

OUTLINE PLAN

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CONSOLIDATION
OF
FIRE SERVICES
IN
UNINCORPORATED BEAUFORT COUNTY



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BACKGROUND

Consolidation of the Sheldon, Burton, Lady's Island/St. Helena Island, Bluffton and Daufuskie Fire Districts into one Beaufort County Fire Department is an issue that has been kicked around for years. It is an issue that has been hanging on far too long without any definitive action or manifest interest.

It is time to put the issue to bed, one way or the other.

Contained herein is a general discussion of a proposed plan of action for consolidating the Fire Districts into one County Fire Department. It is, as the title of the paper states, an outline plan. It is a plan designed to get the consolidation issue off of bottom dead center and is written with the assumption that, if it is decided to go forward with consolidation, this is a guide to what needs to be done.

It is not wrong to not consolidate. It is wrong to not consider consolidation in all respects.

This plan was developed by Randolph L. Wood, Jr., Deputy Administrator for Public Safety and Development, who is not, by any stretch of the imagination, an expert on fire district consolidation. However, he was afforded training in Fire Department consolidation during a week-long seminar sponsored by the International Association of Fire Chiefs held in Boston, Massachusetts. The subject was covered in considerable detail and much of what was learned at the seminar is contained in this paper. One aspect of the Deputy Administrator's job description is to be the County liaison with the five Fire Districts. As a result, a working knowledge has been gained of the personalities, strengths, problems, and overall functioning within each District. This has proven useful in developing this plan.

It has been suggested that the Beaufort County Emergency Medical Service (EMS) be merged with the County Fire Department, once it is created. The concept is not without merit and shall be the subject of a separate plan, if and when the Fire District consolidation effort is successful. To address the EMS issue in this plan would add unnecessary complexity to the process.

INTRODUCTION

Consolidation: To unite in one system or body.

Conway Mizelle, in Mizelle, Hodges & Associates "Fire Protection Study of Selected Areas" (of Beaufort County) dated August, 1990, states, in part:

"Due to the wide differences in these classifications (*ISO*), the ratewise advantages to be gained by the consolidation of fire services will likewise vary considerably. Areas at the top of the scale already enjoy lower fire insurance rates, while those at the bottom of the scale can realize progress toward better rates by receiving the improvements brought about by consolidated services."

During October, 1991, the County Council of Beaufort County passed Ordinance 91/28 which created a blue ribbon Consolidation Board whose purpose was to examine existing local government agencies and their components and to provide findings and recommendations as to which entities and services might lend themselves to full or partial consolidation.

In its final report dated August 24, 1992, the Consolidation Board stated, in part:

"The Fire Departments provide duplicate services throughout the County. There is consensus among professionals involved in the system that many of the services provided by the individual districts could be better or more economically provided by a centralized organization, i.e., training, inspection, personnel administration, communications, maintenance, and purchasing. Long-range planning would be enhanced if it were done on a consolidated basis... By shifting boundaries of existing districts and/or establishing service areas on a County-wide basis, ISO ratings in many areas could be improved."

In Chairman of County Council Tom Taylor's June 27, 1996 memorandum to Councilmen Ron Atkinson and Joel Martin, Mr. Taylor states:

"We have talked several times in the past about setting up an ad hoc committee to look at the overlap of fire districts in this County. ...For example, do we need to ask them to consider further the issue of consolidation...?"

Given the current and future growth of Beaufort County as well as the growing costs of manning, equipping and expanding the infrastructure of the Fire Districts, it is now time to give serious consideration and study to the issue of Fire District consolidation into one County Fire Department. The handwriting, so to speak, is on the wall. There are forces at work in the County which will lead toward the inevitable adoption of some form of consolidation or merger of the Fire Districts.

The question is: "Who should do it?" Fire District officials and County Staff can wait for the County Council to order a study by selected citizens who would have to go through an extensive education process on what makes the individual districts tick. As well, a consultant can be hired and generous fees can be paid for a study. Alternatively, the individual district Chiefs, senior Officers, Commission/Board Members and County Staff can proactively initiate the process, and in doing so, have a greater measure of influence and control over the outcome. *Logic and common sense create a compelling case for the latter scenario.*

GENERAL

The consolidation process, if agreement is reached by all parties to examine the feasibility of such, is not simple. In fact, it will be fraught with many obstacles and difficult issues such as politics, personal agendas, fear of loss of control, blocking and stalling, turf protection, and job security. Part of the process is developing a plan and strategy to deal with obstacles and other barriers which may surface. The success of the consolidation efforts will depend to a large extent on how the plan is presented to the public. A solid public relations effort needs to begin immediately before rumors begin to fly about the effects of consolidation. Equally as important as a good public relations effort is a good, continuous listening effort. Provisions must be implemented for listening to the concerns of various constituent groups and responding to them.

The consolidation process will not be completed in short order. It has proven to be a lengthy process in other communities which have consolidated fire departments. All who have been involved in fire department consolidation state that it is demanding, frustrating, and the worst thing they ever experienced. But they agree that it was worth all of the grief.

A clear understanding of the benefits of Fire District consolidation must be reached early in the process as well as an awareness of consolidation problems and shortcomings. All efforts must be directed in promoting the benefits and effectively countering the detractors. Listed below are some of the readily apparent benefits of consolidation.

- Strategic location of infrastructure without regard to artificial boundaries.
- Economies of scale.
- Potential of lower ISO.
- Forced program examination.
- Cost savings.
- Elimination of duplication.
- Maximizing personnel and equipment.

- Standardization of services, programs, and equipment.
- Reduced overhead.
- Provision of same service for less money.
- Provision of more service for about the same money.
- Facilitates coordinated strategic planning.
- Firefighter safety and training.

Similarly, the obstacles to consolidation must be understood early in the process and kept in mind throughout. Resistance to change marks any new process or idea and consolidation provides resistance a fertile field. New and clever ways to block and stall the process will surface. To some, the idea of consolidation is disruptive to the *status quo*.

The three primary obstacles to consolidation are turf protection, politics, and control. As seen through the eyes of elected and appointed officials, fire chiefs, firefighters, and the taxpayers, these issues become more specific.

-- Elected and appointed officials.

- ** Concern with public opinion. "If I support this, I won't be re-elected."
- ** What will this cost? "I will not support a tax increase for my constituents".
- ** Loss of control.
- ** "Who says consolidation is better? Show me."

-- Fire Chiefs.

- ** Job security.
- ** "Where do I fit in?"
- ** Loss of control and autonomy.
- ** Loss of power and blow to ego.
- ** "Who says consolidation is better? Show me."

-- Paid Firefighters.

** Job security.

** "What's my role and how am I affected?"

** "I don't want to work in (pick one) Sheldon, Burton, LI/St. Helena, Bluffton, Daufuskie."

** "Who says consolidation is better? Show me."

-- Volunteers.

** "What's my role and how am I affected? Will paid firefighters be favored at our expense?"

** "I don't want to work in (pick one) Sheldon, Burton, LI/St. Helena, Bluffton, Daufuskie."

** "Who says consolidation is better? Show me."

-- Taxpayers

** "Is our tax money leaving our area?"

** "Do we get substandard firefighters from another area?"

** "We like our own team."

** "Who says consolidation is better? Show me."

A commitment must be made, up front, by all of the parties involved in the consolidation study to evaluate all of the issues and to be objective in the process. No long-term promises will be made that consolidation is THE only way to go. However, it must be looked at as perhaps doing what is right and in terms of doing the best we can.

Once again, it is not wrong to NOT consolidate. It is wrong to not consider it in all respects. Foremost in the process of examining consolidation is an underlying key concept that must be continually kept in mind. This is the "Million Dollar Question":

WHAT IS IN THE BEST INTEREST OF THE PEOPLE WE SERVE?

THE "PROCESS"

There is no set or "right" process to be used when considering consolidation. General guidelines have been developed by other communities who have been through the process and will be used herein as a suggested methodology to address the issue. The "Phases", as suggested below, are not rigid benchmarks but rather transition points of ideas, commitment, and efforts in the process. The process can be expanded, contracted, or modified in any way to meet the needs of the participants. All parties must be open-minded and pragmatic: If it works, do it! If it doesn't, can it!

The suggested process, when examined closely, is very much akin to the Strategic Planning Process. As an old saying goes, "If you don't know where you're going, any road will get you there. However, you may not like where you end up." Strategic planning is a powerful tool for setting priorities and making informed decisions about the future. Strategic planning begins at the very first opening remark at the very first meeting in the consolidation process and has no end point as it is a continuous, iterative process. Strategic planning is:

** A process by which the guiding members of an organization envision its future and develop the necessary procedures and operations to achieve that future.

** A process that relies on, and builds, teamwork even as it is deliberately bringing about change in an organization by preparing that organization to meet threats or take advantage of opportunities.

Strategic planning is an essential core function to the consolidation process.

Phases

- 1 Informal Discussion
- 2 Information and Education
- 3 Agreement to Examine Feasibility
- 4 Evaluate and Inventory
- 5 Develop Feasibility Report
- 6 Establish a Strategic Plan
- 7 Agree to Proceed
- 8 Implement Plan
- 9 Review and Monitor Results
- 10 Make Necessary Adjustments

PHASE 1 INFORMAL DISCUSSION

What do we expect to accomplish? A unified commitment to begin a consolidation study.

Is there interest among the Chiefs, the District Commission/Board Members (hereafter referred to as Members), the County Councilmen and the public to consider consolidation? Remember, it is not wrong to not consolidate. It is wrong not to consider it in all respects.

**** Key Point:** Communicate, communicate, communicate throughout the process.

First, County Staff and the Chiefs of each Fire District will meet to cuss/discuss the concept and to review benefits and shortcomings. This is not the time for "nuts and bolts" discussions of finances, debt service, equipment disposition, etc.

Second, County Staff, the Fire Chiefs, senior Officers and Members of each District will meet to discuss the concept.

Third, inform the taxpayers of each District of the idea of consolidation during a regular Fire District meeting. This is the first step in the public education process. Realize that a considerable segment of the public may be opposed to the notion of consolidation. They have pride and a sense of identity with their districts and many believe what they have does not need changing. Pose the question and give the answer: "What is in your best interest, our taxpayers? We don't know yet but come with us and we'll find out together." Get the news media involved and the sooner they have "buy-in", the better the chances are of later succes.

All five Fire District Chiefs, senior Officers, Members, and County Staff meet to forge a unified commitment to begin a consolidation study.

**** Key Point:** Communicate. Consolidation is not a secretive process.

PHASE 2 INFORMATION AND EDUCATION

What do we expect to accomplish? A public announcement of an agreement in Phase 1.

This is the opportunity to make presentations to the Public Safety Committee and County Council of the basic rules on which the group as a whole has agreed. Again, this is not the time for details. They will be developed later. This is, in essence, a public announcement that the Fire Districts are in agreement to proceed to the next phase.

Without a doubt, the news media will start "what-iffing" the whole concept of consolidation at this time. It is essential that a united front be presented as to the agreement to proceed.

Anticipate the emergence of the "nay-sayers" and those who, for whatever reason or agenda, are opposed to consolidation or even the notion of determining if it is feasible.

PHASE 3 AGREEMENT TO EXAMINE FEASIBILITY OF CONSOLIDATION

What do we expect to accomplish? A detailed examination of the feasibility of consolidation.

This phase is the heart of the process in that a firm "buy-in" to a serious consolidation effort will occur here; or, conversely, die here. The key factor is to form cooperative multi-discipline "inter-governmental" committees composed of representatives of all the Fire Districts and interested members of the public to initially examine functional areas.

All stakeholders must be at the table. This includes employees, volunteers, staff, members, and elected officials from each jurisdiction. Community leaders need to be actively involved. What are their expectations? How will the different stakeholders influence the process? What does the process need from each stakeholder group? Again, the focus is on "What is in the best interest of the people we serve?"

The greatest threat to success in this phase are the obstacles to consolidation that will creatively and subtly appear. A plan must be formed to deal with them and to remove them as barriers.

-- Feasibility Considerations:

- * What are the advantages and disadvantages? How do we capitalize on them or overcome?
- * What are the obstacles? How do we remove them?
- * Time and resources that can be devoted to the process.
- * Who will be involved?
- * Management of the process.
- * Whose commitment is needed?
- * What is the tentative timetable?
- * What is the vision?
- * What are the goals?
- * What do we want out of consolidation?

Keep the "Million Dollar Question" in mind throughout. The key is to develop and answer the how, what, why, when and where questions and to be creative.

Establish and adhere to a timetable for completion.

The final step is to compile the committee reports into an executive summary and present the findings, in broad terms, to the five Commissions, the Public Safety Committee and to Council. Given that consolidation is found to be feasible and there is agreement to continue the process, a close examination of existing organizations, systems, and resources will follow as the next step.

PHASE 4 INVENTORY AND EVALUATE

What do we expect to accomplish? A detailed inventory and evaluation of each Fire District. An effective tool for accomplishing this phase is the SWOT Analysis which is central to the strategic planning process. It is an analysis of the Strengths, Weaknesses, Opportunities, and Threats of each Fire District and consists of an external scan and an internal assessment.

-- The internal assessment process is conducted to examine the strengths and weaknesses of the organization.

- * How is it organized?
- * Performance measures.
- * Planning.
- * Productivity.
- * Systems and procedures.
- * Use of technology.
- * Facilities and infrastructure.
- * Values.
- * Ability to assimilate change.
- * Ability to sustain change.

-- The external scanning process is undertaken to identify the major threats and opportunities that face an organization in the foreseeable future.

- * Identify major search areas to scan.
- * Collect and analyze information on the search areas.
- * Identify forces and trends for each search area.
- * Identify opportunities for each search area.
- * Produce products that are useful for decision-making and planning.

Again, the task force or intergovernmental approach is a key to success in this phase. This phase is where the details are examined and the framework is constructed for developing a plan. Here, data is analyzed to determine what is important. However, each current functional area existing within each district must be inventoried and evaluated to obtain a profile of the assets and liabilities as they exist. Focus on the best aspects of each of the departments. Functional areas to be analyzed by division:

-- Community Services

- * Fire Prevention and Code Enforcement.
- * Investigations.
- * Inspections.
- * Standardization.
- * Community Development.
- * Governmental Affairs.
- * Public information.
- * Fire Safety Education.
- * Demographics.

-- Emergency Services

- * Fire Response and Water Supply.
- * Station/Equipment Location and Boundaries/Response Areas/Mutual and Automatic Aid.
- * Specialty Teams--Hazmat/Dive.
- * Line and Staff Manning.
- * Five Year Plan.
- * Standardization.

-- Support Services

- * Training.
- * Building Maintenance.
- * Equipment Maintenance.
- * Logistics.
- * Standardization.

-- Administration

- * Data Processing.
- * Finance and Payroll.
- * Human Resources.
- * Insurance.
- * Standardization.

-- Financial Considerations

Compare:

- * Tax Rates.
- * Bonded Debt.
- * Capital Equipment Replacement Strategy.
- * Tax Rate History.
- * Salary and Benefits.
- * Infrastructure Status.
- * Assessed value.
- * ISO Ratings.

Anticipate:

- * Valuation Shifts.
- * Service area changes.
- * Financial Gains and Losses.

Quite obviously the County Comptroller and Tax Assessor will be the sources for much of this data.

Establish and adhere to a timetable for completion.

Once all the data is analyzed in terms of the organizations, systems, and resources, the next phase becomes a natural extension of the evaluation and inventory phase.

PHASE 5 - DEVELOP A FEASIBILITY REPORT

What do we expect to accomplish? Design a functional organization plan.

This is the "nuts and bolts" part of the consolidation process. The intergovernmental work committees continue to be crucial to the success of this phase. Simply stated, the work committees design and develop each functional area of the "new" organization using the data collected and analyzed in the previous phase.

After the functional area plans are developed, the individual plans are assembled into an organizational plan. Every aspect of the organization must be considered in detail and a justifiable model developed.

-- Identify desired service levels at the very beginning.

-- Capitalize on organizational and individual strengths.

** Key Point: You don't always have to sell cheaper - sell services. "What is in the best interest of the people we serve?"

-- In a "nutshell":

- * Develop a model fire department using all of the data previously collected and analyzed.

- * Justify and defend the choice.

- * Identify crucial issues and their solutions.

- * How will the department be financed and existing bonded debt be handled?

During this phase, if not before, the processes for dissolving the public service districts must be studied and whatever political action is required to do so should be tested and the necessary legislation or ordinances drafted and be ready for appropriate action.

Establish and adhere to a timetable.

The Feasibility Report must be exhaustive in scope, focusing on every possible detail as this phase sets the stage for the next phase--the Strategic Plan.

** Key Point: Communicate, communicate, communicate.

PHASE 6 ESTABLISH A STRATEGIC PLAN

What do we expect to accomplish? A rational approach to consolidation.

A strategic plan is composed of strategies, that is, general programs of action, that imply commitment of resources to reach objectives. During the preceding phases, many opportunities, problems and concerns will have been raised as a result of the detailed inventory and evaluation of each of the districts along with the development of the feasibility report. In this phase, three objectives must be accomplished to round out the development of a strategic plan:

- *Strategic direction must be set.
- *Strategic issues must be identified.
- *Strategies must be developed.

-- Setting strategic direction. Where do we want to go?

- Elements:

- * Values: what we care most about.
- * Vision: a statement of a possible and desirable future state of the organization.
- * Mission: what the organization will do to make its vision a reality.

-- Identifying strategic issues. Strategic issues are the issues or concerns that must be addressed in order to achieve vision and mission.

- Identify the strategic issues.

- Address the following questions about the issue:

- * Why is it an issue?
- * How do we know it is an issue?
- * Can we do something about it?
- * What are the consequences of not addressing the issue?

-- Developing strategies.

- Develop strategies to address each strategic issue.

- * What are the alternatives?
- * What opportunities are there for the alternatives?
- * What barriers exist to carrying out each alternative?
- * What are the alternatives to overcoming the barriers?
- * Criteria for selecting among the alternatives:
 - Cost
 - Time
 - Fit with values, vision and mission
 - Immediacy
 - Political considerations
 - "Must do" vs. "like to do"
 - Staff and other resources

The purpose of a strategic plan is to determine and communicate, through a system of major objectives and policies, a picture of what kind of a fire department is envisioned. Strategies do not outline how to accomplish the objectives as this is the task of many major and minor action plans. Strategies furnish a framework for guiding thinking and action.

PHASE 7 AGREE TO PROCEED

This is the formal "go" or "no go" phase in the process. An extensive amount of work will have occurred in the agreement to examine the feasibility of consolidation, the evaluation and inventory of each district, the development of a feasibility report, and the establishment of a strategic plan. It should be clear at this point as to what "is in the best interests of the people we serve". The public and the media should by now be "sold" on consolidation presuming they have been actively involved in the process to this point. If, however, it appears there are reasons NOT to proceed, then these reasons must be critically examined and solutions or alternatives developed.

If there is consensus to proceed, then four steps are suggested.

- The individual Fire Districts hold a public hearing(s) to answer questions and allay any citizen concerns.
- The individual Fire Districts uniformly petition the County Council for dissolution of their District in favor of consolidation of fire services into a County Fire Department.
- THE BIG EVENT. Hire a Fire Chief from personnel resources within the County or from outside. It is suggested that the Beaufort County Fire Department be designated a department within the Public Safety Division and the Fire Chief report to the Public Safety Division Deputy Administrator. The Fire Chief should be appointed in a timely manner so that he/she can be totally familiar with what has occurred in the process as well as to provide oversight in implementing the consolidation plan. As well, the Department's Table of Organization should be finalized by the Chief.
- Time the completion of the next phase, Implement the Plan, to the beginning of a County budget year.

PHASE 8 IMPLEMENT THE PLAN

It is one thing to develop clear and meaningful strategies. It is another matter, and one of very great practical importance, to implement strategies effectively. A suggested methodology of implementing strategies is through action plans, which are written tactical or operational programs or decisions. It is suggested that an action plan be developed with the following topics as major sub-sections (which are not all inclusive):

- Develop goals and objectives.
- Identify major activities and in what order they should occur.
- Plan the specific tasks to be undertaken.
- Determine schedule.
- Set target dates.
- Calculate resources needed.
- Allocate resources.
- Link the plan to the new budget year.
- Assign responsibility to someone for each activity.
- How will progress and results be measured?

Is the plan comprehensive, integrated, and consistent with objectives, environmental assumptions, and internal conditions?

PHASES 9 & 10 REVIEW AND MONITOR RESULTS - MAKE ADJUSTMENTS

As was stated earlier, planning is an iterative and continuous process. Once the plan is implemented, it must be closely monitored to see what is working and what is not. Obviously, some things won't work. It is impossible to discuss in this Outline Plan where and how to make changes. The important thing to remember is to find out what is not working and aggressively fix it--and fix it right.

SUMMARY

Again, it is emphasized that this Outline Plan is presented as a guide to help stimulate thinking during the "process". Accept, reject, or modify any part of it, but get on with the process.

Make a genuine and honest effort to examine all aspects and see if it will work. If it is practical to do, implement it in a methodical and precise manner, for there will be only one chance to do it right. If consolidation does not appear to be practical, closely examine the reasons and determine if there are suitable alternatives to overcome the objections or problems. If it still is not practical, so be it. At least it was given an honest shot.

However, the writer of this plan does not believe the word *failure* exists in the Fire Service.