

# Sunriver Service District Strategic Plan 2013-2018



## Our Future

# Sunriver Service District

## Managing Board

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## Chiefs

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## **MISSION STATEMENT**

**Protecting life and property, while fostering a sense of safety and security in our community.**

To accomplish the mission we will:

- Attract and retain qualified and capable personnel, and assure that they are properly trained and properly equipped.
- Provide reliable and professional emergency services tailored to our community.
- Comply with all Federal, State and local laws, codes and ordinances.
- Provide relevant community education.
- Work in partnership with all community entities.

## **VISION STATEMENT**

We will be a model of excellence for public safety services by protecting and enhancing the quality of life for all in the Sunriver Service District by effectively delivering innovative, fiscally sound, community oriented services that meet the changing needs of our community.

# VALUES STATEMENT

## **Integrity**

We will protect the public trust by ensuring that our actions are consistent with our vision, mission, and core values. We value honesty and high ethical standards.

## **Teamwork**

We acknowledge the mutual responsibility of the Sunriver Service District and its citizens to collaborate, support and commit to each other in order to enhance the quality of life in Sunriver.

## **Service**

We are committed to excellence in unbiased, quality superior service.

## **Progressive**

We value our ability to anticipate, influence and embrace change.

## **Professionalism**

We are committed to the highest level of competence and professional conduct.

# HISTORY

## **Sunriver Development**

The Sunriver Owners Association (SROA) was established as the governing body for Sunriver through the Consolidated Plan of Sunriver. SROA owns a large amount of common land, roadways, pathways, recreational facilities and parks, and a community/events center. SROA is a private, not-for-profit homeowners association. There are over 4,200 residential units within Sunriver as well as additional commercial enterprises. It is funded primarily through annual and special purpose assessments of property owners.

## **Formation of the Sunriver Service District**

The Sunriver Service District (SSD) was established through an agreement between Deschutes County and SROA in 2002. Prior to 2002, SROA provided public safety, emergency medical and fire services to Sunriver.

The SSD is a public service district authorized under Oregon Revised Statutes, and is required to adhere to all rules and laws established for Oregon public entities. These include, but are not limited to, Oregon budget law, public meetings and records laws and collective bargaining statutes. It is funded primarily through local property taxes. The SSD board is the managing body of the district, while the Deschutes County Board of Commissioners is the governing body.

SROA Board members are elected by Sunriver property owners. SSD Board members are public officials who are appointed by the Deschutes County Board of Commissioners. The SROA makes recommendations for SSD Board members directly to the Deschutes County Commissioners.

SROA provides services and facilities to the SSD under specific service agreements. The SROA promulgates rules and regulations, which it contracts with the SSD to enforce.

# STRATEGIC PLANNING PROCESS

In 2004, the Sunriver Service District (SSD) prepared a strategic plan for the period 2005-2010. The Special Districts Association of Oregon (SDAO) provided advisory assistance in the preparation of this plan. The planning activity started with discussion sessions and interviews with approximately 60 Sunriver stakeholders of varying backgrounds and interests. A task force was then formed to review and address all inputs and to prepare a strategic plan for SSD Managing Board approval.

The SSD Managing Board decided to update the strategic plan for the period 2010 to 2015, which was adopted by the board in July 2010. In 2012, the SSD Managing Board decided to update the Strategic Plan to cover the period 2013 to 2018. The SSD Managing Board and both Chiefs participated in the update.

## STRATEGIC ISSUES

### GROWTH

- What impact will growth in Sunriver and the surrounding area have on SSD?
- What path forward does SSD want to take to address the growth issue?

### **Issues**

- How should the Service District address the issues associated with the increase in the transient population within Sunriver?
- How should the Service District address the issues associated with the growth south of Sunriver?

### **Background**

#### **Population**

##### **Permanent**

- Sunriver - The permanent population has been declining. SROA is planning efforts to increase this population.
- South County – In 2005, growth in unincorporated Deschutes County was estimated at 2.2% per year. With the economic slowdown, there is very little current construction activity. No significant population growth to the south of Sunriver is expected within the time-frame of this study.

### Transient

- The economy is currently recovering. A new set of challenges faces Sunriver.
- The completion of the SHARC, as well as potential future commercial and recreational development, has resulted in increased recreational activities in Sunriver.
- Increased day use of Sunriver i.e. marina, stables, swim/fitness center is anticipated over the long term.
- New flights to Redmond will tend to increase transient population in Central Oregon.
- Change in housing mix and density within Sunriver.
- The Village Mall redevelopment has increased shopping and dining opportunities in Sunriver.

### Other Factors

- The District's ability to cope with growth is subject to limitations discussed in the Funding section.

### Impact

- The above factors will impact the quality of service and response time.
- Seasonal growth is beginning to occur.
- Increases in crime, traffic and emergency medical needs are functions of an increase in population, especially the transient population.

### Action Items

*The following Action Items are adopted by the board:*

- ✓ *At least annually, review the status of growth issues as they impact service delivery capability.*

### FUNDING

During the next five years what are the salient funding concerns for SSD?

### Issues

- Maintain adequate funding for SSD operations. SSD potentially could reach its tax rate ceiling within the time-frame of this study.
- SROA will be seeking funding for amenities improvements during this same period.
- Labor contracts will need to be negotiated.



## Background

- Revenue for the Sunriver Service District is generated through property taxes, service fees and other sources.
- The increase in tax assessed value is limited by law to 3% per year for existing homes.
- Additions to the tax base are limited to new construction and major renovations because Sunriver is nearing build-out.
- Economic impact of service arrangements with areas to the south of Sunriver.
- Economic environment is unpredictable.
- SSD has a permanent tax limit of \$3.45/1000 of assessed value.
- Revenue is forecast to increase 3.5% per annum due to reduced construction and laws that restrict assessment increases on existing property to 3% annually.
- Operating expenses are increasing at about 4% per year.
- Deschutes County currently obtains over \$2 million per year in room tax revenues from Sunriver tourists; none of this money comes directly back into the community.
- SSD is approaching its tax rate limit.
- Potential construction of a new fire training facility.
- Facilities/Amenities Master Plan additions to the fire and police facilities.
- There are other foreseeable demands on our financial climate, which impact our ability to fund, such as PERS, healthcare costs, facilities and training.

## Impact

- Based upon current cost/revenue growth, SSD could reach its taxing limit within the time-frame of this study.
- At some point, possibly within the timeframe of this study, additional funding will need to be developed, or police and fire budgets will need to be constrained.

## Options

- Consider cost reductions in Sunriver police and fire services when the property tax cap is reached.
- Initiate a special tax levy vote when the property tax cap is reached.
- Conduct a vote to increase the permanent tax limit.
- Seek grant funding for equipment, training, and other appropriate items.

## Action Items

*The following Action Items are adopted by the board:*

- ✓ *Annually review economic trends and financial projections to pursue options as necessary.*
- ✓ *The board will annually develop a 3-year budget projection in conjunction with annual budget process.*

- ✓ *Exercise prudent budgetary control over police and fire operations in order to delay reaching the current property tax funding cap.*
- ✓ *Consider shared or contracted services.*
- ✓ *Determine desired service levels and establish a public policy to meet those needs.*
- ✓ *Develop a policy statement regarding the establishment of funds for continuing operations.*

## **COMMUNICATIONS**

- How does SSD most effectively communicate with resident/non-resident owners, visitors, the business community and other interested parties?

### **Issue**

- Continuing to seek innovative ways to effectively communicate.

### **Background**

- Many people, owners and visitors alike, don't know the functional differences and relationships between SROA, SSD, the Sunriver Resort, and the Village Mall businesses. They are unaware of what rules apply and what services are available to them.
- The SSD should participate in the communication of many types of information.
  - Emergencies.
  - Services available from the Sunriver Police and Fire Departments.
  - Responses by, and other actions of, the Police and Fire Depts.
  - Sunriver Rules and Regulations that have Public Safety Implications.
  - Hazards.
  - Interdepartmental, between the Police and Fire.
- There are many groups with which the SSD should communicate.
  - Owners, resident and non-resident.
  - Renters, short and long term.
  - Day or special event visitors.
  - The business community, including the Business Park.
  - SROA.
  - The Sunriver Resort.
- SSD is currently utilizing a number of communication methods.
  - Public education and community engagement.
  - The Sunriver Scene.
  - SROA's Community access TV channel 4.
  - Open meetings of the SSD Managing Board.
  - Property Management and Rental Agencies.
  - The Sunriver Resort.
  - SROA and SSD websites.
  - Public communications officer.

- Participation in local professional organizations.
- The Police Department's annual Citizens Academy.
- Sunriver 4<sup>th</sup> of July Festival.
- Neighborhood Watch meetings.

## Impact

- The ability to effectively communicate and engage with the community will impact the district's ability to carry out its assigned functions of providing services to the community.
- The quality and reach of SSD's communication system, and the extent to which it is utilized, will directly affect how well the issues of this Strategic Plan are addressed.

## Options

- Periodic informational mailings to non-resident owners. Perhaps these messages could be enclosed in some SROA mailings.
- Augment the SSD website to include a current list of frequently asked questions and their answers. Publicize the existence of this site and continue to make it available as a link from the SROA site. Make the site interactive.
- Create "groups" of residents' and non-residents' e-mail addresses for broad target messages.
- Cooperate with the media, and encourage the Scene to continue its Public Safety section and the chiefs to recognize and publish important messages relating to their departmental activities.
- Integrate existing organizations into the communication network. i.e. Neighborhood Watch, Citizens Patrol, Fire Department Reserves, Chamber of Commerce, The Sunriver Resort, the Rental Property Managers Association etc.

## Action Items

*The following Action Items are adopted by the board:*

- ✓ *Schedule annual meeting for Sunriver residents and/or hold a joint meeting with the SROA that addresses the status of the district.*
- ✓ *Encourage Chiefs to continue their cooperation with the media and publication of the information in the Scene regarding their departments.*
- ✓ *Continue to utilize the communication options described above.*

# POLICE DEPARTMENT

# Community Policing

## Issues

- In the next five years, what services and level of service will the Sunriver community desire and/or will be required to meet the objectives outlined in this Strategic Plan?
- How will the Sunriver Police Department develop and sustain a sense of safety and security in the Sunriver community?

## Background

- The Sunriver Community consists of many partners including, Owners (resident and non-resident), Sunriver Owners Association, The Resort, Business Community and Visitors.
- Sunriver has been engaged in re-investment through, infrastructure improvements, SHARC facility, expansion and improvements in the Village and The Marketplace on Cottonwood Rd.
- Sunriver is a residential community as well as a destination resort, combining a core community with significant influx of visitors during summer months and major holidays.
- The Service District Board has directed both the Police and Fire Departments to increase their connections in the community through developing partnerships, collaboration and education efforts to positively impact the livability of the Community.

## Impact

- Improving partnerships will provide for efficiencies in addressing issues as they arise. Issues can be in the area of emergency preparedness, crime prevention efforts, increased safety for owners and visitors all contributing to a healthy and vibrant community.
- Through effective partnerships, service to the community can be improved to effectively continue to meet changing demands.

## Options

- Develop additional partners in the community.
- Develop staff so that Community Policing philosophy is embraced throughout the department.
- Identify opportunities for community education.
- Track crime trends or other safety concerns.

## Action Items

*The following Action Items are adopted by the board:*

- ✓ *Strengthen and improve existing programs to include Citizen Patrol and Neighborhood Watch.*
- ✓ *Identify and develop additional opportunities or programs to collaboratively work with the community in addressing emerging issues.*
- ✓ *Provide staff with training to maximize their efforts.*

## Level of Service

### Issue

- What staffing level will be required to engage the community, at the same time, ensuring safety for residents, visitors and police staff?

### Background

- The Sunriver Police Department has a full-time Chief, two Sergeants, eight Patrol Officers and one Administrative Assistant.
- During the summer months, staff is augmented by non-sworn bicycle officers, who patrol the pathways and assist with community programs.
- The Sunriver Police Department has officers on-duty 24 hours a day, seven days a week, ensuring immediate response to emergency and non-emergency calls.
- A cooperative relationship exists with neighboring police agencies, which can be called upon if additional resources are necessary.
- Citizen Patrol volunteers are an extremely valuable asset to the community, assisting with community events and activities that do not require a sworn police officer.

### Impact

- Current staffing levels provide 24/7 coverage with adequate supervision.
- Bike Patrol and Citizen Patrol augment the sworn staff.

### Options

- Analysis of call load and community demands may provide data to make adjustments in deployment strategy with existing staff.
- Staffing levels can be increased to better respond to seasonal demands.
- Staffing levels can be reduced, resulting in a reduction in full-time police coverage.

### Action Items

**The following Action Items are adopted by the board:**

- ✓ **Maintain current staffing levels.**
- ✓ **Conduct analysis of community demands and call load to determine deployment strategy.**

## **FIRE DEPARTMENT/EMERGENCY MEDICAL**

- In the next five years what services and level of service will Sunriver owners (resident and non-resident), visitors, and the business community want/need?

### **Impact of Automatic & Mutual Aid Agreements**

#### **Issue**

- How can the Sunriver Fire Department provide adequate service in Sunriver if resources are actively diverted elsewhere through automatic or mutual aid?

#### **Background**

- Sunriver Fire Department has automatic aid agreements with surrounding Fire Districts including Bend and La Pine and mutual aid agreements in the tri-county area.
  - “Automatic Aid” is an industry term that refers to *automatically* summoning outside resources for particular types of alarms, incidents in certain locations, incidents requiring specific types of equipment, or under pre-determined sets of circumstances. Sunriver has these agreements with Bend and La\_Pine fire departments, the U.S. Forest Service (USFS), and the Oregon Department of Forestry (ODF).
  - “Mutual Aid” is an industry term that refers to summoning outside resources when you have exceeded, or know you will exceed, your agency’s resource capability on an incident or multiple incidents.
- There are many benefits to Sunriver from both automatic and mutual aid agreements.
  - Sunriver receives critical assistance when it is needed. The importance of this benefit would be impossible to exaggerate.
  - Sunriver realizes a significant revenue stream from ambulance transports from La Pine.
  - Mutual aid provides field experience for our employees.
  - By engaging in more field activity, employees experience a higher level of job satisfaction and are less inclined to seek employment elsewhere.
- Growth is taking place south of Sunriver in the La Pine Fire District.

- South Deschutes County is growing in transient visitors, and this adds a greater workload to fire services.
- There is a perception that Sunriver Fire Department is the primary service provider for the Sunriver Business Park, Crosswater and Vandever Ranch, although technically these areas are in the La Pine Fire District.
- With longer-term growth to the south, the number of outside calls will most likely increase.
- Since La Pine hired six new Firefighter/Paramedics in 2009, mutual-aid responses have trended downward. In 2009, Sunriver Fire Department responded on 43 occasions; in 2012, that number is 23, a decline exceeding 50%.

## Impact

- There is no significant impact to Sunriver Fire Department resulting from existing mutual aid agreements.
- Entering into mutual aid agreements with neighboring agencies in no way obligates Sunriver Fire to provide assistance under circumstances that would leave Sunriver unprotected. The mutual aid agreement specifically states: *“The party to whom the request is made shall have the ability to refuse such request if sending such assistance may lead to an unreasonable reduction in the level of protection within his or her jurisdiction.”*

## Options

- Maintain current practices.

## Action Items

*The following Action Items are adopted by the board:*

- ✓ *Fire Chief will maintain and update intergovernmental agreements as needed.*
- ✓ *Maintain current practices.*

## Organizational Structure & Staffing Levels

### Issue

- What is the appropriate organizational structure and staffing level to meet the needs of the Sunriver community over the next five years?

### Background

- After conducting a Standards of Cover (SOC) study, an SOC document was developed, detailing a deployment plan for Sunriver Fire that was approved and adopted by the SSD Board on April 1, 2011.
- The Fire Department has attempted to maintain sufficient on-duty resources, of both career and reserve staff, to handle two simultaneous medical calls considered non-critical in nature. In addition, it is usually able to handle small fires and Immediately Dangerous to Life and Health (IDLH) environment incidents by meeting OSHA mandated two-in/two-out requirements for entering an IDLH environment.
- In order to provide the present level of service the department has relied on a good mix of career and reserve personnel. There are presently 10 career operations personnel, including the Chief, and up to 20 reserve firefighters (the SSD Board has approved this level, but it has never been achieved.
  - Reserve firefighters are usually college students with little or no firefighting experience but who are actively seeking a career position in fire service.
  - Length of service with Sunriver is usually one to two years.
  - Reserves initially are provided entry level training in order to supplement career staff, but they only work under direct supervision. Ultimately they are trained to the NFPA Firefighter 1 certification level and work under general supervision.
  - Without a robust reserve program, the department would be frequently- if not usually- incapable of meeting the 2 in/2 out requirements with its current career staffing levels.
- There are 3 rotating shifts with 3 career personnel on duty at all times and 1 to 4 reserve firefighters typically providing supplemental staffing on each shift. Additionally, the Assistant Chief and Fire Chief trade duty weeks and respond to major incidents in the community while off-duty.
  - The three career firefighters include: one engineer/paramedic, one firefighter/paramedic, and one captain/paramedic.
- The Sunriver community presently enjoys a Class III ISO rating. The rating is based on water supply, communications, and fire department operations (staffing, training, equipment, etc.).
  - The importance to Sunriver is that this rating reflects the quality of fire protection provided to the community and keeps insurance premiums down.
- While the department is able to provide initial response for all types of emergencies, it lacks personnel depth to provide backup or sufficient resources to safely and efficiently manage more complicated emergencies at least in the initial phase of the operation, which is the most critical phase.
- Housing in Sunriver has proven to be prohibitively expensive for personnel in the department. Therefore, most live in the Bend area which creates a recall time of at least 20 minutes under favorable weather and road conditions.
- The department relies heavily on its automatic and mutual aid agreements to provide resource depth for major emergencies.

## Impact



- Currently, staffing policies determine service level capabilities as well as safety and efficiency considerations.
- Since April 2011, the Fire Department has been operating within the scope and guidelines of the Standards of Cover document approved and adopted by the SSD Board at that time. It shall continue to do so unless and until circumstances change or data becomes available to necessitate a change of standards.

## Options

- Maintain current staffing levels.
- Consider increasing line staff.
- Determine Fire Department optimum staffing.

## Action Items

*The following Action Items are adopted by the board:*

- ✓ *Emergency response activities will be monitored monthly.*
- ✓ *The ongoing effectiveness and accuracy of the SOC document and policies and practices will be updated as necessary.*

## Facilities and Equipment

### Issues

- Over the next five years (and beyond), what are the facilities and equipment concerns for the SSD?
- The SSD currently expends, on average, \$80,000 annually for a fire station it does not own. This represents the cost of rent and the attendant requirements for maintenance, repairs, etc., enumerated in the lease agreement to house the fire department in its current facility. This cost has increased each year and it should be anticipated to increase significantly in future years as the building ages.
- The existing facility is limited in office space, work stations, and storage areas for its current needs and doesn't allow for future growth should the need arise.
- The Fire Department currently lacks sufficient training facilities to safely and efficiently train firefighting personnel for structural firefighting operations, live-fire training, vertical ventilation and search and rescue.

## Background

- The current fire station was constructed in 1995. At that time, there were two full-time (24/48) members per shift and a Fire Chief. The department also included volunteers who came and went from the station as calls for service and training activities required (volunteers were not housed in the sleeping quarters). Now, fifteen years later, there are three full-time members assigned to each shift, a Fire Chief, a full-time Training Officer, an Office Manager, and a group of reservists (whose numbers fluctuate between fourteen and eighteen) that is board-authorized up to twenty, and who work shifts alongside the full-time staff.
- There is not a current plan, nor is funding being reserved, for any future modification, renovation, or replacement of this facility. Because the building is not district-owned, it is ineligible for Assistance to Firefighters Grants (AFG) that are available through the Federal Emergency Management Agency (FEMA) for existing facility modification. The growth of staff has resulted in crowding in office space, work stations, and storage area, and, potentially, inadequate sleeping quarters.
- Moreover, the absence of a tactical training facility makes achieving and maintaining acceptable levels of proficiency in structural firefighting and related skills extremely difficult in many areas and virtually impossible in others.
- In June 2011 a comprehensive facilities study was completed. This study identified and described existing facilities as well as needs. The facilities study was forwarded onto the SROA architects and facilities planners and adopted into the SROA Infrastructure and Amenities Master Plan.

## Impact

- Without a comprehensive facilities plan that includes acquiring a tactical training facility, firefighters will continue to receive insufficient training opportunities to learn and maintain critical skills directly related to their primary mission – protecting life and preserving property. This necessarily includes structural search and rescue, vertical ventilation, and live-fire training capabilities.

## Options

- Increase the reserve fund for the ultimate upgrade and/or expansion of the existing fire station and for the possible development of a training facility.
- Make no change from current practice.
- Review the current lease agreement with SROA to determine whether modifications would be appropriate.
- Consider purchase of the fire station from SROA in order to be eligible for Federal grants for facility upgrades.

## Action Items

*The following Action Items are adopted by the board:*

- ✓ *Continue pursuing the construction of a live-fire training facility.*

- ✓ **Work closely with SROA to identify District needs in the facilities and amenities planning process.**

## **EMERGENCY PREPAREDNESS**

- How can SSD most effectively reduce the threat and impact of natural and manmade disasters in and around Sunriver?

### **Issue**

- Proactive planning, coordination and education are needed to reduce the threat and impact of natural and man-made disasters in and around Sunriver.

### **Background**

- In the course of developing the *Sunriver Service District Strategic Plan 2010 – 2015*, it was identified that an all-hazard Emergency Operations Plan (EOP) was needed and should meet the following criteria:
  - Develop a Community Emergency Response Plan working closely with Deschutes County Emergency Services Authorities.
    - Focus would be on self-sufficiency during the first 72 hours
    - Assure our plan dovetails with the County Plan
    - Within Sunriver, assure all Sunriver plans – those developed by SSD, SROA, Rental Management Companies, and Sunriver Resort are coordinated, consistent, and operate under the leadership of one person with totally clear lines of authority and responsibility.
    - The purpose of the plan would be to protect and maintain safety and to ensure implementation of the following response actions:
      - Determine and implement search and rescue, evacuation, and protective actions.
      - Support disaster medical operations, including casualty management.
      - Support requests for response resources.
      - Maintain the availability of critical services in the absence of normal infrastructure.
  - Work closely with all affiliated Emergency Agencies to maximize resource availability.
- Funded by a grant from the Department of Homeland Security, an Emergency Operations Plan for disaster mitigation, response, and recovery was developed and, in February 2011, adopted. This plan is issued in accordance with, and under the provisions of, ORS Chapter 401, which establishes the authority for the Deschutes County Board of Commissioners, upon advisement of the Sunriver Emergency Manager or on-scene Incident Commander (IC), to declare a state of emergency for Sunriver.

- In the course of developing the EOP, hazards and threats to the community were identified and ranked according to probability of a given event, the risk it presents, and the community's current level of preparedness. These hazards/risks include:
  - Wildfire
  - Utility Failure
  - Transportation Incident
  - Severe Weather
  - Hazardous Materials
  - Drought
  - Earthquake
  - Flood
  - Health/Medical
  - Terrorism
  - The complete Hazard Analysis Matrix can be found in Table 2-1 (page 2-7, 2-8) of the Sunriver EOP
- The EOP has been approved by the Sunriver Service District Managing Board and adopted by the Deschutes County Board of Commissioners. It will be revised and updated as required.

## **Impact**

- The Sunriver EOP will work closely with Deschutes County Emergency Services Authority in the event of a disaster
- Focus will be self-sufficiency during the first 72 hours
- Evacuation may be required. An evacuation plan must be in place, coordinated with the EOP partners and communicated to the community
- In the event of a disaster, emergency medical operations, including casualty management, will be in place
- Protection of property and maintenance of safety will be ongoing concerns
- Of critical importance is ensuring that emergency plans of Sunriver partners are coordinated, consistent, and operate under the guidance of the Incident Command System with clear lines of authority and responsibility
- A disaster of significant magnitude will require close coordination with allied emergency agencies in order to maximize resource availability
- Current EOP must be maintained

## **Action Items**

*The following Action Items are adopted by the board:*

- ✓ ***The Sunriver Service District EOP, including appendices and annexes, will be reviewed annually or as appropriate after an exercise or incident response.***
- ✓ ***The EOP will be formally repromulgated by the Sunriver Service District Managing Board and the Deschutes County Board of Commissioners once every five years.***

- ✓ *Consistent with National Incident Management System (NIMS) requirements, mock disaster drills will be developed and conducted annually.*
- ✓ *Appropriate public education programs will be developed and disseminated through a variety of sources.*

## ADMINISTRATIVE RELATIONSHIPS

### SSD – SROA – Relationship

#### Issue

- What is the most efficient and cooperative way to manage the contractual and other relationships between the SSD and the SROA, for the benefit of the Sunriver community?

#### Background

- Legally a private group does not control a public entity receiving tax money.
  - Rules governing public entities are more strict than those governing homeowner associations.
  - SSD Board must act under public meeting laws and members are individually responsible for compliance.
  - SROA Board does not have the same restrictions.
- The agreement between SROA and the County gives SROA some responsibilities with regard to SSD including:
  - SROA nominates SSD Board Members recommended by the SROA Nominating Committee
  - SROA reviews and approves SSD Budget
  - SROA must pre-approve SSD hiring of an Administrative Manager
  - Two SROA Board members sit on SSD Board
    - Board members serving on both boards must be aware of the potential for conflict between the interests of the two groups.
  - The Sunriver Owners Association (SROA) provides service contracts to the Sunriver Service District (SSD) for Accounting, Human Resources and Vehicle Maintenance.
  - SROA leases buildings to the police and fire departments.
  - The SSD has a contract to provide Enforcement of SROA Rules and Regulations.
  - Contracts are reviewed regularly.

#### Impact

- Without an ongoing monitoring of the status of performance of the mutual obligations and a meeting of expectations, the relationship will not function efficiently.
- Issues between SROA and SSD will arise due to differing priorities, expectations and timelines.
- Sometimes there is confusion, misunderstanding and misinterpretation by the public on who is to enforce certain rules and how they are to be enforced.

## Options

- In establishing contracts between the SSD and the SROA, the goal is to achieve the most efficient and mutually-beneficial relationship possible. Because the homeowner/taxpayer is funding both entities, the goal is not to maximize profits, but to minimize costs. The purpose of both parties is to provide the best possible service by the most cost-effective means possible. Neither entity seeks an advantage or bears an inequitable burden.
- Roles, responsibilities and expectations must be clearly defined, understood and agreed to by all organizations.
  - Develop and employ methods of communication as needed between SROA and SSD, including Board Members, operational groups (supervisors) and line personnel.
  - Periodically provide SSD/SROA employees with current information that identifies which group (Police, Fire, Community Development, and Environmental) has responsibility to enforce specific Rules and Regulations.
  - Promptly identify and address conflicting issues.
  - Schedule annual joint SROA/SSD Board meetings to share objectives, discuss issues, priorities, etc.
  - Review agreement with County and ensure all parties understand responsibilities and authorities.
  - Members of both SSD and SROA Boards need to understand public laws which govern SSD.
- All contracts between SROA and SSD may be reviewed at the request of either party.
- Third party reviews may occur following major changes to a contract or at the request of either party.
- SSD evaluates, for cost comparison, outside sources as service providers.
- SSD evaluates handling administrative services internally.
- Inform public which group (Police, Fire, Community Development, and/or Environmental) has the responsibility and the authority to enforce specific Rules and Regulations.

## Action Items

*The following Action Items are adopted by the board:*

- ✓ *Hold an annual joint meeting between the SSD Board and The SROA Board, to share objectives and discuss issues and priorities.*

- ✓ *The SSD Chair will meet quarterly with the SROA President to discuss issues of mutual interest and/or concerns.*
- ✓ *The SSD Chair will report the results of the quarterly meeting between the SROA President and the SSD Chair at the next regular meeting of the SSD Board.*
- ✓ *Contracts between SROA and SSD will be reviewed by an independent third party upon request by either party.*

## **SSD – Relations with Neighboring Agencies**

### **Issue**

- While there is contact at the operational level between SSD and Neighboring Agencies, there is no contact at the policy making level. The chiefs report to the Board, and the Board interfaces with other agencies only at the request of the chiefs.

### **Background**

- At the operational level SSD has excellent contacts with neighboring agencies.
- The SSD Board has not developed relationships with neighboring agencies' Boards.
- There are no meetings at the policy-making level.

### **Impact**

- The working relationship with other agencies is at the operating level. The Board is dependent upon the chiefs notifying it when issues are important to the Board.

### **Options**

- SSD Board works to build relationships with other agencies that SSD interacts with:
  - La Pine Fire Department
  - Forest Service
  - Bend Fire Department
  - Sheriff
- Continue maintaining primary relationships at the operational level.

### **Action Items**

*The following Action Item is adopted by the board:*

- ✓ *Maintain current practices.*

## Police/Fire Relationships

### **Issue**

- The Police and Fire Departments need to have a good working relationship and an understanding of each agency's roles and responsibilities.

### **Background**

- Police and Fire, when dispatched to an incident, have different roles and responsibilities, which may result in a condition that has the potential to cause conflict.
- The Police and Fire Departments have made a concerted effort to gain an understanding of each other's roles and responsibilities at the scene of an incident by conducting:
  - Joint meetings
  - Joint training exercises
  - Joint community events
- Both Police and Fire Departments have been trained in NIMS protocols.

### **Impact**

- Both Police and Fire personnel agree that they have a good understanding of each other's roles and responsibilities resulting in a strong working relationship.

### **Options**

- The SSD to continue to monitor the working relationship between the Police and Fire Departments.
- Both the Police and Fire Departments to continue to maintain open communication and joint training between their two agencies.
- The SSD to support efforts to foster positive public opinion regarding the relationship between the Police and Fire Departments.

### **Action Items**

*The following Action Items are adopted by the board:*

- ✓ *Maintain current practices.*

## SSD Governance



## Issues

- What specific actions are required of the board to carry out its delegated and assigned responsibilities?
- How, specifically, should the board “manage” the day-to-day affairs of the SSD given that:  
1) actions of the board as a public body, can only be taken in an open, public meeting, and  
2) no single director has the authority to act for the board unless authorized by board action?
- What general responsibilities can be delegated by the board to the board chair or other individual directors so as to avoid unnecessary delays between meetings and provide for efficiency in operations?

## Background

- Five, appointed directors constitute the “Managing Board” of the SSD. Their duties are described, in general, in the Sunriver Service District Management Agreement of June 26, 2002 between SROA and the Deschutes County Board of Commissioners.
- The SSD does not employ a general manager. The Chief of Police and Fire Chief report directly to the board.
- The SSD is a public body subject to the open meeting and other laws which govern public entities in Oregon.
- Directors serve three-year terms, and there is some degree of “overlap”.

## Impact

- The effectiveness of the board is dependent upon:
  - Directors must obtain a working knowledge of the policies and practices of the District.
  - Directors must gain an understanding of the fiscal needs and resources of the District.
  - Directors must have an understanding of the laws which govern public bodies.
  - Directors should be provided with a clear and detailed understanding of what is expected of them during their term in office.

## Options

- Develop a program of director training and assimilation to insure that newly-appointed directors understand the business of the District and the requirements of the position.
- Develop a policy which outlines the responsibilities of the Chair to act for the District outside of meetings.
- Develop a written protocol, compliant with the open meeting and public records laws, for the handling of communications among board members and the public. (These rules are currently under review by the Oregon Legislature).

- Consider, during the years of this Strategic Plan, whether the District should employ a general manager.

## **Action Items**

*The following Action Item is adopted by the board:*

- ✓ *The board approves all of the above options.*