



N64W23760 Main Street
Sussex, Wisconsin 53089
Phone (262) 246-5200
FAX (262) 246-5222
Email: info@villagesussex.org
Website: www.villagesussex.org

AGENDA
PUBLIC SAFETY & WELFARE COMMITTEE
VILLAGE OF SUSSEX
5:30 P.M. TUESDAY, JULY 21, 2020
SUSSEX CIVIC CENTER – COMMUNITY ROOM 1st FLOOR
N64W23760 MAIN STREET

Pursuant to the requirements of Section 19.84, Wis. Stats., notice is hereby given of a meeting of a Village Committee, at which a quorum of the Village Board may attend in order to gather information about a subject which they have decision making responsibility. The meeting will be held at the above noted date, time and location. Notice of Village Board Quorum, (Chairperson to announce the following if a quorum of the Village Board is in attendance at the meeting: Please let the minutes reflect that a quorum of the Village Board is present and that the Village Board members may be making comments under the Public Comments section of the agenda, during any Public Hearing(s) or if the rules are suspended to allow them to do so.)

1. Roll call
2. Consideration and possible action on minutes from meeting of June 16, 2020.
3. Discussion and possible action on next steps on the process for a Fire Chief.
4. Adjournment.

Wendy Stallings
Chairperson

Jeremy Smith
Village Administrator

Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. For additional information or to request this service, contact Jeremy Smith at 246-5200.

VILLAGE OF SUSSEX
SUSSEX, WISCONSIN

Minutes of the Public Safety & Welfare Committee meeting held on June 16, 2020.

The meeting was called to order at 6:00 p.m.

Members present: Martin Lastrilla, Wendy Stallings, Greg Zoellick and Ron Wells.

Members excused: None

Staff present: Village Administrator Jeremy Smith, Assistant Administrator Kelsey McElroy Anderson, Deputy Fire Chief Boyd Thew, Deputy Fire Chief Jarred Ihlenfeld and WSD Capt. Lisa Panas.

Others present: Ed Henschel and Jeff Roehmer from RW Management.

A quorum of the Village Board was not present at the meeting.

A motion by Wells, seconded by Lastrilla, to approve the February 18, 2020 minutes as presented. Motion carried 4-0.

Emergency Government Items: none

Police Items:

5A. Capt. Panas provided the Police Services report. Captain Panas was asked to provide a breakdown of the type of trainings they are provided with respect to dealing with diversity issues and with mental illness training.

Fire/Paramedic Items:

Deputy Chief Thew gave his report. The Committee asked for details about the number of people on each shift and mutual aid by time of day.

A motion by Lastrilla, seconded by Wells to recommend to the Village Board approval of hiring full time paramedic/firefighters instead of Lieutenants in 2020. Motion carried 4-0.

There was a discussion about next steps for the Fire Chief position vs. consolidation/partnership of the Department. RW Management presented some options to consider. The Committee had lots of questions about choosing the right path forward. Chairwomen Stallings asked for RW to present a more detailed proposal for consideration at a July public safety meeting.

Other Topics for future agendas:

A motion by Stallings, seconded by Zoellick to adjourn the meeting at 6:56 pm. Motion carried 4-0.

Respectfully submitted,

Jeremy Smith
Village Administrator



N64W23760 Main Street
Sussex, Wisconsin 53089
Phone (262) 246-5200
FAX (262) 246-5222
Email: info@villagesussex.org
Website: www.villagesussex.org

MEMORANDUM

To: Public Safety Committee, Village Board

From: Jeremy Smith, Village Administrator

Re: Fire Department

Date: 6/10/2020

Sussex is in the middle of a transition with its Fire Department from a paid on call Department to a Paid in House Department. Earlier in the meeting Deputy Chief Thew who is the senior Fire Department Officer at this time will be requesting filling regular fire fighter positions instead of the Lts. that were scheduled for the budget and I fully support Deputy Chief Thew's request.

The Village Board will now need to provide policy direction for where we go from here. It is important for our fire staff to understand the direction and we are at a position where we can proceed to hire again. During the pandemic we have been running with 4 staff in the station most of the time. This has been tremendously helpful in our response capabilities. Our FT firefighters have been doing an amazing job leading and developing the newer members and filling in the gaps, but the current set-up isn't sustainable.

The current Village Board policy was to add \$100,000 to each budget year until we had 5 paid in the station. The combination of 3FT and 2 PT or 4 FT and 1PT for each shift was still being explored by the former Chief. We currently need \$319,000 to complete that goal (4FT 1 PT) with full staffing by 2022 and budget impacts completed by 2023. The 2021 budget would have us hire 3 Lt's (or Firefighters) and 3 more firefighters mid year 2022 to complete the staffing transition. The Village would have in 2023 a fully staffed station with 5 personnel 24-7 365, with paramedic level care, command leadership on each crew, and a Chief providing overall leadership, development, and community outreach. Over 80% of our calls are for EMT/Paramedic and we could handle the growing communities call volume and provide high and fast levels of care. This would complete the transition.

This model allows the Village the greatest impact on service level responses to changing community needs. This leaves the Village Board in control of long term costs. The Fire Department is the second largest Village budget and the ability to manage these costs long term is vital under levy limit environment where no new tax dollars are available. The Village has already downsized its vehicle fleet in 2019 and will be able to downsize its equipment and protective gear costs as well once the transition is complete. I would recommend continuing the Village Board policy direction and to direct the Board of Fire Commission to proceed with hiring a Chief.

If the Village Board wanted to consider other options I would recommend we hire a consultant to explore all the potential partnerships that exist. It is important that we fully understand the long term implications of any other structure/partnership from a service delivery standpoint and cost control stand point.

FIRE DEPARTMENT TRANSITION MANAGEMENT PROPOSAL



PREPARED FOR:
VILLAGE OF SUSSEX
Waukesha County, Wisconsin

JUNE 19, 2020

Jeffrey R. Roemer, CPM
jroemer@mcmgrp.com
Cell: 920.540.1002
Office: 920.751.4200, ext. 401
1445 McMahon Drive - Neenah, WI 54956



RW MANAGEMENT
- A McMahon Associates, Inc. Company -

TABLE OF CONTENTS

Section 1 – Cover Letter

Section 2 – Qualifications

Section 3 – Methodology

Section 4 – Project Team

Section 5 – Detailed Work Plan

Section 6 – Compensation

Section 7 – Related Experience



Section 1: **COVER LETTER**

June 19, 2020

Jeremy Smith
Village Administrator
Village of Sussex
N64 W23760 Main St.
Sussex, WI 53089
Re: Proposal



RW MANAGEMENT

- A McMahon Associates, Inc. Company -

Thank you for the opportunity for RW Management – A McMahon Associates, Inc Company (RW) to submit a proposal to provide Fire Department Transition Management Consulting to the Village of Sussex. RW is ready to work with the Village and the Fire Department by providing a smooth transition and department direction guidance and recommendations. Management Counsel and Interim Management projects have been a major focus for RW in the last eighteen years. These projects generally require the need to assist with a smooth transition to new fire department administration with the day to day migrations and direction changes that will take place over the next three – 6 months. Similar RW work in the past has included departments such as the Cities of Green Bay and De Pere, and the Villages of Allouez, Bellevue, Germantown, Verona and Johnson Creek.

RW is a national and international consulting firm whose focus is on public safety consulting services. The majority of our clients are public sector entities; municipalities, counties, tribes or special districts. Our team of consultants is all senior level staff and are either current or former municipal management practitioners including fire chiefs, police chiefs, EMS directors, emergency management directors and City administrators.

Our process is designed to be all-inclusive and will involve the many stakeholders of the department as well as the Village and surrounding agencies. An important component of our approach is frequent communication with the Village Administration. We fully understand the expediency that the current COVID-19 and protests has brought all of us, and we are prepared to provide this important work with the Village immediately, enhancing every potential to keep the department moving in the current direction during a very crucial time in public safety.

Thank you again for the opportunity to submit this proposal. If you have any questions or desire to schedule a meeting where we can present our proposal in more detail and answer any questions, please feel free to contact me at 920-841-4778 or by email at jroemer@mcmgrp.com. We look forward to working with you on this important project for the Village and the Department.

Respectfully,
RW Management, A McMahon Associates, Inc. Company

Jeffrey R. Roemer

Jeffrey R. Roemer
Public Safety Manager

JRR:lam



Section 2: **QUALIFICATIONS**

RW is a Wisconsin based public management consulting arm of McMahon Associates, Inc. providing professional, high quality public management consulting, project management and other related services to organizations throughout the United States and abroad. RW consultants have served the needs of several municipalities and emergency services in the United States. RW consultants remain very active with a number of public safety and government related organizations including:

- Wisconsin City/County Management Association
- International City/County Management Association
- American Society for Public Administration
- Wisconsin State Fire Chiefs Association
- International Association of Fire Chiefs
- International Association of Police Chiefs
- Association of Public Safety Communications Officials
- American Academy of Certified Public Managers
- Paramedic Systems of Wisconsin
- National Emergency Number Association
- National Police Protection Association
- Wisconsin Society of Certified Public Managers
- Wisconsin State Police Chiefs Association
- Wisconsin Association of Public Safety Communications Officials

RW's mission statement is "To provide the highest quality, independent professional public safety consulting, project management and services, as measured by the successful implementation of recommendations and services to our clients." We accomplish this mission by providing a team of professionals committed to the needs and issues of public safety and government. RW's consultants are active practitioners in the public safety area and understand the issues, challenges, standards and responsibilities of public safety and provide proven methods to improve efficiency and effectiveness.



Section 2: **QUALIFICATIONS**

continued

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

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



Section 3: **METHODOLOGY**

Our approach to this project requires a clear understanding of the current Fire department organization, staffing, operations, administration, planning, mitigation and related concerns. The key elements of our methodology include:

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

Client Input

In order to perform Fire Department Transition Management and make specific recommendations, it is critical that we receive quality information from officials, staff and members of the Village. Accordingly, our approach includes regular meetings with the Fire Chief and Village Administration, along with associated agencies that would have valuable information to communicate to the Service.

Practical Recommendations

Our ultimate goal is to provide our client with recommendations that can be used now, and in the future, to improve the efficiency and effectiveness of the Fire Department Administration Transition. These recommendations need to be practical and based on sound practical standards and legal considerations.

Project Management

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



ASSIGNED STAFF

Personnel assigned to this project are selected from the consultants of RW Management and other personnel who are formally engaged in an ongoing relationship with RW. The project manager supervises the project team and clerical support personnel support the team. The combined resources assure that the client receives the best possible combination of professional attention.

ROLES AND RESPONSIBILITIES

Personnel assigned to this project are selected from the staff of RW and McMahon Associates, Inc. The project manager supervises the project team and clerical support personnel support the team. The combined resources assure that the client receives the best possible combination of professional attention.

Project Manager – The project manager will oversee, direct, coordinate and control all work that is done on the project. The project manager will also provide liaison with the client project team, be responsible for the content and quality of the project, make necessary presentations and ensure that the project is completed according to the timeline established.

Edmund M. Henschel

Mr. Henschel is a Public Management Specialist with RW. Prior to joining RW, he served as a City manager for 27 years, serving municipalities in Wisconsin and Michigan. He also has 10 years of municipal consulting experience conducting consolidation studies, department operation reviews, and labor negotiations (representing municipal management). As a consultant he has specialized in shared service and consolidation studies as well as management reviews for a wide range of municipal departments. As a City manager, he was instrumental in forming one of the first police consolidations in the State of Michigan in the 1970s. He has conducted numerous consolidation studies in the past ten years. He was the lead consultant in a police consolidation that involved a total of seven municipalities in Michigan. He has spoken at national and regional conferences and written several articles on the subject of municipal consolidations. He has also drafted several inter-governmental cooperation agreements. Mr. Henschel recently served as the City Manager for Waukesha, WI.



Project Team Members – Project staff is selected for their relevant experience in the service to be provided. Each is assigned with specific responsibilities related with the elements of the project. The work of the project staff is provided to the project manager for review, collation and for interface with the client’s project team.

Mr. Robert Whitaker

Chief Whitaker’s experience in fire and rescue service spans more than 25 years. He currently serves as the Fire Chief/Administrator for North Shore Fire/Rescue, just outside of Milwaukee, WI. As Fire Chief/Administrator, Mr. Whitaker’s responsibilities focus on strategic direction of the organization, fiscal management, information technology and intergovernmental relations between the department and the multiple municipalities served by the organization.

Mr. Jeffrey Roemer

Mr. Roemer has over 35 years of experience in public safety. Mr. Roemer is a certified public manager and has been providing full time public safety management consulting for the last twenty-two (22) years. He worked as Fire Chief for the City of Menasha from 1995 to 1998, Public Safety Director for the Village of Allouez from 1988 to 1995, and shift commander for the Village of Ashwaubenon for seven (7) years. He has worked on numerous public safety projects for the last fourteen (14) years, as project manager, in communities nationwide. He recently served as the Fire Chief and Emergency Management Director for the City of Green Bay and the City of De Pere, where he had responsibility for all aspects of emergency management including preparedness, response, recovery, and mitigation.



Edmund M. Henschel
Public Management Specialist
RW Management



Ed Henschel is a Public Management Specialist for RW Management. Prior to joining RW Management he served as a City administrator and village manager for 30 years, serving municipalities in Wisconsin and Michigan. He also has 15 years of municipal consulting experience conducting department operation reviews and labor negotiations. As a consultant he has specialized in shared service and consolidation studies as well as management reviews for a wide range of municipal departments.

Ed successfully created one of the first consolidated police departments in Michigan in the 1970s. Since then he has been involved in a number of shared service projects throughout the Midwest, both as a municipal manager and a consultant. He has also written articles and spoken at state, regional and national conferences on this subject.

As a result of his many years managing municipal governments, Ed has extensive experience with personnel matters, overtime analysis, department operations, strategic planning, budgeting, financial planning and shared service studies.

In addition to his responsibilities as a consultant, Ed has also served as the Executive Director of the Wisconsin City/County Management Association. He is a member of the International City/County Management Association and is on the board of directors of the Public Policy Forum, which conducts regional public policy analysis. He was on the Advisory Board for the Masters in Public Administration Program at Northern Illinois University, is a member of the Waukesha County Sheriff's Department Grievance Committee and currently teaches a graduate level course at the University of Wisconsin - Milwaukee.

Education

Central Michigan University

Bachelor of Science in Education

Master of Arts in Political Science

University of Minnesota

Carlson School of Management - Management Training Program



Jeffrey R. Roemer, CPM
Public Safety Manager
RW Management



Professional Summary

Mr. Roemer has an extensive background in the Public Safety area. For more than 35 years he has served with municipal governments in various duties, including Fire Chief for the City of Menasha, WI. Before serving with the City of Menasha, he was Public Safety Director (Police, Fire and EMS Chief) for the Village of Allouez, WI. He has worked in nearly all facets of Public Safety, as a Police Officer, Firefighter, and Emergency Medical Technician, and as a supervisor and department head in each of the disciplines.

As Police and Fire Chief, Mr. Roemer was responsible for all activities in the municipal Public Safety environment. He has provided departmental support for planning and implementing Information Systems, Dispatch Centers, Emergency Operations Centers, Budgeting, Shared Services, and Command Post and ICS operations, along with many other administrative and supervisory duties. His broad knowledge base allows a unique perspective and understanding of the varied requirements found in the municipal environment. Serving at this level of the organization provided Mr. Roemer with the opportunity to recommend, plan and manage change within the organization and often, outside of his organization.

As a Public Safety Consultant, Mr. Roemer has been a project manager for numerous Public Safety related organizational, communication, dispatch center, consolidation, information system, operational, and emergency operation center projects. Mr. Roemer has served as Interim Project Manager and Fire Chief for several agencies in the last 21 years, including the City of Green Bay, Wisconsin. Mr. Roemer also serves as an active member of the International Association of Fire Chiefs, the Wisconsin Society of Certified Public Managers, the American Academy of Certified Public Managers, and the Associated Public Safety Communications Organizations.

Mr. Roemer's knowledge of Public Safety in a municipal setting has gained him recognition both at a local, national and international level. He has served as Secretary-Treasurer to the Great Lakes Division of the International Association of Fire Chiefs, Past President of the Wisconsin Society of Certified Public Managers and numerous other positions with Police, Fire and Rescue Boards and Committees. Mr. Roemer has been recognized as the 2001 "Manager of the Year" by the Wisconsin Society of Certified Public Managers. He currently serves on the State of Wisconsin All Hazards Incident Management Team and the Northeast Wisconsin Regional Incident Management Team. Jeff Roemer also serves on the newly consolidated Western Lakes Fire Department Oversight Board and was voted in as Vice President of the Board.

Education

Northeast Wisconsin Technical College
National Fire Academy
University of Wisconsin
Northwestern University

Associate Degree in Police Science
Executive Fire Officer Graduate
Certified Public Manager
School of Police Staff and Command Graduate



Robert Whitaker
Public Safety Specialist
RW Management



Professional Summary

Mr. Whitaker has worked in fire, emergency medical and emergency management settings for 27 years. He currently serves as the Fire Chief/Administrator for North Shore Fire/Rescue, just outside of Milwaukee, WI. As Fire Chief/Administrator, Mr. Whitaker's responsibilities focus on strategic direction of the organization, fiscal management, information technology and intergovernmental relations between the department and the multiple municipalities served by the organization.

Mr. Whitaker has worked in a number of roles within the fire and emergency medical/service field. He started his career as a paid-on call firefighter, moving to career firefighter, firefighter/paramedic, Fire Lieutenant, Operations Battalion Chief, Battalion Chief of Training and Emergency Medical Services, Deputy Chief of Administration and now, Fire Chief/Administrator. Throughout his career, he has managed programs that included transition of records management systems, professional development and training for the organization and transition of 911 PSAP and Communications/Dispatch responsibilities to a newly consolidated center.

Mr. Whitaker is an active member of the International Association of Fire Chiefs, Wisconsin Fire Chiefs Association, the Great Lakes Fire Accreditation Managers Association, the International City/County Managers Association, serves as a member of Curriculum Committee for the Wisconsin Fire Chiefs Education Association and as the Secretary/Treasurer of the Milwaukee County Association of Fire Chiefs.

Mr. Whitaker has recently been employed by RW Management Group, Inc. to provide his expertise in public safety consolidation and accreditation. He was involved in the functional consolidation efforts needed to combine the North Shore Fire Departments and Dispatch center. The North Shore Fire Department recently completed the accreditation process of the Commission on Fire Accreditation International (CFAI).

Education

Oklahoma State University
Southern Illinois University

Masters of Science, Fire & Emergency Management
Bachelor of Science, Fire Service Management



Fire Department Transition Management Consulting

1. Department Meetings – Regular meetings will be held with the Fire Chief and Village Administrator, to review the duties and responsibilities of RW and project plan during the term of this project.
2. Management Team – The management team will consist of the RW project team and the Fire Chief and his Chief Officers. This team will meet initially to organize and plan the communications structure, the daily, weekly and monthly work plan, which will be utilized to improve the effectiveness of Fire-Rescue department operations and administration and provide effective and efficient recommendations for the future.
3. Reporting – A management summary report will be provided to the Villae Administrator on a monthly basis. This report will outline the transition management activities and actions that have taken place during the course of this project.
4. Availability – The RW management team will perform project work 24 – 32 hours per month and will provide the ability for direct communications with the Fire Chief on a daily basis.
5. Administration – The management team will manage the department transition plan, mission statement, goals, standard operating guidelines, standards of performance, discipline procedures and strategic planning for the future of the department.
6. Mentoring – The RW management team will assist and coach the new fire administration with day to day and long-term administrative decisions and planning.
7. Personnel Management – The RW management team will assist the Chief with the selection, promotion, evaluation, scheduling and discipline of the department employees.
8. Legal Compliance – The RW management team will assist the Chief in maintaining compliance with all current administrative rules and applicable standards, along with current departmental practices to ensure compliance with relevant legal guidelines and standards.
9. COVID-19 – The RW management team will assist the Chief with daily briefings, changes and policy implementation relating to the current pandemic issues.
10. Fire Prevention – The RW management team will assist with the training and development related standard operating guidelines to assure adherence to fire inspection regulations, best inspection practices and uniformity throughout the Department.



Section 5: **DETAILED WORK PLAN**

11. The RW management team will assist with budget review and understanding, in preparation of the upcoming 2021 budget plan, including revision of the capital improvement plan.
12. The RW management team will provide guidance and assistance with shared services implementation and relations with external agencies. The team will assist in preparing and presenting shared service recommendations to the Village Board and Fire Commission for approval.
13. The RW management team would also be available to assist with human resource management as needed by the Department. This would include a hiring process if recommended or needed.

Time Period

RW would recommend a minimum of a six-month (6) period of Fire Department Transition Management for the Village of Sussex. This time period would allow for the needed coordination and administrative assistance that is needed to provide the Department and Village with relevant and important administrative and operational assistance and recommendations.



Fire Department Transition Management Consulting –

\$4,000.00 per month (Not-To-Exceed Amount)

Payment Schedule –

Fire Department Transition Management Consulting – Equal Monthly payments. Invoices will be sent the beginning of every month.

RW will complete the work tasks as defined in our proposal for the not-to-exceed amount presented in the proposal. Only if the scope of the project changes would there be any additional hours billed to the project. These changes in project costs would only occur after approval by appropriate Village personnel. Either party may terminate the agreement by giving 30 days written notice.



Section 7: **RELATED EXPERIENCE**

continued

Village of Johnson Creek, WI

RW Management provided interim management and management counsel of the Johnson Creek Fire Department for the last 9 months. RW also provided the Village with an Executive Selection process. Mr. Roemer also served as the Village Emergency Management Director during this time period. RW is currently providing the Village with Transition Management Services.

Contact: John Swisher
Village President
125 Depot Street
Johnson Creek, WI 53038
Phone 920- 699-9380

City of Green Bay, WI

RW Management Group provided long term management of the Green Bay Fire Department for a period of almost four years. Jeffrey R. Roemer served as Fire Chief from April of 2008 until December 31, 2011. Chief Roemer also provided the City with an Executive Selection process and multiple Assessment Centers for promotions, which included training department personnel as assessors. Mr. Roemer also served as the City Emergency Management Director during this time period and established a joint Emergency Operations Center with the County and wrote an Emergency Operations Plan for the City.

Contact: City of Green Bay
100 N. Jefferson
Green Bay, WI 54301
Phone 920-448-3005

Village of Germantown Fire Department – Germantown, Wisconsin

RW completed management counsel and provided the Interim Fire Chief assistance with reorganizing the department and correcting and implementing staffing changes. This project involved extensive organizational changes to correct issues and help with providing an approved course of action for the new fire administration.



Section 7: **RELATED EXPERIENCE**

continued

Contact: Steven Kreklow
Village Administrator
Germantown, WI 53022
Phone: 262-250-4775

Door County - Sturgeon Bay, Wisconsin

RW provided interim services as Emergency Services Director and Emergency Management Director for the County of Door. This position had the responsibility for all Emergency management Services and coordination in the County, along with providing administration for Emergency Medical Services throughout the entire County.

Contact: Ken Pabich
County Administrator
421 Nebraska St.
Sturgeon Bay, WI 54235
Phone: 920-746-2552

City of De Pere, Wisconsin

RW recently provided interim management as a Fire Chief and Emergency Management Director for the City of De Pere Fire Rescue. This position will also include a complete evaluation of the Fire-EMS Department with recommendations for the makeup and organization of the current department. RW also assisted the City with the executive selection process for the permanent Chief.

Contact: Larry Delo, City Administrator
335 S. Broadway
De Pere, WI 54115
Phone: 920-339-4044

Milwaukee Regional Medical Center - Wauwatosa, Wisconsin

RW is currently providing Public Safety Management Counsel for the Milwaukee Regional Medical Center (MRMC). This is a major medical complex in the metro Milwaukee area, that is in the process of taking over ownership and full public safety responsibility from



Section 7: **RELATED EXPERIENCE**

continued

Milwaukee County. Jeff Roemer currently serves as the Public Safety Consultant on this project.

Contact: Robert Simi
Executive Director
8700 W. Watertown Plank Rd.
Wauwatosa, WI 53226
414-778-4570



FIRE DEPARTMENT SHARED SERVICE PROPOSAL

PREPARED FOR:
VILLAGE OF SUSSEX
Waukesha County, Wisconsin



JULY 9, 2020

Jeffrey R. Roemer, CPM
jroemer@mcmgrp.com
Cell: 920.540.1002
Office: 920.751.4200, ext. 401
1445 McMahon Drive - Neenah, WI 54956



TABLE OF CONTENTS

Section 1 – Cover Letter

Section 2 – Qualifications

Section 3 – Methodology

Section 4 – Project Team

Section 5 – Detailed Work Plan

Section 6 – Compensation

Section 7 – Related Experience



Section 1: COVER LETTER

July 9, 2020

Jeremy Smith
Village Administrator
Village of Sussex
N64 W23760 Main St.
Sussex, WI 53089
Re: Proposal



RW MANAGEMENT

- A McMahon Associates, Inc. Company -

Thank you for the opportunity for RW Management – A McMahon Associates, Inc Company (RW) to submit a proposal to provide a Fire Department Shared Services Study to the Village of Sussex. RW is ready to work with the Village and the Fire Department by providing shared service options and recommendations. Similar RW work in the past has included departments such as the Cities of Green Bay and De Pere, and the Villages of Allouez, Bellevue, Germantown, Verona and Johnson Creek.

RW is a national and international consulting firm whose focus is on public safety consulting services. The majority of our clients are public sector entities; municipalities, counties, tribes or special districts. Our team of consultants is all senior level staff and are either current or former municipal management practitioners including fire chiefs, police chiefs, EMS directors, emergency management directors and City administrators.

Our process is designed to be all-inclusive and will involve the many stakeholders of the department as well as the Village and surrounding agencies. An important component of our approach is frequent communication with the Village Administration. We fully understand the expediency that the current COVID-19 and protests has brought all of us, and we are prepared to provide this important work with the Village immediately, enhancing every potential to keep the department moving in the current direction during a very crucial time in public safety.

Thank you again for the opportunity to submit this proposal. If you have any questions or desire to schedule a meeting where we can present our proposal in more detail and answer any questions, please feel free to contact me at 920-841-4778 or by email at jroemer@mcmgrp.com. We look forward to working with you on this important project for the Village and the Department.

Respectfully,
RW Management, A McMahon Associates, Inc. Company

Jeffrey R. Roemer

Jeffrey R. Roemer
Public Safety Manager

JRR:lam



Section 2: QUALIFICATIONS

RW is a Wisconsin based public management consulting arm of McMahon Associates, Inc. providing professional, high quality public management consulting, project management and other related services to organizations throughout the United States and abroad. RW consultants have served the needs of several municipalities and emergency services in the United States. RW consultants remain very active with a number of public safety and government related organizations including:

- Wisconsin City/County Management Association
- International City/County Management Association
- American Society for Public Administration
- Wisconsin State Fire Chiefs Association
- International Association of Fire Chiefs
- International Association of Police Chiefs
- Association of Public Safety Communications Officials
- American Academy of Certified Public Managers
- Paramedic Systems of Wisconsin
- National Emergency Number Association
- National Police Protection Association
- Wisconsin Society of Certified Public Managers
- Wisconsin State Police Chiefs Association
- Wisconsin Association of Public Safety Communications Officials

RW's mission statement is "To provide the highest quality, independent professional public safety consulting, project management and services, as measured by the successful implementation of recommendations and services to our clients." We accomplish this mission by providing a team of professionals committed to the needs and issues of public safety and government. RW's consultants are active practitioners in the public safety area and understand the issues, challenges, standards and responsibilities of public safety and provide proven methods to improve efficiency and effectiveness.



Section 2: QUALIFICATIONS

continued

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

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



Section 3: METHODOLOGY

Our approach to this project requires a clear understanding of the current Fire department organization, staffing, operations, administration, planning, mitigation and related concerns. The key elements of our methodology include:

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

Client Input

In order to perform a Fire Department Shared Services Study and make specific recommendations, it is critical that we receive quality information from officials, staff and members of the Village. Accordingly, our approach includes regular meetings with the Village Administration, along with associated agencies that would have valuable information to communicate to the Service.

Practical Recommendations

Our ultimate goal is to provide our client with recommendations that can be used now, and in the future, to improve the efficiency and effectiveness and direction of the Fire Department over the long term.. These recommendations need to be practical and based on sound practical standards and legal considerations.

Project Management

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



Section 4: PROJECT TEAM

ASSIGNED STAFF

Personnel assigned to this project are selected from the consultants of RW Management and other personnel who are formally engaged in an ongoing relationship with RW. The project manager supervises the project team and clerical support personnel support the team. The combined resources assure that the client receives the best possible combination of professional attention.

ROLES AND RESPONSIBILITIES

Personnel assigned to this project are selected from the staff of RW and McMahon Associates, Inc. The project manager supervises the project team and clerical support personnel support the team. The combined resources assure that the client receives the best possible combination of professional attention.

Project Manager – The project manager will oversee, direct, coordinate and control all work that is done on the project. The project manager will also provide liaison with the client project team, be responsible for the content and quality of the project, make necessary presentations and ensure that the project is completed according to the timeline established.

Edmund M. Henschel

Mr. Henschel is a Public Management Specialist with RW. Prior to joining RW, he served as a City manager for 27 years, serving municipalities in Wisconsin and Michigan. He also has 10 years of municipal consulting experience conducting consolidation studies, department operation reviews, and labor negotiations (representing municipal management). As a consultant he has specialized in shared service and consolidation studies as well as management reviews for a wide range of municipal departments. As a City manager, he was instrumental in forming one of the first police consolidations in the State of Michigan in the 1970s. He has conducted numerous consolidation studies in the past ten years. He was the lead consultant in a police consolidation that involved a total of seven municipalities in Michigan. He has spoken at national and regional conferences and written several articles on the subject of municipal consolidations. He has also drafted several inter-governmental cooperation agreements. Mr. Henschel recently served as the City Manager for Waukesha, WI.



Section 4: PROJECT TEAM

continued

Project Team Members – Project staff is selected for their relevant experience in the service to be provided. Each is assigned with specific responsibilities related with the elements of the project. The work of the project staff is provided to the project manager for review, collation and for interface with the client's project team.

Mr. Robert Whitaker

Chief Whitaker's experience in fire and rescue service spans more than 25 years. He currently serves as the Fire Chief/Administrator for North Shore Fire/Rescue, just outside of Milwaukee, WI. As Fire Chief/Administrator, Mr. Whitaker's responsibilities focus on strategic direction of the organization, fiscal management, information technology and intergovernmental relations between the department and the multiple municipalities served by the organization.

Mr. Jeffrey Roemer

Mr. Roemer has over 35 years of experience in public safety. Mr. Roemer is a certified public manager and has been providing full time public safety management consulting for the last twenty-two (22) years. He worked as Fire Chief for the City of Menasha from 1995 to 1998, Public Safety Director for the Village of Allouez from 1988 to 1995, and shift commander for the Village of Ashwaubenon for seven (7) years. He has worked on numerous public safety projects for the last fourteen (14) years, as project manager, in communities nationwide. He recently served as the Fire Chief and Emergency Management Director for the City of Green Bay and the City of De Pere, where he had responsibility for all aspects of emergency management including preparedness, response, recovery, and mitigation.

Edmund M. Henschel
Public Management Specialist
RW Management

Professional Summary

Ed Henschel is a Public Management Specialist for RW Management. Prior to joining RW Management he served as a City administrator and village manager for 30 years, serving municipalities in Wisconsin and Michigan. He also has 15 years of municipal consulting experience conducting department operation reviews and



Section 4: PROJECT TEAM

continued

labor negotiations. As a consultant he has specialized in shared service and consolidation studies as well as management reviews for a wide range of municipal departments.

Ed successfully created one of the first consolidated police departments in Michigan in the 1970s. Since then he has been involved in a number of shared service projects throughout the Midwest, both as a municipal manager and a consultant. He has also written articles and spoken at state, regional and national conferences on this subject.

As a result of his many years managing municipal governments, Ed has extensive experience with personnel matters, overtime analysis, department operations, strategic planning, budgeting, financial planning and shared service studies.

In addition to his responsibilities as a consultant, Ed has also served as the Executive Director of the Wisconsin City/County Management Association. He is a member of the International City/County Management Association and is on the board of directors of the Public Policy Forum, which conducts regional public policy analysis. He was on the Advisory Board for the Masters in Public Administration Program at Northern Illinois University, is a member of the Waukesha County Sheriff's Department Grievance Committee and currently teaches a graduate level course at the University of Wisconsin - Milwaukee.

Education

Central Michigan University

Bachelor of Science in Education

Master of Arts in Political Science

University of Minnesota

Carlson School of Management - Management Training Program



Section 4: PROJECT TEAM

continued

*Jeffrey R. Roemer, CPM
Public Safety Manager
RW Management*



Professional Summary

Mr. Roemer has an extensive background in the Public Safety area. For more than 35 years he has served with municipal governments in various duties, including Fire Chief for the City of Menasha, WI. Before serving with the City of Menasha, he was Public Safety Director (Police, Fire and EMS Chief) for the Village of Allouez, WI. He has worked in nearly all facets of Public Safety, as a Police Officer, Firefighter, and Emergency Medical Technician, and as a supervisor and department head in each of the disciplines.

As Police and Fire Chief, Mr. Roemer was responsible for all activities in the municipal Public Safety environment. He has provided departmental support for planning and implementing Information Systems, Dispatch Centers, Emergency Operations Centers, Budgeting, Shared Services, and Command Post and ICS operations, along with many other administrative and supervisory duties. His broad knowledge base allows a unique perspective and understanding of the varied requirements found in the municipal environment. Serving at this level of the organization provided Mr. Roemer with the opportunity to recommend, plan and manage change within the organization and often, outside of his organization.

As a Public Safety Consultant, Mr. Roemer has been a project manager for numerous Public Safety related organizational, communication, dispatch center, consolidation, information system, operational, and emergency operation center projects. Mr. Roemer has served as Interim Project Manager and Fire Chief for several agencies in the last 21 years, including the City of Green Bay, Wisconsin. Mr. Roemer also serves as an active member of the International Association of Fire Chiefs, the Wisconsin Society of Certified Public Managers, the American Academy of Certified Public Managers, and the Associated Public Safety Communications Organizations.

Mr. Roemer's knowledge of Public Safety in a municipal setting has gained him recognition both at a local, national and international level. He has served as Secretary-Treasurer to the Great Lakes Division of the International Association of Fire Chiefs, Past President of the Wisconsin Society of Certified Public Managers and numerous other positions with Police, Fire and Rescue Boards and Committees. Mr. Roemer has been recognized as the 2001 "Manager of the Year" by the Wisconsin Society of Certified Public Managers. He currently serves on the State of Wisconsin All Hazards Incident Management Team and the Northeast Wisconsin Regional Incident Management Team. Jeff Roemer also serves on the newly consolidated Western Lakes Fire Department Oversight Board and was voted in as Vice President of the Board.

Education

Northeast Wisconsin Technical College
National Fire Academy
University of Wisconsin
Northwestern University

Associate Degree in Police Science
Executive Fire Officer Graduate
Certified Public Manager
School of Police Staff and Command Graduate



Section 4: PROJECT TEAM

continued

Robert Whitaker
Public Safety Specialist
RW Management



Professional Summary

Mr. Whitaker has worked in fire, emergency medical and emergency management settings for 27 years. He currently serves as the Fire Chief/Administrator for North Shore Fire/Rescue, just outside of Milwaukee, WI. As Fire Chief/Administrator, Mr. Whitaker's responsibilities focus on strategic direction of the organization, fiscal management, information technology and intergovernmental relations between the department and the multiple municipalities served by the organization.

Mr. Whitaker has worked in a number of roles within the fire and emergency medical/service field. He started his career as a paid-on call firefighter, moving to career firefighter, firefighter/paramedic, Fire Lieutenant, Operations Battalion Chief, Battalion Chief of Training and Emergency Medical Services, Deputy Chief of Administration and now, Fire Chief/Administrator. Throughout his career, he has managed programs that included transition of records management systems, professional development and training for the organization and transition of 911 PSAP and Communications/Dispatch responsibilities to a newly consolidated center.

Mr. Whitaker is an active member of the International Association of Fire Chiefs, Wisconsin Fire Chiefs Association, the Great Lakes Fire Accreditation Managers Association, the International City/County Managers Association, serves as a member of Curriculum Committee for the Wisconsin Fire Chiefs Education Association and as the Secretary/Treasurer of the Milwaukee County Association of Fire Chiefs.

Mr. Whitaker has recently been employed by RW Management Group, Inc. to provide his expertise in public safety consolidation and accreditation. He was involved in the functional consolidation efforts needed to combine the North Shore Fire Departments and Dispatch center. The North Shore Fire Department recently completed the accreditation process of the Commission on Fire Accreditation International (CFAI).

Education

Oklahoma State University
Southern Illinois University

Masters of Science, Fire & Emergency Management
Bachelor of Science, Fire Service Management



Fire Department Shared Service Study

Project Kickoff

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

Initial Assessment and Observations

3. Obtain and review documentation provided by the project team pertaining to this project, such as existing Fire/Rescue/EMS documentation, equipment inventories, detailed call volume statistics, community development plans, service contracts, surveys, risk assessments, capital improvement plans, previous studies and annual reports.
4. Develop and provide instructions for the completion of Fire/Rescue/EMS operations questionnaires to assist RW in gaining an understanding of the current Fire/Rescue/EMS environment. Distribute the questionnaires to the appropriate personnel. Upon completion, RW will collect the questionnaires and review them prior to any on-site interviews or department observations.

Continued Assessment and Documentation

5. Assess the current Fire/Rescue/EMS operations and begin to develop future needs by performing interviews and on-site observations. The interviews and observations will be held in both group and individual settings. This proposal is based on interviews and observations being conducted with a variety of personnel about the following areas:
 - Fire Department Administration
 - Fire Commission
 - Elected Officials
 - Village Administrator(s)
 - External Fire-EMS Agencies
 - Economic Development Personnel
 - Station and Major Equipment Review



Section 5: DETAILED WORK PLAN

continued

Interviews and observations will primarily focus on the following issues:

- Current Fire/Rescue/EMS operations, staffing and levels of service
 - Fire/Rescue/EMS workload, call volume and activity
 - Current and anticipated budget issues
 - Current and future facility needs (Ten-year period)
 - Service delivery in regard to national standards
 - Advantages and disadvantages of local consolidation
 - Funding source(s) to sustain operations and future service delivery
 - Review of future staffing needs (Ten year period)
6. Prepare for and facilitate a project status meeting to discuss the results of the interviews and on-site observations with the Project Team and to review the next steps of the project.

Analysis, Performance Review and Recommendations

7. Review present Fire/Rescue/EMS workflows and processes to analyze and develop potential organizational and operational requirements. This review will be based on the Center for Public Safety Excellence (CPSE) categories and criteria. The performance indicators that will be examined include the following:
- Governance and Administration
 - Assessment and Planning
 - Goals and Objectives
 - Financial Resources
 - Programs
 - Physical Resources
 - Human Resources
 - Training and Competency
 - Essential Resources
 - External System Relations
8. Determine any changes, or future trends, for public safety industry standards related to Fire/Rescue/EMS operational requirements. During the development of all recommendations, RW will consider many factors and standards as a basis for recommendations, including:
- National Highway Safety Traffic Administration (NHSTA)
 - National Fire Service Accreditation Program (NFSAP)
 - National Fire Protection Association (NFPA)



Section 5: DETAILED WORK PLAN

continued

- Federal Emergency Management Association (FEMA)
 - National Fire Administration (NFA)
 - Occupational Safety and Health Administration (OSHA)
 - Insurance Services Office (ISO) Rating Schedule
 - Local Fire Protection Ordinances
 - State of Ohio Statutes and Administrative Code
 - Journal of American Medical Association (JAMA)
 - Commission on Accreditation of Ambulance Services (CAAS)
 - American Ambulance Association (AAA)
9. Develop a comprehensive detailed Fire/Rescue/EMS Department Review, utilizing the information provided by the documentation received and the interviews and on-site observations. The projected growth and level of service needs will be considered during the development of these recommendations. Recommendations will include:
- Current Fire/Rescue/EMS operations, staffing and levels of service
 - Fire/Rescue/EMS workload, call volume and activity
 - Governance and Administration
 - Assessment and Planning
 - Physical Resources
 - Human Resources
 - Training and Competency
 - Essential Resources
 - External System Relations
 - Current and anticipated budget issues
 - Current and future facility needs (Ten-year period)
 - Service delivery in regard to national standards
 - Advantages and disadvantages of local consolidation
 - Funding source(s) to sustain operations and future service delivery
 - Review of future staffing needs (Ten-year period)
 - Any other issues identified during the analyses will be addressed
10. Prepare for and facilitate a Recommendations Meeting to present preliminary recommendations and obtain feedback from the Project Team.

Document Preparation and Review



Section 5: DETAILED WORK PLAN

continued

11. List and describe the findings and recommendations on the Fire Department Shared Service Study.
12. Assemble the **Study** document. Perform a detailed quality assurance review of the document to ensure that the document meets the expectations of the Village and conforms to RW's standards.
13. Prepare, produce and deliver the draft **Study** to the Project Team for review. Facilitate a Report Delivery Meeting to review content as well as schedules and expectations for the remaining project steps.
14. Facilitate a Review Meeting with the Project Team approximately one (1) week after initial delivery to answer questions regarding the content of the Plan. Make any changes to the Plan based on the discussions at the Review Meeting. Produce and deliver the final document bound copy to the Project Team.
15. Facilitate a presentation of the final report to the Village Board.

Time Period

This Fire Department Shared Service Study can be completed in a three (3) – four (4) month time frame. RW will be responsible for the following specific deliverables in keeping with the schedule described above:

- A comprehensive and professional Fire Department Shared Service Study.
- Seven (7) bound copies and one (1) electronic copy of the final Document.



Fire Department Shared Service Study –

\$24,500.00 (Not-To-Exceed Amount)

Payment Schedule –

Fire Department Shared Service Study. Invoices will be sent the beginning of every month.

RW will complete the work tasks as defined in our proposal for the not-to-exceed amount presented in the proposal. Only if the scope of the project changes would there be any additional hours billed to the project. These changes in project costs would only occur after approval by appropriate Village personnel.

Fire Department Shared Service Study	\$ 23,500
Expenses	\$ <u>1,000</u>
TOTAL	\$ 24,500

Payment schedule:

3 equal monthly payments

RW will complete the work tasks as defined in our proposal for the not-to-exceed amount presented in the proposal. Additional hours would be billed only if the scope of the project changes. These changes in project costs would only occur after approval by appropriate Department personnel. Either party may terminate the agreement by giving 60 days written notice. This project is based on an estimate of 200 hours.



Section 7: RELATED EXPERIENCE

Village of Johnson Creek, WI

RW Management provided interim management and management counsel of the Johnson Creek Fire Department for the last 9 months. RW also provided the Village with an Executive Selection process. Mr. Roemer also served as the Village Emergency Management Director during this time period. RW is currently providing the Village with Transition Management Services.

Contact: John Swisher
Village President
125 Depot Street
Johnson Creek, WI 53038
Phone 920- 699-9380

City of Green Bay, WI

RW Management Group provided long term management of the Green Bay Fire Department for a period of almost four years. Jeffrey R. Roemer served as Fire Chief from April of 2008 until December 31, 2011. Chief Roemer also provided the City with an Executive Selection process and multiple Assessment Centers for promotions, which included training department personnel as assessors. Mr. Roemer also served as the City Emergency Management Director during this time period and established a joint Emergency Operations Center with the County and wrote an Emergency Operations Plan for the City.

Contact: City of Green Bay
100 N. Jefferson
Green Bay, WI 54301
Phone 920-448-3005

Village of Germantown Fire Department – Germantown, Wisconsin

RW completed management counsel and provided the Interim Fire Chief assistance with reorganizing the department and correcting and implementing staffing changes. This project involved extensive organizational changes to correct issues and help with providing an approved course of action for the new fire administration.

Contact: Steven Kreklow
Village Administrator
Germantown, WI 53022
Phone: 262-250-4775



Section 7: RELATED EXPERIENCE

continued

Door County – Sturgeon Bay, Wisconsin

RW provided interim services as Emergency Services Director and Emergency Management Director for the County of Door. This position had the responsibility for all Emergency management Services and coordination in the County, along with providing administration for Emergency Medical Services throughout the entire County.

Contact: Ken Pabich
County Administrator
421 Nebraska St.
Sturgeon Bay, WI 54235
Phone: 920-746-2552

City of De Pere, Wisconsin

RW recently provided interim management as a Fire Chief and Emergency Management Director for the City of De Pere Fire Rescue. This position will also include a complete evaluation of the Fire-EMS Department with recommendations for the makeup and organization of the current department. RW also assisted the City with the executive selection process for the permanent Chief.

Contact: Larry Delo, City Administrator
335 S. Broadway
De Pere, WI 54115
Phone: 920-339-4044

Milwaukee Regional Medical Center – Wauwatosa, Wisconsin

RW is currently providing Public Safety Management Counsel for the Milwaukee Regional Medical Center (MRMC). This is a major medical complex in the metro Milwaukee area, that is in the process of taking over ownership and full public safety responsibility from Milwaukee County. Jeff Roemer currently serves as the Public Safety Consultant on this project.

Contact: Robert Simi
Executive Director
8700 W. Watertown Plank Rd.
Wauwatosa, WI 53226
414-778-4570

