis to calculate their full cost recovery levels, to compare them to the current fee structure, and to recommend adjustments where necessary. The District's current fee schedule was adopted under Board Resolution # 07-1115-5 on November 15, 2007. During FY 2011/2012, the District will again review and revise the fee schedule where appropriate.

Debt Management: The District strives to adhere to a "pay as you go" system for financing its future capital needs. However, the issuance of debt can be a valuable tool in achieving some of the District's strategic goals in regards to capital expansion or planning ahead for capital programs. Additionally, attractive interest rates for borrowing may make this option more viable.

The District confines long term borrowing to capital improvements or projects that cannot be financed from current revenues and to those capital projects with anticipated longevity. The District will not use long-term debt to fund current operations and will first attempt "pay as you go" financing and/or the use of operating funds when applicable. If the District funds capital projects using debt proceeds, it establishes a maturity date that does not exceed the useful life of the project or asset funded by those proceeds.

The District's Debt Management policy sets parameters for when the District will take on debt and the associated limitations. Arizona State Statutes (Arizona Revised Statute §48-806) establish limits on the total amount of General Obligation (GO) Bond and Certificate of Participation (COP) indebtedness for fire districts. This limit is set at the lesser of six percent of secondary assessed taxable property value of the District in the year of issuance or the maximum voter approved bond offering amount. The District has not yet pursued GO bond or COP, financing although it may at some point in the future. The chart below outlines the District's statutory debt limits for the past five fiscal years.

Outstanding Debt and Debt Limitations

Fiscal Year Ended June 30,	Secondary Net Assessed Valuation	General Obligation Bonds			Lease/Purchase Debt	
		Legal Limit for Bonds	Outstanding Bond Debt	Percent of Legal Limit Available	Outstanding Lease/Purchase Debt	Percent of Bond Legal Limit
2011	\$388,861,955	\$23,331,717	\$ -	100.0%	\$ 5,650,778	24.2%
2010	455,991,330	27,359,480	-	100.0%	6,092,635	22.3%
2009	505,223,198	30,313,392	-	100.0%	6,437,170	21.2%
2008	458,677,185	27,520,631	-	100.0%	6,756,371	24.6%
2007	293,512,421	17,610,745	-	100.0%	3,478,118	19.7%

Because the District has not previously pursued bond financing, it has not been evaluated by independent bond rating agencies. The District has established financial policies that will help position the organization to achieve a favorable rating if and when the time comes to pursue this option, and evaluation is subsequently required.

The District does have another form of debt financing available for use in securing larger capital purchases. Lease/Purchase Agreements are an asset secured loan held by a single investor, usually a bank. This form of debt is backed by the full faith and credit of the District and leasehold interests are granted to the bank. The bank, in turn, leases the property back to the District under long-term agreements. Under these agreements, the District is obligated to make lease payments to the bank on a pre-determined schedule until the debt is satisfied. Once the obligations are satisfied, all rights, title and interest in the assets are transferred back to the District. Should the District default on the Lease/Purchase Agreement, the bank may terminate the leases, take possession of, and liquidate, the assets pledged under the agreements and the District is then relieved of any subsequent obligation to the bank.

Lease/Purchase Agreements are not subject to any statutory legal debt limitations. However, debt service payments are required to be paid from the primary tax levy. Since this form of capital funding is paid from the primary tax levy, it is restricted by the District's taxable levy limit. This may prevent the District from entering into agreements for future capital projects that are not currently part of the Capital Projects Replacement Schedule.

Current outstanding Lease/Purchase debt obligations are limited to \$5,650,778 payable to DeLage Landon with a maturity date of June 2023. The FY 2011/2012 operating budget identifies \$573,026 in principal and interest payments for the before mentioned obligation. The schedule on the following page outlines the required debt service payments for the next five fiscal years.

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**Outstanding Debt Amortization Schedule by Fiscal Year
For the Fiscal Years of 2011/2012 through 2015/2016**

Fiscal Year Ended June 30,	<u>DeLage Landon Lease/Purchase Debt</u>			Outstanding Debt at Fiscal Year End
	Principal	Interest	Total FY Debt Service Requirements	
2012	\$ 333,590	\$ 239,436	\$ 573,026	\$ 5,317,188
2013	348,088	224,937	573,025	\$ 4,969,100
2014	407,282	209,340	616,622	\$ 4,561,818
2015	424,982	191,638	616,620	\$ 4,136,836
2016	443,454	173,168	616,622	\$ 3,693,382

Accounting, Auditing, and Financial Reporting: District policy dictates the system of internal accounting and internal and external financial reporting that will be adhered to as the District conducts its financial transactions. The District will comply with accounting principles generally accepted in the United States in its accounting and financial reporting, as contained in the following publications:

- Governmental Accounting, Auditing, and Financial Reporting (GAAFR), issued by the Government Finance Officers Association (GFOA) of the United States and Canada.
- Codification of Governmental Accounting and Financial Reporting Standards, issued by the Governmental Accounting Standards Board (GASB).
- Pronouncements of the Financial Accounting Standards Board, (FASB).

Monthly financial reports are provided for the Governing Board, Fire Chief and all District division and program managers. The reports summarize the District's financial activity comparing actual revenues and expenditures with budgeted amounts. A system of internal accounting controls and procedures is maintained to provide reasonable assurance of the safeguarding of assets and proper recording of financial transactions. A comprehensive financial audit is performed annually by an independent public accounting firm with the objective of expressing an opinion on the District's financial statements and their validity. The District annually reviews federal grant proceeds to determine if an additional comprehensive financial audit of federal grant programs according to the Single Audit and the Federal Office of Management and Budget (OMB) Circular A-133 is required.

Cash Management and Investing: The Maricopa County Treasurer serves as the District's fiduciary agent and is responsible for its management of tax revenues. Maricopa County collects real property taxes and Fire District Assistance Taxes (FDAT) on behalf of the District and the District recognizes tax receipts after notification by the Maricopa County Treasurer. Tax revenues are deposited by the Maricopa County Treasurer and invested in a pooled account called the Local Government Investment Pool (LGIP). The District maintains a Secondary General Fund account for fees for services collected, a Payroll Fund account for payroll processing, an Ambulance Fund

account for ambulance transport fees collected, and the Capital Projects Fund account at a locally accessible banking institution. The District participates in Automated Clearing House (ACH) and check fraud protection, as well as collateralization of its accounts and Federal Deposit Insurance Corporation (FDIC) insurance protection through its financial institutions.

Capital Expenditures (Fixed Assets): The Governing Board has adopted a District Property Stewardship and Capitalization Policy in accordance with parameters as outlined in Governmental Accounting, Auditing and Financial Reporting Manual (GAAFR). This policy establishes a capitalization threshold of \$5,000 and a minimum useful life of more than one year for all fixed assets. All fixed assets are purchased through Capital Improvement Plan (CIP) funding. Typically, fixed assets are replacement items as well as new capital items necessary to provide personnel with the tools essential to support the District's mission, vision, and values in the most efficient and productive manner. All assets are depreciated utilizing the straight-line method and based on useful lives as outlined in the capitalization policy. Fixed assets purchases are reviewed annually based on need and in correlation with the District's Business Plan and the Aging/Replacement Schedule contained in the CIP.

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Fund Overviews

The Sun City West Fire District currently uses three major fund groups: the General Fund, the Special Revenue Fund, and the Capital Projects Fund. The General Fund includes required annual revenues and expenditures. The Special Revenue Fund includes annual revenues and expenditures associated with special projects. The Capital Projects Fund is a “savings” account for the Capital Improvement Plan (CIP) which allows for the funding of future capital improvements.

Each fund is considered to be a separate accounting entity which may or may not carry a fund balance. Fund balance is generally defined as the difference between a fund’s assets and liabilities. The operations of each fund are accounted for by providing a separate set of self-balancing accounts that comprise its assets, liabilities, fund equity, revenues and expenditures as appropriate. The District reports each of these funds as major governmental funds in its financial statements. All District audited financial statements are presented using the modified accrual basis of reporting.

The chart below shows the estimated balances of each of the District’s major funds at June 30, 2011, and the estimated revenues, expenditures and fund balance over the course of the coming fiscal year. More comprehensive information regarding each of the District’s funds is outlined in the following paragraphs.

Fiscal Year 2011/2012 Fund Balance Summary				
Fund	June 30, 2011 Estimated Fund Balance	FY 2011/2012 Estimated Revenues	FY 2011/2012 Estimated Expenditures	June 30, 2012 Estimated Fund Balance
General Fund	\$ -	\$ 11,618,816	\$ (11,618,816)	\$ -
Special Revenues Fund	\$ 34,287	\$ 5,000	\$ (2,500)	\$ 36,787
Capital Projects Fund	\$ 3,978,096	\$ 487,946	\$ (465,000)	\$ 4,001,042
Total All Funds:	\$ 4,012,383	\$ 12,111,762	\$ (12,086,316)	\$ 4,037,829

General Fund:

The General Fund, or working fund, outlines, in detail, anticipated maintenance and operational revenues and expenditures for FY 2011/2012. This fund’s activities represent the true financial plan for the Sun City West Fire District during the fiscal year. At fiscal year end, this fund does not maintain a fund balance in accordance with Arizona Revised Statutes §48-807-L. Any revenues over expenditures at June 30 are transferred into the District’s Capital Projects Fund in accordance with District policy and are used to support future capital needs.

Special Revenue Fund:

The Special Revenue Fund manages designated reserved funding for ongoing, usually self-sustaining specialized programs and includes the District’s Fire Corps Program, Child Safety Car Seat lending program, paramedic training grant program, and any other smaller special purpose grants. This is a new fund which was initiated during FY

2010/2011. This account will carry a fund balance from year-to-year, as any revenues received for a specific purpose must only be expended for that purpose. These programs may be extended from year to year. The Special Revenue Fund revenues and expenditures depicted in the above chart are estimated for FY 2011/2012 as revenues received are generally donated and expenditures only occur as necessary to support the ongoing programs. The accountability of these funds follows the same basic documentation and approval principles as used to support the District's General Fund transactions.

Capital Projects Fund:

The Capital Projects Fund is, in effect, the District's "savings" account and was established through Board action to support the Capital Improvement Plan (CIP) and is designed to fund future capital purchases. Revenue sources for this fund include transfers from the General Fund as allocated through the Capital Projects Funding Account, Loan Proceeds, and interest earnings. All fiscal year end revenues over expenditures, including unutilized contingency funds, are transferred directly into the Capital Improvement Plan in accordance with District policies. This account will carry a fund balance from year to year, as capital projects may encompass many years.

The Fire District publishes a Capital Improvement Plan as a section within the five-year Business Plan document that outlines specific projected capital expenditures. Capital expenditures, although recommended, are approved on an individual basis by the Board of Directors. The District's Business Plan is presented to the Board of Directors for adoption in April of each year. The CIP section of this document is recognized as a guide for recommended capital asset purchases and replacements only. At the appropriate time, each of the suggested capital asset purchases and/or replacements is presented to the Board of Directors for review, discussion and possible action. The Board provides guidance regarding each asset purchase and authorizes each transaction individually.

However, due to the nature of capital expenditures and their potential impact on future general fund maintenance and operations expenditures, the FY 2011/2012 recommended capital projects are discussed in the following paragraphs.

<i>FY 2011/2012 CIP Projects Expenditure Details</i>		
CIP Project Description	Project Expenditures	Funding Source
[TBD] E104 Pumper Addition	\$ 450,000	Capital Projects Fund Balance
Thermal Imaging Camera Replacement	\$ 7,000	Capital Projects Fund Balance
Copy Machine Replacement	\$ 8,000	Capital Projects Fund Balance
Total Capital Improvement Revenues:	\$ 465,000	

Type III Pumper Addition: Some of the newer response areas within the District contain rural and undeveloped roadways. As a result of increased calls for service in this frontier zone, it is necessary for the District to purchase apparatus that can effectively maneuver in these areas.

The proposed purchase of a Type III Pumper apparatus will satisfy many response requirements in the newly annexed areas of the District and also provide a potential for additional wildland revenues. This Type III Pumper could also be included in the District's Arizona State Land Department contract and be available for deployment to out of District wildland assignments. After significant research regarding this issue, District staff members have determined that the addition of this pumper to the apparatus fleet and onto the State Land contract for wildland deployment would result in accomplishing response needs as well as potentially recoup costs associated with the initial purchase of the apparatus.

The design and construction of a Type III Pumper apparatus can take can sometimes exceed eighteen months. Therefore, general fund expenditures associated with the addition of a Type III Pumper apparatus may not impact the FY 2011/2012 budget. Future on-going expenditures would include: annual liability insurance, general maintenance, tire and battery replacements, fuel usage and preventative maintenance expenditures. These expenditures will be addressed in the appropriate budgetary accounts for this as well as future budget periods.

Thermal Imaging Camera Replacement: District staff is requesting the purchase of a Thermal Imaging Camera (TIC) to replace one of the cameras purchased in 2001. The District currently has five TIC's in operation, assigned to the following apparatus: BC-101, E-101, L-102, LT-102, and E-103. All of the current cameras were purchased over the course of several years beginning in 2001 through 2006. Three of the oldest cameras were purchased in 2001 and it is the District's CIP plan to begin replacing these TIC's during the next few years. These cameras are used during search and rescue and fire overhaul operations. Due to the age and older technology of the current cameras, they are becoming less effective to maintain and operate. Therefore it is recommended that they be replaced.

Upon replacement, ongoing general fund expenditures are minimal and are only necessary in the event of repair once the TIC has been purchased and placed into service. Therefore, no additional considerations have been outlined in the FY 2011/2012 budget accounts.

Copy Machine Replacement: Per the Capital Improvement Plan replacement schedule, District staff is recommending the purchase of a replacement copy machine for use at the administrative office. The current copy machine was purchased in 2005 and is utilized extensively, producing an average of 30,000 copies per month. Reliability and serviceability has continued to decline with this usage causing annual maintenance contract costs to increase. Supplies such as toner and staples for this machine are not included in the current annual maintenance contracts and are also increasing in price.

Technological advances now allow copy machines to generate printed and copied documents more efficiently, both in black and white and in color. The associated annual maintenance contracts have also been priced for the potential purchase of a new unit, as this would impact the FY 2011/2012 Budget. Preliminary proposals contain all required supplies, apart from copy paper, including staples, color and black toner cartridges, preventative maintenance, and repairs. All inclusive of projected expenditures, the per-page expense is anticipated to be lower than the copier and printers currently in use by the District. Ultimately, the newer machine is anticipated to decrease document production costs by phasing out some of the District's current printers and decreasing the number of expensive printer ink cartridges purchased for existing devices.

Although the anticipated service and supplies contract for the proposed copy machine purchase may be slightly higher than the currently budgeted copier service agreement, additional funding has not been allocated. Staff feel additional costs would be offset by savings in other related areas of the budget. Since this purchase is not anticipated to be made under urgent circumstances, timing of the potential purchase also plays a factor in this decision. Should the Board of Directors approve this recommended purchase, staff will spend the time necessary to finalize the research on all copy machine options and associated ongoing expenditures before proceeding with any contracts.

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Budget Message

The FY 2011/2012 budget process began in the midst of continuing significant economic challenges at national, state, and local levels. Major budget highlights in recent years began in 2007 during which there were significant increases in property tax values and robust development activity. This trend reversed in 2008 with declines in development-related fee revenues, property values, and falling interest rates. These declines were coupled with higher inflation and increases in gasoline and commodities prices. These trends, in conjunction with the continued economic downturn, provide a sobering outlook for the next several years.

The Fire District cannot and will not ignore the fact that tough financial times continue to be experienced by many District property owners and sustained economic challenges are predicted. The persisting weakness in the overall economy presented a considerable challenge in developing the FY 2011/2012 budget.

The Board has provided key policy directives and goals for consideration during the FY 2011/2012 budget process. Given the tumultuous economy and the forecast for continued assessed valuation declines, the Board has directed staff to present a budget that maintains core services but that continues to exclude any “non-essentials.” It was emphasized to section managers that the expectation was that staff and employees would continue to be expected to do more with less.

Many factors were considered when preparing the District’s financial plan for the FY 2011/2012 Budget and Operational Plan. Some of these factors included:

- Fluctuation of property tax revenues and millage rates due to changes in the economic environment.
- Changes in population or other service-level indicators.
- Changes in political environment.
- Anticipated continuation of declining property values within the District.
- Recent changes to Arizona Revised Statutes regarding Fire District Funding, specifically the Property Tax Levy Limits.
- Recent changes in medical reimbursement laws resulting from the passing of the Health Care Reform Bill affect Medicare and health insurance companies, which impact ambulance service revenues as a result.
- Recent annexations contributing to the expansion of the District’s service boundaries.

The revenue and expense charts in the pages that follow outline the overall financial plan for FY 2011/2012. The total budgetary expenditures are estimated at \$11.6 million, which includes a contingency/reserve of \$350,000. The budget, as presented, results in an overall decrease from the FY 2010/2011 budget of approximately 2.0%, nevertheless, as a direct result of the significant decline in the District’s Net Assessed Valuation (-10.4%), median valued District residential property owners may realize a slight increase in their Fire District taxes.

The FY 2011/2012 Budget and Operational Plan presents a responsible financial plan that enables the District to continue to deliver its vital services at present service levels but eliminates most “nice to haves” in exchange for “have to haves.” A significant number of expenditure reductions are an integral part of this year’s budget balancing strategy. These reductions were not applied on an across-the-board basis. Instead, District management requested reductions focused on preserving the Fire District’s core services while reducing or eliminating non-essential funding wherever possible. Summary tables and detailed listings of the various budget category reductions are listed throughout this budget document.

As previously stated, the Maricopa County Assessor’s Office data indicates that the Fire District’s assessed valuation decreased by 10.4% for FY 2011/2012. The Assessor’s Office has projected an additional decrease of 2.6% in FY 2012/2013, and another decrease in FY 2013/2014 of 3.1% before leveling off in FY 2014/2015. These decreases can be largely attributed to the continued decline in the assessed valuations of District properties. However, the net effect of these valuation declines was greatly offset by the recent annexations completed by the District in 2010. These annexations attributed an additional \$41 million in additional value to the previous valuation of the District.

The District has developed a balanced budget for FY 2011/2012 totaling \$11,618,816 representing an overall decrease of 2.0% and seeks to sustain core services while reducing expenditures that may be considered discretionary. An amplified focus on generating additional alternative revenues through service programs provides total funding in the amount of \$2,177,123 and lowers the tax levy by 3.5% over the previous fiscal year’s projections to \$9,441,693.

It is important to again note that the District’s budgeting is done on a modified accrual basis of accounting, described as the act of recording expenditures at the time liabilities are incurred and recording revenues when measurable and available. This coincides with the District’s audited financial statements, which are also presented using the modified accrual basis of reporting.

Non Financial Goals and Objectives

Financial policies are essential to the effective fiscal management of the District; however, they must be coupled with strategic, long-term non-financial planning processes in order to support an effective organization. The District uses three core documents to facilitate a long-range planning process and to update its goals and objectives annually. These core documents are identified as the Strategic Plan, the Business Plan and this Annual Budget and Operational Plan. The Strategic Plan is a foundation document that serves as a blueprint to build and improve the organization. The Strategic Plan provides a vision based framework for the District that will be evaluated and updated every five years. The Business Plan covers the five year projection period of the Strategic Plan and will be reviewed and revised annually in conjunction with the annual budget process. The action items objectives, outlined in

detail within the Strategic Priorities in the new Business Plan will assist in determining the prioritization of budget requests and the overall allocation of resources. The Strategic Plan and the Business Plan are developed collaboratively through participation and input from the Board, administrative and management staff, employee representatives, and District residents. Progress towards planned goals is evaluated on a quarterly basis and during the update process.

External factors such as the national or regional economy, demographic and statutory changes, legislation, are all considered when updating or setting new goals and objectives. The District also uses a SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats) to guide the development of the strategic priorities, and the action items and objectives detailed in the Strategic Plan and the Business Plan. During the previous fiscal year and in preparation for the 2011–2016 Strategic Plan update and the generation of the new Business Plan, the District incorporated recommendations resulting from the Center for Public Safety Excellence (CPSE)/Commission on Fire Accreditation International (CFAI) Fire District Accreditation Evaluation Process. The following are the 2011-2016 Strategic Priorities as outlined in the Strategic Plan:

1. Community Outreach & Partnerships
2. Financial Sustainability
3. Resource Development & Deployment
4. Personnel Development
5. Infrastructure

The District's Strategic Priorities are further distilled in the new five-year Business Plan through a series of detailed Action Items and Action Item Objectives used as benchmarks to measure progress towards goal completion each year. Each Strategic Priority includes Strategic Components with associated Action Items which are listed below:

Strategic Priority #1: Community Outreach & Partnerships

- Strategic Component – Customer Service
 - Action Item 1.1 – Community Education & Relations
- Strategic Component – Citizen Health & Safety
 - Action Item 1.2 – Community Assistance Program
 - Action Item 1.3 – Fire Prevention / Investigations
- Strategic Component – Collaborative Community Partnerships
 - Action Item 1.4 – Fire Corps Volunteer Program

Strategic Priority #2: Financial Sustainability

- Strategic Component – Alternative Revenue Sources
 - Action Item 2.1 – Merger / Functional Consolidation / Partnerships
 - Action Item 2.2 – Operational Funding / Cost Savings & Recovery
- Strategic Component – Resource Maximization
 - Action Item 2.3 – Planning / Forecasting / Service Area Expansion
- Strategic Component – Cost Effectiveness

- Action Item 2.4 – Alternative Work Schedules or Locations
- Action Item 2.5 – Recycling / Conservation Program

Strategic Priority #3: Resource Development & Deployment

- Strategic Component – Response Capacity / Capability
 - Action Item 3.1 – Mapping / GIS
 - Action Item 3.2 – Disaster Preparedness
- Strategic Component – Service Delivery & Resource Allocation
 - Action Item 3.3 – Fire District Accreditation
 - Action Item 3.4 – Ambulance Operations Accreditation
 - Action Item 3.5 – Incident Response Quality Assurance
 - Action Item 3.6 – Emergency Response / Effective Deployment of Resources
 - Action Item 3.7 – 800 MHz Communication System
 - Action Item 3.8 – EMS Standards & Legislation
- Strategic Component – Operational Partnerships
 - Action Item 3.9 – Fire Service Leadership / Regional Consistency & Coordination

Strategic Priority #4: Personnel Development

- Strategic Component – Knowledge & Skills
 - Action Item 4.1 – Personnel Training
- Strategic Component – Recruitment & Retention
 - Action Item 4.2 – Human Resources / Personnel Retention
 - Action Item 4.3 – Recruitment
 - Action Item 4.4 – Management & Leadership / Succession Plan
- Strategic Component – Well Being
 - Action Item 4.5 – Employee Fitness and Wellness
 - Action Item 4.6 – Risk Management / Health & Safety

Strategic Priority #5: Infrastructure

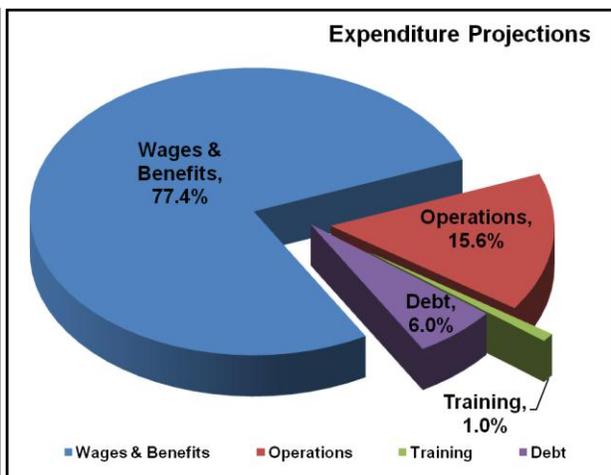
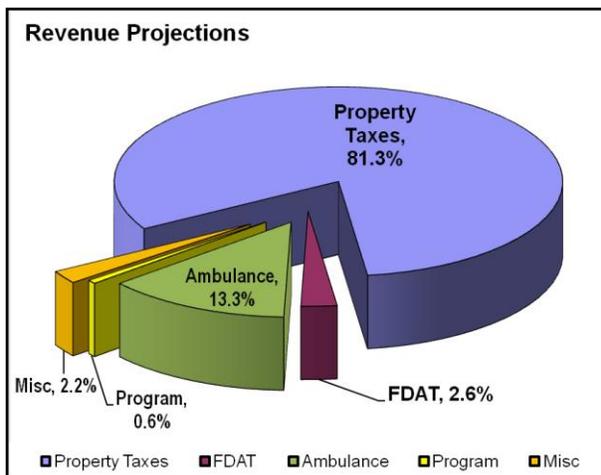
- Strategic Component – Facilities, Apparatus & Equipment
 - Action Item 5.1 – Facilities Renovation / Expansion
 - Action Item 5.2 – Facilities Preventative Maintenance Program
 - Action Item 5.3 – Apparatus Preventative Maintenance Program
 - Action Item 5.4 – Fire Equipment
 - Action Item 5.5 – EMS Equipment
 - Action Item 5.6 – Training Site
- Strategic Component – Information Technology Utilization
 - Action Item 5.7 – Review & Enhance Internal Communication Mechanisms
 - Action Item 5.8 – Administration Paperless System
- Strategic Component – Repeatable & Accountable Organizational Processes
 - Action Item 5.9 – District Policies & Standard Operating Procedures
 - Action Item 5.10 – Data & Records Management

Budget Overview – Revenue & Expenditure Summary

This FY 2011/2012 Annual Budget and Operational Plan is outlined in detail throughout the following pages of this document. The charts below provide an overview of the projected revenues and expenditures. Also included for comparisons are the Fiscal Year 2009/2010 actual revenues and expenditures, the FY 2010/2011 adopted budget and estimated revenues and expenditures for the fiscal year ending June 30, 2011 and the budget variance between fiscal year 2010/2011 and 2011/2012.

Revenue Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
4110 · Property Taxes	\$ 8,845,395	\$ 9,786,319	\$ 9,708,028	\$ 9,441,693	\$ (344,626)	-3.5%
4120 · Fire District Assistance Tax (FDAT)	\$ 297,640	\$ 300,000	\$ 294,300	\$ 300,000	\$ -	0.0%
4200 · Ambulance Revenues	\$ 1,410,333	\$ 1,553,781	\$ 1,507,645	\$ 1,545,913	\$ (7,868)	-0.5%
4300 · Program Revenues	\$ 38,617	\$ 47,690	\$ 158,309	\$ 73,239	\$ 25,549	53.6%
4400 · Miscellaneous Revenues	\$ 249,570	\$ 163,772	\$ 215,157	\$ 257,971	\$ 94,199	57.5%
Total Revenues:	\$ 10,841,554	\$ 11,851,562	\$ 11,883,439	\$ 11,618,816	\$ (232,746)	-2.0%

Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
Wages & Benefits	\$ 8,483,660	\$ 8,956,991	\$ 8,532,377	\$ 8,998,716	\$ 41,725	0.5%
Operating Expenditures	\$ 1,423,630	\$ 2,036,372	\$ 1,348,984	\$ 1,808,506	\$ (227,866)	-11.2%
District Training & Development	\$ 55,468	\$ 110,675	\$ 78,126	\$ 110,568	\$ (107)	-0.1%
Debt Service	\$ 766,621	\$ 747,524	\$ 699,652	\$ 701,026	\$ (46,498)	-6.2%
Total Expenditures:	\$ 10,729,379	\$ 11,851,562	\$ 10,659,139	\$ 11,618,816	\$ (232,746)	-2.0%



Revenues

General Fund Revenues are anticipated using available information and historical projections. The FY 2011/2012 Budget includes funding from several different sources. Each revenue classification will be discussed in detail. The most significant portion of the District's revenues are provided through property taxes. The Fire District Assistance Tax is also collected and remitted by Maricopa County on behalf of the District.

Property & Fire District Assistance Taxes

4100 Tax Revenue Projections						
Description	FY 2009/2010 <i>ACTUALS</i>	FY 2010/2011 <i>ADOPTED</i>	FY 2010/2011 <i>ESTIMATED</i>	FY 2011/2012 <i>ADOPTED</i>	Budget Variance	% of Change
4110 · Property Taxes	\$ 8,845,395	\$ 9,786,319	\$ 9,708,028	\$ 9,441,693	\$(344,626)	-3.5%
4120 · Fire District Assistance Tax (FDAT)	\$ 297,640	\$ 300,000	\$ 294,300	\$ 300,000	\$ -	0.0%
Total 4100 Tax Revenues:	\$ 9,143,035	\$ 10,086,319	\$ 10,002,329	\$ 9,741,693	\$(344,626)	-3.4%

4110 Property Taxes: Property taxes are levied by Maricopa County based on a calendar year, although the Fire District operates on a fiscal year. Property values are established as of January 1 of each year and the tax rates on those values are set by the Maricopa County Assessor on the third Monday in August.

The Maricopa County Treasurer's Office generates and issues the property tax bills, usually by September of each year. The first tax payment from District property owners is due on October 1 and is considered delinquent after November 1. The second tax installment is due April 1 and is considered delinquent after May 1.

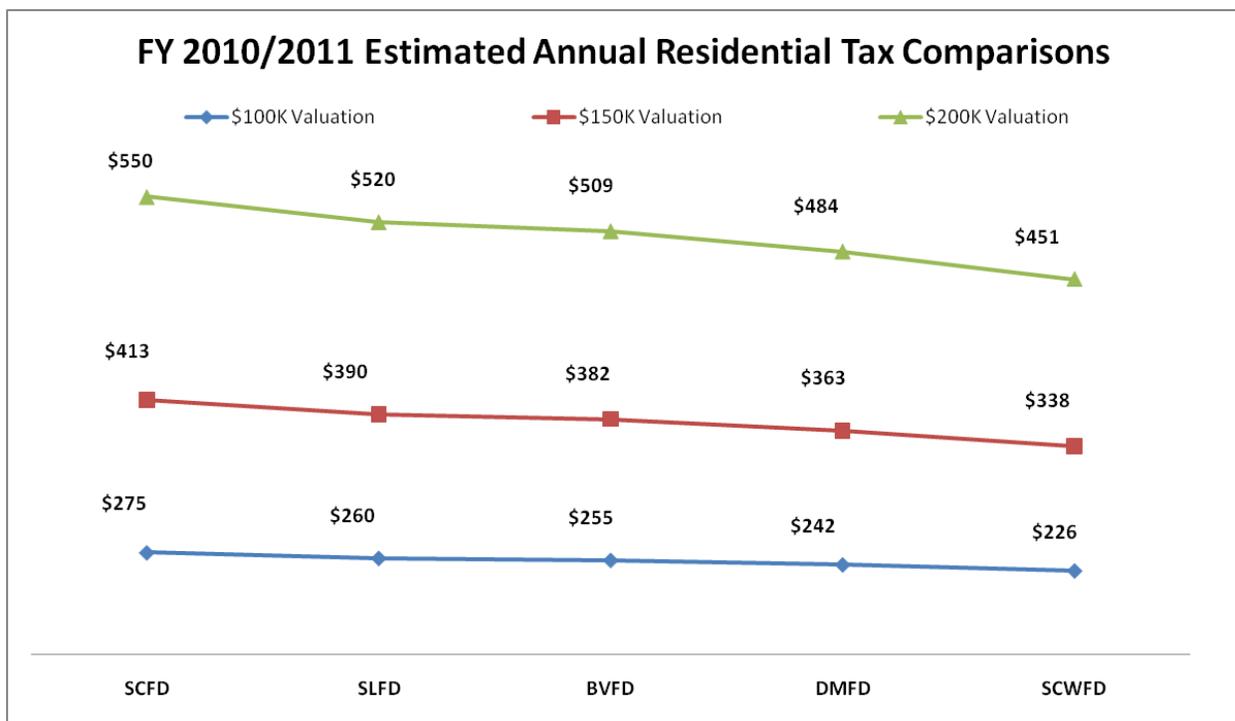
As previously stated, the Fiscal Year 2011/2012 Budget is structured to minimize the taxation impact to property owners within the Fire District. However, due to varying changes in property values and legislative decreases in assessment ratios for commercial and vacant land, the District would be unable to set a tax rate that would maintain the identical property taxes assessed to property owners each year. The District is anticipating a tax rate for FY 2011/2012 of approximately \$2.4280 per \$100 of secondary assessed valuation, (A.R.S. 48-807F states that the tax levy cannot exceed \$3.25 per \$100.00 of assessed value). The average assessed value of a home within the Fire District was decreased by the Maricopa County Assessor from \$147,800 in 2010 to a value of \$142,100 for 2011, a reduction of approximately 3.9% of assessed value in one year. However, the median value of a commercial property was decreased from \$1,184,788 to \$878,202 for 2011, a reduction of approximately 26% of assessed value during the same period. Given the projected tax rate for FY 2011/2012, a District resident who owns a median valued home is anticipated to realize a slight increase while commercial property owners should realize a decrease in their Fire District Tax for next year. The final tax rate and levy amount will be determined by the Maricopa County Assessor's Office in August 2011.

Historically, the District has established a tax rate that is among the lowest in the Phoenix Metropolitan area for fire districts of equivalent size, while providing services that are among the highest. Of the four other fire districts that are similar in size to the Fire District of Sun City West, only three provide both fire suppression and ambulance transport services. For instance, residents of the Sun City Fire District must pay a for-profit provider for their ambulance transport needs.

Tax rates are just one factor used to allocate a government's tax levy to the taxpayer relative to property value and should not be used as a key performance indicator. Other factors such as relative median home value should be used to analyze the average cost per home owner. The legal tax rates for comparable fire districts, including the Sun City West Fire District, for the Fiscal year ending June 30, 2011 (tax year 2010), are illustrated in the charts below:

District	Tax Rate	Estimated annual tax based on home value of:		
		\$100,000	\$150,000	\$200,000
Sun City Fire District (SCFD)	\$ 2.7523	\$ 275.23	\$ 412.85	\$ 550.46
Sun Lakes Fire District* (SLFD)	\$ 2.6001	\$ 260.01	\$ 390.02	\$ 520.02
Buckeye Valley Fire District* (BVFD)	\$ 2.5458	\$ 254.58	\$ 381.87	\$ 509.16
Daisy Mountain Fire District* (DMFD)	\$ 2.4219	\$ 242.19	\$ 363.29	\$ 484.38
Sun City West Fire District* (SCWFD)	\$ 2.2555	\$ 225.55	\$ 338.33	\$ 451.10

* Districts who provide ambulance transport services.



4120 Fire District Assistance Tax: The Fire District Assistance Tax (FDAT) is allocated to each fire district within a county based on a formula determined by state

statute. The funding is derived from a tax that is attached to all properties within Maricopa County. The annual maximum allowable FDAT revenue is set at \$300,000 or 20% of the District's property tax levy, whichever is the lesser amount. The District currently receives the maximum allowable FDAT Revenues.

Ambulance Transport Revenue

4200 Ambulance Revenue Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
4200 - Ambulance Revenues	\$ 1,410,333	\$ 1,553,781	\$ 1,507,645	\$ 1,545,913	\$ (7,868)	-0.5%
Total 4200 Ambulance Revenues:	\$ 1,410,333	\$ 1,553,781	\$ 1,507,646	\$ 1,545,913	\$ (7,868)	-0.5%

4200 Ambulance Transport Revenues: Ambulance transport revenues provide more than 13% of the District's operating revenues as previously presented in earlier pages of this document. This is one of the service areas for which fees can be charged by the District in order to recoup associated expenditures. However, as a result of recently enacted changes in Federal Medicare laws associated with the Federal Healthcare Initiative and state mandated laws, these revenues are projected to decrease (0.5%) for the coming fiscal year. This is the second year, since the commencement of ambulance transport services in 1994, that the District has experienced a decline in ambulance revenues.

Included in the insurance changes are increases in deductibles paid by the patient which are subsidized for District taxpayers. The Fire District does not charge its residents any out-of-pocket cost for ambulance transport nor does it profit from this service as stipulated by the District's Certificate of Necessity as approved by the Arizona Department of Health Services. The projected revenues are designed to cover as many of the costs of providing the service, as possible.

Program Revenue

The District's Program Revenues are designed to offset the cost of providing specialized services such as plan reviews, construction permits, and out of district wildland deployments. This revenue section is anticipated to increase during FY 2011/2012 as a result of the District's goal to institute additional alternative funding sources.

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4300 Program Revenue Projections							
Description	FY 2009/2010	FY 2010/2011	FY 2010/2011	FY 2011/2012	Budget	% of	
	ACTUALS	ADOPTED	ESTIMATED	ADOPTED	Variance	Change	
4310 · Plan Review Fees	\$ 1,637	\$ 2,000	\$ 7,083	\$ 4,000	\$ 2,000	100.0%	
4320 · Permit Fees	\$ 4,310	\$ 16,000	\$ 18,836	\$ 14,000	\$ (2,000)	-12.5%	
4330 · Inspection Fees	\$ -	\$ 300	\$ 600	\$ 12,300	\$ 12,000	4000.0%	
4340 · New Construction Permit Revenues	\$ -	\$ -	\$ 1,053	\$ 3,775	\$ 3,775	100.0%	
4360 · State Land/Wildland Revenues	\$ 5,130	\$ 5,765	\$ 98,245	\$ 5,164	\$ (601)	-10.4%	
4390 · Special Program Revenues	\$ 27,540	\$ 23,625	\$ 32,491	\$ 34,000	\$ 10,375	43.9%	
Total 4300 Program Revenues:	\$ 38,618	\$ 47,690	\$ 158,309	\$ 73,239	\$ 25,549	53.6%	

4310 Plan Review Fees: These revenues are derived from building plans submitted to the District for review to ensure compliance with the International Fire Code, 2006 Edition Standards of Construction adopted by the District in June of 2006. These codes protect the public by addressing conditions hazardous to life and property resulting from fire, explosion, handling or use of hazardous materials and the use and occupancy of buildings and premises. The International Fire Codes are designed to meet these needs through model code regulations that safeguard the public health and safety. These revenues remain low as a direct result of the decline in construction and the current economic situation. As the economy improves, these revenues will be positively impacted through increased requests for these services.

4320 Permit Fees: Operational and construction permits are generally issued in conjunction with plan review fees for renovation of existing structures such as tenant improvements, changes to alarm and sprinkler systems, and the retro-fit of environmental systems. They are required to comply with the same code references as plan reviews. The District has projected a slight increase in these fees associated with anticipated submissions by building contractors within the District.

4330 Inspection Fees: The District is projecting a significant increase in inspection fees for the coming fiscal year. This increase is a direct result of the anticipated expansion of the District's annual fire inspection fee program. These fees are common practice in the fire service and are designed to offset the costs associated with fire inspection services.

4340 New Construction Permit Revenues: New Construction Permit Revenues are generated when a new structure, either commercial or residential, is built within the District. These fees are authorized under the District's adopted fee schedule and are assessed when plans are submitted for new construction being built from the ground up. These permits are issued following the same code enforcement requirements as previously discussed.

4360 State Land/Wildland Revenues: The District currently supports one Wildland Brush Unit and as many as ten Red Card Certified Firefighters available for deployment by the Arizona State Land Department and/or the Federal Bureau of Land Management (BLM). When activated, District apparatus and personnel are dispatched to provide

wildland firefighting assistance generally within the State of Arizona. These personnel and equipment may also be deployed outside of the state. Deployments can last from a few hours to a few weeks at a time. The deployments, especially when District apparatus is involved, generate significant revenues. The District receives reimbursement for all wage and benefit costs associated with the activated wildland firefighters and the vacancies created in their absence, and a pre-approved hourly contract rate for use of the apparatus. All meals and lodgings are provided for deployed personnel while on assignment, and any travel and per diem costs incurred while in transit to and from a wildland campaign are reimbursable. Damage to apparatus and equipment sustained within the boundaries of a wildland operation are repaired at the cost of the parent agency contracting for the piece of equipment.

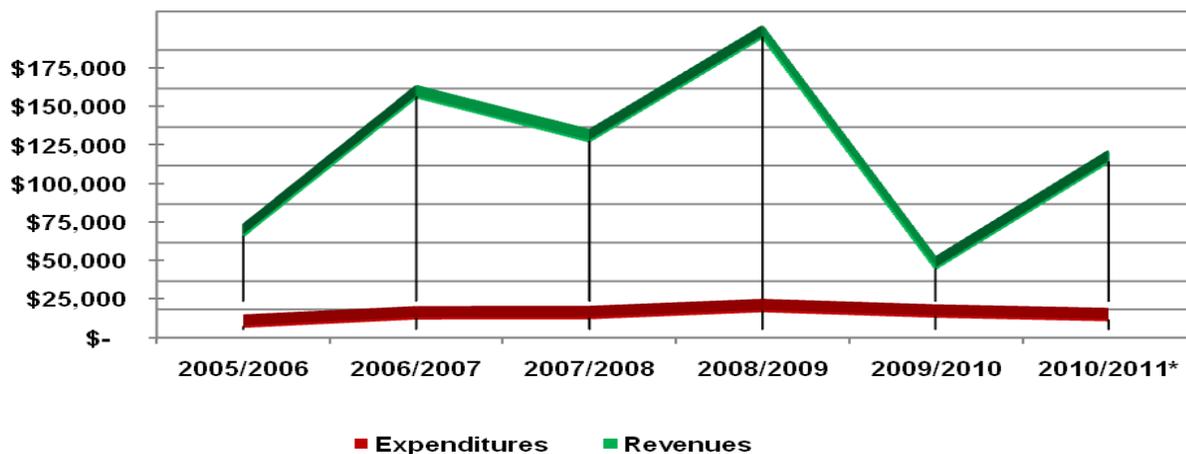
The wildland season is very unpredictable. The District's Wildland Team may be in service for several weeks at a time, traveling from one deployment to another, or may not be utilized for a year or more. This makes projecting Wildland Revenues extremely difficult. It is the practice of the District to budget revenues equivalent to the Wildland Program expenditures for the annual training and equipment expenditures necessary to support the program. Revenues received generally support the personnel costs and the maintenance and upkeep of the apparatus and equipment. Training and maintenance are ongoing costs in the budget that must be maintained. Below are the revenues and expenditure details associated with the Wildland Program since its inception in FY 2005/2006:

Wildland Program History

Fiscal Year	Expenditures	Revenues	Revenues Over/(Under) Expenditures
2005/2006	\$ 1,482	\$ 42,028	\$ 40,546
2006/2007	\$ 6,906	\$ 132,142	\$ 125,236
2007/2008	\$ 7,094	\$ 103,521	\$ 96,427
2008/2009	\$ 11,615	\$ 170,968	\$ 159,353
2009/2010	\$ 8,052	\$ 20,869	\$ 12,817
2010/2011*	\$ 5,765	\$ 90,000	\$ 84,235
Totals:	\$ 40,914	\$ 559,528	\$ 518,614

* Estimated

Wildland Program



4390 Special Program Revenues: Special program revenues include Emergency Lockbox, Smoke Alarm and T-shirt revenues. These items are offered to the public in support of the District's Residential Emergency Lockbox Program and Smoke Alarm Inspection Program. The Lockbox Program provides residents of the District with a safe and rapid entry system to assist a patient in the event they are unable to open the door. The Smoke Alarm Program is a service in which the District members provide inspection services associated with residential smoke alarms. During the course of these inspections, staff may find smoke alarms in need of replacement. In these situations, staff can provide replacement smoke alarms at that time. The increasingly popular Emergency Lockbox program, combined with the addition of smoke alarm sales has resulted in a projected increase in this revenue stream. The final component of this revenue stream is the District T-shirt Program. Each year, during Fire & life Safety Events, the District sells logoed t-shirts to the public. The District is projecting an approximate 43.9% increase in revenues for this budget account in FY 2011/2012.

Miscellaneous Revenue

Miscellaneous Revenues are comprised of a collection of various contributions and fees. These fees are outlined below.

4400 Miscellaneous Revenue Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
4430 · Contractual & Misc Revenue	\$ 126,780	\$ 43,310	\$ 105,806	\$ 146,635	\$ 103,325	238.6%
4435 · Fire Ins Premium Revenue (PSPRS)	\$ 103,238	\$ 104,962	\$ 93,279	\$ 95,836	\$ (9,126)	-8.7%
4440 · Interest - General Fund	\$ 16,726	\$ 14,000	\$ 12,765	\$ 14,000	\$ -	0.0%
4445 · EMS/CPR Training Fees	\$ 2,588	\$ 1,500	\$ 807	\$ 1,500	\$ -	100.0%
4450 · Sale of Surplus Equip & Assets	\$ 239	\$ -	\$ 2,500	\$ -	\$ -	0.0%
Total 4400 Miscellaneous Revenues:	\$ 249,571	\$ 163,772	\$ 215,157	\$ 257,971	\$ 94,199	57.5%

4430 Contractual & Miscellaneous Revenues: Contractual and miscellaneous revenues include a myriad of projectable and un-projectable revenues including contracts for emergency service responses, cell tower lease revenues, public records requests and incident report copies. The most significant revenue in this section is associated with the recent agreement between the District and the Glendale Fire Department Helicopter Air-Medical & Logistics Operations (HALO) Program. The HALO agreement generates revenue through assignment of a Sun City West firefighter paramedic to assist with staffing of the emergency medical helicopter. The District is reimbursed for the expenditures associated with this staffing, which is anticipated to be in excess of \$103,000 during FY 2011/2012.

4435 Fire Insurance Premium Revenues: The Fire Insurance Premium Revenues are generated from the Firefighter Relief and Pension Funds allocated to each fire department within the state as determined by statute. An insurance premium tax fund has been developed by the state and each fire district and department is eligible for a

portion of these monies to offset the costs associated with their firefighter pension funds. Several factors determine what each participating entity will receive, including the number of fire agencies that submit qualified reports to the state by the established deadline, the number of PSPRS participants and payroll contributions required by each agency, and the amount of funding available to disperse. The funds are automatically sent to the Public Safety Personnel Retirement System (PSPRS) on behalf of the Fire District each year. These revenues are extremely difficult to predict from year to year and the District has experienced significant fluctuations. Using historical analysis, staff is projecting a decrease in these revenues for FY 2011/2012 of approximately 8.7%.

4440 Interest – General Fund: This account records the interest earnings of the District's General Fund which are earned through the pooled investment account called the Local Government Investment Pool (LGIP) managed by the Maricopa County Treasurer.

4445 EMS/CPR Training Fees: The District provides Cardio Pulmonary Resuscitation and Continuous Chest Compression training for the public and healthcare providers in the Sun City West area for a nominal fee. This fee is designed to offset the cost to provide the training. These revenues are typically minimal.

4450 Sale of Surplus Equipment & Assets: Periodically, older apparatus and equipment, having reached the end of its useful service to the District, is designated as surplus property or assets. Every effort is made to obtain the greatest return on the original investment in the asset. Generally an asset that cannot be traded in towards its replacement asset is then disposed of in compliance with the District' surplus property policies. The District does not have any budgeted surplus property disposals planned for the coming fiscal year.

Grant / Alternative Funding

The District continues to aggressively investigate alternative revenue sources. District staff is working to secure various grants to enhance District services or to offset existing costs. However, grants are not a guaranteed source of revenue. Many times the District may not be awarded grant funds until well into the fiscal year or not at all. This can greatly impact the overall revenues and expenditures made throughout the fiscal year. Therefore, it was determined by the Governing Board that it would not be prudent to include potential grant awards in the annual budget revenue and expenditure accounts. This change allows for a more realistic revenue and expenditure picture and does not limit the District's ability to use any alternative funding should a grant be successfully obtained. Further details regarding grants and any potential required matching funds may be found in the Capital Improvement Plan section of the District's 2011-2016 Business Plan.

Expenditures

The District's Expenditures are classified into four general categories: Wages and Benefits, Operating Expenditures, District Training and Development, and Debt Service. The following pages present details regarding each of these expenditure categories. Each expenditure category will be discussed in detail in various segments of this document under the appropriate managing sections. Each managing section will outline areas of responsibility and the contributing expenditure accounts.

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Board of Directors, Special Projects & Financial Services Section

The Fire Chief oversees the Special Projects Section and the Financial Services Section. These sections are supported by the Executive Assistant, the Accounting Supervisor, and the Account Clerk. The Fire Chief and the Executive Assistant comprise the Special Projects Section which facilitates the District's Board of Directors requirements and special projects such as the generation and facilitation of the District's Strategic and Business Plans, pursuing grants, and Fire District Accreditation. The Accounting Supervisor and Account Clerk constitute the District's Financial Services Section and are responsible for ensuring all financial requirements are accomplished.

Board of Directors and Special Projects Section

The Fire Chief is hired by the Board of Directors to manage the Fire District as a whole, including ensuring that all employees adhere to the Policy Manual as set forth by the Board and the Operations Manual which is developed and managed by the Fire Chief. These manuals guide and direct the employees of the District in providing the highest level of service and professional standards. The Fire Chief and the Executive Assistant also have the task of ensuring that the District's Board of Directors are advised of all pertinent and important issues so they may make informed decisions for their constituents. The Fire Chief and the Executive Assistant guide the District and Board in complying with the laws governing special districts and open meetings. They are also charged with researching and applying for grants to support the efforts of the District. Special Projects involves tasks such as development of the District's Strategic Plan and Business Plan and other assignments as necessary (accreditation, intranet policy and operational manuals, etc.).

Special Projects Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Fire Chief	1.0	1.0	1.0
Executive Assistant	1.0	1.0	1.0
Total Personnel Assigned	2.0	2.0	2.0

Special Projects Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Number of Board Workshops Supported	12	12
Number of Legally Mandated Board Meetings Supported	12	12
Projected Number of Public Hearings/Special Meetings Supported	5	3
Number of Board Policies Administered	89	89
Number of Operations Procedures Administered	223	223
Grant Applications Submitted/Value	5/\$814,267	TBD
Grant Awards Received/Value	3/\$314,267	TBD
Number of Special Projects Managed*/**	7	3

*FY 2010/2011 Special Projects:

- Research and implementation of new Strategic Plan structure
- Research and implementation of new District Business Plan
- Finalize Fire District Accreditation Process
- Completion of Intranet Forms Catalog
- November 2010 Election for two (2) Fire Board Positions
- Completed two District annexations
- Researched and implemented an organizational realignment

**FY 2011/2012 Special Projects:

- Annual Review/Revision of the District's Business Plan
- Maintain Fire District Accreditation and complete Accreditation Annual Compliance Report
- Maintain Intranet Forms Catalog and Intranet Policy & Operational Manuals

Status of 2010/2011 Performance Goals and Objectives

- Research possible revision/recommendations for Strategic Operational Objectives Plan including potential creation of stand-alone Strategic Plan – **Goal Accomplished**
- Assist in the completion of the final stages in the CFAI Accreditation process – **Goal Accomplished - Awarded the CFAI Accreditation in August 2010**
- Continued to seek alternative grant revenue opportunities to enhance District funding – **Goal Accomplished / Ongoing**
- Oversee November 2010 Fire Board election process – **Goal Accomplished**
- Oversee new Fire Board member orientation and update Fire Board Manuals – **Process Ongoing**
- Continue to explore working with a grant writer on a contingency basis to locate and secure grants – **Process Ongoing**
- Create an intranet Fire District Forms Catalog for personnel use – **Goal Accomplished**
- Research revising an external survey on Fire District website to solicit more community input regarding the Strategic Plan – **Goal Modified**

FY 2011/2012 Performance Goals & Objectives

- Complete annual review and revision of District Business Plan.
- Continue to research potential grant opportunities and seek alternative grant revenue to enhance District funding.
- Continue to explore working with a grant writer on a contingency basis to locate and secure grants.
- Maintain the intranet Fire District Forms Catalog, Policy and Operations Manuals for personnel use.
- Continue to explore possible program partnerships/functional consolidation or mergers, present any results to the Fire Board, implement results as appropriate.
- Complete Accreditation Annual Compliance Reports (ACR).
- Complete annual review of District Policies and Standard Operating Procedures.
- Monitor Legislative issues that affect Fire Districts.

Board of Directors

The Fire District of Sun City West Board of Directors (Fire Board) is comprised of five elected members who are responsible for the overall budgetary and policy direction of the Fire District. The Board approves the scope and direction of the services to be provided to the citizens and ensures that their needs are met, in so far as possible, with available resources.

Fire District Board members, while elected into service, may come from varied backgrounds and may have limited knowledge of the federal, state and local governmental requirements to which they must adhere in the oversight of a fire district.

The Special Projects Section coordinates training for the Elected Board of Directors members to ensure that every opportunity for education is provided. The largest single training entity for Fire District officials is the Arizona Fire District Association (AFDA). AFDA generally sponsors conferences twice a year, in January and between the July and September months. Conferences are usually Thursday through Sunday and provide a variety of topics presented by a cadre of qualified educators. Training typically includes representatives from state and local governmental entities to which fire districts are required to submit annual reporting mandates; legal counsels who provide information on open meeting laws and board member roles and responsibilities; auditors, accountants and other experienced individuals in the field of fire district finance, etc. Each conference offers varied subject matter and reinforces the importance of continued education through the inception of a certificated program. This training benefits both new and tenured fire board members. There are occasions in which other professional organizations may provide training that would benefit District Board members and that funding is also reserved in this area.

This section of the budget also contains items such as Board meeting and administrative expenses, and elections funding as necessary.

Fire Board Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5330 · Election Expenditures	\$ -	\$ 12,927	\$ 86	\$ -	\$ (12,927)	-100.0%
6110 · Educational Expenditures	\$ 990	\$ 1,350	\$ 990	\$ 1,350	\$ -	0.0%
6130 · Travel Expenditures	\$ 5,089	\$ 6,025	\$ 3,114	\$ 5,925	\$ (100)	-1.7%
5515 · Meeting Expenditures	\$ 1,328	\$ 1,000	\$ 997	\$ 1,000	\$ -	0.0%
Total Fire Board:	\$ 7,407	\$ 21,302	\$ 5,187	\$ 8,275	\$ (13,027)	-61.2%

- 5330 Election Expenditures:** The District is required by State statute to hold biennial elections for its board members. The next election may be required in FY 2012/2013, when there will be three (3) Board Members with completed terms. Generally, in years for which there are no Board seats due for re-election, there would be no funding allocated for this account.

- **6110 Educational Expenditures:** This budgetary account provides funding for training conference registration for all five (5) Board members to attend both Arizona Fire District Association (AFDA) training conferences, plus any other potentially beneficial conferences that might arise throughout the fiscal year.
- **6130 Travel Expenditures:** This account allows for the per diem, lodgings, and travel expenditures that are associated with Board members attending educational conferences throughout the fiscal year.
- **5515 Meeting Expenditures:** This funding, which is derived from the overall District Outreach budgetary account, covers Fire Board meeting expenses and supplies.

Special Projects

The following budgetary accounts are used to complete special projects.

Special Projects Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5325 · Consulting Expenditures	\$ 19,316	\$ 12,500	\$ 37,832	\$ 12,500	\$ -	0.0%
5590 · Accreditation	\$ 8,652	\$ 6,000	\$ 5,016	\$ 2,500	\$ (3,500)	-58.3%
Total Special Projects:	\$ 27,968	\$ 18,500	\$ 42,848	\$ 15,000	\$ (3,500)	-18.9%

- **5325 Consulting:** These funds are used for professional consultant related research and guidance during the fiscal year. These consultants may provide the District with professional Human Resource guidance; Information Technology (IT) consulting; in-depth feasibility studies, and the generation and coordination of mapping and response systems with the City of Phoenix. The District is required to revise mapping systems and the electronic Computer Aided Dispatch (CAD) information as new streets and locations are added within its boundaries. This funding allows for these services to be accomplished. FY 2010/2011 expenditures in this account are significantly higher than budgeted as a result of the Information Technology consulting services required by the District. However, the costs associated with the IT consulting were offset by funds budgeted for an IT Coordinator position which was not filled.
- **6310 Accreditation:** The funds associated under this account will allow the District to comply with the annual reporting criteria required to maintain the Center for Public Safety Excellence (CPSE) Accreditation. Initial exploration regarding the Ambulance Services Accreditation through the Commission on Accreditation of Ambulance Services (CAAS) will also begin during FY 2011/2012.

Financial Services Section

The Financial Services Section is managed by the Accounting Supervisor who is supported by an Account Clerk. The Accounting Supervisor answers directly to the Fire Chief and is responsible for all financial matters.

The Financial Services Section administers and maintains all financial systems of the Fire District. These systems include developing and maintaining the Capital Improvement Plan (CIP), which is included in the District's new Business Plan; focusing on operational funding; cost savings and recovery; revenue generation strategies; accounting; payroll; budget preparation; purchasing; and customer billing services. This section also has the responsibility of ensuring compliance with all applicable state and federal financial reporting statutes. The section compiles and submits reports to state and local governments regarding the annual budget and the preparation and undergoing of annual audits as required by state statute. The reports are prepared in accordance with Generally Accepted Accounting Principles (GAAP), and Governmental Accounting Standards Board (GASB) including the incorporation of GASB 34 requirements into audit and financial presentations.

The Financial Services Section also ensures that the District's financial systems are structured to satisfy the recommendations of the Committee of Sponsoring Organizations of the Treadway Commission (COSO). The District continually performs assessments to improve internal control using guidance from the COSO framework. As a result of these assessments, the District modified the presentation of the General Fund and maintains separate Capital Projects Fund and a separate Special Revenue Fund within the accounting system. The Financial Services Section separated these funds to ensure autonomy between the funds. This separation was initiated at the prompting of the District's external auditor and allows the District to more clearly allocate funds for restricted uses and specific capital projects that may carry over from one fiscal year to another. It also allows for an accurate presentation of the District's cash resources and how they are applied in support of the long-term funding goals.

It is the goal of the Financial Services Section to ensure that the District is fiscally responsible in all areas of operations. This includes budgeting and expending budgeted funds. The Financial Services Section is extensively involved in the preparation of this annual budget document.

Financial Services Section Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Accounting Supervisor	1.0	1.0	1.0
Account Clerk	1.0	1.0	1.0
Total Personnel Assigned	2.0	2.0	2.0

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Financial Services Section Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Mandated Annual Reports Processed & Filed		
Maricopa County Board of Supervisors	2	2
Maricopa County Treasurer	2	2
Arizona Department of Health Services	1	1
Lending Agencies	2	1
Arizona State Fire Marshal's Office	1	1
United States Department of Commerce	1	1
Arizona Department of Revenue	2	2
Arizona Property Tax Oversight Commission	2	2
Monthly Fire Board Financial Reports	12	12
General Accounting Requirements		
Bank Accounts Managed	11	11
Warrants/Checks Processed	992	1,000
Deposits Processed	78	80
Arizona State Land Billing Invoices Processed	0	2
1096/1099 Miscellaneous Reports Processed	1-1096 15-1099's	1-1096 20-1099's
Payroll Requirements		
Employee Payroll Files Managed	82	84
Payroll Checks/EFT's Processed	2,369	2,407
Payroll Liability Checks/EFT's Processed	522	522
Quarterly Payroll Reports Filed	16	16
Federal W3/W2's Wage and Earnings Statements Processed	1-W3 82-W2's	1-W3 88-W2's
Arizona A1-R Wage and Earnings Statements Processed	1-A1-R	1-A1-R

Status of FY 2010/2011 Performance Goals & Objectives

- Continue the skillful and responsible management of the District's monetary resources to optimize the public's investment in their organization - **Goal Accomplished / Ongoing**
- Continue the pursuit of strategies that minimize tax levy dependence through alternative revenue sources - **Goal Accomplished / Ongoing**
- Continue to refine the accounting system and revise policies and procedures where necessary - **Goal Accomplished / Ongoing**
- Refine the computerized purchase order system to eliminate duplication and encumber funds to increase accuracy of reflected budget activity - **Goal Accomplished**
- Continue to work with the Community Risk Reduction Division to review proposed District growth/development and determine timelines and future financial impact - **Goal Accomplished / Ongoing**
- Refine payroll process to increase efficiency and decrease required schedule verification - **Goal Accomplished**
- Maintain apparatus, equipment, & facility depreciation schedule - **Goal Accomplished / Ongoing**
- Maintain replacement schedule for vehicles, large equipment, and smaller capital

items - **Goal Accomplished / Ongoing**

- Submit the FY 2010/2011 Budget to the Government Finance Officers Association (GFOA) for the Distinguished Budget Presentation Awards Program for award consideration - **Goal Accomplished/Award Received**
- Generate a Comprehensive Annual Financial Report (CAFR) for the Fiscal Year Ended (FYE) June 30, 2010 audit presentation - **Goal Accomplished**
- Submit the FYE June 30, 2010 CAFR to the Government Finance Officers Association (GFOA) for a Certificate of Achievement for Excellence in Financial Reporting - **Goal Accomplished/Awaiting Results**
- Begin research regarding General Obligation Bonding - **Goal Accomplished / Ongoing**

FY 2011/2012 Performance Goals & Objectives

- Continue the skillful and responsible management of the District's monetary resources to optimize the public's investment in their organization.
- Continue the pursuit of strategies that minimize tax levy dependence through alternative revenue sources.
- Continue to refine the accounting system and revise policies and procedures where necessary.
- Continue to work with the Community Risk Reduction Division to review the proposed District growth/development and determine timelines and future financial impact.
- Continue to maintain apparatus, equipment & facility depreciation schedule.
- Continue to maintain replacement schedule for vehicles, large equipment, and smaller capital items.
- Submit the FY 2011/2012 Budget to the Government Finance Officers Association (GFOA) for the Distinguished Budget Presentation Awards Program for award consideration.
- Generate a Comprehensive Annual Financial Report (CAFR) for the FYE June 30, 2011 audit presentation.
- Submit the FYE June 30, 2011 CAFR to the Government Finance Officers Association (GFOA) for the Certificate of Achievement for Excellence in Financial Reporting award consideration.
- Conclude financial research regarding non-emergency inter-facility ambulance transport and possibly implement.
- Complete research regarding General Obligation Bonding.
- If approved, complete process for General Obligation Bond Election.
- Research & identify additional alternative revenue methods to enhance District funding.
- Identify and explore Cost Savings & Cost Recovery strategies. Pursue strategies that maximize tax levy variations.
 - Review proposed land development & determine financial impact projects would have on District.
 - Assist the Community Risk Reduction Division in evaluating additional ways in which Fire Corps volunteers can be utilized to assist with various District tasks and programs.

- Evaluate Fee Schedule expansion.

Personnel Compensation, Benefits and Staffing

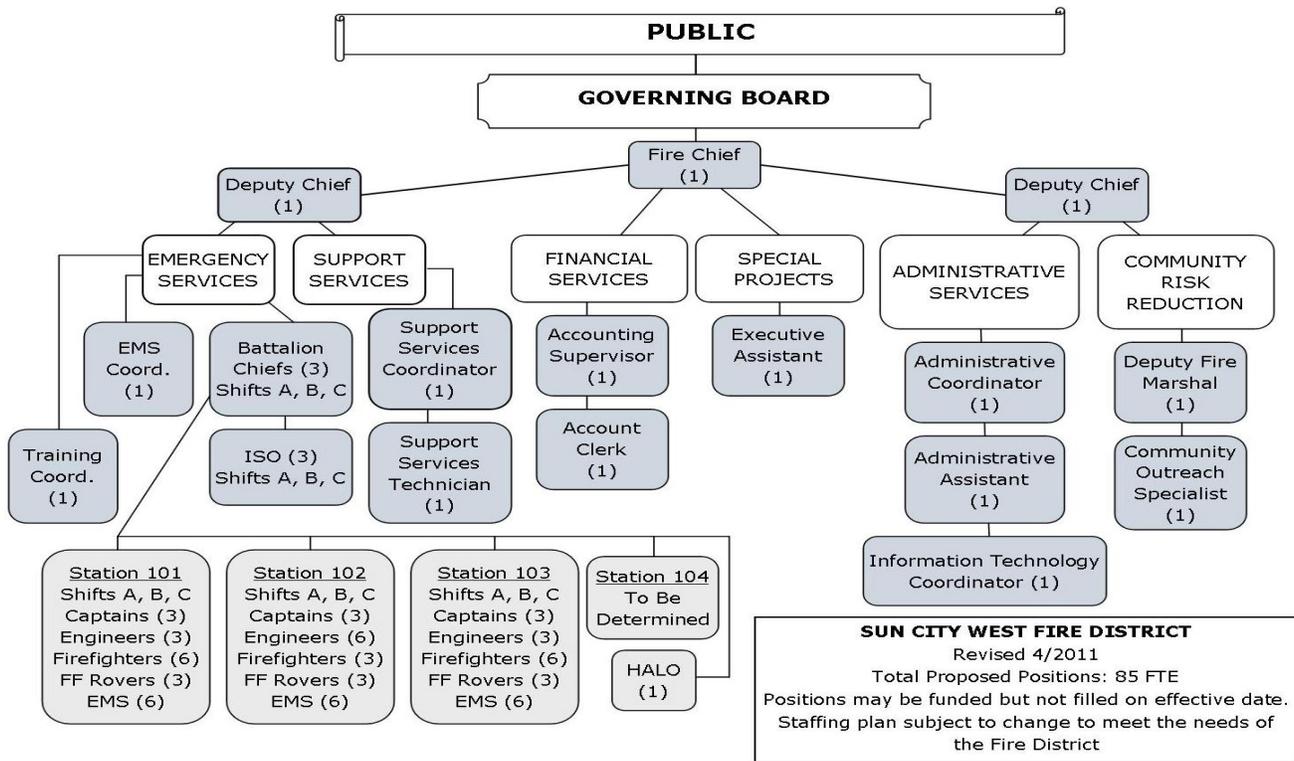
The Financial Services Section is charged with researching, budgeting, and tracking all direct personnel expenditures. This includes the Board's goal of ensuring competitive compensation and benefits.

Experienced emergency service providers are in great demand. Attracting and retaining highly skilled individuals in order to provide the highest standard of service, while balancing the current economic conditions, continues to be an important goal set by the Governing Board. This budget represents the Fire Board's intent to attract and retain these professionals by providing competitive salary and benefit incentives to encourage long term, committed service to the District, and to reward excellent performance through merit-based compensation increases. The Board's intent could not be accomplished effectively without the cooperation of the Fire District's Financial Services Section whose focus is on the research, coordination, and contracting of many of the District's Human Resource requirements and benefits.

Personnel Staffing

When evaluating and determining adequate District staffing levels, current and future employee workload, current response models, regulatory requirements, and industry standards are explored. The current District staffing levels set forth by the Board are detailed in the Organizational Chart/Staffing Plan presented on the next page:

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Fire District Personnel Authorized Staffing Levels – Summary

Position/Rank	2009/2010 Actual	2010/2011 Authorized	2011/2012 Proposed
Fire Chief	1.0	1.0	1.0
Deputy Fire Chief	2.0	2.0	2.0
Executive Assistant	1.0	1.0	1.0
Accounting Supervisor	1.0	1.0	1.0
Account Clerk	1.0	1.0	1.0
Deputy Fire Marshal	1.0	1.0	1.0
Community Outreach Specialist	1.0	1.0	1.0
Administrative Coordinator	1.0	1.0	1.0
Administrative Assistant	1.0	1.0	1.0
Information Technology Coordinator	0.5	1.0	0.0
EMS Coordinator	1.0	1.0	1.0
Support Services Coordinator	1.0	1.0	1.0
Training Coordinator	0.0	1.0	0.0
Support Services Technician	1.0	1.0	1.0
Battalion Chief (Shift Sworn)	3.0	3.0	3.0
Captain (Shift Sworn)	12.0	12.0	12.0
Engineer (Shift Sworn)	12.0	12.0	12.0
Firefighter (Shift Sworn)	15.0	15.0	15.0
Firefighter Rover (Shift Sworn)	9.0	9.0	9.0
Firefighter HALO Medic (Shift Sworn)	0.0	0.0	1.0
EMS Personnel (Shift Non-Sworn)	18.0	18.0	18.0
Total District Personnel	82.5	84	83.0

The Fire Chief, Deputy Fire Chiefs, Accounting Supervisor, Administrative Coordinator, Information Technology Coordinator, EMS Coordinator, Support Services Coordinator, and Battalion Chiefs are each classified as exempt employees. Day shift employees generally work an average of 40 hours per week. Shift sworn and non-sworn personnel are divided into three (3) platoons and currently work an average of 56 hours per week. Each member of the District's platoons currently works a 24-hour shift every third day.

Personnel Compensation and Benefits

District compensation and benefit data is contained within this section of the annual budget document. This section of the operating budget tends to be the most unpredictable and the most difficult area in which to project actual expenditures for the entire fiscal year. It is analyzed from every possible angle in an attempt to avoid over or under budgeting. These budgeted expenditures have been meticulously calculated ensuring only appropriate values have been assigned to each line item. Items such as employment taxes, retirements, and worker's compensation costs are requirements under federal and/or state mandates. In order to remain competitive in the local marketplace, the Board has also dictated that certain benefits be provided to preserve the District's exceptionally skilled labor force. The various District Divisions and Sections also submit budget requests for estimated overtime, identified in the budget as coverage compensation, and other wage related expenditures.

Loss of employees creates financial issues based on the costs associated with the hiring and training of new employees. The vacancies created within the daily staffing model also require overtime manpower to fill vacant positions. Another turnover related issue is the loss of experienced paramedic level personnel which can lead to operational deficiencies.

The Board of Directors has combated this issue through systematic increases to the District wage and benefit packages over the years. Due to these efforts, the employee benefits package is more competitive when compared with other valley entities which has resulted in a reduction in employee turnover.

The District's Board of Directors wisely created a standard Wage Scale based on an employee's position/rank. This scale allows employees who obtain a minimum of a "meets standard" rating on their annual Employee Performance Review to advance to the next step for their position/rank unless they have reached the top step in the scale. This type of wage scale design is currently used by several entities in the Valley and has proven effective in removing subjectivity and also instilling consistency into personnel compensation packages.

A factor commonly used by the District in determining annual wage scale enhancements has been competitiveness with neighboring emergency service agencies. The District participates in a wage and benefit study periodically to compare wages and benefits of similar entities. This is extremely valuable as wage and benefit competitiveness is vitally important in maintaining a stable and satisfied work force.

District management feels that the highly qualified and dedicated personnel in this District deserve to receive wages and benefits that are at least equitable with those of other departments/districts in the Valley.

The District wage scale sorts employees into five (5) general classes for which wages are generated. These classes combine individuals based on work periods under the Fair Labor Standards Act requirements for generation of mandatory overtime hours. While the District's Staffing Plan depicts an optimum total of 85 full time employees, the FY 2011/2012 Budget and Operational Plan currently allocates funding for 83 full time employees. Projected vacancies for the coming fiscal year include the positions of Information Technology and Training Coordinators. Although these positions are not intended to be filled within the next fiscal year, they remain in the District's approved Organizational/Staffing Plan for future consideration.

FY 2011/2012 Compensation and Benefits Significant Changes

Potential compensation and benefits changes for any given fiscal year are heavily weighed against a number of factors. In previous years, it was blatantly obvious the District's compensation and benefits package was greatly lacking in comparison to other Valley agencies. This was reflected in increased employee turnover and through compensation studies conducted both locally and across Arizona which compared wage and benefits packages with other entities similar in size and make-up. In previous years, this process has warranted changes in the District's wage scale and in the benefits that were offered. As a result of the due diligence of the Board, the District has obtained a compensation and benefits package of a comparable nature to other entities at the District's level of professionalism.

Annually, inflationary impacts are one factor used in determining the necessity and extent of annual Cost of Living Allowance (COLA) enhancements which require an adjustment in the District's established wage scale. The District utilizes two sources of information to determine COLA's for the coming fiscal year. Those sources are the Consumer Price Index and the Social Security Administration's COLA adjustment for the Social Security and Supplemental Security Income (SSI). Further information regarding these two influences is summarized in the following paragraphs.

Inflation has been defined as a process of continuously rising prices or equivalently, of a continuously falling value of money. Various indexes have been devised to measure different aspects of inflation. However, the Consumer Price Index (CPI) has often been used by the Fire District when measuring inflationary impact on employee wages. The U.S Department of Labor website states "The CPI measures inflation as experienced by consumers in their day-to-day living expenses. The CPI is generally the best measure for adjusting payments to consumers when the intent is to allow consumers to purchase, at today's prices, a market basket of goods and services equivalent to one that they could purchase in an earlier period. The CPI also is the best measure to use to translate retail sales and hourly or weekly earnings into real or inflation-free dollars". The CPI for All Urban Consumers (CPI-U) increased of 0.5 percent in March 2011 on a

seasonally adjusted basis, the U.S. Bureau of Labor Statistics reported. Over the last 12 months, the all items index increased 2.7 percent before the seasonal adjustment.

The Social Security Administration announced in October 2010 that the monthly Social Security and Supplemental Security Income (SSI) benefits would not automatically increase for 2011. This is directly related to the fact that there was no increase in the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPU-W) from the third quarter of 2008 to the third quarter of 2010. Consequently, for the second time in three decades, Social Security recipients will not receive a cost of living adjustment.

Every year since the Fire District began operations with its own employees in 1994, the Board of Directors has allowed employee input regarding annual wage and benefit changes. This year, the employees were polled by the Sun City West Firefighters Association to ascertain what wage and benefit issues they would like the Board of Directors to consider changing or creating for FY 2011/2012. Given the current state of the economy, District employees have not requested any benefit enhancements for next year. Therefore, there are no additions to the FY 2011/2012 benefit package expenditures except anticipated increases in pension, health and dental insurance premiums.

Additions to the compensation expenditures only include wage increases that are projected as part of the annual review/merit process for those employees who have not yet reached the top step salary for their particular wage scale. Considering all District employees, 38.6% or 32 employees are ineligible for merit enhancement during FY 2011/2012. In addition, another 11 employees will transition to the top step for their wage scale, making them ineligible for merit increases during the next fiscal year. Consequently, by June 30, 2012 the total number of “topped out” employees will reach 43 or 51.9% of current work force. A Cost of Living Adjustment is not programmed for FY 2011/2012 for any Sun City West Fire District employees for a third consecutive year. Prior to the 2009/2010 fiscal year, the District had programmed COLA increases into the budget every year since the District’s inception.

The table offered on the next page identifies each account associated with the District’s wages and benefits program, followed by detail descriptions of those accounts.

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Wages & Benefits Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5000 General Wages						
5005 · Administrative	\$ 419,125	\$ 421,702	\$ 421,672	\$ 427,955	\$ 6,253	1.5%
5010 · EMS	\$ 868,866	\$ 891,931	\$ 870,008	\$ 890,978	\$ (953)	-0.1%
5015 · Emergency Services	\$ 3,738,730	\$ 3,829,017	\$ 3,721,004	\$ 3,860,830	\$ 31,813	0.8%
5020 · Community Risk Reduction	\$ 229,015	\$ 269,756	\$ 231,576	\$ 235,533	\$ (34,223)	-12.7%
5025 · Support Services	\$ 113,632	\$ 117,775	\$ 113,202	\$ 103,104	\$ (14,671)	-12.5%
Total 5000 General Wages:	\$ 5,369,368	\$ 5,530,181	\$ 5,357,463	\$ 5,518,400	\$ (11,781)	-0.2%
5000 Continued: Additional Compensation						
5030 · Miscellaneous Compensation	\$ 10,225	\$ 20,850	\$ 20,475	\$ 23,200	\$ 2,350	11.3%
5035 · Longevity Compensation	\$ 56,038	\$ 53,618	\$ 53,177	\$ 57,068	\$ 3,450	6.4%
5050 · Holiday On-Call Compensation	\$ 219,317	\$ 223,419	\$ 223,419	\$ 225,096	\$ 1,677	0.8%
5070 · Program Manager Compensation	\$ 2,600	\$ 2,600	\$ 2,600	\$ 2,600	\$ -	0.0%
5085 · Coverage Compensation	\$ 442,345	\$ 353,833	\$ 295,436	\$ 311,763	\$ (42,070)	-11.9%
Total 5000 Additional Compensation:	\$ 730,525	\$ 654,320	\$ 595,107	\$ 619,727	\$ (34,593)	-5.3%
Total General Wages:	\$ 6,099,893	\$ 6,184,501	\$ 5,952,570	\$ 6,138,127	\$ (46,374)	-0.7%
5100 Employer Taxes & Benefits						
5110 Employer Taxes						
5111 · Social Security Tax - Employer	\$ 95,746	\$ 104,447	\$ 67,563	\$ 93,058	\$ (11,389)	-10.9%
5112 · Medicare Tax - Employer	\$ 87,423	\$ 91,614	\$ 86,491	\$ 90,452	\$ (1,162)	-1.3%
5113 · AZ UI & Job Training Tax	\$ 4,621	\$ 5,327	\$ 5,023	\$ 5,268	\$ (59)	-1.1%
5114 · Workers Compensation Insurance	\$ 114,990	\$ 139,608	\$ 132,315	\$ 141,814	\$ 2,206	1.6%
Total 5110 Employer Taxes:	\$ 302,779	\$ 340,996	\$ 291,393	\$ 330,592	\$ (10,404)	-3.1%
5120 Retirements						
5121 · PSPRS Retirement Contributions	\$ 706,153	\$ 752,077	\$ 709,288	\$ 805,645	\$ 53,568	7.1%
5122 · ASRS Retirement Contributions	\$ 142,403	\$ 161,658	\$ 146,438	\$ 150,443	\$ (11,215)	-6.9%
5123 · 401(a) Retirement Contributions	\$ 182,689	\$ 186,278	\$ 202,304	\$ 198,686	\$ 12,408	6.7%
Total 5120 Retirements:	\$ 1,031,244	\$ 1,100,013	\$ 1,058,030	\$ 1,154,774	\$ 54,761	5.0%
5130 Benefit Insurance						
5131 · Health Insurance	\$ 757,869	\$ 1,013,211	\$ 925,818	\$ 1,088,838	\$ 75,627	7.5%
5132 · Dental Insurance	\$ 71,175	\$ 75,868	\$ 71,699	\$ 83,197	\$ 7,329	9.7%
5133 · Life Insurance	\$ 13,043	\$ 13,593	\$ 14,617	\$ 13,510	\$ (83)	-0.6%
5134 · PSPRS Cancer Insurance	\$ 5,200	\$ 5,400	\$ 3,675	\$ 3,975	\$ (1,425)	-26.4%
5135 · Post Employment Health Plan	\$ 60,896	\$ 62,122	\$ 60,055	\$ 61,660	\$ (462)	-0.7%
5136 · MERP Retiree Med Reimbursement	\$ 4,200	\$ 4,200	\$ 4,200	\$ 4,200	\$ -	0.0%
5137 · Long Term Disability	\$ 21,571	\$ 20,010	\$ 21,060	\$ 17,542	\$ (2,468)	-12.3%
5138 · Flexible Spending Account	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%
5139 · Vision Insurance	\$ 6,069	\$ 6,462	\$ 6,351	\$ 5,170	\$ (1,292)	-20.0%
Total 5130 Benefit Insurance:	\$ 940,022	\$ 1,200,866	\$ 1,107,474	\$ 1,278,092	\$ 77,226	6.4%
5140 Operational Allowances						
5141 · Sick Leave Buy Back	\$ 35,409	\$ 52,822	\$ 51,773	\$ 19,461	\$ (33,361)	-63.2%
5142 · Uniform Allowance	\$ 63,892	\$ 65,521	\$ 60,846	\$ 65,450	\$ (71)	-0.1%
5143 · Cell Phone Allowance	\$ 10,420	\$ 12,272	\$ 10,288	\$ 12,220	\$ (52)	-0.4%
Total 5140 Operational Allowances:	\$ 109,721	\$ 130,615	\$ 122,907	\$ 97,131	\$ (33,484)	-25.6%
Total Benefits:	\$ 2,383,767	\$ 2,772,490	\$ 2,579,804	\$ 2,860,589	\$ 88,099	3.2%
Total Combined Wages & Benefits:	\$ 8,483,660	\$ 8,956,991	\$ 8,532,374	\$ 8,998,716	\$ 41,725	0.5%

The following bullet points provide detailed information regarding all accounts grouped in the 5000 General Wages and the 5100 Employer Taxes & Benefits sections of the previous table.

- **5005 Administrative Services Division:** These employees generally work a 40-hour work schedule. This account includes salaries for the Fire Chief, Administrative Coordinator, and the Accounting Supervisor. Also included in this account are the hourly wages for the Executive Assistant, the Account Clerk, and the Administrative Assistant position.
- **5010 EMS Section:** This account encompasses Emergency Medical Service personnel including the ranks of Emergency Medical Technician (EMT) and Paramedic. They are considered Shift Non-Sworn employees who staff District ambulances and work one 24-hour shift every third day generating an average of a 56-hour work week. Under the Fair Labor Standards Act, this requires 16 hours of mandatory overtime each work week, which is accounted for in this budget item. This class also includes salary funding for the EMS Coordinator who is assigned to a 40-hour work week schedule.
- **5015 Emergency Services Division:** The ranks of Captain, Engineer, and Firefighter are included in this account. The majority of the personnel in this account are classified as Shift Sworn Employees who also work one 24-hour shift every third day generating an average work week of 56 hours. However, these employees fall under a special Fair Labor Standards Act 7(k) Exemption which determines that these personnel receive only three (3) hours of mandatory overtime for each 56-hour work week which is accounted for in this budget item. This account increased due to the addition of one full time employee in the form of a Firefighter Paramedic for staffing of the HALO program. However, due to the nature of the HALO program, all expenditures associated with this employee will be off-set by the HALO revenues received. One (1) Deputy Chief and three (3) Battalion Chiefs salaries are funded through this account. When authorized, this account generally includes the hourly wages of one (1) Training Coordinator.
- **5020 Community Risk Reduction Division:** Employees in this account generally work a 40-hour work week schedule. Budgeted funds contain the salary of one (1) Deputy Chief, and the hourly wages of the Deputy Fire Marshal, and the Community Outreach Specialist. The decrease in this account resulted from the continued Information Technology Coordinator position vacancy for FY 2011/2012. However, this position is authorized under the District's current Staffing Plan and may be funded at some point in future years.
- **5025 Support Services Division:** These employees generally work a 40-hour work week schedule. This account includes the salary of a Support Services Coordinator and hourly wages for a Support Services Technician. The Support Services Coordinator position became vacant in late FY 2010/2011, producing the under expenditure of this budget. This position is anticipated to be filled in FY

2011/2012 at a lower compensation level with a less tenured employee.

- **5030 Miscellaneous Compensation:** This account funds Out-of-Class Assignment Compensation, which is currently earned on a per shift basis after the completion of an initial 120 non-consecutive hours of working in an Out-of-Class capacity. Hours are accumulated on an annual basis and are carried over from previous years until the minimum requirement is met. An Out-of-Class Assignment is defined as an employee temporarily working in a position of higher rank/responsibility, i.e: an Engineer who must temporarily work in the position of Captain. Employees may only work in this higher ranking capacity if they meet District defined minimum requirements for the higher ranking position. Currently, employees receive this structured stipend for each full 24-hour shift worked under Out-of-Class assignment guidelines after completing the 120 non-consecutive Out-of-Class hours.
- **5035 Longevity Compensation:** This program was designed to encourage long term employment with the Fire District by providing added compensation for tenured employees based on specific policy guidelines. This program, as well as a competitive wage and benefit package, has proven instrumental in helping to slow the trend of excessive and costly employee turnover. The program is designed to reward employee loyalty with the District and has become commonplace in fire departments across the valley.
- **5050 Holiday / On-Call Compensation:** The District's business requires 24-hour service, 7 days a week, 365 days per year including holidays. This requires that Fire District personnel spend time away from their families during established holidays. Various on-call personnel such as the Support Services personnel, District qualified Fire Investigators, and Chief Officers are also required to be on call every day of the year on a 24-hour basis. This program is in place to compensate employees for these mandatory holiday and 24-hour on call responsibilities and is also a common fire department benefit.
- **5070 Program Manager Compensation:** This program compensates the Emergency Medical Services (EMS) Supplies and Fitness Program Managers for additional specialized duties above and beyond their normal job requirements. These program managers acquire an in-depth knowledge of their specific programs in order to effectively ensure certain District requirements are adhered to on a daily basis.
- **5085 Coverage Compensation:** This is a difficult area in which to project budgeted funding. Many unknown circumstances contribute to this expenditure area which can greatly impact the outcome of this budgetary item over the course of the fiscal year. Funds provide for the maintenance of required manpower to effectively meet the needs of the property owners in an emergency response and also to comply with local, state and federal standards. Unforeseen events or illnesses, mandatory state and federal training compliance

requirements, unplanned personnel vacancies, or large scale incidents all affect this expenditure. While the District attempts to ensure that there will always be personnel available to cover these gaps in the daily schedule, personnel may be required to provide services during their normal 'off-duty' hours. Federal law mandates that these hours be compensated at a rate of one and one half times an employee's normal hourly wage. Due to the District having a minimum number of staffing vacancies as compared to previous years, this account is expected to realize under-expenditure for FY 2010/2011 and a conservative decrease was budgeted for FY 2011/2012.

- **5111 Social Security Tax:** The District is required to comply with certain federal, state and local government regulations and statutes which outline specific budgetary requirements. Although the District is required to pay the usual employer taxes, it does receive some exemptions, i.e., shift-sworn emergency services employees are exempt from Social Security due to their required inclusion in the Arizona Public Safety Personnel Retirement System (PSPRS). The District is required to pay a 6.2% tax on all wages paid to employees who are not mandated to be included in PSPRS. This generally represents less than half of the District's employees. The District has projected a significant decrease in the account as a result of a recent ruling by the Arizona State Retirement System (ASRS) regarding PSPRS annuitant employees. This ruling states that any employee who is a PSPRS annuitant, meaning they have previously participated in and retired from PSPRS, may not participate in ASRS. Therefore, they are not covered by the District's Section 218 Agreement with the Social Security Administration and are not covered under Social Security. The District currently has two senior employees who are legislatively excluded from ASRS and PSPRS. Eligible employees are also mandated to pay a portion of their wages for this tax.
- **5112 Medicare Tax:** The District is required to pay a 1.45% tax on all wages paid to all employees. Employees are also mandated to pay an equivalent portion of their wages for this tax.
- **5113 AZ Unemployment & Job Training Tax:** As a governmental entity, the District is given the option of deciding whether to be a taxable, contributing employer or a reimbursable employer for Arizona State Unemployment Insurance. The District received a rate of 0.71% during last fiscal year and anticipates that the rate will increase slightly to 0.75% for FY 2011/2012. This tax is based on the first \$7,000 of wages paid to each employee during the calendar year. In addition, a 0.10% tax is paid on the same wages for the Arizona Job Training Program. In the past several years, the District has had minimal claims for unemployment benefits paid out on its behalf. Decreases in this account are calculated based on planned vacancies for FY 2011/2012.
- **5114 Worker's Compensation Insurance:** District employees work in an atmosphere where they are faced with potentially life threatening or bodily injury

situations on a daily basis. The risk to their lives and livelihoods is greater than that of the average private sector employee. This results in elevated annual premiums for Worker's Compensation Insurance. Premium rates differentiate between each Worker's Compensation Class and can change from year to year based on industry trends. The District did experience an increase in the Firefighter's Classification rates for FY 2011/2012 resulting in an increase in this budget expenditure. However, the District focuses on safety both in the field and in its facilities which has resulted in reduced instances of reportable injuries. This aids the District in maintaining a steady and more predictable premium.

- **5121 PSPRS Retirement:** The District's sworn or firefighting employees are mandated to participate in the Arizona Public Safety Personnel Retirement System (PSPRS). The annual actuarial produced by the PSPRS has determined the District's required contribution rate for FY 2011/2012 year is 20.06% of wages paid to all eligible employees. This rate is an increase when compared to the FY 2010/2011 contribution rate of 18.33%. Additionally, recent changes in state statute now mandate that the District must pay an actuarially established contribution rate on all wages paid to PSPRS annuitants who have been re-hired into a PSPRS position. The District has two senior employees that fit this criterion. The PSPRS FY 2011/2012 contribution rate for PSPRS annuitants is 10.51%. As a result of the increase in the PSPRS rate and the addition of this new legislative requirement, this account experienced 7.1% increase in required funding. Participating employees are also mandated to pay a designated portion of their wages, established by statute, to the PSPRS. The employee contribution rate was also impacted by recent legislative changes and has been increased for the coming fiscal year from 7.65% to 8.65%, and is anticipated to increase annually over the next four years.
- **5122 ASRS Retirement:** The District's non-sworn or non-firefighting personnel participate in the Arizona State Retirement System (ASRS). The annual actuarial produced by the ASRS has set the District's required contribution rates for the FY 2011/2012 at 9.87% of wages paid to all eligible employees which represents a slight increase from the 9.6% rate of the prior fiscal year. Eligible employees are also mandated to pay a portion of their wages to the ASRS. Recent passage of legislation associated with the ASRS also increased employee contributions, shifting more of the funding burden from employers to employees. As a result of these changes, the employee contribution rate increased from 9.6% to 11.13% for FY 2011/2012. Despite an increase in the District's contribution rate for FY 2011/2012, this account was reduced as a result of these new legislative changes.
- **5123 401(a) Retirement:** This program is a long-term personal retirement account designed to help provide additional retirement funds for District employees. This type of program is common in the fire service and is often referred to as a Deferred Compensation Program. The District currently funds the 401(a) account at a rate of 3.0% of wages paid per employee. Employees

become 100% vested after five years of continuous service with the Fire District. This account was significantly increased as a result of the ASRS ruling. Those employees that are not eligible to participate in the ASRS, PSPRS or Social Security retirement systems are provided an alternative retirement contribution. These employees receive the equivalent of the District's ASRS and Social Security contribution rates, less the PSPRS annuitant rate, as an in-kind contribution into their 401(a) accounts.

- **5131 Health Insurance:** Health Insurance, including a prescription drug program, is provided as a benefit to the employees, eligible retirees and their dependents in accordance with industry standards. The District's current insurance carrier, United Healthcare (UHC), initially proposed a 19% increase over last year's premium costs. The District compared the various insurance alternatives available and, in an attempt to reduce the requested premium increase, began negotiations with other carriers. The District also opted to change insurance brokers during this year's negotiation process.

The District has decided to change medical insurance carriers and also to offer two medical insurance options for employees and eligible retirees this year. The first option is the CIGNA Open Access Plus (OAP) Plan which is very similar to the District's United HealthCare PPO Plan from last fiscal year. The second option is the CIGNA Choice Fund Health Savings Account (HSA) Plan.

The HSA is a form of consumer directed health coverage pairing a high-deductible health plan with tax-free savings account for medical expenses. HSA's are ultimately designed to reduce healthcare insurance costs for employers and employees. HSA's were designed to motivate better health care purchasing decisions. The underlying idea is that people make smarter financial choices when they're spending their own funds. Consequently, claims will be smaller and renewals will be less.

Premiums for full-time employees will continue to be covered by the District with either medical insurance option, while premiums for dependent coverage will continue to be shared between the employee and the District. To alleviate the issues involved with annual premium increases and to create more support from employees ("if you abuse it, it will cost you more in future premium increases"), the decision was made to adopt an annual 80/20 PPO/OAP and 85/15 HSA premium payment arrangement for full-time employee dependant coverage. The District will also make a contribution for health-related expenses to the HSA account of full-time employees participating in the HSA plan.

- **5132 Dental Insurance:** Dental insurance is provided as a benefit to the employees and their dependents in accordance with industry standards. Premiums for employees are covered by the District while premiums for dependent coverage are shared between the employee and the District. Previously, the Fire District Governing Board chose to stabilize the annual

employee dental premium amounts. To alleviate the issues involved with annual premium increases and to create more support from employees (“if you abuse it, it will cost you more in future premium increases”), the decision was made to adopt an annual 80/20 premium payment arrangement for dependent coverage.

Fire District employees are currently covered through Met Life Dental. Met Life had initially proposed a 24% increase in premiums for FY 2011/2012. This was ultimately negotiated down to a 13% increase over the prior year’s rates. The proposed budget currently reflects the proposed Met Life increase.

- **5133 Life Insurance:** Life insurance is provided to each employee with a benefit equal to one and one half times their annual salary, up to the maximum value of \$100,000. The District had enjoyed a two-year contract rate with Standard, which expired June 30, 2011. However, the District was able to renew this contract for another year, maintaining the previous premium rate guarantee and the same premium rates until June 30, 2012. Decreases are attributed to planned position vacancies.
- **5134 PSPRS Cancer Insurance:** This benefit is provided to Arizona Public Safety Personnel Retirement System (PSPRS) participants and is funded through and provided by PSPRS. The District does not have an option to discontinue this insurance as it is mandated by State statute. Participants become eligible to utilize this benefit from their first day of inclusion under PSPRS. This account funds the required coverage of both the active PSPRS participants and those participants currently enrolled in the Deferred Retirement Option Plan (DROP). In FY 2010/2011, the annual premiums were reduced from \$100 to \$75 per participant. PSPRS has confirmed that these rates are anticipated to either remain at the \$75 rate or be reduced for FY 2011/2012.
- **5135 Post Employment Health Plan (PEHP):** This employee benefit plan is designed to allow the Fire District to invest funds into a Post Employment Health Plan (PEHP) under Internal Revenue Code Section 501(c)(9) VEBA. These funds provide for the payment of post employment qualified medical premiums that employees will incur upon separation from service to the District. This program was established in July 2007 to replace the Medical Expense Reimbursement Plan (MERP) previously sponsored by the District. The PEHP benefit is currently funded at a rate of 1.0% of wages paid per employee.
- **5136 MERP Retiree Medical Reimbursement (MERP):** The Medical Expense Reimbursement Plan (MERP) became effective July 1, 1999. It was revised by Board Resolution # 7212005 (July, 2005) to disallow any new participants after July 1, 2007. This program reimburses PSPRS or ASRS eligible retirees \$50 per month, not to exceed \$600 annually, for any medical expenses they incur and is issued in January of each year. This benefit terminates when the retiree becomes Medicare eligible. This program currently supports seven District retirees and will be gradually eliminated when the last eligible retiree reaches

Medicare eligibility age in FY 2022/2023.

- **5137 Long Term Disability (LTD):** This benefit is provided through two different entities: Arizona State Retirement System (ASRS) and, The Standard Insurance Company. This fiscal year, ASRS mandates that both the employee and the District pay a premium rate of 0.25% of each participant's wages annually to provide for Long Term Disability. Participants become eligible to utilize this benefit from the first day of their enrollment into ASRS. Because Public Safety Personnel Retirement System (PSPRS) participants do not receive this benefit through their retirement system, the District contracts with a vendor to provide a comparable benefit to that of ASRS participants. The District was able to renew this contract for another year, slightly reducing the previous premium rate.
- **5138 Flexible Spending Account (FSA):** A Flexible Spending Account (FSA) is a tax-advantaged financial account administered through the District's cafeteria plan. An FSA allows an employee to allot a portion of his or her earnings, up to \$2,000 annually, to pay for qualified expenses as established under the cafeteria plan. These types of accounts are most commonly used for medical expenses but can also be utilized for dependent care, up to \$5,000 annually. Money deducted from an employee's pay and placed into the FSA is not subject to payroll taxes, resulting in a decrease in payroll taxes for both the employee and the District. There is generally a minimal monthly administrative fee for each participant in this type of program. Account forfeitures from the previous fiscal year and current year payroll tax savings are anticipated to cover any costs that may be generated.
- **5139 Vision Insurance:** This account funds vision insurance benefits for the employees of the District. Employees may elect additional coverage for their dependents, but must currently pay 100% of these dependent costs. EyeMed Vision Care will be providing a similar benefit for FY 2011/2012 at a decrease in premium costs, as compared to last year's vision benefit. This account experienced a decrease in expenditures as a result of the proposed full time employee vacancies combined with the decreases in premium costs.
- **5141 Sick Leave Buy Back:** In accordance with the District's Sick Leave Buy-Back / Pay-Out Policy, employees who meet the policy requirements are eligible to sell back sick leave hours accumulated above an established minimum requirement. Employees who are eligible to participate in this program may sell back sick leave hours at a rate of two (2) days/shifts in exchange for one (1) day/shift (.50 cents on the dollar) at their normal hourly wage. This program was created in an effort to reduce future District liability funding requirements. This allows employees to decrease their sick leave accumulation at current hourly wages rather than continuing to accumulate hours. Hours held could result in a greater expense to the District if cashed out at a higher wage upon employee retirement. An additional benefit to the District is the reduction in sick leave usage experienced as a result of this program. Funding for this expenditure is

calculated based on projected usage by District employees. Employees that plan to participate in this program during the next fiscal year are required to notify the Financial Services Section by March 1 of each year. This account experienced a decrease as a result of the retiring of two long time employees and fewer participant requests under this policy for the coming fiscal year.

- **5142 Uniform Allowance:** The District's Uniform Allowance Policy directly governs the funds in this account. In order to ensure that employees maintain a professional appearance and comply with safety standards, the District requires that its employees wear uniforms as outlined in its policies. In order to mandate uniform standard compliance, each employee is provided an annual uniform allowance which is added to the employee's compensation as taxable income. All employees who interact in the field with the exception of some members of the Administrative Staff receive this taxable benefit.
- **5143 Cell Phone Allowance:** Previously, the District issued and maintained cell phones for use by key individuals who are required to be accessible 24 hours a day, 7 days a week. Key employees who fall under this mandate are required to sign contracts and provide proof of continued cellular service ensuring accessibility. In return, these individuals are paid a per pay period allowance to maintain this service requirement. FY 2010/2011 vacancies in positions qualifying for this allowance contributed to the under expenditure in this account. However, it is anticipated that all qualifying positions will be filled next year.

Accounting and Professional Services

Accounting responsibilities include all finance, accounting, payroll, budget preparation, purchasing, and customer billing services. Completion of the annual audit and Comprehensive Annual Financial Report (CAFR) and annual budget report submissions are also tasks performed with the assistance of these funding categories. The District must periodically seek the services of outside professionals to provide needed services. Those budgetary line items are also contained in this section.

Financial Services Section Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5305 · Accounting	\$ 10,888	\$ 12,500	\$ 12,479	\$ 14,350	\$ 1,850	14.8%
5310 · Bank Service Charges	\$ 9,907	\$ 14,250	\$ 8,550	\$ 15,000	\$ 750	5.3%
5315 · Payroll Processing	\$ 847	\$ 1,050	\$ 566	\$ 1,200	\$ 150	14.3%
5320 · Ambulance Billing	\$ 135,364	\$ 147,610	\$ 143,226	\$ 146,862	\$ (748)	-0.5%
5505 · Memberships & Dues	\$ 7,131	\$ 7,889	\$ 7,889	\$ 7,960	\$ 71	0.9%
5510 · Professional Subscriptions	\$ 3,070	\$ 3,346	\$ 3,346	\$ 3,376	\$ 30	0.9%
5595 · Contingency	\$ 250,000	\$ 611,834	\$ 10,766	\$ 350,000	\$ (261,834)	-42.8%
Total Accounting & Professional:	\$ 417,207	\$ 798,479	\$ 186,822	\$ 538,748	\$ (259,731)	-32.5%

- **5305 Accounting:** State statute requires the District to hire an outside

independent Certified Public Accountant (CPA) to provide a complete audit of all District financial information on an annual basis. This line item is managed by the Financial Services Section and allows funding for the annual audit process as well as for occasional consultation with a Certified Public Accountant for audit preparations and other financial matters that arise during the fiscal year. The District produced its first Comprehensive Annual Financial Report (CAFR) for the period ending June 30, 2010. This new document takes the place of the previous Basic Financial Statements and provides the public, and District creditors, with the broadest picture of the District's financial status as possible. It is the intent of the District to continue production of this in-depth financial report. Some of the projected increases in this account are associated with the additional CPA hours required in auditing the CAFR. There is also funding for participation in the Government Finance Officers Association (GFOA) Budget and CAFR Award Programs. The District annually solicits bids from multiple CPA firms around the state to ensure it is receiving the most professional and efficient services available.

- **5310 Bank Service Charges:** The District has been able to avoid banking service charges in previous years through the use of balance credits applied against banking service fees. However, as a result of the economic downturn and consequent reduction in interest rates, the District is no longer receiving enough balance credits to offset these costs. Therefore, the District was forced to revise this account and its associated expenditures. As interest rates increase, these fees may be reduced or eliminated.
- **5315 Payroll Processing:** Internal payroll processing was implemented on January 1, 2007, and has been extremely successful. This account funds the expenditures required for payroll processing. The requirements include periodic tax table updates through the accounting software, tax form requirements for federal and state reporting, and miscellaneous supplies. Due to increases in the tax table costs, this account has been slightly increased. This program is managed by the District's Financial Services Section personnel.
- **5320 Ambulance Billing:** The contract with Mediclaim Data Services (MDS), the District's ambulance transport billing service provider, is managed by the Financial Services Section. The MDS contract was renewed effective July 1, 2009, and is due to expire on June 30, 2012. This contract allows for a fee rate of 9.5% of net ambulance revenues collected by MDS and is calculated based on the estimated ambulance revenues for FY 2011/2012. Should revenue collections either decrease or increase from the estimated budget amount, this expenditure account will be impacted accordingly.
- **5505 Memberships & Dues:** As a professional organization, the District has a responsibility to maintain specific memberships with organizations to ensure the continued education of its employees. Some of these memberships keep the District apprised of the ever-changing legal aspects of emergency service

protocols and nuances. Other dues keep the District involved in the local community as well as State and national associations, again helping to ensure that District personnel have access to the most current information as quickly as it becomes available for distribution. Examples of these professional organizations include the Arizona Fire District Association (AFDA), the National Fire Protection Association (NFPA), the International Code Council (ICC), and the Government Financial Officer's Association (GFOA). This account was slightly increased as a result of increased fees for some of the District's professional memberships.

- **5510 Professional Subscriptions:** The District subscribes to local periodicals to accumulate current information and historical data. During FY 2009/2010, the District ceased the purchase of periodicals for all stations, with the exception of the Administrative office, which uses them for public relations as well as for historical and current events purposes. It also subscribes to nationally recognized professional materials which provide educational information for the Emergency Medical Services personnel and code enforcement manuals which are utilized by staff on a regular basis. Increases in this account are attributed to increases in some of the required subscription costs.
- **5595 Contingency:** The Contingency section of the District expenditures budget was established through Governing Board action to offset unforeseen expenses and revenue shortages during the fiscal year. Unanticipated expenses can arise at any time. For example, it is not uncommon for the District to end its fiscal year with a nearly 3% shortage in property tax revenue. Another area of potential revenue shortage is in ambulance transport revenues. Shortfalls in ambulance transport revenues can be attributed to a wide range of causes including Federal Medicare reimbursement changes or fewer transports than estimated during the budgeting process. This expenditure account also acts as an offset to the necessary capital projects annual funding requirements. Along with general revenues over expenditures at fiscal year-end, unexpended funds in this account are transferred directly to the Capital Projects Fund in support of future capital needs.

The Government Accounting, Auditing, and Financial Reporting (GAFR) Manual recommends a contingency fund of no less than 5-15% of the required General Fund operational expenditures. Currently, the Fire District's contingency allotment represents approximately 3% of these expenditures. Following the GAFR recommendations, the District's contingency fund should be incrementally increased each year, with the ultimate goal of maintaining the recommended minimums. Should the District decide to pursue Ambulance Non-Emergency Transport Services, the associated initial funding for expenditures for this Special Revenue Project may be utilized from this account. This account was significantly decreased from FY 2010/2011 due to funding that had been placed in the account to cover potential increases in dispatching fees and health insurance costs during that fiscal year that are not planned for FY 2011/2012.

Debt Service

Large-scale apparatus, specialized equipment, and facilities have always been immense expenses to fire districts and the taxpayers who support them. The District consistently looks for ways to decrease the impact of these major purchases to its property owners through alternative funding sources. The method of using alternative funding through lease/purchase spreads the costs of a capital asset over the actual useful service life of the asset. This method allows the asset to be paid for by the taxpayers who actually benefit from its use. Assets that are purchased using cash on hand accumulated from current taxes and current residents may not benefit those current taxpayers; instead benefitting future taxpayers. In the past, the Board of Directors has acquired lease/purchase proceeds to alleviate funding through increased tax levies for significant capital asset purchases. Utilizing General Obligation (GO) Bonds, lease/purchases, and other funding mechanisms provides the District with the ability to stretch tax dollars to maximize limited budgets. These alternative funding methods have been used by fire districts as well as other local governments throughout the years and remain a key element to stabilizing tax rate fluctuations.

During FY 2007/2008, the District refinanced approximately \$2.7 million dollars of previously existing debt, reducing interest rates and repayment obligation timeframes. It also acquired roughly \$3.5 million in new capital funding. The new debt service program provided the funding necessary to complete the District's immediate capital projects, including the completion of renovations of Fire Station 102 and the replacement of an aging fire pumper and ladder truck. This debt issuance, in conjunction with the District's annual depreciation schedule funding, is expected to significantly reduce the need for future debt funding.

The District historically has retired debt early when cash reserves have been adequate. During FY 2010/2011, the Board of Directors approved the decision to retire the Marquette Bank Lease/Purchase that was not scheduled to be fully satisfied until April of 2013. This debt had a principal balance of \$102,789.47 and accumulated interest of \$2,040.37, totaling \$104,829.84 at the time of the regularly scheduled April 2011 payment. Anticipated revenues over expenditures for the year were used to satisfy this indebtedness, saving the District an additional two years in debt service payments at an interest rate of 3.75%. This decision saved the District approximately \$4,200 in interest expenditures.

The District continues to manage its remaining debt. With the retirement of the Marquette Bank debt, the District will have approximately \$5.3 million dollars of outstanding indebtedness at the end of FY 2011/2012. DeLage Landon is the holder of the District's remaining debt, which has a fixed interest rate of 4.3%. The annual principal and interest payments for this Lease/Purchase Agreement equate to roughly \$573,000 for FY 2011/2012 and FY 2012/2013. This will increase in FY 2013/2014 to approximately \$617,000 and remain at that level until the debt is fully retired in June of 2023. The District will continue to explore options for retiring debt early whenever feasible.

Debt Service Expenditure Projections						
Description	FY 2009/2010	FY 2010/2011	FY 2010/2011	FY 2011/2012	Budget	% of
	ACTUALS	ADOPTED	ESTIMATED	ADOPTED	Variance	Change
7230 · Marquette Principal	\$ 170,248	\$ 39,132	\$ 122,163	\$ -	\$ (39,132)	-100.0%
7235 · Marquette Interest Expenditure	\$ 9,715	\$ 4,467	\$ 4,465	\$ -	\$ (4,467)	-100.0%
7250 · DeLage Landon Principal	\$ 174,287	\$ 319,694	\$ 319,694	\$ 333,590	\$ 13,896	4.3%
7255 · DeLage Landon Interest Expenditure	\$ 262,371	\$ 253,331	\$ 253,330	\$ 239,436	\$ (13,895)	-5.5%
7290 · Capital Projects Funding (Deprc)	\$ 150,000	\$ 130,900	\$ -	\$ 128,000	\$ (2,900)	-2.2%
Total Debt Service:	\$ 766,621	\$ 747,524	\$ 699,652	\$ 701,026	\$ (46,498)	-6.2%

- **7230 Marquette Principal:** The budget for this account was not funded as a result of the early retirement of this debt.
- **7235 Marquette Interest:** The budget for this account was not funded as a result of the early retirement of this debt.
- **7250 DeLage Landon Principal:** This account funds the current year's semi-annual principal payment expenditures. This Lease/Purchase Debt is scheduled to be fully retired in June 2023.
- **7255 DeLage Landon Interest:** This account funds the current year's semi-annual interest payment expenditures. The interest rate associated with this debt is fixed at 4.3% for the term of the debt.
- **7290 Capital Projects Funding (Depreciation):** This account allocates funding for the purchase and replacement of the District's depreciable capital assets including facilities, apparatus and other costly equipment. Calculations for this account are derived from the Capital Improvement Plan and are revised annually.

The District Board has implemented a practice to develop and annually review a Capital Improvement Plan (CIP) as a section within the District's Business Plan. Although the Fire District prepares a separate CIP from the Annual Budget and Operational Plan, the two plans are closely linked. The CIP is a systematic method of anticipating, planning, and budgeting for major capital projects. The structure of the plan is based on the District's Property Stewardship and Capitalization Policies. The Plan includes depreciation schedules, normal replacement schedules, and recommended annual funding requirements.

Through the use of aging and depreciation schedules, and future capital funding projections; the District has developed the Capital Projects Funding program to assist in dispersing, over multiple years, the detrimental impact that large capital purchases have on the annual budget process. This negative impact has been lessened through capital planning including the depreciation of large assets over their life span and designating funding on an annual basis to support this program.

Administrative / Community Risk Reduction Divisions

The Administrative / Community Risk Reduction Divisions are overseen by a Deputy Fire Chief who is supported by an Administrative Coordinator, Administrative Assistant, Information Technology Coordinator, Deputy Fire Marshal, and the Community Outreach Specialist. Each Division and its responsibilities will be detailed in the following pages of this document.

Administrative Services Division

The Administrative Services Division is supported by the Administrative Coordinator, Administrative Assistant, and the Information Technology Coordinator.

The primary responsibilities of the Administrative Services Division are to provide administrative support in the form of human resources, records management, office management, customer service, and information technology support. The Division's employees are charged with maintaining personnel records and public documents, customer relations with residents seeking services directly from the administrative offices of the District, and maintaining sophisticated computer operations to ensure proper data management.

Administrative Services Division Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Administrative Coordinator	1.0	1.0	1.0
Administrative Assistant	1.0	1.0	1.0
Information Technology Coordinator	0.5	1.0	1.0
Total Personnel Assigned	2.5	3.0	3.0

Administrative Services Division Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Human Resources		
Number of Employees Supported	82	83
Number of Volunteers Supported	38	60
Retirements and Departures Processed	1	1
New Employees Hired and Orientated	5	TBD
Workers Compensation Claims Processed	9	TBD
Employee Benefit Fairs Conducted	3	3
Recruitment Events	1	TBD
Information Technology		
Number of PC's Supported	56	56
Number of Critical Software Packages Supported	24	26

Status of FY 2010/2011 Performance Goals and Objectives

- Successfully conduct orientation for newly hired employees – **Goal Accomplished**

- Completed research/feasibility study regarding alternative work schedules – **Goal Accomplished / Ongoing**
- Manage the District's wide area data network, the District's intranet, internet and e-mail resources, all District desktop PCs and related equipment and PC software – **Goal Accomplished / Ongoing**
- Design and update existing intranet for easier access to pertinent information for employees – **Goal Accomplished / Ongoing**
- Continue support for fire and medical information programs as well as the link from the Communications Center to the District's emergency management reporting system – **Goal Accomplished / Ongoing**
- Continue to support the financial, human resources, EMS, fire, fleet and building maintenance software programs and all other software utilized to operate the District – **Goal Accomplished / Ongoing**
- Refine and computerize performance appraisal instrument – **Process Ongoing**
- Develop and implement enhanced intranet copies of the District Policy and Operations Manuals – **Goal Accomplished**
- Update and distribute new policies and procedures as necessary – **Goal Accomplished / Ongoing**
- Implement workflow management software operations – **Goal Accomplished / Ongoing**
- Manage District's recycling program – **Goal Accomplished / Ongoing**
- Institute a facility Renewable Energy System Project for all District facilities – **Goal Accomplished**
- Enhance the content of District quarterly newsletters – **Goal Accomplished / Ongoing**
- Instituted new web based computer program to enhance supply and maintenance tracking – **Goal Accomplished**
- Teleconferencing software installed and operational – **Goal Accomplished**

FY 2011/2012 Performance Goals and Objectives

- Conduct orientation for all newly hired employees.
- Complete an employee wage and benefit study.
- Evaluate trial period for Administrative alternative work schedule.
- Continue research/feasibility study regarding field personnel work schedules, review results of study and possibly implement.
- Continue to manage the District's wide area data network, the District's intranet, internet and e-mail resources, all District computers and related equipment and software.
- Continue to update existing intranet for easier access to pertinent information for employees.
- Continue to update and distribute new policies and procedures as necessary.
- Continue to enhance the content of District quarterly newsletters.
- Continue support for fire and medical information programs as well as the links from the Communications Center to the District's emergency management reporting system.
- Continue to support the financial, human resources, EMS, fire, fleet and building

maintenance software programs and all other software utilized to operate the District.

- Implement new computerized performance appraisal instrument.
- Continue to work towards a paperless office environment.
- Continue to manage District's recycling program.
- Complete renewable Energy System Project components.
- Research appliances due for replacement and purchase Energy Star appliances when possible.
- Finalize transition to Document Locator (workflow/records management software)
- Evaluate & install operating system software upgrades.
- Identify additional items to be scanned that could enhance efficiency and storage reduction.
- Evaluate computer system storage and access for ease of use.
- Enhance HRIS System in FireHouse.
- Evaluate GIS Mapping Program Equipment needs.
- Increase viability and spectrum of District Data Management.
- Enhance the Support Services Division data management systems.

Property, Casualty, and Management Liability Insurance

The District must ensure that its assets are protected to prevent any possible disruption in the services it provides to District property owners. To provide this assurance, the District obtains insurance policies that will replace property as a result of damage, theft, or loss. The District also retains insurance coverage to protect against unforeseen or unidentified potential liabilities.

Non-Medical District Insurance Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5210 · Facilities/Equipment Insurance	\$ 34,760	\$ 24,991	\$ 24,991	\$ 25,011	\$ 20	0.1%
5220 · Motor Vehicle Insurance	\$ 16,176	\$ 22,051	\$ 20,154	\$ 18,618	\$ (3,433)	-15.6%
5230 · Umbrella, Errors & Omissions	\$ 8,336	\$ 8,093	\$ 8,093	\$ 9,236	\$ 1,143	14.1%
Total Non-Medical District Insurance:	\$ 59,272	\$ 55,135	\$ 53,238	\$ 52,865	\$ (2,270)	-4.1%

- **5210 Facilities / Equipment Insurance:** This policy ensures repair and / or replacement of any District facilities or equipment that may incur an incident preventing normal service operations due to damage, theft, or destruction losses. This line item also includes General and Management Liability Insurances costs.
- **5220 Motor Vehicle Insurance:** This policy ensures that, in the event of an accident or loss, any apparatus belonging to the District will be replaced or repaired as quickly as possible and without a significant and unforeseen expense to the District. Decreases in this account are related to newer apparatus and lower premium costs.

- **5230 Umbrella, Errors & Omissions:** This policy protects the District and its taxpayers against unknown threats of litigation that could potentially have a detrimental financial impact. Arizona Theft Recovery and a \$400,000 Annual Fidelity Bond are also contained in this expenditure item. Increases in these premiums are reflective of increases in industry rates.

Administrative, Human Resources, and Information Technology

The administrative component of this segment includes the following: general administration and records management; clerical support for the various divisions; and continuous review, revision, and enforcement of the District Policy and Operations Manuals. The records management responsibilities include serving as legal custodian of the District's official records; coordinating public records request fulfillment; and records retention and destruction processes.

The Human Resources component encompasses many programs and services designed to support the District and its employees in the achievement of the District's mission. Human Resources oversees areas pertaining to employee hiring and orientation, performance management, benefits administration, Policy and Operation Manuals' maintenance, Milestone Recognition Program, and employee benefits and services. Additional responsibilities include administering local, state and federal employment laws; wages and salaries; employee and retiree healthcare benefits; the Deferred Compensation Program; and other areas essential to the management of the District's Human Resources including coordination and implementation of employee events, retirement programs, and additional recognition awards.

The information technology component of this section is responsible for District-wide integration and coordination of all technology applications; managing the District's wide area data network; work station computers; e-mail resources; District webpage; Global Information Systems (GIS) and data analysis; employee scheduling software (TeleStaff software); the District's data management systems (i.e. Document Locator System, Target Safety, FireAdmin.com, NEFSIS, Firehouse and Electronic Patient Care Reporting (ePCR) software) which handle District records management, incident reporting and other information; Fire Prevention occupancy and inspection records; and training records. To enhance effectiveness and efficiency, the District is increasingly utilizing technology in all facets of its operations. Correct and reliable statistical information is also vital to the District in terms of grant acquisition, Accreditation accomplishment, and growth planning projections.

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Administrative, HR & IT Expenditure Projections						
Description	FY 2009/2010	FY 2010/2011	FY 2010/2011	FY 2011/2012	Budget	% of
	ACTUALS	ADOPTED	ESTIMATED	ADOPTED	Variance	Change
5335 · Legal Expenditures	\$ 3,794	\$ 32,000	\$ 6,518	\$ 25,000	\$ (7,000)	-21.9%
5515 · District Outreach	\$ 8,326	\$ 11,785	\$ 9,066	\$ 11,785	\$ -	0.0%
5520 · Office Supplies	\$ 9,875	\$ 12,500	\$ 12,200	\$ 12,500	\$ -	0.0%
5525 · Office Equipment	\$ 2,810	\$ 9,000	\$ 9,000	\$ 7,000	\$ (2,000)	-22.2%
5530 · Postage & Delivery	\$ 3,500	\$ 3,500	\$ 2,855	\$ 3,000	\$ (500)	-14.3%
5535 · Publishing & Printing	\$ 2,801	\$ 4,696	\$ 3,517	\$ 4,050	\$ (646)	-13.8%
5540 · Copier R/M Expenditures	\$ 1,461	\$ 2,534	\$ 1,620	\$ 2,534	\$ -	0.0%
5450 · Computer/Systems/Equip R/M	\$ 10,555	\$ 17,500	\$ 17,500	\$ 46,500	\$ 29,000	165.7%
5455 · Computer Software Licensing	\$ 6,677	\$ 22,992	\$ 22,992	\$ 22,247	\$ (745)	-3.2%
5545 · Computer Hardware	\$ 4,872	\$ 10,000	\$ 10,000	\$ 10,000	\$ -	0.0%
5550 · Computer Software Expenditures	\$ 3,937	\$ 5,000	\$ 5,000	\$ 5,000	\$ -	0.0%
5610 · Duty Uniforms	\$ 5,548	\$ 7,100	\$ 3,487	\$ 6,050	\$ (1,050)	-14.8%
Total Administrative, HR & IT:	\$ 64,154	\$ 138,607	\$ 103,756	\$ 155,666	\$ 17,059	12.3%

- 5335 Legal Expenditures:** This account encompasses any legal expenditure requirements that may arise during the fiscal year. The budget is estimated based on past usage and current circumstances associated with potential grants, annexations, pending agreements, etc. This line item has been decreased for FY 2011/2012.
- 5515 District Outreach:** This section of the budget is used for the recognition and appreciation of the Fire District's customers, volunteers, residents, and employees. These funds are allotted to maintain a productive family environment for the District, its Board members, residents, employees, and customers. This line item includes such items as funding for Board member, citizen, and employee recognition events. Additionally, opportunities such as Board member and employee retirements and special recognition awards are purchased from this account. Other non-financial appreciation tokens and rewards include hams and turkeys for the on-duty crews during holidays. Current annual recognition items include the Firefighter of the Year Award and the Service Milestone Award Program. Employee events are critical to providing and maintaining the "family support" atmosphere within the District. This expenditure account also allows for ongoing administrative and business meetings hosted by the District. These meetings include, but are not limited to, Valley Fire Consortium meetings, Westside Fire Chiefs meetings, District Budget meetings, District Strategic Planning meetings, etc.
- 5520 Office Supplies:** This section is mainly comprised of items associated with the daily business operations of the administrative office and fire stations and includes miscellaneous office, clerical, filing, and paper supplies. A significant portion of the expenditures in this account are attributed to the purchase of toner and ink cartridges. The District continues to save external printing costs by the

printing of some brochures and public safety information internally. However, combined with the production of significant documents such as this budget document, the Strategic Plan, the Business Plan and other necessary reports does contribute to usage of ink and toner. Additionally, the cost of these supplies has steadily increased. If the District should replace the current copy machine with a full color unit, as recommended by the CIP replacement schedule, expenditures in this account should be maintained for FY 2011/2012.

- **5525 Office Equipment:** These funds are used to provide basic office equipment for use by the District to facilitate operational requirements. This line item allocates funding for printers, fax machines, calculators, and small computer equipment such as mouse or keyboard replacement. This account has been decreased based on the projected office equipment needs for next year.
- **5530 Postage & Delivery:** This account provides the funding necessary to mail or ship materials as needed. This account also provides for the leasing of a postage meter to facilitate the allocation of postage. This account has been decreased as a direct result of the District's transition toward more paperless systems. Previously, a significant amount of these budget expenditures were attributed to the mailing of paper patient care reports to the District's ambulance billing company. Transfer of these reports is now accomplished electronically.
- **5535 Publishing & Printing:** The District is a professional organization and, as such, is required to produce published materials such as business cards, blood pressure cards, and informational and educational brochures that highlight information on safety concerns, injury prevention, etc.
- **5540 Copier Expenditures:** This account allows for the purchase of supplies and the quarterly maintenance contract for the District's copy machines.
- **5450 Computer Systems Equipment Repair / Maintenance (R/M):** The computer systems are a critical component of the District's operations and are used extensively. These systems are managed by the Administrative Services Division and allow personnel to meet the daily management, information recording and reporting, and research and processing requirements of the District. This account has been increased for the 2011/2012 fiscal year due to the planned lack of funding for the Information Technology Coordinator Position.
- **5455 Computer Software Licensing:** This account funds the annual maintenance contracts of the District's current computer software systems. These systems include: FireHouse, TeleStaff, QuickBooks, Document Locator, FireAdmin.com, ArcView GIX, GasBoy, NEFSIS, ESO-ePCR, and many more. In order to sustain these programs with the most current updates, annual maintenance contracts must be maintained. This account ensures that functionality. These systems are designed to maintain or increase the effectiveness and efficiency of District data and records management processes.

- **5545 Computer Hardware:** The District's computer hardware and network funding is contained within this account. These funds will be used to maintain the current computer network and internet service in good working order and to purchase new and replacement components as needed.
- **5550 Computer Software Expenditures:** These funds provide for the purchase of new software programs and operating systems such as Microsoft Office, Outlook, Publisher and Microsoft Windows. These software and operating programs do not require annual upgrades. They only occur when necessary or when new computers are purchased.
- **5610 Duty Uniforms:** This account provides uniforms for the administrative staff mandating that all personnel present a professional appearance at all times. This account also sponsors funding for initial uniforms issued to any newly hired or promoted field personnel to enforce the District's professional operational appearance and safety standards.

Administrative Services Division Training

The Administrative Training section of the budget is managed by a Deputy Fire Chief and provides funding for the administrative personnel within the District. The continued education of personnel within the District is one of the most important missions the District accomplishes on a yearly basis. The District's focus on training continues to contribute to the highly skilled professionals who provide effective, efficient, and safe services to District property owners and visitors.

The Special Projects and Financial Services Sections, along with the Administrative Services Division, are comprised of professionals in the fields of fire district management, accounting, business administration, human relations, executive and clerical functions, and information technologies administration. These individuals strive to benefit the District through their knowledge and training.

Personnel charged with the responsibility of managing the District's personnel, finances and information technology systems require annual training. Changes in federal and state regulations, as well as a cadre of other management, legal, financial, technology and data management related issues occur annually. This may include knowledge of human resource issues, tax revenue statutes and payroll tax withholding mandates, as well as legal reporting issues and tasks. Periodic training is required to ensure that legal constraints are adhered to regarding these issues. Additionally, staff must keep abreast of topics such as the Fair Labor Standards Act (FLSA), the Family Medical Leave Act (FMLA), the Health Insurance Portability and Accountability Act of 1996 (HIPPA), and Arizona Revised Statutes, Title 48, regarding Special Taxing Districts.

Federal mandates have forced changes in several areas impacting human resources and benefits administration; specifically, in the areas of withholding taxes and the Consolidated Omnibus Budget Reconciliation Act (COBRA), which pertains to the

continuation of health insurance benefits for separated employees.

Administrative Training Expenditure Projections						
Description	FY 2009/2010	FY 2010/2011	FY 2010/2011	FY 2011/2012	Budget	% of
	ACTUALS	ADOPTED	ESTIMATED	ADOPTED	Variance	Change
6610 · Educational Expenditures	\$ 2,783	\$ 9,910	\$ 3,844	\$ 9,660	\$ (250)	-2.5%
6630 · Travel Expenditures	\$ 3,843	\$ 6,615	\$ 5,730	\$ 8,115	\$ 1,500	22.7%
Total Administrative Training:	\$ 6,625	\$ 16,525	\$ 9,574	\$ 17,775	\$ 1,250	7.6%

- 6610 Educational Expenditures:** This funding allows for the Special Projects, Financial Services Section, and Administrative Services Division personnel to attend AFDA and other beneficial conferences, degree advancement courses, state and federally sponsored employer seminars, and retirement administration symposiums. Educational fees for the pursuit of the Professional Human Resource Manager's (PHRM) Certification Program through the Society for Human Resource Management (SHRM) for the Administrative Coordinator, and the pursuit of a Bachelor's Degree in Accounting for the Accounting Supervisor, are included with this account.
- 6630 Travel Expenditures:** This account allows for the per diem, lodgings, and travel expenditures that are associated with attending educational conferences and courses throughout the fiscal year. The most noteworthy of these is attendance at the Arizona Fire District Association Conference twice annually for designated members of the administrative staff.

Community Risk Reduction Division

The Community Risk Reduction Division's mission is to reduce the frequency and magnitude of fires and emergency incidents through cost effective, service oriented fire prevention programs which are developed through participation in local enforcement and regulatory processes. Equally important to this mission is the fire and life safety educational component. The Community Risk Reduction Division is overseen by a Deputy Chief/Fire Marshal. This Division is responsible for fire inspections and fire code enforcement; plans review; fire investigations (cause & origin); planning and development of District resources to include potential annexations; community fire and life safety education, community/media relations, and disaster preparedness.

The Community Risk Reduction Division focuses on basic targeted functions including Fire Prevention, Fire and Life Safety Education, future Planning - Land / Growth Development, and volunteerism. While the operations of this Division have a significant impact on the current and future residents of the District, it thrives on a proportionately smaller funding requirement for support. The District plans to continue the expansion of the Fire Corps Volunteer Program for the coming fiscal year.

Community fire and life safety education is the first line of defense in fire prevention. Through community fire and life safety education, the District has a tool to educate the public by learning from the mistakes of others so the same mistakes are not repeated. The Community Risk Reduction Division is responsible for the development and delivery of all fire and life safety education programs.

Providing fire prevention inspections and enforcement of the Fire Code is intended to minimize the damage to life and property due to fires (safer buildings mean fewer fires). District personnel also participate in the plan review process to identify potential fire and life safety hazards prior to the construction and/or remodel of commercial occupancies within the District. The Community Risk Reduction Division works with the Maricopa County Sheriff's Office in determining the origin and cause of fires involving significant damage or that are suspicious in nature.

Community relations and media dissemination are also functions for which this Division is currently accountable. These activities are valuable because the Fire District must continually reach the community with methods other than call response to maintain and enhance the community's safety message and the positive influence of the District.

Proactive and progressive District planning and development is another important program administered by the Community Risk Reduction Division in projecting new services and needed improvement in current service delivery to District residents and property owners.

As a part of this proactive and progressive planning, the District's Fire Corps Program was created to help coordinate volunteer activities that will make the District's communities safer, stronger, and better prepared to respond to any emergency situation. It provides opportunities for people to participate in a range of measures to make their families, their homes, and their communities safer from the threats of crime, terrorism, and disasters of all kinds. The Fire Corps Program builds on the successful efforts that are already in place in many organizations in the community to prevent crime and respond to emergencies. Programs that started through local innovation are the foundation for Fire Corps and this national approach to citizen participation in community safety.

The Fire District is one of many organizations partnering with the Sun City West Citizen Corps Council to strive for a safer, stronger, and better prepared community. This partnership affords the District opportunities for additional resources and funding for Community Risk Reduction on a federal, state, county, and local level. For example, last year, the District partnered with the Sun City West Foundation for a smoke alarm grant and the Rotary Club for 10-year lithium batteries. The Fire District will always strive to partner with other organizations for the betterment of the community.

The Citizen Corps Council serves as the umbrella that the "Are You Ready?" and Fire Corps Volunteer Programs fall under to better serve the community and target specific needs of Sun City West residents. The Fire District has long recognized the excellent

resources available in the residents of the communities served by the Fire District. Many citizens possess obvious knowledge, talents, and specialized skills that would be invaluable in assisting the Fire District. The Fire Corps Volunteer Program was established to assist in the expansion of the Fire District's services to an increased number of residents as well as allowing the Fire District to implement new programs without adding additional paid personnel. The Fire District currently utilizes volunteer nurses for the regular blood pressure checks at the Administrative Office and are expanding the use of the Fire Corps volunteers into several areas which include, but are certainly not limited to: the Lock Box Program, Child Safety Seat Loaner Program, smoke alarm inspections and installations, home safety surveys and inspections, commercial fire inspections, community education activities, CCC/CPR/AED Community Training, non-hazardous service call response, future Community Connector Program, Chaplain Services, etc.

The Community Risk Reduction Division evaluated the District's current Community Emergency Response Team (CERT)/Citizens Academy Programs and designed a multi-faceted Fire Corps Volunteer Program based on that evaluation. Additional volunteer recruitment efforts have been implemented and the program continues to thrive.

The District's Disaster Preparedness Program is also funded in this area of the budget. The District must be prepared in the event of a major disaster at the strategic as well as task level. The District continues to participate in a Train-the-Trainer course of study through the Department of Homeland Security which provides training in the areas of weapons of mass destruction, domestic terrorism, and self awareness/preparedness in events of natural disaster. These courses are provided at a minimal cost to the District.

Community Risk Reduction Division Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Deputy Chief / Fire Marshal	1.0	1.0	1.0
Deputy Fire Marshal	1.0	1.0	1.0
Community Outreach Specialist	1.0	1.0	1.0
Total Community Risk Reduction Personnel	3.0	3.0	3.0

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Community Risk Reduction Division Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Community Risk Reduction Code Enforcement		
Total Fire Crew Inspections	400	300
Total Community Risk Reduction Staff Inspections	32	100
Inspections Not Completed within 30 Day Variance	0	0
Construction Inspections	29	35
Hazards Noted	150	TBD
Hazards Abated	150	TBD
Total Plans Reviewed	17	20
Plans Reviewed within 30 Day Goal	17	20
Consultations	14	20
Permits Issued	17	20
Fire Investigations		
Investigations Performed	5	TBD
Hours expended in investigation	50	TBD
Community Education / Relations		
News Releases & Articles	108	120
Public Education Presentations	81	90
Public Education Attendance	6,936	7,500
Public Relations Events / Presentations	76	85
Event Presentation Attendance	850	900
Child Safety Seat Installations	392	450
Lock Box Sales	608	700
Lock Box Installations	943	700
Lock Box Maintenance	853	700
Smoke Alarm Checks	500	500
Smoke Alarm Installations	1,064	1,100
Volunteer Coordination		
Number of Volunteers	38	65
Number of Volunteer Hours Provided to the District	1,083	1,200
Number of Volunteer Training Hours	336	350
Planning and Development		
Plat/Development Plan Reviews	0	2
Developer/Owner Consultations	2	2
Disaster Preparedness		
Disaster Preparedness Courses Provided	10	15
Number in Attendance	270	350

Status of 2010/2011 Performance Goals and Objectives

- Distributed Residential Lock Box Program signs in the community – **Goal Accomplished**
- Continue with promotional and educational programs for the community – **Goal Accomplished / Ongoing**
- Continue to explore new partnerships to assist in delivering our educational safety messages to the community – **Goal Accomplished**
- Continue to expand “Remembering When” educational program which includes senior fall and fire prevention as well as other components – **Goal**

Accomplished

- Increase District personnel participation in Homeowner's Association meetings, community service clubs, Sun City West Citizen's Corps Council, etc. – **Goal Accomplished**
- Develop standardized written community education lesson plans for consistency in presentation – **Process Ongoing**
- Develop formalized evaluation instrument on type & quality of District presentations – **Goal Accomplished / Ongoing**
- Coordinate Citizens Academies and Fire Corps Volunteer Program – **Goal Modified**
- Research area Connector Programs as well as potential partnerships and resources – **Process Ongoing**
- Identify Community Assistance needs within the Fire District – **Process Ongoing**
- Complete all priority inspections to reduce potential for life loss within a 30 day variance of their scheduled time – **Goal Accomplished**
- Complete all plan reviews and permit/user fee invoices within a 30 day period from the time received – **Goal Accomplished**
- Maintain annual fire prevention / investigation training program for District fire and EMS crews – **Goal Accomplished / Ongoing**
- Assist other Divisions with Material Safety Data Sheets (MSDS), pre-planning, and mapping/GIS requirements – **Goal Accomplished**
- Maintain/update maps of neighboring jurisdictions – **Goal Accomplished**
- Update records and forecast District growth related issues on a quarterly basis – **Goal Accomplished**
- Enhance and continue to develop closer working relationships with land owners and developers in Fire District's annexed areas – **Process Ongoing**
- Promote District services to other areas not currently in the Fire District but considered to be in the Fire District planning area – **Process Ongoing**
- Continue to plan for service issues associated with the District's growth planning areas including efforts to define and then secure future station sites and service need timelines in conjunction with accreditation – **Goal Accomplished / Ongoing**
- Continue involvements in legislative issues that affect Fire Districts – **Goal Accomplished / Ongoing**
- Continue to develop a plan to guide the District in developing an Emergency Operations Management Team. Alternative funding sources should be explored and included in the final plan. – **Goal Modified / Ongoing**
- Continue to develop a plan to guide the District in developing an Emergency Operations Center. Alternative funding sources should be explored and included in final plan – **Process Ongoing**
- Continue to update / revise the District Disaster Plan. The final plan should be integrated with the Maricopa County Disaster Plan and, upon adoption, should be distributed to affected agencies (i.e.: Maricopa County, Maricopa County Sheriff's Office, etc.) – **Goal Accomplished**
- Continue to identify target hazards and audit community response needs – **Goal Accomplished**

- Develop Citizens Corp and a training program to sustain it – **Process Ongoing**
- Continue to maintain a training and exercise plan to evaluate and improve the major emergency response plan of the District – **Process Ongoing**
- Continue the fostering of hazard mitigation throughout the District via public education and plan development – **Process Ongoing**
- Enhance reporting information implementation from FireHouse into Computer Aided Dispatch system – **Goal Accomplished**
- Enhance automated reporting in FireHouse – **Goal Accomplished**
- Enhance community Risk Reduction Programs to include Impacts & Outcomes – **Goal Accomplished**
- Implement Emergency Preparedness Awareness training – **Goal Accomplished**
- Expand Community Continuous Chest Compression/AED (CPR) Program – **Goal Accomplished**
- Partner with Adult Care Homecare Assistance for supplies to conduct CPR/CCC Programs – **Goal Accomplished**
- Develop email distribution capability for selected FireHouse reports – **Goal Accomplished**
- Create a cross referencing fire hydrant program with Arizona American Water – **Goal Accomplished**
- Complete upgraded Knox key security systems in all front line & reserve apparatus – **Goal Accomplished**
- Add upgraded mapping to Computer Aided Dispatching (CAD) System – **Goal Accomplished**

FY 2011/2012 Performance Goals and Objectives

- Continue with promotional and educational programs for the community.
- Continue to explore new partnerships to assist in delivering our educational safety messages to the community.
- Continue to deliver the “Remembering When” educational program which includes senior fall and fire prevention as well as other components.
- Continue District field participation in Homeowner’s Association meetings, community service clubs, etc.
- Finalize standardized written community education lesson plans for consistency in presentation.
- Finalize formalized evaluation instrument on type & quality of District presentations.
- Continue to coordinate Citizens Academies and Fire Corps Volunteer Program.
- Continue to research area Community Assistance Programs as well as potential community assistance partnerships.
- Continue to research and identify long term community assistance needs within the Fire District.
- Complete all priority inspections to reduce potential for life loss within a 30 day variance of their scheduled time.
- Complete all plan reviews and permit/user fee invoices within a 30 day period from the time received.
- Implement expanded inspection fee program.

- Maintain annual fire prevention/investigation training program for District fire and EMS crews.
- Assist other Divisions with Material Safety Data Sheets (MSDS), pre-planning, and mapping/GIS requirements.
- Maintain/update maps of neighboring jurisdictions.
- Evaluate access/egress capabilities in the newly annexed areas and work to improve any issues.
- Continue to update records and forecast District growth related issues.
- Build & maintain relationships with developers from new and prospective annexation areas.
- Assess projected District growth plans/potential.
- Promote District services to other areas not currently in the Fire District but considered to be in the Fire District planning area.
- Continue to plan for service issues associated with the District's growth planning areas including efforts to define and then secure future station sites and service need timelines in conjunction with accreditation.
- Continue to research & assess alternative funding mechanisms for community education/services.
- Monitor and evaluate performance measures for existing and new District Community Risk Reduction programs.
- Explore the development of a community electronic newsletter.
- Create a District property owner contact database.
- Continue to update/revise District Disaster Preparedness Plan as necessary. The final plan should integrate with Maricopa County Disaster Plan and, upon adoption, should be distributed to affected agencies (i.e. Maricopa County, Maricopa County Sheriff, etc.).
- Identify additional target hazards on an "as necessary" basis & input into Computer Aided Dispatch (CAD) database.
- Continue to maintain a training and exercise plan to evaluate and improve the major emergency response plan of the District.
- Continue the fostering of hazard mitigation throughout the District via public education and plan development.
- Identify additional community events in which District participation would be warranted.
- Research additional Fire Corps Volunteer Program usage.
- Identify additional Fire Corps Program resource opportunities.
- Add additional Fire Corps Volunteers as budgeted.
- Explore additional social media & other outlets for citizen communications possibilities.
- Continue evaluation of utilizing volunteer inspectors including budgetary impact, and training/supervision requirements.
- Train assigned personnel in advanced fire investigation practices.
- Continue to work with residents of newly annexed areas to improve access, water supply, and address identification.
- Research methods to communicate Fire District news, events and educational information to annexed area residents.

- Assist in monitoring legislative issues that affect Fire Districts.
- Research additional Mapping/GIS software based on planning needs.
- Provide mapping/GIS training as needed.
- Update response maps as necessary to maintain correct data.
- Participate in any NIMS required courses.
- Identify additional community resources for the “Are You Ready?” Program.
- Enhance the “Are You Ready?” Program as necessary.

Community Risk Reduction Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5655 · Disaster Preparedness Supplies	\$ 388	\$ 2,000	\$ 1,000	\$ 1,500	\$ (500)	-25.0%
5660 · Fire Corps Materials & Supplies	\$ 1,148	\$ 2,668	\$ 2,668	\$ 2,668	\$ -	0.0%
5665 · Risk Reduction Materials	\$ 11,584	\$ 13,462	\$ 10,876	\$ 13,050	\$ (412)	-3.1%
5691 · Lock Box Materials	\$ 22,079	\$ 20,425	\$ 26,943	\$ 21,895	\$ 1,470	7.2%
5692 · T-Shirt Materials	\$ 550	\$ 900	\$ -	\$ 900	\$ -	0.0%
5693 · Smoke Alarm Materials	\$ -	\$ -	\$ 6,683	\$ 8,100	\$ 8,100	100.0%
Total Community Risk Reduction Section:	\$ 35,749	\$ 39,455	\$ 48,170	\$ 48,113	\$ 8,658	21.9%

- **5655 Disaster Preparedness Supplies:** Expenditures from this category provide for supplies necessary to maintain disaster preparedness requirements. The goal is to ensure the preparedness to properly perform the tasks which would be assigned in the event of a disaster, as well as ensuring the preparedness of our residents for catastrophic events and/or possible activation of the County’s Emergency Operations Center (EOC). This account has been reduced as a result of the program being more established most of the necessary equipment being already purchased.
- **5660 Fire Corps Materials & Supplies:** As the Fire District continues to operate its volunteer Fire Corps Program, it is necessary to provide miscellaneous materials, uniforms and equipment for their use as they assist the District in its various public safety programs. This budgetary account is utilized for that purpose.
- **5665 Risk Reduction Materials:** This budget category covers much of the supplies necessary to run existing or projected programs of the Community Risk Reduction Division. Community education materials, promotional items, and community education supplies include promotional and print materials employed in District community education and relations events to reinforce educational messages and familiarize residents with the Fire District. It also covers promotional items necessary for distribution at Health & Safety Expo events. Expenditures associated with the “Are You Ready?” program are found in this account. Funds also cover any educational / training videos or CD’s. These are an excellent tool to make use of during community education presentations and also for in-house training on community education or fire prevention topics. Videos and CD’s will also be utilized in the District’s “Remembering When”

Program and various other projects. Plans review, permit, inspection, investigation and Fire Hydrant Marker supplies are also purchased with this funding.

- **5691 Lock Box Materials:** This expenditure account has been generated to track the expenditures associated with the expanding Emergency Lock Box Program. This account was established due to the District now being the sole source vendor of lock boxes for District property owners. This account tracks the purchase of lock boxes, lock box maintenance supplies, drills, drill bits and other materials used to support this program. A portion of the District's Program Revenues are budgeted to recoup these direct expenses.
- **5692 T-Shirt Materials:** The District purchases and sells t-Shirts that allow the employees and community to show their pride and support of the District. These shirts are sold at public education events and at the District's Administration office. This has been a popular program and the District wishes to ensure its continuance through this account. A portion of the District's Program Revenues are budgeted to recoup these direct expenses.
- **5693 Smoke Alarm Materials:** The District has extended its customer service efforts with the addition of this program. Smoke alarms are now purchased by the District in order to have stock on hand during a routine smoke alarm inspection. Previously, during the course of a smoke alarm inspection at a resident's home, if it was determined that the smoke alarm was in need of replacement, the resident would be responsible for purchasing a new alarm. District personnel would then be re-scheduled to return to install the new alarm. Under this new program, the resident has the option of purchasing the replacement smoke alarm from District personnel at the time of the inspection and it is installed without the delay involved in getting the replacement or the need for District personnel to make a second trip to the home. A portion of the District's Program Revenues are budgeted to recoup these direct expenses.

Community Risk Reduction Division Training

Funding in this category supports continuing education in the areas of code enforcement, arson investigation, community education, or other Division related training. Community education related training for employees is also necessary for the continued growth of these programs. The District also supports training of the Fire Corps Volunteer Program through this section of the Budget.

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Community Risk Reduction Training Expenditure Projections						
Description	FY 2009/2010	FY 2010/2011	FY 2010/2011	FY 2011/2012	Budget	% of
	ACTUALS	ADOPTED	ESTIMATED	ADOPTED	Variance	Change
6320 · Educational Expenditures	\$ 2,205	\$ 4,800	\$ 2,770	\$ 5,810	\$ 1,010	21.0%
6340 · Travel Expenditures	\$ 321	\$ 5,170	\$ 2,017	\$ 7,620	\$ 2,450	47.4%
6350 · Fire Corps Training	\$ 180	\$ 4,100	\$ 1,836	\$ 3,125	\$ (975)	-23.8%
Total Community Risk Reduction Section:	\$ 2,706	\$ 14,070	\$ 6,623	\$ 16,555	\$ 2,485	17.7%

- 6320 Educational Expenditures:** It is necessary for Division employees to take classes in fire investigation, plans review, building inspections, and public education. Also included are classes from the National Fire Academy (NFA). NFA classes are state-of-the art Fire Service classes that are available at a minimal cost to the District. Continuing education is necessary on an ongoing basis to stay current with changes in the fire service and code enforcement. Many of the classes are also required to retain or obtain required certifications. Such courses include, but are not limited to: Fire Code continuing education classes, fire cause and origin classes, Child Safety Seat Technician continuing education classes, Arizona Fire District Association seminars, and Arizona State Fire Marshal's courses. Additions to this account are the result of the need to provide funding for two District personnel to participate in a Fire Investigation Certification Program.
- 6340 Travel Expenditures:** This account allows for the per diem, lodgings and travel expenditures associated with attending educational requirements outlined above for the Community Risk Reduction Division. This account was increased due to the proposed Fire Investigation Certification Programs for two District personnel.
- 6350 Fire Corps Training:** This account covers expenses for training Fire Corps personnel in the skills needed to accomplish tasks in the office environment and in the field. Such skills include, but are not limited to, computer training, office equipment training, Child Safety Seat Technician training, Target Safety training, training needed to install smoke alarms and residential lock boxes, and any necessary software training. This account would also cover any "train the trainer" expenses needed for those individuals that would provide support to existing and new programs such as fall prevention, fire and life safety classes, and other educational classes that the District offers to residents. The most significant decrease to this account is associated with the shift from the use of the Glendale Regional Training Center for the annual Driver's Training requirements to local training provided for Fire Corps Volunteers, possibly in conjunction with the Sheriff's Posse.

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Emergency Services Division

The Emergency Services Division is responsible for providing a safe environment for residents and property owners by minimizing the loss of life and property through effective and innovative emergency response programs. This Division is responsible for ensuring an effective emergency response for all incidents including fire, Emergency Medical Services (EMS), specialized rescue, hazardous materials, and major emergencies.

The administrative function for this Division is overseen by a Deputy Chief whose responsibilities include: management of daily operations; identification of training objectives; monitoring quality of service; research and implementation of new programs and technologies; compliance with applicable regulations and standards; and general systems development.

The Division consists of several sub-sections including: the Firefighting and Personal Protective Equipment Section, the Wildland Program, the Self Contained Breathing Apparatus (SCBA) Section, the Health and Safety Section, the Mission Readiness – Training/Development Section, the Recruitment Section, and the EMS Section.

Personnel assigned within the Emergency Services Division also have particular responsibilities to ensure that all District personnel are protected during the performance of their duties. The National Fire Protection Association’s (NFPA) Standard 1710 provides a detailed explanation of fire department recommended staffing levels, response times, EMS requirements, and legal issues regarding personnel. The goal of the District is to maintain a high level of service while attempting to comply with the recommendations of NFPA 1710.

Staffing Plan

The staffing plan addresses many of the recommendations as stated by NFPA 1710. It also addresses daily scheduling issues that arise from attrition, vacation and sick leave usage, work related injuries, standard operating procedures, OSHA 2-In/2-Out regulations, and automatic-aid consortium recommendations and requirements.

Emergency Services Division Staffing

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Deputy Fire Chief	1.0	1.0	1.0
EMS Coordinator	1.0	1.0	1.0
Battalion Chiefs	3.0	3.0	3.0
Captains	12.0	13.0	12.0
Engineers	12.0	12.0	12.0
Firefighters	15.0	15.0	16.0
Firefighter Rovers	9.0	9.0	9.0
EMS Personnel	18.0	18.0	18.0
Total Assigned Personnel	71.0	72.0	72.0

Emergency Response

Emergency response represents the most visible aspect of the District’s mission. A major consideration in the delivery of effective emergency services is the timeframe, or emergency response time, in which these services are delivered. Emergency response time is defined as the elapsed time from the moment an emergency call is received in the Communications Center until the first unit arrives on scene. As a part of the Accreditation process through the Commission on Fire Accreditation International (CFAI), the District was required to develop a Standards of Cover (SOC) document. The SOC is based on empirical study and demonstrates continuous improvement strategies that include deployment considerations, minimum response times, and standard of cover assessments. These improvement strategies were used to establish formal performance measures or response goals for the District. The emergency response performance measure has been segmented into three components which are identified as Call Processing Time, Turnout Time, and Response Time Standards or travel time to the incident. The District Board adopted formal Resolution #10-0121-1 on January 21, 2010 to formally establish these goals. The District compares emergency responses against these goals to determine the effectiveness of its emergency responses. Details regarding each performance measure are listed below.

District Performance Measures / Response Goals

- **District Call Processing Time:** The District will work with the Regional Communications Center to strive for an emergency call processing time of sixty (60) seconds or less, 90% (percent) of the time.
- **Turnout Time:** A critical component of response time is turnout time (the amount of time that passes between the incident being broadcast to firefighters and the time that District fire apparatus is en route to the emergency).

Type of Incident	Turnout Time Standard*
Emergency Medical Incidents (0700-2200 hours)	1 Minute
Emergency Medical Incidents (2201-0659 hours)	1 Minute, 30 Seconds
Fire Incidents (0700-2200 hours)	1 Minute, 30 Seconds
Fire Incidents (2201-0659 hours)	1 Minute, 45 Seconds

**Standard based on 90% (percent) fractile.*

- **Response Time Standards:** The District will always strive to deliver emergency services in a safe and efficient manner. The response time goals for each type of response, excluding call processing time and turnout time, are detailed as follows:

○ **Fire Suppression Response Time Standards:**

Resource	Response Time Standard* Demand Zone A	Response Time Standard* Demand Zone B
First Due Company	4 Minutes (Travel)	8 Minutes (Travel)
Initial Full Alarm Assignment	6 Minutes (Travel)	10 Minutes (Travel)

**Standard based on 90% (percent) fractile.*

○ **Special Operations Response Time Standards:**

Resource	Response Time Standard* Demand Zone A	Response Time Standard* Demand Zone B
Hazardous Materials - First Due Company	4 Minutes (Travel)	8 Minutes (Travel)
Hazardous Materials – Balance of Units	10 Minutes (Travel)	12 Minutes (Travel)
Technical Rescue - First Due Company	4 Minutes (Travel)	8 Minutes (Travel)
Technical Rescue – Balance of Units	10 Minutes (Travel)	12 Minutes (Travel)

**Standard based on 90% (percent) fractile.*

○ **Emergency Medical Operations Response Time Standards:**

Resource	Response Time Standard* Demand Zone A	Response Time Standard* Demand Zone B
First Due Unit	4 Minutes (Travel)	7 Minutes (Travel)
Balance of Units	4 Minutes 30 Seconds (Travel)	7 Minutes 30 Seconds (Travel)

**Standard based on 90% (percent) fractile.*

These goals will help to ensure that the District operates in a manner consistent with the Phoenix Metropolitan Automatic Aid Consortium. Maintaining staffing recommendations and response times within these guidelines will also assist the District in meeting its Certificate of Necessity (CON) mandates for the provision of ambulance services, in maintaining Accreditation, and in maintaining its current Insurance Services Office (ISO) rating of Class 2. Maintaining this Class 2 ISO rating has a direct impact on lower fire insurance premiums for property owners in the District.

The District presents the following table to demonstrate the performance as compared to the established response goals for the period of July 1, 2009 through June 30, 2010. The table below displays data for all emergency calls that occurred during FY 2009/2010. It presents the emergency response time and the three performance measure components as established under the District's response goals. The information is presented in the form of Hours:Minutes:Seconds (00:00:00) to represent the length of time in which each component was performed. The percentages listed across the top of the table indicate the total percentage of emergency calls that were processed within the time indicated in each cell.

Performance Measure	90%	80%	70%	60%	50%
Call Processing Time	00:01:42	00:01:24	00:01:12	00:01:00	00:00:54
Turnout Time	00:01:06	00:01:00	00:00:54	00:00:42	00:00:42
Travel Time	00:04:42	00:04:06	00:03:42	00:03:24	00:03:06

Along with the Response Goals discussed above, the District has also established certain on-scene Performance Objectives. These performance objectives define the District's goals once responding units have arrived on the emergency scene. The following bullet points detail the District's Performance Objectives as adopted by formal Resolution #10-0121-1 on January 21, 2010:

- **Fire Suppression Performance Objective:** To stop the escalation of a fire where found. Typically this includes search and rescue for victims, confining the fire to the room of origin, and limiting the heat and smoke damage to immediate area of the room of origin. The first arriving engine company initiates search/rescue and fire attack operations. The second arriving engine company provides a back-up line and/or a Rapid Intervention Crew (RIC). The first arriving ladder company provides ventilation and loss control measures as necessary. The response shall be capable of providing a 500 gallon per minute initial fire attack.

An effective fire force is comprised of a minimum of fifteen (15) personnel deployed via three (3) engine companies, one (1) ladder/ladder tender, and one (1) battalion chief. Upon notification of a "working fire", an additional nine (9) personnel will be automatically dispatched via one (1) Engine Company and various other support vehicles.

- **Special Operations Performance Objectives:**
 - **Hazardous Materials:** To isolate, evacuate, and identify the hazardous material(s) that created the emergency and mitigate the hazard.
 - **Technical Rescue:** To initially determine the number, location, and condition of victims involved in the incident and to extricate the victim(s) using the lowest risk option possible.

An Effective Response Force (ERF) will be composed of eight (8) to fourteen (14) personnel deployed in engine and ladder companies, hazmat or technical rescue apparatus and a battalion chief.

- **Emergency Medical Operations Performance Objectives:** Stop the escalation of a medical emergency, within the capabilities of the effective response force. Specifically, assess patients and prioritize care to minimize death and disability. Intervene successfully in life-threatening emergencies, stabilize patients to prevent additional suffering, and provide basic or advanced life support and transportation to a treatment facility as necessary.

An effective response force of four (4) to six (6) personnel with a minimum of two paramedics deployed via ambulance/medic unit, Engine Company, and/or Ladder Company to initiate basic or advanced life support activities as appropriate.

The District's on-scene performance objectives were recently formalized; therefore there is no formal statistical data to compare at this time. However, these performance objectives have been integrated into the District's computerized emergency response tracking database and will be comparable in the future.

Firefighting and Personal Protective Equipment

This section contains all expenditures related to firefighting and personal protective equipment acquisition, maintenance, and supplies. The District strives to obtain and maintain the appropriate tools for employees to safely and effectively provide the services necessary to protect District property owners. The Personal Protective Equipment (PPE) Program ensures all District personnel possess a complete set of PPE clothing and equipment which is maintained in a safe and functional condition. The program is also responsible to regularly maintain, replace and/or repair any component of the assigned PPE equipment and performs other related tasks as required.

Firefighting Equipment and PPE Section Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Battalion Chief	1.0	1.0	1.0
Captain	1.0	1.0	1.0
Engineer	1.0	1.0	1.0
Total Personnel Assigned	3.0	3.0	3.0

Firefighting Equipment and PPE Section Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Total Front Line Fire Hose in Service:		
4" Supply Line (Feet)	2,600'	2,600'
2 ½" Attack Line (Feet)	1,800'	1,800'
1 ¾" Attack Line (Feet)	2,200'	2,200'
Red Line (Feet)	600'	600'
Hard & Soft Suction (Feet)	120'	120'
Smoke Ejectors	2	4
Positive Pressure Ventilation Fans	2	2
Thermal Imaging Cameras (TIC's)	5	6
Extrication Systems in Service:		
Hydraulic Rescue Systems	2	2
Pneumatic Air Bag Lift Systems	2	2
Stabilization Systems	2	2
Rescue Saws In Service:		
Chain Saws – Carbide Chains	4	4
Circular Saws – Carbide Blades	5	5
Turn-Outs in Service:		
Number of Turn-Out Ensembles Maintained	76	76
Number of Turn-Out Ensembles Repaired	12	12

Status of 2010/2011 Performance Goals and Objectives

- Maintain all spare fire apparatus in a ready state for usage (“turn-key operation”) – **Goal Accomplished / Ongoing**
- Maintain an adequate inventory of firefighting equipment and supplies – **Goal Accomplished / Ongoing**
- Maintain the District’s Wildland Response Team equipment and supplies – **Goal Accomplished / Ongoing**
- Maintain all equipment in a state of good repair for the safety of all firefighters – **Goal Accomplished / Ongoing**
- Continue to replace PPE items based on manufacturer’s recommendations or as a result of irreparable damage – **Goal Accomplished / Ongoing**
- Maintain employee certification for PPE repairs and maintenance – **Goal Accomplished / Ongoing**
- Continue to mentor a second employee to fulfill the duties as the future PPE Manager – **Goal Accomplished / Ongoing**
- Continue the development and management of comprehensive and accurate records concerning PPE training, equipment maintenance, equipment allocations, etc. – **Goal Accomplished / Ongoing**
- Implement computerized PPE equipment and maintenance tracking system – **Goal Accomplished / Ongoing**
- Review/modify the District response model – **Goal Accomplished**
- Research and implement, if appropriate, organizational realignment – **Goal Accomplished**

FY 2011/2012 Performance Goals and Objectives

- Continue to maintain all spare fire apparatus in a ready state for usage (“turn-key operation”).
- Continue to maintain an adequate inventory of firefighting equipment and supplies.
- Continue to maintain the District’s Wildland Response Team equipment and supplies.
- Continue to maintain all equipment in a state of good repair for the safety of all firefighters.
- Continue to replace PPE items based on manufacturer’s recommendations or as a result of irreparable damage.
- Continue to maintain employee certification for PPE repairs and maintenance.
- Continue the management of comprehensive and accurate records concerning PPE training, equipment maintenance, equipment allocations, etc.
- Complete response/deployment analysis regarding appropriate apparatus.
- Identify needs to preserve and/or improve levels of service to keep pace with predicted service are and call volume growth in terms of: Personnel, Apparatus, Facilities, and Finances.
- Implement new service delivery strategies (alternative response criteria) as indicated.
- Complete construction type/timeline for Station 4.
- Complete staffing study for Station 4.

- Complete annual comprehensive evaluation of PPE, fire equipment, and SCBA for potential upgrade/replacement needs.

The following table outlines the expenditure accounts associated with the Firefighting and Personal Protective Equipment Section of the budget:

Firefighting and PPE Section Expenditure Projections						
Description	FY 2009/2010	FY 2010/2011	FY 2010/2011	FY 2011/2012	Budget	% of
	ACTUALS	ADOPTED	ESTIMATED	ADOPTED	Variance	Change
5430 · Firefighting Equipment R/M	\$ 622	\$ 3,000	\$ 2,812	\$ 3,000	\$ -	0.0%
5710 · Firefighting Equipment	\$ 6,695	\$ 9,700	\$ 11,659	\$ 16,765	\$ 7,065	72.8%
5730 · Protective Equipment	\$ 24,431	\$ 44,010	\$ 42,139	\$ 37,821	\$ (6,189)	-14.1%
Total Firefighting & PPE Section:	\$ 31,748	\$ 56,710	\$ 56,610	\$ 57,586	\$ 876	1.5%

- **5430 Firefighting Equipment Repair / Maintenance (R/M):** This account allows personnel from the Emergency Services Division to complete minor repairs to firefighting equipment such as turnouts, chainsaws, hoses, etc.
- **5710 Firefighting Equipment:** This account provides funding for the replacement of disposable and reusable firefighting equipment damaged from repeated use. Items include, but are not limited to: saw blades and chains, fire suppression foam, hose couplings and appliances, and hand tools such as shovels, halogen tools, pike poles, and axes. Increases in this account are directly related to the need to replace a significant amount of hose and two smoke ejector fans.
- **5730 Protective Equipment:** The dangers inherent in firefighting require specialized personal protective equipment for District personnel which can withstand extreme conditions. Although the District is able to perform minor repairs to this equipment, some items require replacement due to excessive wear or damage which cannot be economically or properly repaired to meet minimum NFPA safety standards. Decreases in the account are related to the previously budgeted purchase of initial personal protective equipment for personnel who filled suppression vacancies within the District last fiscal year.

Wildland Deployment Program

The District has supported a very successful Wildland Deployment Program over the last several years. This program provides many benefits to both the District and the firefighters who participate in this program. The District initially made a significant investment in this program. The District has recouped all of the associated costs, as well as receiving additional revenues.

It is very difficult to project certain revenues and expenditures for this beneficial program. The District's Wildland Team may be activated several times or not at all

during any given year depending on the number, length, and size of the wildland fires that occur nationwide. Due to the unpredictable nature of wildfires, including when and where they might strike, the District may show significant fluctuations in the associated annual revenue and expenditure budgets for this program.

The Wildland Team has been deployed to many parts of the nation in recent years including: Arizona, California, Georgia, Idaho, Montana, and New Mexico. These deployments have provided our firefighters with invaluable experience and knowledge in wildfire and urban interface tactics.

Wildland Section Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Wildland Red Card Engine Boss	1.0	2.0	3.0
Wildland Red Card Personnel	12.0	12.0	12.0
Total Assigned Personnel	13.0	14.0	15.0

Wildland Performance Measures

Description	2009/2010 Actual	2010/2011 Estimated	2011/2012 Projected
Wildland Deployments	2	1	TBD
Wildland Re-Certified Red Card Engine Boss	1	1	1
Wildland Engine Boss Trainees	0	2	2
Wildland Red Card Re-Certified Firefighters	10	10	10

Status of 2010/2011 Performance Goals and Objectives

- Maintain adequate number of Wildland Red Card Certified personnel in the District - **Goal Accomplished / Ongoing**
- Assist with advanced Wildland certifications for interested employees - **Goal Accomplished / Ongoing**
- Ensure all Wildland Red Card Firefighters participate in the annual Central Arizona Wildland Response Team (CAWRT) Training - **Goal Accomplished / Ongoing**
- Maintain all Wildland apparatus supplies, equipment and personnel in a ready state for immediate deployment at any time day or night - **Goal Accomplished / Ongoing**
- Provide all District members with annual urban interface and brush fire training - **Goal Accomplished / Ongoing**
- Maintain CAWRT Duty Officer Status - **Goal Accomplished / Ongoing**

FY 2011/2012 Performance Goals and Objectives

- Continue to maintain adequate number of Red Card certified personnel in the District and assist with advanced Wildland certifications for interested employees.
- Continue to ensure all Wildland Red Card Firefighters participate in the annual Central Arizona Wildland Response Team (CAWRT) Training
- Continue to maintain all Wildland apparatus supplies, equipment and personnel

in a ready state for immediate deployment at any time day or night.

- Continue to provide all District members with annual urban interface and brush fire training.
- Continue to maintain CAWRT Duty Officer status.
- Biannually (2012, 2014, 2016) renew, at a minimum, Arizona State Forester's Cooperative Fire Rate Agreement with the Arizona Department of Revenue

Wildland Section Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5720 · Wildland Equipment	\$ 4,985	\$ 3,215	\$ 3,215	\$ 1,964	\$ (1,251)	-38.9%
6235 · Wildland Training Expenditures	\$ 3,067	\$ 2,550	\$ 2,550	\$ 3,200	\$ 650	25.5%
Total Wildland Section:	\$ 8,052	\$ 5,765	\$ 5,765	\$ 5,164	\$ (601)	-10.4%

- **5720 Wildland Equipment:** This budgetary account provides funding for replacement of all Wildland tools and equipment such as fire shelters and packs, chainsaw blades, hoses, hand tools, Global Positioning Satellite (GPS) devices, nozzles and couplings. Additional deployment costs such as travel to and from deployments, which are generally reimbursed, are included in this account. All costs in this expenditure area are generally offset by the revenues this program produces.
- **6235 Wildland Training Expenditures:** This budgetary account provides funding for all Wildland training. Expenditures associated with this account include annual “Red Card” Training necessary to maintain Wildland certifications and attendance to the annual state sponsored Wildland Academy. These costs are generally offset by the revenues this program produces.

Self Contained Breathing Apparatus (SCBA)

The Self Contained Breathing Apparatus (SCBA) Program ensures all necessary SCBA equipment is maintained in a safe and functional condition, and provides for the regular service, replacement and / or repair of any SCBA equipment components. The program is also responsible for performing fit testing on SCBA and Hepa masks for appropriate personnel as required.

Self Contained Breathing Apparatus Section Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Battalion Chief	1.0	1.0	1.0
SCBA Technicians	3.0	3.0	3.0
Program Coordinator	1.0	1.0	1.0
Total Assigned Personnel	5.0	5.0	5.0

Self Contained Breathing Apparatus Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Total Number of SCBA Units	31	31
Number of Annual Fit Tests Performed	130	130
Total Front Line SCBA Units Maintained (M)/Repaired (R)	31(M)/25(R)	31(M)/25(R)
Total Training SCBA Units Maintained	10	10
Total number of Clear Command Systems Maintained	24	24
Total SCBA Air Compressors Maintained	1	1
Total SCBA Training Sessions Conducted	2	2

Status of FY 2010/2011 Performance Goals and Objectives

- Continue with annual SCBA and N95 Airborne Pathogen Mask fit testing for all line personnel – **Goal Accomplished**
- Continue to assure that state and national standard procedures are followed (i.e. NFPA, OSHA, ANSI, etc.) – **Goal Accomplished**
- Perform annual maintenance inspections and repairs – **Goal Accomplished**
- Maintain and manage all inventories and equipment for the SCBA program – **Goal Accomplished**
- Attempt to forecast industry changes as they may apply to the District – **Goal Accomplished**
- Attend seminars, conferences, and classes to upgrade knowledge of SCBA practices and to obtain ideas for improving and developing new programs – **Goal Accomplished**
- Maintain required certifications in order to ensure that proper maintenance and safety skills are current – **Goal Accomplished**
- Maintain accurate and comprehensive records including SCBA training, maintenance, equipment allocations, etc. – **Goal Accomplished**
- Complete in-service training and place all newly obtained SCBA equipment into operation. – **Goal Accomplished**

FY 2011/2012 Performance Goals and Objectives

- Continue with annual SCBA and N95 Airborne Pathogen Mask fit testing for all line personnel.
- Continue to assure that state and national standard procedures are followed (i.e. NFPA, OSHA, ANSI, etc.).
- Perform required maintenance inspections and repairs.
- Maintain and manage all inventories and equipment for the SCBA program.
- Attempt to forecast industry changes as they may apply to the District.
- Maintain/obtain required certifications in order to ensure that proper maintenance and safety skills are current.
- Maintain accurate and comprehensive records including SCBA training, maintenance, equipment allocations, etc.
- Maintain the electronic emergency scene SCBA accountability system.

SCBA Equipment Section Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5435 · SCBA Equipment R/M	\$ 5,935	\$ 2,850	\$ 2,990	\$ 2,850	\$ -	0.0%
5740 · SCBA Equipment	\$ 6,715	\$ 12,790	\$ 6,353	\$ 12,790	\$ -	0.0%
Total SCBA Equipment Section:	\$ 12,650	\$ 15,640	\$ 9,343	\$ 15,640	\$ -	0.0%

- 5435 SCBA Equipment Repairs / Maintenance (R/M):** Mandatory testing of current SCBA equipment requires annual air compressor testing and preventative maintenance, quarterly air quality testing of the cascade system used to refill SCBA air cylinders expended during training or an incident, and Posi-Check III maintenance and calibration. OSHA requires Hydrostatic testing of SCBA Cylinders every three years and DOT Cascade Storage Cylinders every five years. This testing was last performed on the SCBA Cylinders and on the Cascade Cylinders in September of 2009. Therefore, this account has been maintained. Expenditure overages in this account were due to the need to obtain the early calibration of the Posi-Check III Fit Tester.
- 5740 SCBA Equipment:** Maintenance of the District's Self Contained Breathing Apparatus (SCBA) equipment is vital for District personnel's safety on an emergency scene. These funds cover maintaining and repairing SCBA units, and the periodic hydrostatic testing mandated for all SCBA cylinders including the four (4) DOT storage cylinders that are part of the cascade system. The District has also implemented a program requiring that all mask face pieces are serviced and rebuilt on an annual basis to assure proper safety performance.

Health and Safety

The Health and Safety Section is responsible for overseeing the general safety and health of District employees. The goal of the Health and Safety Section is to educate and train employees regarding safety awareness and to assist them in maintaining a minimum level of physical conditioning to prevent personal injury during their job performance. The District provides facilities and trainers to encourage self awareness of individual physical abilities as well as strengths and weaknesses. By increasing awareness of potential safety hazards both on emergency scenes and in the District's facilities, the District strives to reduce the occurrence of workplace accidents and injuries. The District and its personnel are required to observe the Occupational Safety and Health Act (OSHA) requirements as well as other regulations and standards set by national organizations such as the National Fire Protection Agency (NFPA). This budget category allocates funding to assure that the District is in compliance with these regulations and standards.

Health & Safety Section Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Battalion Chief	1.0	1.0	1.0
Incident Safety Officers	3.0	3.0	3.0
Program Manager	1.0	1.0	1.0
Fire Captain / Peer Fitness Instructors	3.0	3.0	3.0
Total Assigned Personnel	8.0	8.0	8.0

Health and Safety Section Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Wellness Program Participation by Employees (%)	75%	100%
Annual Fit-For-Duty Physicals for Shift Personnel	73	74
Exercise Participation by Shift Personnel (%)	100%	100%
Yearly Fitness Assessments for Shift Personnel (%)	100%	100%

Status of FY 2010/2011 Performance Goals and Objectives

- Facilitate and provide yearly Fit-For-Duty physicals for required District personnel – **Goal Accomplished**
- Facilitate and provide annual drivers’ training and driver’s license checks for all District personnel. Provide initial drivers’ training programs for new employees – **Goal Accomplished**
- Audit District facilities and equipment for regulatory agency compliance and safety – **Goal Accomplished**
- Use captured information pertaining to the nature and number of on-the-job injuries sustained by personnel for the purpose of developing and implementing focused prevention initiatives – **Goal Accomplished**
- Monitor personnel who have repeatedly emerged in Workers’ Compensation claims – **Process Ongoing**
- Continue to develop and implement programs designed to reduce the incidence of on-the-job injuries (e.g., flyers/brochures, incentives, awareness campaigns, training) – **Goal Accomplished**
- Maintain peer fitness program - complete fitness assessments for shift personnel – **Process Ongoing**
- Maintain guidelines for exercise and nutrition for shift personnel - **Goal Accomplished**
- Implement annual fitness reviews for all shift personnel with a peer fitness trainer - **Goal Accomplished**
- Implement and maintain Fitness Award Program - **Goal Modified**
- Continue to work with Glendale Fire Department regarding utilization of auxiliary health center - **Goal Accomplished**
- Publish quarterly educational topics for District newsletter with topics dealing with fitness, nutrition, safety, and general health and wellness - **Goal Accomplished**
- Conduct periodic Health & Safety Section self assessment and program audit - **Goal Accomplished**

- Work with the Administrative Services Division to provide pre-hire physicals for new District personnel – **Goal Accomplished**
- Facilitate return to work and fit-for-duty issues for District personnel – **Goal Accomplished**
- Investigate all employee injuries and accidents – **Goal Accomplished**
- Evaluate Workers Compensation claims for common injuries. Determine effective ways to reduce these types of injuries with preventative education programs – **Goal Accomplished**
- Evaluate and maintain quality pre- and post-exposure services – **Goal Accomplished**
- Evaluate and revise District safety policies and procedures where needed – **Goal Accomplished**
- Evaluate and possibly implement employee safety handbook – **Goal Modified**
- Continue to administer required annual employee inoculation program – **Goal Accomplished**
- Explore other community based inoculation programs for possible implementation – **Process Ongoing**
- Continue to evaluate current Critical Incident Stress Debriefing needs. Explore options and develop a plan to deal with current as well as future needs including utilizing CISD teams from neighbor jurisdictions – **Process Ongoing**
- Review and Revise Infection Control Plan as necessary – **Process Ongoing**
- Implement District Safety Manual - **Goal Modified**
- Review all District Drive Cam activation incidents and provide individual counseling and discipline on an as needed basis – **Goal Accomplished**
- Evaluate and possibly implement a Fitness Award Program – **Process Ongoing**

FY 2011/2012 Performance Goals and Objectives

- Continue to facilitate and provide yearly physicals for required District personnel.
- Continue to facilitate and provide annual drivers' training and driver's license checks for District personnel. Provide initial drivers' training programs for new employees and volunteers.
- Continue to audit District facilities and equipment for regulatory agency compliance and safety.
- Continue to use captured information pertaining to the nature and number of on-the-job injuries sustained by personnel for the purpose of developing and implementing focused prevention initiatives.
- Continue to monitor personnel who repeatedly emerge in Workers' Compensation claims.
- Continue to develop and implement programs designed to reduce the incidence of on-the-job injuries (e.g., flyers/brochures, incentives, awareness campaigns, training).
- Continue to maintain peer fitness program - complete fitness assessments for shift personnel.
- Continue to maintain guidelines for exercise and nutrition for shift personnel.
- Continue annual fitness reviews for all shift personnel with a peer fitness trainer.
- Evaluate and possibly implement a Fitness Award Program.

- Continue to work with the Glendale Fire Department regarding utilization of health center.
- Publish quarterly educational information for District newsletter with topics dealing with fitness, nutrition, safety, and general health and wellness.
- Conduct periodic Health & Safety Section self assessment and program audit.
- Work with the Administrative Services Division to provide pre-hire physicals for new District personnel.
- Facilitate return to work and fit for duty issues for District personnel.
- Investigate all employee injuries and accidents.
- Evaluate Workers Compensation claims for common injuries. Determine effective ways to reduce these types of injuries with preventative education programs.
- Evaluate and maintain quality pre- and post-exposure services.
- Evaluate and revise District safety policies and procedures where needed.
- Evaluate and possibly implement Employee Safety Handbook.
- Continue to administer required annual employee inoculation program.
- Explore other community based inoculation programs for feasibility.
- Continue to evaluate current Critical Incident Stress Debriefing needs. Explore options and develop a plan to deal with current as well as future needs including utilizing CISD teams from neighboring jurisdictions.
- Review and revise Infection Control Plan as necessary.
- Develop and initiate a District wide Fitness Program based on the results of the annual Fit-For-Duty Physical tiered assessment of physical ability and establish fitness improvement goals for each employee.
- Review all District DriveCam activation incidents and provide individual counseling and discipline on an as needed basis.
- Continue implementation of Fitness Award Program.
- Redesign fitness section on District intranet.
- Evaluate Peer Fitness Program for enhancement if necessary.
- Research possible improvements to District facilities that promote health & safety.
- Maintain DriveCam Program.

Health and Safety Section Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5340 · Physicals/Vaccinations/Testing	\$ 49,152	\$ 58,912	\$ 51,583	\$ 56,992	\$ (1,920)	-3.3%
5470 · Fitness Equipment R/M	\$ 715	\$ 1,650	\$ 1,207	\$ 1,650	\$ -	0.0%
5650 · Safety Materials & Supplies	\$ 1,482	\$ 1,000	\$ 768	\$ 750	\$ (250)	-25.0%
5750 · Health & Safety Equipment	\$ 897	\$ 825	\$ 1,269	\$ 825	\$ -	0.0%
6220 · Fitness & Safety Training	\$ 1,448	\$ 2,000	\$ 2,000	\$ 1,400	\$ (600)	-30.0%
5070 · Program Manager Compensation	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ -	0.0%
Total Health and Safety Section:	\$ 54,995	\$ 65,687	\$ 58,128	\$ 62,917	\$ (2,770)	-4.2%

- **5340 Physicals/Vaccinations/Testing:** In order to ensure compliance with National Fire Protection Association (NFPA) Standards, the District began a mandatory physical examination program in 1994 and has been committed to

maintaining a high level of employee preventative health analysis since that time. This program has proven to be effective with the early detection of many employee health conditions that required either medication or alternative treatment procedures. The goal of this program is to keep District employees' health and fitness level above average. By monitoring employee health the District is, in essence, saving money due to a reduction in potential Worker's Compensation claims and sick time usage as well as avoiding possible untimely and very costly medical retirements. Expenditures in this area commonly include physicals and lab fees, an annual infection control program, and annual inoculations, testing, and titers.

- **5470 Fitness Equipment Repair / Maintenance (R/M):** With regular use of current physical fitness equipment, maintenance and repair are to be expected. These funds will assist in maintaining the equipment in good working condition for ongoing use.
- **5650 Safety Materials & Supplies:** This account funds the Occupational Safety and Health Act (OSHA) required health and safety signs and materials that are posted at each of the District stations, affixed to apparatus, and dispersed to personnel throughout the fiscal year.
- **5750 Health & Safety Equipment:** By providing fitness equipment, the District both supports and promotes the maintenance of employee health through daily muscle conditioning and stress relief programs. Peer fitness instructors train the District's employees in effective and safe fitness routines. The proposed funds will allow the replacement of training equipment, if necessary, due to normal wear and tear or should an item become damaged beyond repair.
- **6220 Fitness & Safety Training:** Training of District Safety personnel is mainly accomplished through the Fire Department Safety Officers Association which focuses on training mandated for personnel to maintain their certification and skill level. Critical Incident Stress Debriefing (CISD) and Occupational Safety and Health Act (OSHA) training are also budgeted in this area. This account was reduced as a result of the completion of the certification process for the District's current Peer Fitness Trainers.
- **5070 Program Manager Compensation:** This funding compensates the program manager for added responsibilities in maintaining the requirements of the health and safety program.

Mission Readiness: Recruitment, Training and Development Section

The Mission Readiness: Recruitment, Training and Development Section provides coordination for both the training and development of current suppression personnel as well as providing an active role in the recruitment of new District personnel. The primary focus of this section is to provide ongoing training for emergency personnel (with the

exception of Emergency Medical Services training which will be reviewed later in this budget document). Continuing Education is required by local, state, and federal regulations and standards (including NFPA Standards Volume 10, OSHA Regulations 29 CFR 1910, the Arizona State Fire Marshal's Office, and the Valley Automatic-Aid Consortium). This section also coordinates instruction on any new organizational procedures and guidelines.

The District Recruitment Program goals are executed by a group of highly trained and motivated employees charged with continuing the District's practice of hiring quality personnel. Recruitment of outstanding personnel and a commitment to their continued development is essential to organizational success. This is accomplished through formalized procedures for the recruitment, testing, and initial training of new District personnel. The end result will be individuals who consistently provide District taxpayers with excellent service.

Mission Readiness: Recruitment, Training and Development Section Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Deputy Chief	1.0	1.0	1.0
Battalion Chief	1.0	1.0	1.0
Training Coordinator	0.0	1.0	0.0
Total Assigned Personnel	2.0	3.0	1.0

Mission Readiness: Recruitment, Training and Development Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Training and Development		
Engine/Ladder Company Training Hours	2,028	432*
Company, Multiple-Company & Night Drills Hours	774	774*
Officer Training Hours	1,489	180*
Driver/Operator Training Hours	880	880*
Hazardous Materials Training Hours	69	60*
Pre-Fire Planning Inspections Hours	144	150
Entry Level Recruit Academy Personnel	4	0
Recruitment		
Shift Sworn Employee Recruitment Processes	1	0
Shift Non-Sworn Recruitment Processes	1	0

*Minimum number of hours required by the ISO, NFPA and OSHA.

Status of 2010/2011 Performance Goals and Objectives

- Provide and document the necessary mandated and compliance training for all District personnel (10 hours minimum per month) including Wildland, PPE, and SCBA training requirements – **Goal Accomplished**
- Continue to facilitate and provide continuing education training to all positions to ensure high levels of competency, efficiency, and safety in the areas of incident management, strategy and tactics, and the mitigation of all types of incidents –

Goal Accomplished

- Continue fostering career-long learning among employees by offering professional development consultations, independent study courses, and community college tuition reimbursement, as well as conference and outside seminar opportunities – **Goal Accomplished**
- Continue to evaluate and implement a new training module within the FireHouse software system to develop custom reports automating the training records such as compliance training reporting, individual training records, and credentials tracking – **Goal accomplished**
- Continue to provide monthly reports detailing employee training type and hours – **Goal Accomplished**
- Continue to research and build partnerships with public agencies to promote joint coordination of training props, academies, facilities and instructors – **Goal Accomplished**
- Continue to work closely with the Administrative Services Division in the areas of promotional processes, supervisor and management training, succession planning, and on-going employee professional development – **Goal Accomplished**
- Develop and monitor a measurable set of standards to evaluate the productivity and performance of the District's training programs – **Goal Accomplished**
- Continue to work with various regulatory agencies and other associations to stay abreast of changing standards and assist in the development of future training policies and standards – **Goal Accomplished**
- Continue to work with the Regional Operations Consistency Committee (ROCC) to maintain regional consistency and coordination – **Goal Accomplished**
- Maintain an adequate incident critique program – **Goal Accomplished**
- Create plan to possibly implement a Fire District Cadet / Membership Program - **Goal Modified**
- Continue to utilize the Target Safety Training Program to its full potential - **Goal Accomplished**
- Continue to work closely with the Administrative Services Division in the areas of selecting, hiring, and training of new employees - **Goal Accomplished**
- Continue to develop and monitor a measurable set of standards to evaluate the productivity and performance of the District's recruitment programs - **Goal Accomplished**
- Continue evaluating current joint firefighter recruitment process for value/efficiency - **Goal Accomplished**
- Maintain affiliation with other agencies for Candidate Physical Ability Test (CPAT) testing – **Goal Accomplished**
- Initiate more aggressive, energetic, and targeted racial/ethnic and gender minority recruitment programs designed to attract greater quantities of quality applicants for sworn positions – **Process Ongoing**
- Develop and implement written guidelines for new employee recruitment and selection activities – **Process Ongoing**
- Research alternative methods for high standard recruit firefighting training - **Goal Accomplished**

FY 2011/2012 Performance Goals and Objectives

- Provide and document the necessary mandated and compliance training for all District personnel (10 hours minimum per month) including Wildland, PPE and SCBA training requirements.
- Continue to facilitate and provide continuing education training to all positions to ensure high levels of competency, efficiency, and safety in the areas of incident management, strategy and tactics, and the mitigation of all types of incidents.
- Continue fostering career-long learning among employees by offering professional development consultations, independent study courses, and community college tuition reimbursement, as well as conference and outside seminar opportunities.
- Continue use of the training module within the FireHouse software system to develop custom reports automating the training records such as compliance training reporting, individual training records, and credentials tracking.
- Continue to provide monthly reports detailing employee training type and hours.
- Continue to research and build partnerships with public agencies to promote joint coordination of training props, academies, facilities, and instructors.
- Continue to work closely with the Administrative Services Division in the areas of selecting, hiring and training of new employees, promotional processes, supervisor and management training, succession planning, and on-going employee professional development.
- Develop and monitor a measurable set of standards to evaluate the productivity and performance of the District's training programs.
- Continue to work with the various regulatory agencies and other associations to stay abreast of changing standards, and to assist in the development of future training policies and standards.
- Continue to work with the Regional Operations Consistency Committee (ROCC) to maintain regional consistency and coordination.
- Maintain an adequate incident critique program.
- Create plan to possibly implement a Fire District Cadet / Mentorship Program.
- Continue to utilize the Target Safety Training Program to its full potential.
- Maintain affiliation with other agencies for Candidate Physical Ability Test (CPAT) testing.
- Maintain a more aggressive, energetic, and targeted racial/ethnic and gender minority recruitment programs designed to attract greater quantities of quality applicants for sworn positions.
- Develop and implement written guidelines for new employee recruitment and selection activities.
- Work with other local Westside agencies regarding Westside training facilities.
- Maintain continued membership in pertinent industry related agencies.
- Analyze necessity for recruitment process based on Station 4 status.
- Complete outline of structure of the District's Professional Leadership Program including items such as mentorship literature, "move-up" task books, etc.
- Institute formalized "move-up" Captains/Battalion Chiefs/Incident Safety Officer (ISO) academies, training.
- Train/coordinate/prepare with neighboring Special Operations Teams.

The following table details the budgetary accounts associated with the District's Mission Readiness Program:

Mission Readiness Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5555 · Hiring, Testing & Recruitment	\$ 7,531	\$ 15,405	\$ 1,849	\$ 13,255	\$ (2,150)	-14.0%
6230 · Educational Expenditures	\$ 19,612	\$ 34,217	\$ 32,734	\$ 30,458	\$ (3,759)	-11.0%
6240 · Training Materials	\$ 6,107	\$ 7,180	\$ 6,625	\$ 7,180	\$ -	0.0%
6250 · Travel Expenditures	\$ 238	\$ 5,933	\$ 1,984	\$ 4,350	\$ (1,583)	-26.7%
Total Mission Readiness:	\$ 33,489	\$ 62,735	\$ 43,192	\$ 55,243	\$ (7,492)	-11.9%

- 5555 Hiring, Testing, & Recruitment:** Funding in this area covers the new employee recruitment processes and allows the District to test potential candidates through extensive interview panels, written examinations, and pre-employment screenings. The District also includes funding for Promotional Testing in this budget account. Promotional testing opportunities for Battalion Chief, Captain, and Engineer are typically offered biennially to establish a promotional list. The promotional testing process requires a written exam, a practical test, and an interview panel. During this fiscal year, the District is anticipating the completion of a Captain's promotional testing process. This budget account was decreased since the District's current staffing levels are met and only minimal employee turnover is anticipated.
- 6230 Educational Expenditures:** This budgetary account provides funding for all suppression training mandated by multiple local, state and federal agencies and includes: Westside Training Consortium sponsored training, District multi-company drills, engine and ladder company evolutions, station and night drills, officer development, Arizona State Fire Marshal Training, seminars, tuition reimbursement, degree enhancement programs, driver's training, hazardous materials training, and recruit training. Expenditures for this account were decreased due to the transition of some training to internal mechanisms, and through the utilization of train-the-trainer programs.
- 6240 Training Materials:** This funding, for a proportionate share of the costs of building props and acquiring rentals (i.e., dumpsters), etc., is used to support the Westside Training Consortium. Expenditures also include funds to maintain facility resource libraries including required training manuals and videos, and additional training items such as salvaged vehicles and props for fire training.
- 6250 Travel Expenditures:** This account allows for per diem, lodgings and travel expenditures associated with attending educational opportunities throughout the fiscal year. Decreases in this account reflect travel costs previously associated with FY 2010/2011 SCBA maintenance training being completed and the associated funding removed from this budget.

Emergency Medical Services Section

The Emergency Medical Services (EMS) Section is responsible for ensuring that the highest quality of medical care and transportation is delivered to patients on emergency scenes and also for ensuring that District personnel uphold strict training standards. The EMS Section also provides community Continuous Chest Compression (CCC), Cardio Pulmonary Resuscitation (CPR), Automated External Defibrillation (AED) and First-Aid training assistance.

As part of the Valley Fire Department Consortium, the District participated in the acquisition of a paperless EMS reporting program that was implemented in many Valley departments. The system was implemented in the Fire District near the end of FY 2009/2010. This new software increases the accuracy and consistency of data collection at emergency incidents further enhancing the quality of patient care. An additional advantage of the program is the statistical analysis capability which allows the EMS Section to easily identify and analyze significant and pertinent incident data. The statistical capabilities of the system will aid in the data collection and analysis frequently required for grant submissions. The EMS section is also involved in pursuing ambulance accreditation and the statistical analysis capability will assist in that process.

Emergency Medical Services Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
EMS Coordinator	1.0	1.0	1.0
Program Manager	1.0	1.0	1.0
Total Assigned Personnel	2.0	2.0	2.0

Emergency Medical Services Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
EMT Refresher Training Course Participants	14	14
Paramedic Refresher Training Course Participants	23	23
Employee CPR Training Participants	42	42
Public CPR Training Participants	100	100
Documentation Quality Assessment (%)	100%	100%

Status of FY 2010/2011 Performance Goals and Objectives

- Continue to facilitate and provide continuing education training to all positions to ensure extremely high levels of competency, efficiency, and safety in the area of EMS – **Goal Accomplished**
- Continue to provide annual performance reports to all District paramedics – **Goal Accomplished**
- Continue to maintain an accurate database on all employee certification types and expiration dates – **Goal Accomplished**
- Maintain paperless reporting/documentation system – **Goal Modified**

- Maintain training programs on usage of the paperless system for all District employees – **Goal Modified**
- Complete EMS Policy revisions – **Goal Accomplished**
- Complete renewal process for District ambulances – **Goal Accomplished**
- Continue preparations for the self-assessment phase of the EMS Accreditation Process – **Process Ongoing**
- Continue to maintain cost effectiveness through explorative EMS supply purchasing program – **Goal Accomplished**
- Continue to monitor the established measurable set of standards to evaluate the productivity and performance of the District's EMS programs – **Goal Accomplished**
- Continue to work with Del Webb Hospital to provide a seamless and efficient patient transfer process – **Goal Accomplished**
- Continue to work with the various regulatory and other associations to stay abreast of changing standards and to assist in the development of future EMS policies and standards – **Goal Accomplished**
- Develop and implement an EMS supplies inventory system – **Goal Accomplished**
- Maintain the database created to track all CCC/CPR/AED and First-Aid courses given by the District and their attendees – **Goal Accomplished**
- Initiate review of Ambulance Services Accreditation Process – **Goal Modified**
- Evaluate participation of District personnel "Critical Care Transport Paramedic" program – **Goal Accomplished**
- Update District intranet with Continuing Medical Education (CME) and training opportunities (dates/descriptions) – **Goal Accomplished**
- Review and, if necessary, revise criteria for Quality Assurance of EMS Charts – **Goal Accomplished**
- Coordinate EMS data storage and retrieval – **Goal Accomplished**
- Assist with ensuring that all pertinent EMS equipment is included on the District capital equipment replacement schedule – **Goal Accomplished**
- Maintain preventative maintenance schedule on all EMS equipment – **Goal Accomplished**
- Initiated computerized reports for medical incidents utilizing ESO Software – **Goal Accomplished**
- Revised in-house training/continuing education program for EMT's & Paramedics – **Goal Accomplished**
- Partner with Banner Del E. Webb Hospital & Surprise Fire Department to provide monthly education topics for paramedics – **Goal Accomplished**
- Seek Regional Faculty status with American Heart Association – **Goal Accomplished**
- Partner with Banner Del E. Webb Hospital to launch first annual "Have a Heart" CPR event in observance of Valentine's Day – **Goal Accomplished**
- Work with Arizona Department of Health Services Epidemiology Section to enhance fall injury documentation and data – **Goal Accomplished**

FY 2011/2012 Performance Goals and Objectives

- Continue to facilitate and provide continuing education training to all positions to ensure extremely high levels of competency, efficiency, and safety in the area of EMS.
- Continue to provide annual, at a minimum, performance reports to all District paramedics.
- Continue to maintain accurate database on all employee certification types and expiration dates.
- Continue to maintain paperless reporting/documentation system.
- Continue to maintain training programs on usage of the paperless system for all District employees.
- Continue EMS Policy revisions where necessary.
- Complete certification renewal process for District ambulances.
- Continue preparations for the self-assessment phase of the EMS Accreditation Process.
- Continue to maintain EMS supply inventory program and monitor cost effectiveness.
- Continue to monitor the established measurable set of standards to evaluate the productivity and performance of the District's EMS programs.
- Continue to work with Del Webb Hospital to provide a seamless and efficient patient transfer process.
- Continue to work with the various regulatory and other associations to stay abreast of changing standards and to assist in the development of future EMS policies and standards.
- Continue to maintain the database created to track all CCC/CPR/AED and First-Aid courses given by the District and their attendees.
- Continue to update District intranet with Continuing Medical Education (CME) and training opportunities (dates/descriptions).
- Continue to review and, if necessary, revise criteria for Quality Assurance of EMS Charts.
- Continue to coordinate EMS data storage and retrieval.
- Assist with ensuring that all pertinent EMS equipment is included on the District capital equipment replacement schedule.
- Maintain preventative maintenance schedule on all EMS equipment.
- Adapt additional continuing education programs and develop Target Safety and other electronic EMS related training.
- Prepare testing process to evaluate employee knowledge of EMS related topics.
- Continue to produce computerized reports for medical incidents utilizing ESO Software
- Continue partnership with Banner Del E. Webb Hospital & Surprise Fire Department to provide monthly education topics for paramedics.
- Maintain Regional Faculty status with American Heart Association.
- Continue partnership with Banner Del E. Webb Hospital's annual "Have a Heart" CPR event in observance of Valentine's Day.
- Continue working with Arizona Department of Health Services Epidemiology Section to enhance fall injury documentation and data.

- Familiarize the District with the Commission on Accreditation of Ambulance Services (CAAS) standards for the Accreditation of Ambulance Services.
- Enhance virtual recreation of incidents or events in multiple locations utilizing District’s multi-media education capability thus reducing number of times personnel would need to leave first-due areas.
- Expand “key efficiency” measures as necessary.
- Evaluate compliance with Arizona Department of Health Services and base station protocols and rules; make any required changes.
- Maintain pertinent memberships in EMS related agencies.
- Continue to develop and coordinate computer/video based training program to reduce classroom hours.
- Select personnel for upgrade to ALS status.
- If necessary, revise criteria for Incident Quality Assurance checks.
- Research & evaluate District medical equipment needs based on future technology and industry standards.

The following accounts outline the expenditures associated with the delivery of EMS services by the District:

EMS Operations Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5440 · EMS Equipment R/M	\$ -	\$ 4,332	\$ 3,580	\$ 5,932	\$ 1,600	36.9%
5810 · EMS Ambulance Registrations	\$ 1,450	\$ 1,625	\$ 1,250	\$ 2,075	\$ 450	27.7%
5820 · EMS Equipment	\$ 9,212	\$ 10,060	\$ 9,238	\$ 10,060	\$ -	0.0%
5830 · EMS Supplies	\$ 80,695	\$ 89,400	\$ 85,945	\$ 89,400	\$ -	0.0%
5840 · EMS Pharmaceutical Supplies	\$ 5,146	\$ 7,200	\$ 9,766	\$ 10,200	\$ 3,000	41.7%
5070 · Program Manager Compensation	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ -	0.0%
Total EMS Operations:	\$ 97,803	\$ 113,917	\$ 111,079	\$ 118,967	\$ 5,050	4.4%

- **5440 EMS Equipment Repair / Maintenance:** EMS equipment requires verification of proper operability; sometimes on a daily basis. There are various necessary requirements to inspect, calibrate, and perform preventative maintenance on items such as heart monitors, pneumatic gurneys, suction units, and glucose monitors, etc. This account increased due to the addition of the annual preventative maintenance for the District’s Continuous Positive Airway Pressure (C-PAP) devices.
- **5810 EMS Ambulance Registrations:** This account funds the annual Arizona Department of Health Services inspection and registration of the District’s six (6) operating ambulances and the anticipated addition of a seventh. This account also funds the biennial re-certifications associated with providing ambulance services under the District’s Certificate of Necessity (CON).
- **5820 EMS Equipment:** To provide superior quality pre-hospital emergency care to District patients, it is necessary to provide quality equipment to the EMS emergency personnel. This account replaces items with a limited service life as

well as the normal “wear and tear” items such as oxygen regulators and cylinders, heart monitor batteries and cables, backboards, and gurney mattresses, etc. This account also funds the purchase of a spare “ToughBook” computer for use with the new electronic patient care reporting (ePCR) system to ensure continued processing should one of the active units become temporarily disabled. Expenditures are also projected for the purchase of replacement electro cardio gram (ECG) and pulse oximetry cables to enhance heart monitor data collection.

- **5830 EMS Supplies:** This budget category provides for the emergency medical disposable or consumable supplies used by the District throughout the fiscal year. These include, but are not limited to, medical oxygen, intravenous catheters, tubing and fluids, bandaging materials, sterile gloves, immobilization gear, intubation and airway tools, etc. This line item will include fees for the Electronic Patient Care Reports (ePCR) paperless documentation system in future years. However, with the purchase of the original software, the District was able to secure a greatly reduced per chart rate by paying for the first three years in advance.
- **5840 EMS Pharmaceutical Supplies:** This budgetary account was added in FY 2009/2010. Previously, the District was able to obtain its pharmaceutical supplies through a direct drug-for-drug exchange at the receiving medical facility. The facility would then bill the patient’s account for any medications administered in the pre-hospital setting. Federal Medicare changes prevent the receiving medical facility from billing for any medications not directly administered by that entity. As a result, the District must now purchase any replacement pharmaceuticals utilized during the course of providing emergency patient care. This account had been calculated based on usage records for the past two years and the District has revised this account based on actual billings received.
- **5070 Program Manager Compensation:** This funding compensates the EMS Program Manager for the added responsibilities of maintaining the consumable inventory requirements of the EMS Program.

Emergency Medical Services Training

The EMS Section coordinates emergency medical training for District personnel and for the community Continuous Chest Compression (CCC), Cardiac Pulmonary Resuscitation (CPR), Automated External Defibrillation (AED) and First-Aid training. Federal and State entities direct standards of training, frequency of recertification, and set minimum training requirement levels that must be adhered to in order for the District to remain eligible to provide pre-hospital emergency care to its citizenry. The District takes great pride in the exceptional level of care it ensures its residents.

It is a District priority to continue to facilitate an EMS Training Program which provides a large portion of the biennial re-certification training requirements in-house thus reducing

off-site travel costs. The District has looked for ways during recent years to decrease the costs associated with maintaining these certifications and their extensive training requirements. Overtime has been a large contributing factor in these higher training costs. Consequently, through the use of Target Safety Training and the introduction of a video conferencing system for the Administrative office and all stations, the District is utilizing a new process for obtaining these certifications. The EMS Coordinator will be heavily relying on the dissemination of didactic training information through the Target Safety System. A new testing system has also been instituted to verify material knowledge and retention. Manipulative testing requirements will still be administered to each re-certification participant. However, the previously required four or five days of didactic classroom training was reduced greatly. This reduced the number of overtime hours needed annually. Changes in the FY 2011/2012 EMS training budget reflect the changes in this recertification program.

EMS Training Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
6510 · Educational Expenditures	\$ 2,765	\$ 9,035	\$ 6,225	\$ 12,045	\$ 3,010	33.3%
6520 · Training Materials	\$ 4,615	\$ 6,800	\$ 4,043	\$ 6,350	\$ (450)	-6.6%
6530 · Travel Expenditures	\$ 1,187	\$ 1,490	\$ 1,188	\$ 1,980	\$ 490	32.9%
Total EMS Training:	\$ 8,567	\$ 17,325	\$ 11,456	\$ 20,375	\$ 3,050	17.6%

- 6510 Educational Expenditures:** This account provides tuition costs for Paramedic and Emergency Medical Technician certification / re-certification. Funding for the annual paramedic refresher education includes any certification fees, such as for International Trauma Life Support (ITLS), and PEPP (pediatric emergencies) courses, as well as fees paid to guest instructors. This funding also provides ongoing training for EMS instructors and CPR trainers to ensure that they are knowledgeable in current standards of care. Training also includes attendance at symposiums and conferences held statewide. Funds are included for transitional training of two (2) EMT-B's to Paramedics. Increases in this account are reflective of increases in the initial paramedic training costs and in the increased need for additional external manipulative testing proctors to coincide with the new training program.
- 6520 Training Materials:** This funding covers training materials required for various EMS classes including manuals, Automated External Defibrillation (AED) training apparatus, CPR and AED training mannequins, CPR cards, training videos, CD's and on-line training aids, etc. Decreases in this account are attributed to a supply of training materials currently being available to the District.
- 6530 Travel Expenditures:** This account allows for the per diem, lodgings and travel expenditures associated with attending educational classes throughout the fiscal year. Increases in this account are due to the increases in lodging costs for attendance of the Arizona Fire District Association and the Arizona Ambulance Association conferences.

Support Services Division

The Support Services Division is managed by a Deputy Chief and is comprised of two (2) full time employees supporting the District's facilities and fleet maintenance needs. This Division maintains all facilities, including assisting in the design and construction of new and/or renovation of existing facilities. The Division maintains five (5) permanent structures totaling more than 51,000 square feet and one (1) temporary structure totaling roughly 1,440 square feet. All six (6) of the District's structures are located on five (5) different property sites. The Division also performs and supervises minor remodeling work and is responsible for facility inventory. Personnel are challenged to project facility strengths and weaknesses utilizing preventative maintenance and accurate assessments of equipment/facility component life expectancy. Facility supplies are also requisitioned and tracked by the Support Services Division.

The fleet maintenance portion of the Support Services Division ensures that preventative maintenance and repair work is performed on all District emergency apparatus, light trucks, automobiles, and specified communications equipment. Personnel also project apparatus strengths and weaknesses to estimate apparatus life expectancy for the vehicle aging/replacement schedule.

Support Services Division Personnel Summary

Position	2009/2010 Actual	2010/2011 Actual	2011/2012 Proposed
Support Services Coordinator	1.0	1.0	1.0
Support Services Technician	1.0	1.0	1.0
Total Assigned Personnel	2.0	2.0	2.0

Support Services Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Facilities Maintained		
Square Footage Maintained for five (5) permanent District Facilities and one (1) temporary structure (approx)	52,440	52,440
Apparatus Maintained		
Emergency Response Vehicles	19	20
Non-Emergency Response Vehicles	9	9
Total Vehicles Maintained	28	29
Estimated Response Apparatus Miles Per Year	175,000	200,000

Status of 2010/2011 Performance Goals and Objectives: Facilities

- Continue to evaluate and modify the District's "facilities work order" system to improve reporting and efficiency – **Goal Accomplished**
- Continue to monitor the measurable set of standards developed previously to evaluate the productivity and performance of the District's facilities maintenance programs – **Goal Accomplished**

- Maintain the District facilities preventative maintenance schedule – **Goal Accomplished**
- Complete all preventative maintenance services within a 20-day variance of scheduled date – **Goal Accomplished**
- Continue to respond to all corrective maintenance requests within one (1) business day – **Goal Accomplished**
- Continue to assist with the District inventory system – **Goal Modified**
- Complete all budgeted maintenance and repair projects – **Goal Accomplished**
- Continue to provide District-wide intra-departmental mail and delivery services – **Goal Accomplished**
- Continue to manage the District’s Surplus Property Program – **Goal Accomplished**

FY 2011/2012 Performance Goals and Objectives: Facilities

- Continue to work within the District’s “*facilities work order*” system to improve reporting and efficiency.
- Continue to monitor the measurable set of standards developed previously to evaluate the productivity and performance of the District’s facilities maintenance programs.
- Continue to maintain the District facilities preventative maintenance schedule.
- Complete all preventative maintenance services within a 20-day variance of scheduled date.
- Continue to respond to all corrective maintenance requests within one (1) business day.
- Continue to assist with the District inventory system.
- Complete all budgeted maintenance and repair projects.
- Continue to provide District-wide intra-departmental mail and delivery services as necessary.
- Continue to manage the District’s Surplus Property Program.
- Enhance computerized Facilities Preventative Maintenance Program.
- Evaluate Facilities Preventative Maintenance equipment needs.
- Planning/programming for future Fire District facility needs (i.e: new District station, training site, etc.)

Status of 2010/2011 Performance Goals and Objectives: Fleet

- Maintain non-capital fleet maintenance costs under set costs per mile of operation, as detailed below: **Goal Accomplished**
 - Pumpers \$1.75/mile
 - Quint/Ladder \$2.00/mile
 - Ambulance \$1.00/mile
 - Ladder Tender \$1.35/mile
 - Misc. Response \$1.00/mile
 - Autos \$0.45/mile
- Maintain preventative maintenance schedules for all apparatus: **Goal Accomplished**
 - Pumpers 4 months/4,000 miles

- Quint/Ladder 4 months/4,000 miles
- Ambulance 4 months/4,000 miles
- Ladder Tender 4 months/4,000 miles
- Misc. Response 4 months/4,000 miles
- Autos 3 months/5,000 miles
- Ladder Inspections Annually
- Pump Test Annually
- Complete all fleet preventative maintenance services within a 20-day variance of scheduled date – **Goal Accomplished**
- Respond to all corrective fleet maintenance requests within one (1) business day – **Goal Accomplished**
- Maintain fleet availability above 95% – **Goal Accomplished**
- Maintain average turnaround times for scheduled services – **Goal Accomplished**
 - Response Apparatus 48 Hours
 - Staff Vehicles 8 Hours
- Evaluate and modify the District’s “fleet work order” system to improve reporting and efficiency – **Goal Accomplished**
- Continue to monitor a measurable set of standards to evaluate the productivity and performance of the District’s fleet management program – **Process Ongoing**
- Equip and place new Battalion Chief’s vehicle into service upon receipt – **Goal Accomplished**
- Assist in contracting for two new ambulances – **Goal Accomplished**
- Complete DriveCam Program installation in District apparatus – **Process Ongoing**

FY 2011/2012 Performance Goals and Objectives: Fleet

- Continue to maintain non-capital fleet maintenance costs under set costs per mile of operation, as detailed below:
 - Pumpers \$1.75/mile
 - Quint/Ladder \$2.00/mile
 - Ambulance \$1.00/mile
 - Ladder Tender \$1.35/mile
 - Misc. Response \$1.00/mile
 - Autos \$0.45/mile
- Continue to maintain preventative maintenance schedules for all apparatus as follows:
 - Pumpers 4 months/4,000 miles
 - Quint/Ladder 4 months/4,000 miles
 - Ambulance 4 months/4,000 miles
 - Ladder Tender 4 months/4,000 miles
 - Misc. Response 4 months/4,000 miles
 - Autos 3 months/5,000 miles
 - Ladder Inspections Annually
 - Pump Test Annually

- Complete all preventative maintenance services within a 20-day variance of scheduled date.
- Respond to all corrective maintenance requests within one (1) business day.
- Maintain fleet availability above 95%.
- Continue Apparatus Technician training and certification process as outlined.
- Research and add appropriate Preventative Maintenance equipment to Capital Replacement Schedule.
- Maintain average turnaround times for scheduled services of:
 - Response Apparatus 48 Hours
 - Staff Vehicles 8 Hours
- Equip and place two new ambulances into service upon receipt.
- Enhance computerized Apparatus Preventative Maintenance Plan.
- Evaluate Apparatus Preventative Maintenance equipment needs.
- Assist in generating specifications and contract requirements for a Type III Pumper.

Facilities Management

The District must maintain facilities to house both the personnel and the apparatus that support the District's mission. The following table outlines details regarding the Facilities Maintenance Expenditures for the coming fiscal year:

Facilities Maintenance Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5391 · Electricity	\$ 70,603	\$ 84,771	\$ 74,268	\$ 79,771	\$ (5,000)	-5.9%
5392 · Natural Gas	\$ 3,639	\$ 4,932	\$ 3,463	\$ 4,932	\$ -	0.0%
5393 · Water & Sewer	\$ 11,048	\$ 16,896	\$ 19,171	\$ 20,076	\$ 3,180	18.8%
5394 · Telephone	\$ 13,614	\$ 15,114	\$ 14,437	\$ 14,352	\$ (762)	-5.0%
5395 · Refuse Services	\$ 2,240	\$ 2,646	\$ 2,456	\$ 2,964	\$ 318	12.0%
5396 · Cable Services	\$ 13	\$ -	\$ -	\$ -	\$ -	0.0%
5411 · Internal Facility R/M	\$ 6,266	\$ 8,280	\$ 5,011	\$ 8,100	\$ (180)	-2.2%
5412 · Outsourced Facilities Maintenance	\$ 15,559	\$ 6,800	\$ 11,479	\$ 7,500	\$ 700	10.3%
5413 · Custodial Services	\$ 3,300	\$ 5,700	\$ 3,850	\$ 5,700	\$ -	0.0%
5414 · Landscaping Services	\$ 3,659	\$ 4,650	\$ 3,409	\$ 4,650	\$ -	0.0%
5415 · Pest Control	\$ 4,227	\$ 4,800	\$ 3,253	\$ 4,800	\$ -	0.0%
5416 · Fire & Security Systems	\$ 3,158	\$ 10,370	\$ 8,060	\$ 8,120	\$ (2,250)	-21.7%
5620 · Janitorial Supplies	\$ 7,567	\$ 7,500	\$ 6,890	\$ 8,000	\$ 500	6.7%
5630 · Facilities Supplies	\$ 3,835	\$ 3,900	\$ 2,648	\$ 3,400	\$ (500)	-12.8%
Facilities Maintenance:	\$ 148,730	\$ 176,359	\$ 158,396	\$ 172,365	\$ (3,994)	-2.3%

- **5391 Electricity:** This account provides funding for all District facilities. Budgeted funding for this account has been decreased due to the yearly analysis of actual costs and the anticipated transition to the use of solar power for all of the District facilities.

- **5392 Natural Gas:** This account funds all natural gas expenditure requirements for all District facilities. This funding is based on actual costs for natural gas consumption by all facilities.
- **5393 Water & Sewer:** This account manages water and sewer services provided to all District facilities and reflects an increase due to actual costs experienced during the current fiscal year and anticipated increases in water and sewer fees for the coming year.
- **5394 Telephone:** This funding allows for continued telephone service at all District facilities and has been decreased based on historical averages.
- **5395 Refuse Services:** This item funds the collection and removal of refuse at District facilities and is based on a fee agreement negotiated in 2007. This agreement requires a 10% increase of monthly collection fees each fiscal year until the District reaches the monthly collection fee of \$57.00 during FY 2011/2012.
- **5396 Cable Services:** This account had previously provided funding for basic cable services at the District's facilities including the Phoenix Fire Network (PFN). However, no funds were budgeted for FY 2011/2012 resulting from an agreement with the Firefighter's Association to pay for all of these services.
- **5411 Internal Facility Repair / Maintenance (R/M):** This funding covers minor repairs or maintenance that may affect any of the District's facilities. It also allocates individual station supply monies for minor emergency repairs that can be accomplished by station personnel during hours that the Support Services Division personnel would generally be unavailable. This allows repairs to be completed in a timely manner and avoids requesting the services of off duty Support Services personnel or not making the repair until maintenance personnel are available. The station supply monies have been reduced for FY 2011/2012, causing a decrease in expenditures for this account.
- **5412 Outsourced Facilities Maintenance:** The Support Services staff is able to accomplish much of the general maintenance requirements for each of the District's facilities. However, major maintenance issues that arise may be beyond the expertise of District staff. This budget account reserves funding for those situations. Increases in this account are due to the increased cost in outsourcing major repairs.
- **5413 Custodial Services:** This budget area provides for one weekly custodial service at the Administration building and is based on a recently re-negotiated fee structure. Scheduled annual carpet cleaning at each facility is also expended from this account.
- **5414 Landscaping Services:** This account supports semi-annual weed control

for all facilities and for any monthly landscape maintenance for the Administrative/Maintenance building not provided by District personnel.

- **5415 Pest Control:** Funding in this section ensures that all facilities receive pest control services monthly and is based on acquired quotes for services. Annual termite treatments for Station 103 are also included in this account.
- **5416 Fire & Security System Monitoring:** This funding allows for the monitoring of fire sprinkler and burglar alarm systems at all District facilities. An additional expenditure in this account is the required annual inspections of the fire extinguishing hood systems in the kitchens at Fire Station 101 & 102. The District must allocate funding for annual inspections of the alarm systems and back flow testing for all facilities. Decreases in this account are attributed to renegotiated maintenance contracts for the sprinkler systems.
- **5620 Janitorial Supplies:** This line item funds the cleaning and janitorial supplies for the basic upkeep of the District's facilities and is based on historical averages.
- **5630 Facilities Supplies:** As the District facilities are multi-purpose in nature and personnel are on duty 24-hours a day, this account provides consumable items such as coffee, sugar, creamer, napkins, and other related items.

Fleet Management

In order to successfully and professionally provide services to residents, the District has a number of apparatus which require periodic repair and preventative maintenance. This account group allows for these necessary repairs and is managed by personnel from the Support Services Division.

Fleet Maintenance Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5420 · Internal Apparatus R/M	\$ 41,064	\$ 46,200	\$ 36,353	\$ 40,000	\$ (6,200)	-13.4%
5425 · Outsourced Apparatus Maintenance	\$ 17,798	\$ 12,000	\$ 18,453	\$ 19,500	\$ 7,500	62.5%
5460 · Support Svc Equip R/M	\$ 473	\$ 500	\$ 228	\$ 500	\$ -	0.0%
5640 · Support Svc/Shop Supplies	\$ 10,061	\$ 8,500	\$ 7,143	\$ 8,000	\$ (500)	-5.9%
5680 · Fuel (Gasoline/Diesel)	\$ 57,471	\$ 75,000	\$ 73,936	\$ 92,000	\$ 17,000	22.7%
Total Fleet Maintenance:	\$ 126,868	\$ 142,200	\$ 136,113	\$ 160,000	\$ 17,800	12.5%

- **5420 Internal Apparatus Repairs and Maintenance (R/M):** This funding is available for use by the Support Services Division to purchase materials necessary to accomplish all in-house apparatus preventative maintenance and minor repairs. Items purchased under this account include, but are not limited to, replacement lighting, alternators, water pumps, filters, brakes, tires and apparatus batteries. This account has been decreased as a result of the new apparatus being under warranty and the decrease in servicing required.

- **5425 Outsourced Apparatus Maintenance:** With the availability of the maintenance facility located at the Administrative offices, the District has continued to experience a decrease in this funding area. However, service requirements exist that cannot be performed by District Support Services personnel which must be outsourced. This account has been increased as a result of continued issues with some of the older apparatus.
- **5460 Support Services Equipment Repair and Maintenance (R/M):** In order to perform their tasks, the Support Services personnel must utilize specialized equipment. This funding allows for the maintenance or repair of essential equipment (air compressor, drill press, engine hoist, etc.).
- **5640 Support Services/Shop Supplies:** This budget account provides for the purchase of minor parts and supplies utilized by the Support Services Division. Items funded here include, but are not limited to, miscellaneous batteries, shop tools, towels, paint, penetrating oils, etc. Decreases in this account are reflective of the new District apparatus.
- **5680 Fuel (Gasoline/Diesel):** Fuel is one the District's single largest consumables and the cost is dictated primarily by existing fuel prices. Fire apparatus have a low mile-per-gallon fuel consumption yet must respond to an increasing call volume. It is recognized that fuel conservation is a responsibility of the District. Various fuel conservation techniques implemented by the District in recent years will continue to be utilized. These efforts include continuing to shop fuel prices from various vendors and distributors, continuing to operate fuel efficient non-emergency vehicles (i.e. Ford Escapes, etc.) for out-of-service functions (i.e. annual physicals, vehicle repair shuttle, training, etc.) and other District business; limiting non-emergency travel to first due areas (mail and station supply pickup and delivery is provided by Support Services personnel as well as utilizing the Support Services Maintenance Vehicle to perform minor vehicle repairs at individual stations rather than driving larger apparatus to the maintenance facility); and maintaining fueling facilities at Station 101 and 103 to limit traveling for fuel. Based on expenditures during FY 2010/2011, and projected fuel prices increasing in FY 2011/2012, this account has been significantly increased.

Emergency Communications

The Support Services Division manages issues associated with emergency communications. This includes the purchase as well as the preventative maintenance and repair work on most District emergency communication and pre-emption systems. The Division is also responsible for the annual dispatch agreement with the Phoenix Fire Department, cellular services used by emergency apparatus for patching to the hospitals for receipt of medical direction, and communications equipment necessary to manage emergency incidents.

Emergency Communications Performance Measures

Description	2010/2011 Estimated	2011/2012 Projected
Radio's Maintained		
Portable Radios	97	97
Mobile Radios	36	36
Total Radio's Maintained	133	133
MCT/AVL Systems		
MCT's Maintained	14	16
AVL's Maintained	14	16
Pre-Emption Systems		
Intersections	15	18
Apparatus	21	23
Paging Service		
Pagers Maintained	16	15

Status of FY 2010/2011 Performance Goals and Objectives

- Continue to ensure response to all corrective communications maintenance requests within one (1) business day – **Goal Accomplished**
- Continue development and monitoring of a measurable set of standards to evaluate the productivity and performance of the District's Emergency Communications Program – **Goal Accomplished**
- Continue upkeep of the current VHF radio system for daily usage – **Goal Accomplished**
- Continue evaluation and implement suitable pre-emption lighting on appropriate apparatus – **Goal Accomplished**
- Continue working with Maricopa County to ensure proper operation of pre-emption systems as well as system installations at all District intersections – **Goal Accomplished**
- Complete all budgeted maintenance and repair projects – **Goal Accomplished**

FY 2011/2012 Performance Goals and Objectives

- Continue to ensure response to all corrective communications maintenance requests within one (1) business day.
- Continue development and monitoring of a measurable set of standards to evaluate the productivity and performance of the District's Emergency Communications Program.
- Continue upkeep of the current VHF radio system and implementation of the new 800 MHz System.
- Continue evaluation and implement suitable pre-emption lighting on appropriate apparatus.
- Continue working with Maricopa County to ensure proper operation of pre-emption systems as well as system installations at all District intersections.
- Complete all budgeted maintenance and repair projects.
- Continue to maintain a seat on the Regional Wireless Cooperative Counsel.
- Continue phased full system activation of 800 MHz Communication System.
- Research funding requirements for additional 800 MHz equipment as necessary.

Emergency Communications Management

The District must maintain an effective and efficient communications system to enable quick response to emergencies and maintain the safety of District personnel. This system is supported through internal personnel and external entities such as the City of Phoenix Dispatch system. The following table details the expenditure accounts associated with the District's Emergency Communications section of the FY 2011/2012 budget:

Emergency Communications Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
5910 · Dispatching Services	\$ 319,956	\$ 352,686	\$ 351,416	\$ 357,870	\$ 5,184	1.5%
5920 · Cellular & ePCR Connections	\$ 11,104	\$ 20,982	\$ 20,499	\$ 23,202	\$ 2,220	10.6%
5930 · Pagers	\$ 1,488	\$ 1,068	\$ 976	\$ 990	\$ (78)	-7.3%
5940 · Radio Repair	\$ 863	\$ 2,000	\$ 2,000	\$ 2,000	\$ -	0.0%
5950 · Communications Parts/Equipment	\$ 3,279	\$ 11,000	\$ 7,355	\$ 13,500	\$ 2,500	22.7%
5960 · Network Systems	\$ -	\$ -	\$ 685	\$ 858	\$ 858	100.0%
Total Emergency Communications:	\$ 336,689	\$ 387,736	\$ 382,931	\$ 398,420	\$ 10,684	2.8%

- **5910 Dispatching Services:** Funding provides for 24-hour dispatching and technical services through the City of Phoenix. It also covers the costs associated with maintenance of the station dispatch packages, Mobile Communications Terminals (MCTs), Automatic Vehicle Locators (AVLs), and printer systems. The cost per dispatch as determined by Phoenix Fire Regional Dispatch Center is budgeted based on a dispatch service fee of \$22.92 per call. This account also funds the expenditures associated with participation in the Regional Wireless Cooperative (RWC). The District pays annual fees for each radio it operates on the 700/800 MHz system. Increases in this account are mainly contributed to the addition of 29 new radios purchased under a Grant received during FY 2010/2011.
- **5920 Cellular & ePCR Connections:** Emergency medical responders must communicate preliminary medical assessments to physicians at receiving medical facilities, who then advise and prescribe pre-hospital care treatments that must be completed en-route by District personnel. Therefore, cellular communication with base hospitals is essential to providing a quality standard of care. This communications capability also ensures on scene coordination of all emergency situations with the Communications Center and other personnel that may need immediate appraisals and updates of incident situations. The ePCR (paperless EMS Patient Care Reporting) system which was implemented in FY 2009/2010 also requires monthly fees associated with the cellular connections required by the new system hardware. Additionally, the annual subscription fees associated with the DriveCam systems are included within this budgetary account. This account was increased for FY 2011/2012 due to the anticipated installation of the balance of the DriveCam system.

- **5930 Pagers:** This budgetary account ensures that responding personnel have more than one communications dispatching data resource. Decreases in this account are contributed to the stabilization of monthly service delivery fees and a reduction in the number of personnel with assigned pagers.
- **5940 Radio Repair:** This funding ensures continued operation of all small communications equipment as well as the maintenance of telephone systems and traffic pre-emption equipment.
- **5950 Communications Parts/Equipment:** This budgetary item allows for the purchase of radio batteries, radio replacements and / or parts for radio equipment, traffic light pre-emption equipment, and other emergency communications equipment. This account increased due to additional traffic signals planned for installation during the coming year and the required pre-emption equipment necessary to support those intersections.
- **5960 Network Systems:** This funding account is new to the District and is required to maintain some of the District's inter-operability between computer systems and facilities.

Support Services Training

Support Services personnel are required to maintain mechanically complex Fire District apparatus in appropriate running order which requires specialized technical and mechanical knowledge as well as specific certifications. Maintaining these certifications is mandated by the District.

Support Services Training Expenditure Projections						
Description	FY 2009/2010 ACTUALS	FY 2010/2011 ADOPTED	FY 2010/2011 ESTIMATED	FY 2011/2012 ADOPTED	Budget Variance	% of Change
6410 · Educational Expenditures	\$ 820	\$ 2,000	\$ 475	\$ 1,500	\$ (500)	-25.0%
6430 · Travel Expenditures	\$ 198	\$ 1,500	\$ -	\$ 500	\$ (1,000)	-66.7%
Total Support Services Training:	\$ 1,018	\$ 3,500	\$ 475	\$ 2,000	\$ (1,500)	-42.9%

- **6410 Educational Expenditures:** Training in this budgetary account funds Mechanic Certification requirements as well as other appropriate training classes attended by Support Services personnel. This account was increased to provide funding for EVT/ASE Certification courses for two Support Services personnel.
- **6430 Travel Expenditures:** This account allows for the per diem, lodgings and travel expenditures associated with Support Services personnel attending training classes throughout the fiscal year. This account has been decreased as a result of minimal travel needs during the coming year.

CONCLUSION

The Fire District Board of Directors and personnel are proud to present this in-depth budgetary document to Fire District property owners for review and comment. The Sun City West Fire District is a unique entity which has a history of using an innovative approach to delivering excellent quality and highly efficient services to its residents. The District believes the FY 2011/2012 budget fully supports that innovative spirit.

The District works conscientiously, in conjunction with its Board of Directors and staff, to produce each fiscal year's budget; striving to minimize the financial impact to its residents through a well managed and efficient budget. Upon the adoption of this budget, the District's Board Members and professional staff will administer each budgetary account with due diligence and accountability to the residents the District serves.

District personnel are tasked with ensuring that the expenditures they make and the actions they take are always in the best interest of the District and the residents and compliment the exemplary service standards established over the years. The FY 2011/2012 Budget presented in this document outlines in detail the minimum financial requirements to maintain the professional services District residents expect.

The Sun City West Fire District believes this budget document provides funding only for those expenditures that support its mission and goal to provide the most effective, efficient and professional emergency response services that can be provided.

The District would like to thank its residents for their continued interest and support. Additional documentation and questions regarding this budget can be obtained through the District's Administrative offices located at 18818 N Spanish Garden Drive, Sun City West, Arizona, 85375.

The following pages provide an index and combine the projected revenues and operating expenses within the proposed Fiscal Year 2011/2012 Budget. This format allows for a complete overview of the entire budget by account number and also allows for comparison with the FY 2010/2011 adopted budget totals.

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Revenue & Expenditure Directory

Fiscal Year 2011/2012 ADOPTED Annual Budget & Operational Plan Summary						
Page #	Description	FY 2010/2011 ADOPTED	FY 2011/2012 ADOPTED	Variance	%	of Change
Revenues						
4100 Tax Revenues						
35	4110 · Property Taxes	\$ 9,786,319	\$ 9,441,693	\$ (344,626)		-3.5%
35	4120 · Fire District Assistance Tax (FDAT)	\$ 300,000	\$ 300,000	\$ -		0.0%
Total 4100 Tax Revenues:		\$ 10,086,319	\$ 9,741,693	\$ (344,626)		-3.4%
4200 Ambulance Revenues						
37	4200 · Ambulance Revenues	\$ 1,553,781	\$ 1,545,913	\$ (7,868)		-0.5%
Total 4200 Ambulance Revenues:		\$ 1,553,781	\$ 1,545,913	\$ (7,868)		-0.5%
4300 Program Revenues						
38	4310 · Plan Review Fees	\$ 2,000	\$ 4,000	\$ 2,000		100.0%
38	4320 · Permit Fees	\$ 16,000	\$ 14,000	\$ (2,000)		-12.5%
38	4330 · Inspection Fees	\$ 300	\$ 12,300	\$ 12,000		4000.0%
38	4340 · New Construction Permit Revenues	\$ -	\$ 3,775	\$ 3,775		100.0%
38	4360 · State Land/Wildland Revenues	\$ 5,765	\$ 5,164	\$ (601)		-10.4%
38	4390 · Special Program Revenues	\$ 23,625	\$ 34,000	\$ 10,375		43.9%
Total 4300 Program Revenues:		\$ 47,690	\$ 73,239	\$ 25,549		53.6%
4400 Miscellaneous Revenues						
40	4430 · Contractual & Misc Revenue	\$ 43,310	\$ 146,635	\$ 103,325		238.6%
40	4435 · Fire Ins Premium Revenue (PSPRS)	\$ 104,962	\$ 95,836	\$ (9,126)		-8.7%
40	4440 · Interest - General Fund	\$ 14,000	\$ 14,000	\$ -		0.0%
40	4445 · EMS/CPR Training Fees	\$ 1,500	\$ 1,500	\$ -		0.0%
40	4450 · Sale of Surplus Equip & Assets	\$ -	\$ -	\$ -		0.0%
Total 4400 Miscellaneous Revenues:		\$ 163,772	\$ 257,971	\$ 94,199		57.5%
Total Combined Revenues:		\$ 11,851,562	\$ 11,618,816	\$ (232,746)		-2.0%

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Revenue & Expenditure Directory, Continued

Fiscal Year 2011/2012 ADOPTED Annual Budget & Operational Plan Summary						
Page #	Description	FY 2010/2011 ADOPTED	FY 2011/2012 ADOPTED	Variance	%	of Change
Wage & Benefit Expenditures						
5000 Wage Expenditures						
55	5005 · Administrative	\$ 421,702	\$ 427,955	\$ 6,253	1.5%	
55	5010 · EMS	\$ 891,931	\$ 890,978	\$ (953)	-0.1%	
55	5015 · Emergency Services	\$ 3,829,017	\$ 3,860,830	\$ 31,813	0.8%	
55	5020 · Community Risk Reduction	\$ 269,756	\$ 235,533	\$ (34,223)	-12.7%	
55	5025 · Support Services	\$ 117,775	\$ 103,104	\$ (14,671)	-12.5%	
55	5030 · Miscellaneous Compensation	\$ 20,850	\$ 23,200	\$ 2,350	11.3%	
55	5035 · Longevity Compensation	\$ 53,618	\$ 57,068	\$ 3,450	6.4%	
55	5050 · Holiday On-Call Compensation	\$ 223,419	\$ 225,096	\$ 1,677	0.8%	
55	5070 · Program Manager Compensation	\$ 2,600	\$ 2,600	\$ -	0.0%	
55	5085 · Coverage Compensation	\$ 353,833	\$ 311,763	\$ (42,070)	-11.9%	
Total 5100 Wages:		\$ 6,184,501	\$ 6,138,127	\$ (46,374)	-0.7%	
5100 Employer Taxes & Benefits Expenditures						
5110 Employer Taxes						
55	5111 · Social Security Tax - Employer	\$ 104,447	\$ 93,058	\$ (11,389)	-10.9%	
55	5112 · Medicare Tax - Employer	\$ 91,614	\$ 90,452	\$ (1,162)	-1.3%	
55	5113 · AZ U/I & Job Training Tax	\$ 5,327	\$ 5,268	\$ (59)	-1.1%	
55	5114 · Workers Compensation Insurance	\$ 139,608	\$ 141,814	\$ 2,206	1.6%	
Total 5110 Employer Taxes:		\$ 340,996	\$ 330,592	\$ (10,404)	-3.1%	
5120 Retirements						
55	5121 · PSPRS Retirement Contributions	\$ 752,077	\$ 805,645	\$ 53,568	7.1%	
55	5122 · ASRS Retirement Contributions	\$ 161,658	\$ 150,443	\$ (11,215)	-6.9%	
55	5123 · 401(a) Retirement Contributions	\$ 186,278	\$ 198,686	\$ 12,408	6.7%	
Total 5120 Retirements:		\$ 1,100,013	\$ 1,154,774	\$ 54,761	5.0%	
5130 Benefit Insurance						
55	5131 · Health Insurance	\$ 1,013,211	\$ 1,088,838	\$ 75,627	7.5%	
55	5132 · Dental Insurance	\$ 75,868	\$ 83,197	\$ 7,329	9.7%	
55	5133 · Life Insurance	\$ 13,593	\$ 13,510	\$ (83)	-0.6%	
55	5134 · PSPRS Cancer Insurance	\$ 5,400	\$ 3,975	\$ (1,425)	-26.4%	
55	5135 · Post Employment Health Plan	\$ 62,122	\$ 61,660	\$ (462)	-0.7%	
55	5136 · MERP Retiree Med Reimb	\$ 4,200	\$ 4,200	\$ -	0.0%	
55	5137 · Long Term Disability	\$ 20,010	\$ 17,542	\$ (2,468)	-12.3%	
55	5138 · Flexible Spending Account	\$ -	\$ -	\$ -	0.0%	
55	5139 · Vision Insurance	\$ 6,462	\$ 5,170	\$ (1,292)	-20.0%	
Total 5130 Benefit Insurance:		\$ 1,200,866	\$ 1,278,092	\$ 77,226	6.4%	
5140 Operational Allowances						
55	5141 · Sick Leave Buy Back	\$ 52,822	\$ 19,461	\$ (33,361)	-63.2%	
55	5142 · Uniform Allowance	\$ 65,521	\$ 65,450	\$ (71)	-0.1%	
55	5143 · Cell Phone Allowance	\$ 12,272	\$ 12,220	\$ (52)	-0.4%	
Total 5140 Operational Allowances:		\$ 130,615	\$ 97,131	\$ (33,484)	-25.6%	
Total Employer Taxes & Benefits:		\$ 2,772,490	\$ 2,860,589	\$ 88,099	3.2%	
Total Wages & Benefit Expenditures:		\$ 8,956,991	\$ 8,998,716	\$ 41,725	0.5%	

Revenue & Expenditure Directory, Continued

FY 2011/2012 ADOPTED Annual Budget & Operational Plan Summary Continued						
Page #	Description	FY 2010/2011 ADOPTED	FY 2011/2012 ADOPTED	Variance	%	of Change
Operating Expenditures						
5200 Insurance						
70	5210 · Facilities/Equipment Insurance	\$ 24,991	\$ 25,011	\$ 20	0.1%	
70	5220 · Motor Vehicle Insurance	\$ 22,051	\$ 18,618	\$ (3,433)	-15.6%	
70	5230 · Umbrella, Errors & Omissions	\$ 8,093	\$ 9,236	\$ 1,143	14.1%	
Total 5200 Insurance:		\$ 55,135	\$ 52,865	\$ (2,270)	-4.1%	
5300 Professional Services						
63	5305 · Accounting	\$ 12,500	\$ 14,350	\$ 1,850	14.8%	
63	5310 · Bank Service Charges	\$ 14,250	\$ 15,000	\$ 750	5.3%	
63	5315 · Payroll Processing	\$ 1,050	\$ 1,200	\$ 150	14.3%	
63	5320 · Ambulance Billing	\$ 147,610	\$ 146,862	\$ (748)	-0.5%	
46	5325 · Consulting Expenditures	\$ 12,500	\$ 12,500	\$ -	0.0%	
45	5330 · Election Expenditures	\$ 12,927	\$ -	\$ (12,927)	-100.0%	
72	5335 · Legal Expenditures	\$ 32,000	\$ 25,000	\$ (7,000)	-21.9%	
98	5340 · Physicals/Vaccinations/Testing	\$ 58,912	\$ 56,992	\$ (1,920)	-3.3%	
113	5391 · Electricity	\$ 84,771	\$ 79,771	\$ (5,000)	-5.9%	
113	5392 · Natural Gas	\$ 4,932	\$ 4,932	\$ -	0.0%	
113	5393 · Water & Sewer	\$ 16,896	\$ 20,076	\$ 3,180	18.8%	
113	5394 · Telephone	\$ 15,114	\$ 14,352	\$ (762)	-5.0%	
113	5395 · Refuse Services	\$ 2,646	\$ 2,964	\$ 318	12.0%	
113	5396 · Cable Services	\$ -	\$ -	\$ -	0.0%	
Total 5300 Professional Services:		\$ 416,108	\$ 393,999	\$ (22,109)	-5.3%	
5400 District Repairs & Maintenance						
113	5411 · Internal Facility R/M	\$ 8,280	\$ 8,100	\$ (180)	-2.2%	
113	5412 · Outsourced Facilities Maintenance	\$ 6,800	\$ 7,500	\$ 700	10.3%	
113	5413 · Custodial Services	\$ 5,700	\$ 5,700	\$ -	0.0%	
113	5414 · Landscaping Services	\$ 4,650	\$ 4,650	\$ -	0.0%	
113	5415 · Pest Control	\$ 4,800	\$ 4,800	\$ -	0.0%	
113	5416 · Fire & Security Systems	\$ 10,370	\$ 8,120	\$ (2,250)	-21.7%	
115	5420 · Internal Apparatus R/M	\$ 46,200	\$ 40,000	\$ (6,200)	-13.4%	
115	5425 · Outsourced Apparatus Maintenance	\$ 12,000	\$ 19,500	\$ 7,500	62.5%	
91	5430 · Firefighting Equipment R/M	\$ 3,000	\$ 3,000	\$ -	0.0%	
95	5435 · SCBA Equipment R/M	\$ 2,850	\$ 2,850	\$ -	0.0%	
107	5440 · EMS Equipment R/M	\$ 4,332	\$ 5,932	\$ 1,600	36.9%	
72	5450 · Computer/Systems/Equip R/M	\$ 17,500	\$ 46,500	\$ 29,000	165.7%	
72	5455 · Computer Software Licensing	\$ 22,992	\$ 22,247	\$ (745)	-3.2%	
115	5460 · Support Svc Equip R/M	\$ 500	\$ 500	\$ -	0.0%	
98	5470 · Fitness Equipment R/M	\$ 1,650	\$ 1,650	\$ -	0.0%	
Total 5400 District Repairs & Maint:		\$ 151,624	\$ 181,049	\$ 29,425	19.4%	

Revenue & Expenditure Directory, Continued

FY 2011/2012 ADOPTED Annual Budget & Operational Plan Summary Continued						
Page #	Description	FY 2010/2011 ADOPTED	FY 2011/2012 ADOPTED	Variance	%	of Change
5500 District Administration						
63	5505 · Memberships & Dues	\$ 7,889	\$ 7,960	\$ 71	0.9%	
63	5510 · Professional Subscriptions	\$ 3,346	\$ 3,376	\$ 30	0.9%	
45/72	5515 · District Outreach	\$ 12,785	\$ 12,785	\$ -	0.0%	
72	5520 · Office Supplies	\$ 12,500	\$ 12,500	\$ -	0.0%	
72	5525 · Office Equipment	\$ 9,000	\$ 7,000	\$ (2,000)	-22.2%	
72	5530 · Postage & Delivery	\$ 3,500	\$ 3,000	\$ (500)	-14.3%	
72	5535 · Publishing & Printing	\$ 4,696	\$ 4,050	\$ (646)	-13.8%	
72	5540 · Copier R/M Expenditures	\$ 2,534	\$ 2,534	\$ -	0.0%	
72	5545 · Computer Hardware	\$ 10,000	\$ 10,000	\$ -	0.0%	
72	5550 · Computer Software Expenditures	\$ 5,000	\$ 5,000	\$ -	0.0%	
103	5555 · Hiring, Testing & Recruitment	\$ 15,405	\$ 13,255	\$ (2,150)	-14.0%	
46	5590 · Accreditation	\$ 6,000	\$ 2,500	\$ (3,500)	-58.3%	
63	5595 · Contingency	\$ 611,834	\$ 350,000	\$ (261,834)	-42.8%	
Total 5500 District Administration:		\$ 704,489	\$ 433,960	\$ (270,529)	-38.4%	
5600 District Operational Supplies						
72	5610 · Duty Uniforms	\$ 7,100	\$ 6,050	\$ (1,050)	-14.8%	
113	5620 · Janitorial Supplies	\$ 7,500	\$ 8,000	\$ 500	6.7%	
113	5630 · Facilities Supplies	\$ 3,900	\$ 3,400	\$ (500)	-12.8%	
115	5640 · Support Svc/Shop Supplies	\$ 8,500	\$ 8,000	\$ (500)	-5.9%	
98	5650 · Safety Materials & Supplies	\$ 1,000	\$ 750	\$ (250)	-25.0%	
82	5655 · Disaster Preparedness Supplies	\$ 2,000	\$ 1,500	\$ (500)	-25.0%	
82	5660 · Fire Corps Materials & Supplies	\$ 2,668	\$ 2,668	\$ -	0.0%	
82	5665 · Risk Reduction Materials	\$ 13,462	\$ 13,050	\$ (412)	-3.1%	
115	5680 · Fuel (Gasoline/Diesel)	\$ 75,000	\$ 92,000	\$ 17,000	22.7%	
82	5691 · Lock Box Materials	\$ 20,425	\$ 21,895	\$ 1,470	7.2%	
82	5692 · T-Shirt Materials	\$ 900	\$ 900	\$ -	0.0%	
82	5693 · Smoke Alarm Materials	\$ -	\$ 8,100	\$ 8,100	100.0%	
Total 5600 Dist Operational Supplies:		\$ 142,455	\$ 166,313	\$ 23,858	16.7%	
5700 Emergency Service Operations						
91	5710 · Firefighting Equipment	\$ 9,700	\$ 16,765	\$ 7,065	72.8%	
93	5720 · Wildland Equipment	\$ 3,215	\$ 1,964	\$ (1,251)	-38.9%	
91	5730 · Protective Equipment	\$ 44,010	\$ 37,821	\$ (6,189)	-14.1%	
95	5740 · SCBA Equipment	\$ 12,790	\$ 12,790	\$ -	0.0%	
98	5750 · Health & Safety Equipment	\$ 825	\$ 825	\$ -	0.0%	
Total 5700 Emergency Svc Ops:		\$ 70,540	\$ 70,165	\$ (375)	-0.5%	
5800 EMS Operations						
107	5810 · EMS Ambulance Registrations	\$ 1,625	\$ 2,075	\$ 450	27.7%	
107	5820 · EMS Equipment	\$ 10,060	\$ 10,060	\$ -	0.0%	
107	5830 · EMS Supplies	\$ 89,400	\$ 89,400	\$ -	0.0%	
107	5840 · EMS Pharmaceutical Supplies	\$ 7,200	\$ 10,200	\$ 3,000	41.7%	
Total 5800 EMS Operations:		\$ 108,285	\$ 111,735	\$ 3,450	3.2%	
5900 Communications						
118	5910 · Dispatching Services	\$ 352,686	\$ 357,870	\$ 5,184	1.5%	
118	5920 · Cellular & ePCR Connections	\$ 20,982	\$ 23,202	\$ 2,220	10.6%	
118	5930 · Pagers	\$ 1,068	\$ 990	\$ (78)	-7.3%	
118	5940 · Radio Repair	\$ 2,000	\$ 2,000	\$ -	0.0%	
118	5950 · Communications Parts/Equipment	\$ 11,000	\$ 13,500	\$ 2,500	22.7%	
118	5960 · Network Systems	\$ -	\$ 858	\$ 858	100.0%	
Total 5900 Communications:		\$ 387,736	\$ 398,420	\$ 10,684	2.8%	
Total Operating Expenditures:		\$ 2,036,372	\$ 1,808,506	\$ (227,866)	-11.2%	

Revenue & Expenditure Directory, Continued

FY 2011/2012 ADOPTED Annual Budget & Operational Plan Summary Continued						
Page #	Description	FY 2010/2011 ADOPTED	FY 2011/2012 ADOPTED	Variance	%	of Change
District Training & Development Expenditures						
6100 Fire Board Training						
45	6110 · Educational Expenditures	\$ 1,350	\$ 1,350	\$ -	0.0%	
45	6130 · Travel Expenditures	\$ 6,025	\$ 5,925	\$ (100)	-1.7%	
Total 6100 Fire Board Training:		\$ 7,375	\$ 7,275	\$ (100)	-1.4%	
6200 Emergency Services Training						
98	6220 · Fitness & Safety Training	\$ 2,000	\$ 1,400	\$ (600)	-30.0%	
103	6230 · Educational Expenditures	\$ 34,217	\$ 30,458	\$ (3,759)	-11.0%	
93	6235 · Wildland Training Expenditures	\$ 2,550	\$ 3,200	\$ 650	25.5%	
103	6240 · Training Materials	\$ 7,180	\$ 7,180	\$ -	0.0%	
103	6250 · Travel Expenditures	\$ 5,933	\$ 4,350	\$ (1,583)	-26.7%	
Total 6200 Emergency Svcs Tng:		\$ 51,880	\$ 46,588	\$ (5,292)	-10.2%	
6300 Community Risk Reduction Training						
84	6320 · Educational Expenditures	\$ 4,800	\$ 5,810	\$ 1,010	21.0%	
84	6340 · Travel Expenditures	\$ 5,170	\$ 7,620	\$ 2,450	47.4%	
84	6350 · Fire Corps Training	\$ 4,100	\$ 3,125	\$ (975)	-23.8%	
Total 6300 Community Risk Reduction Training:		\$ 14,070	\$ 16,555	\$ 2,485	17.7%	
6400 Support Services Training						
119	6410 · Educational Expenditures	\$ 2,000	\$ 1,500	\$ (500)	-25.0%	
119	6430 · Travel Expenditures	\$ 1,500	\$ 500	\$ (1,000)	-66.7%	
Total 6400 Support Services Tng:		\$ 3,500	\$ 2,000	\$ (1,500)	-42.9%	
6500 EMS Training						
109	6510 · Educational Expenditures	\$ 9,035	\$ 12,045	\$ 3,010	33.3%	
109	6520 · Training Materials	\$ 6,800	\$ 6,350	\$ (450)	-6.6%	
109	6530 · Travel Expenditures	\$ 1,490	\$ 1,980	\$ 490	32.9%	
Total 6500 EMS Training:		\$ 17,325	\$ 20,375	\$ 3,050	17.6%	
6600 Administrative Training						
75	6610 · Educational Expenditures	\$ 9,910	\$ 9,660	\$ (250)	-2.5%	
75	6630 · Travel Expenditures	\$ 6,615	\$ 8,115	\$ 1,500	22.7%	
Total 6600 Administrative Training:		\$ 16,525	\$ 17,775	\$ 1,250	7.6%	
Total District Training & Development:		\$ 110,675	\$ 110,568	\$ (107)	-0.1%	
Debt Service Expenditures						
67	7230 · Marquette Principal	\$ 39,132	\$ -	\$ (39,132)	-100.0%	
67	7235 · Marquette Interest Expenditure	\$ 4,467	\$ -	\$ (4,467)	-100.0%	
67	7250 · DeLage Landon Principal	\$ 319,694	\$ 333,590	\$ 13,896	4.3%	
67	7255 · DeLage Landon Interest Expenditure	\$ 253,331	\$ 239,436	\$ (13,895)	-5.5%	
67	7290 · Capital Projects Funding (Deprc)	\$ 130,900	\$ 128,000	\$ (2,900)	-2.2%	
Total Debt Service:		\$ 747,524	\$ 701,026	\$ (46,498)	-6.2%	
Total Combined Expenditures:		\$ 11,851,562	\$ 11,618,816	\$ (232,746)	-2.0%	

Wage Scale

(Includes **0.0%** Cost of Living Adjustment)

<u>Salaried Classes</u>	<u>Salary Range</u>	
Fire Chief	\$ 101,085	\$ 142,237
Deputy Fire Chief	\$ 93,351	\$ 125,099
Battalion Chief	\$ 88,032	\$ 112,354
EMS Coordinator	\$ 57,716	\$ 77,345
Accounting Supervisor	\$ 51,369	\$ 72,281
Administrative Coordinator	\$ 50,261	\$ 70,722
Support Services Coordinator	\$ 49,532	\$ 69,697

<u>Administrative Classes</u>	<u>Hourly Range</u>	
Deputy Fire Marshal	\$ 25.37	\$ 35.70
Training Coordinator	\$ 23.73	\$ 27.48
Executive Assistant	\$ 22.52	\$ 31.69
Community Outreach Specialist	\$ 20.06	\$ 28.22
Information Technology Specialist	\$ 18.34	\$ 25.80
Account Clerk	\$ 17.12	\$ 24.09
Support Services Technician	\$ 17.24	\$ 24.27
Administrative Assistant	\$ 14.52	\$ 20.43

<u>Suppression Classes</u>	<u>Hourly Range</u>	
Captain - EMT	\$ 23.73	\$ 27.48
Engineer - EMT	\$ 19.50	\$ 23.71
Firefighter - EMT	\$ 15.10	\$ 21.24
Firefighter - Recruit	\$ 20.68	\$ 20.68

<u>EMT Classes</u>	<u>Hourly Range</u>	
EMS Division - CEP	\$ 12.93	\$ 18.21
EMS Division - EMT	\$ 10.27	\$ 13.76

Current Specialty Pays:

- **Paramedic Incentive:** Non-Exempt Shift sworn positions, are paid an additional \$2.15 per hour if they are currently working in a Paramedic position.
- **Program Manager Incentive:** Approved Program Managers are eligible to receive an additional \$50.00 per pay period. There are currently two approved Program Managers positions in the District; Health & Safety Program Manager and Emergency Medical Services Program Manager.

Budget Posting Summary

Arizona Revised Statutes § 48-805 requires the Fire District to post the proposed budget in a minimum of three public places as well as publish it in a newspaper of general circulation within the District for thirty days prior to a public hearing called by the Fire Board to adopt the final budget. Copies of the budget shall also be available to members of the public upon written request to the district. Following the public hearing, the district board shall adopt the budget.

The following condensed version of the Fire District Fiscal Year 2011/2012 PROPOSED Annual Budget & Operational Plan was published in the Daily News Sun newspaper on Saturday, May 21, 2011, posted in the District's five public posting places, posted on the District's website, www.scwfire.org, and placed in the local library for public inspection and comment. During the thirty day publishing period, District staff continued to negotiate with vendors and insurance providers to reduce the overall budget resulting in a \$66,535 reduction from the originally published proposed budget. The specifics of the revised budget were reviewed in detail at the normally scheduled Fire Board Meetings on Tuesday, June 14, 2011 and Thursday, June 16, 2011 and again during the Public Hearing and Special Board Meeting held on Tuesday, June 21, 2011 prior to the adoption of the final budget. Upon final adoption of the Fiscal Year 2011/2012 Budget & Operational Plan, the following condensed budget summary and an Affidavit of Publishing were submitted to the Maricopa County Board of Supervisor's Office by the Fire Board as required under Statute.

Fire District of Sun City West	
Fiscal Year 2011/2012 PROPOSED Annual Budget & Operational Plan	
July 1, 2011 Through June 30, 2012	
General Fund Revenues:	
Tax Revenue	\$ 9,511,289
Fire District Assistance Tax	\$ 300,000
Ambulance Insurance Billing Revenue	\$ 1,545,913
Program Revenues	\$ 71,114
Miscellaneous Revenues	\$ 257,035
Total General Fund Revenues:	\$ 11,685,351
General Operations Expenditures:	
Wages & Benefits	\$ 9,090,018
Operations	\$ 1,433,739
Training & Development	\$ 110,568
Contingencies	\$ 350,000
Total General Operations Expenditures:	\$ 10,984,325
Debt Service Expenditures:	
Debt Services Expenditures	\$ 701,026
Total Combined General Ops, Debt Service Expenditures:	\$ 11,685,351
	
Public Budget Hearing:	
Copies of the proposed budget are available upon request through the Fire District of Sun City West Administrative Offices by calling the phone number listed below or by visiting the District Website at www.scwfire.org . The initial Public Budget Hearing was held on Tuesday, May 17, 2011 at 9:00 a.m. and the final Public Budget Hearing will be held on Tuesday, June 21, 2011 at 9:00 a.m. Both meetings take place at the District's Administrative Offices located at:	
18818 North Spanish Garden Drive Sun City West, Arizona 85375 Administrative Office Phone Number: 623-584-3500	
Published: Daily News-Sun, May 21, 2011/ 16668670	

Budget Posting Summary, Continued

**Fire District of Sun City West
Fiscal Year 2011/2012 ADOPTED Annual Budget & Operational Plan
July 1, 2011 Through June 30, 2012**

General Fund Revenues:

Tax Revenue	\$ 9,441,693
Fire District Assistance Tax	\$ 300,000
Ambulance Insurance Billing Revenue	\$ 1,545,913
Program Revenues	\$ 73,239
Miscellaneous Revenues	\$ 257,971
Total General Fund Revenues:	\$ 11,618,816

General Operations Expenditures:

Wages & Benefits	\$ 8,998,716
Operations	\$ 1,458,506
Training & Development	\$ 110,568
Contingencies	\$ 350,000
Total General Operations Expenditures:	\$ 10,917,790

Debt Service Expenditures:

Debt Services Expenditures	\$ 701,026
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Total Combined General Ops, Debt Service Expenditures:

\$ 11,618,816

Public Budget Hearing:

Copies of the proposed budget are available upon request through the Fire District of Sun City West Administrative Offices by calling the phone number listed below or by visiting the District Website at www.scwfire.org. The initial Public Budget Hearing was held on Tuesday, May 17, 2011 at 9:00 a.m. and the final Public Budget Hearing was held on Tuesday, June 21, 2011 at 9:00 a.m. Both meetings took place at the District's Administrative Offices located at:

18818 North Spanish Garden Drive
Sun City West, Arizona 85375
Administrative Office Phone Number: 623-584-3500

Signatures on Original Document

David Wilson, Board Chairman

William Hamel, Board Clerk

Adoption Resolution



...Caring People Providing Quality Service



SUN CITY WEST FIRE DISTRICT

18818 N. Spanish Garden Drive, Sun City West, Arizona 85375

Business: (623) 584-3500 – Fax: (623) 546-8613 – www.scwfire.org

FIRE DISTRICT OF SUN CITY WEST BOARD OF DIRECTORS RESOLUTION #11-0621-2

A RESOLUTION OF THE ELECTED OFFICIALS OF THE FIRE DISTRICT OF SUN CITY WEST ADOPTING AN OPERATING BUDGET FOR FISCAL YEAR 2011/2012 IN THE AMOUNT OF \$11,618,816.

WHEREAS, Arizona Revised Statutes, Title 48 require the Fire District of Sun City West to adopt an annual operating budget, and;

WHEREAS, the Fire District of Sun City West has posted and published its proposed annual operating budget in compliance with State Law, and;

WHEREAS: a Public Hearing was held in compliance with State Law on the Proposed Fiscal Year 2011/2012 Operating Budget containing funding for continued emergency fire and ambulance services, salaries, wages and benefits for District employees, general operating expenditures, continued training expenditures, and debt service;

RESOLVED AND ADOPTED at a duly noticed public meeting of the Fire Board of the Fire District of Sun City West adopts the Fiscal Year 2011/2012 Operating Budget in the amount of \$11,618,816 (attached), on Tuesday, June 21, 2011, by a majority of the Fire Board Members.

APPROVED:

ATTEST:

Signatures on Original Document

David Wilson, Board Chairman

William Hamel, Board Clerk

GLOSSARY OF TERMS

Account	A term used to identify an individual asset, liability, expenditure control, revenue control, or fund balance.
Accrual Basis of Accounting	The method of accounting under which revenues are recorded when they are earned (whether or not cash is received at the time) and expenditures are recorded when goods and services are received (whether cash disbursements are made at the time or not).
Accreditation (CFAI)	A comprehensive system of fire and emergency service evaluation conducted by unbiased outside expert evaluators which assists fire departments and districts in achieving organizational and professional excellence.
Alarm	A call received by the Dispatch Center which is then relayed to the appropriate fire station for emergency response.
ALS	Advanced Life Support. Emergency medical care that may include all basic life support actions, plus invasive medical procedures, including: IV therapy, administration of anti-arrhythmic and other specified medications and solutions. Highest level of pre-hospital care.
ASRS	Arizona State Retirement System (Non-sworn employee pension plan).
Assessed Valuation	The total taxable value placed on real estate and other property as a basis for levying taxes.
Assets	Property that is owned by the District which has monetary value.
BC	Battalion Chief
Battalion Chief	An operations manager with rank above Captain. Directly responsible for the supervision of and daily operational readiness of their assigned shift. Responds to and takes command of emergencies. Also, directly supervises a number of assigned stations.
BLS	Basic Life Support. Emergency medical care generally limited to non-invasive procedures, such as airway maintenance, breathing support, CPR, hemorrhage control, splinting of suspected fractures, management of spinal injury, and protection and transport of the patient in accordance with accepted procedures. BLS providers with special training may also use semiautomatic defibrillators for cardiac defibrillation.
Bond	A written promise to pay a specified sum of money (called principal or face value) at a specified future date (called maturity date) along with periodic interest paid at a specified percentage. The difference between a note and a bond is the latter usually runs for a longer period of time and requires greater legal formality.
Bonded Debt	The portion of indebtedness represented by outstanding bonds.

Brush Truck	Four wheel drive trucks with small pumps and water supply capabilities that are specifically designed for wildland-urban interface fires.
Budget	A plan of financial operation embodying an estimate of proposed expenditures for a given period (typically a fiscal year) and the proposed means of financing them (revenue estimates).
CAAS	Commission on Accreditation of Ambulance Services.
Capital Assets	Assets of significant value and having a useful life of several years. Capital assets are also called fixed assets.
Captain	Rank above Engineer. Responsible for the overall administration of his/her assigned station including operational readiness, personnel supervision, and the station's budget.
CCC (Continuous Chest Compression)	A method of cardiopulmonary resuscitation (see CPR) which utilizes chest compressions only (hands only).
CEP	Certified Emergency Paramedic.
CERT	Citizens Emergency Response Team.
Chart of Accounts	The classification system used by the District to organize the accounting for various funds.
CIP	Capital Improvement Plan.
Company	A work unit comprised of a piece of apparatus and its assigned crew.
CPAT	Candidate Physical Ability Test.
CPR (Cardio-pulmonary Resuscitation)	An emergency procedure consisting of external cardiac massage and artificial respiration; attempts to restore circulation of the blood and prevent death or brain damage due to lack of oxygen.
CPSE	Center for Public Safety Excellence (formerly CFAI).
Dispatch	The Regional Dispatch Center is responsible for receiving emergency and non-emergency calls and for sending the appropriate apparatus to respond to the call.
DROP	Deferred Retirement Option Plan. A retirement option within the PSPRS program.
DSO	District Safety Officer.
EMS	Emergency Medical Services.

EMT	Emergency Medical Technician. One who is trained at different levels of medical skills.
Engine	A piece of apparatus which carries water, pumps water, and carries ladders, hose and medical supplies. All District engines also provide ALS emergency medical capabilities.
Engineer	Rank above Firefighter. In addition to performing all the assigned duties of a firefighter, an Engineer maintains and drives the equipment and apparatus.
EOC	Emergency Operations Center. Assembly of incident management staff responsible for directing and coordinating operations of one or more public service agencies in a catastrophic emergency, whether natural or manmade (i.e. flood, windstorm).
FEMA	Federal Emergency Management Agency.
Firefighter	Performs firefighting and rescue operations for combating, extinguishing and prevention of fires as well as for saving life and property. District firefighters are also EMT-Basic or paramedics.
Fiscal Year	A twelve month period of time to which the annual budget applies. The Fire District Fiscal Year runs from July 1 st through June 30 th .
Fixed Assets	Assets of a long-term character which are intended to continue to be held or used, such as land, buildings, machinery, furniture, and other equipment.
Fractile	A value which divides a set of data into equal proportions.
GAAFR	Governmental Accounting, Auditing, and Financial Reporting Manual, Using the GASB 34 Model, produced by the Government Finance Officers Association.
GAAP	Generally Accepted Accounting Principles. A widely accepted set of rules, conventions, standards, and procedures for reporting financial information, as established by the Financial Accounting Standards Board.
GASB	Government Accounting Standards Board. A major organization to develop generally accepted accounting principles (GAAP) for use by governmental entities in reporting financial information.
GASB 34	A statement issued by GASB and titled "Basic Financial Statements and Management's Discussion and Analysis for State and Local Governments". This statement changes the governmental financial reporting model, requiring accrual accounting for all activities to include recording and depreciating all capital assets.
GFOA	Government Finance Officers Association

Hazardous Material	Any substance or matter that is likely to inflict injury or harm or impose great or continued risk unless dealt with in a manner prescribed by state and federal regulations.
HRIS	Human Resource Information System.
IAFC	International Association of Fire Chiefs.
IAFF	International Association of Firefighters.
Incident	An event involving a fire, medical emergency, hazardous material spill or release/potential release of a hazardous material.
Interface	The area where native vegetation and manmade structures meet.
Internet	An electronic communications network that connects computer networks and organizational computer facilities around the world.
Intranet	Internal communications network based upon Internet technology used for departmental exchanges of information.
ISO	Incident Safety Officer.
Ladder	A piece of apparatus that carries a full complement of ground ladders in addition to an aerial ladder.
LT	Ladder Tender.
MCSO	Maricopa County Sheriff's Office.
MSDS	Material Safety Data Sheet.
Modified Accrual Basis of Accounting	The basis of accounting under which expenditures are recorded when goods or services are actually received, rather than when the invoices are paid. The exception on this general rule is interest on general long-term debt, which is recognized when due. Revenues are recorded in the accounting period in which they become measurable and available.
NFPA	National Fire Protection Association.
NIOSH	National Institute of Safety and Health.
OSHA	Occupational Safety and Health Administration.
Paramedic	The highest level of training an EMT can reach in the State of Arizona.
PORA	Property Owners and Residents Association.
PSPRS	Public Safety Personnel Retirement System (sworn employee pension plan).

Response	Actions taken by the Fire District in response to a citizen's request for services. This includes the initial dispatch, travel time and on-scene care of the resident.
RMS	Records Management System Software.
Rescue	Any kind of incident that requires specialized training or equipment that is utilized to provide assistance to a victim(s), i.e. trench collapse, water-related accidents, hazardous materials spills.
SCBA	Self Contained Breathing Apparatus.
Tender	A piece of apparatus that carries water to supply an engine in a rural area.
TRT	Technical Rescue Team.
Wildland Area	An area in which development is essentially non-existent except for roads, railroads, power lines and similar transportation facilities.
WMD	Weapons of Mass Destruction.