

# Sunriver Service District Strategic Plan 2021



## Our Present and Our Future 2021-2025

# 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 and engagement.
- Work in partnership with all community entities.

This document is a summary of the Strategic Plan to continue to meet this mission, intended to address a five-year period from 2021 through 2025, with a revision at that time.

# History and Demographics

## District History

Sunriver was opened to the public in 1969 as a 5,500-acre development, and in 1978 sold 2,200 acres back to the US Forest Service, ending up as a 3,300-acre planned residential and resort community. Sunriver consists of residential homesites, common areas, recreational facilities, the Sunriver Resort and a commercial development known as The Village at Sunriver. There is also a small number of independent commercial properties. Sunriver is considered an unincorporated part of Deschutes County.

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.

The Sunriver Service District (SSD) was established by a vote of the electors and through an agreement between Deschutes County and SROA in 2002. The Management agreement authorizes the District to provide fire prevention & protection, security services, law enforcement services and emergency medical services. The management agreement has been updated multiple times, with the last revision in 2018. Prior to 2002, SROA provided public safety, emergency medical and fire services in Sunriver. In the establishment of the District, SROA maintained ownership of the facilities, which are leased to the SSD under specific agreements. SROA also provides a variety of contractual services to the SSD, such as accounting, HR related administration, and vehicle repair and maintenance. SROA also contracts with the SSD for services, such as specific rules enforcement and partial funding for seasonal Bike Patrol.

The District is a service district authorized under Oregon Revised Statute 451.010 (3), 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, public records, and collective bargaining statutes. It is funded primarily through local property taxes. The SSD board is the Managing Board of the District, while 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, upon recommendation of the SROA Board.

## **General Demographics**

The demographics of Sunriver are heavily dependent on the time of year. Sunriver has a permanent population of approximately 1500 residents. The permanent population is typically retired and a higher age compared to other local areas. This generally means that the public safety needs of the area are different from other localities. During some seasons, the population of the area significantly increases to as much as 20,000 residents and visitors. Public safety, therefore, is very different based on the time of year and population. An example of the District's response to this environment is the addition of seasonal bike patrol and seasonal paramedics in the summer months.

The general Central Oregon region has been growing significantly. In the last decade it has been one of the fastest growing regions in the nation. A geographical break exists in the region in the form of a mountain pass and federal land between Bend and the region to the south. The south Deschutes County area has nearly doubled in population during the decade from 2010-2020. The City of La Pine has annexed some of the surrounding unincorporated areas during this period as well.

Sunriver has not typically grown at the rate of the surrounding area, maintaining its general character as a resort and vacation community. The permanent population has grown less than 20% in the past decade by most estimates. The general makeup of Sunriver housing is 20% owner-occupied full-time, 45% owner-second-home, and 35% vacation rental.

As a consequence of the 2020-21 COVID-19 pandemic, many professional employees and students transitioned, at least temporarily, to working and studying remotely in Sunriver and the general region. In some cases, the transition to full-time residence appears to be permanent, but the rate is not yet known. This potentially eliminates a barrier to working families making their home in Sunriver full-time. Another consideration has been the location of high schools serving Sunriver students, either in central Bend or La Pine. The Bend-La Pine School District is building a new high school on the south end of Bend with a closer proximity to Sunriver. These two factors may shift the demographics to include more full-time families and working professionals. A consistent evaluation of personnel needs should occur regularly as the demographics of Sunriver change.

The Sunriver Service District provides public safety in the contiguous area which is also served by the Sunriver Owners' Association. The District is also responsible for 350 square miles of Ambulance Service Area that expands to rural areas and the national forest outside of Sunriver proper. The District has several agreements with other public safety entities for mutual aid and auto aid to serve greater Deschutes County.

# Strategic Considerations

For this revision of the Strategic Plan, the Sunriver Service District (SSD) is focused on five strategic areas of interest:

- Staffing and Demographics: Proper staffing and personnel retention, within existing budget constraints, to meet the health and safety standards required by the community.
- Facility and Equipment: Growth or updating of facilities given current and future staffing, to meet the goals for modernization, safety, and compliance.
- Financial Diligence: Adequate reserve funds to meet the requirements of the District.
- Emergency Preparedness: Ensure that the region is prepared for potential emergencies with the District as the lead in preparation and execution.
- Stakeholder Relationships: Community engagement as a part of strategic planning and the enhancement of productive relationships with stakeholders, professional partners, and the community at large.

# Strategic Considerations Detail

## Staffing and Demographics

### **Background:**

In 2018 the District hired a new Police Chief and Fire Chief. Since that time both departments have addressed staffing structures to increase effectiveness. In 2018 the Police Department added a Lieutenant to provide administrative support to the Chief and the first line supervisors. FY 2020/21 budget authorized two additional Firefighter/Paramedics in the fire department to address minimum staffing requirements. The desire is to add one more Firefighter/Paramedic position, so that all three shifts would have additional coverage. Concerns of fiscal feasibility prevented full implementation of the staffing expansion. Full-time District staff is augmented by summer seasonal Bike Patrol Officers in the Police Department, a part-time Fire Department PIO, summer seasonal Paramedics, and year-round part-time Reserves in the fire department. Staffing and deployment strategies fluctuate throughout the year based on the tourist influx.

The District Managing Board of Directors is supported by a half-time Board Administrator and a part-time Office Assistant. Accounting and HR services are contracted outside the District.

The District recognizes employees are their greatest asset. It is committed to their professional development, which is accomplished through the hiring process, relevant and progressive training and a focus on employee health and wellness. Both departments utilize professional policy manuals provided by Lexipol, a national policy subscription service, ensuring best practices are applied as well as timely legal updates. It is believed that well supported and trained employees will have a high degree of job satisfaction, leading to low turnover. Small agencies often have some turnover as employees look for broader opportunities found in larger agencies, which the District has experienced. There is likelihood of potential turnover due to upcoming retirements in several key positions in the District.

### **Key Action Items:**

- Yearly analysis of appropriate staffing levels as part of the report on Police and Fire Performance Measures to include:
  - Calls for service data
  - Overtime analysis
  - Best practices in service delivery considerations
- Specific study on how the demographics of Sunriver has changed since COVID-19 and what service level changes might be needed as a result
- Department specific training plans as part of the report on Police and Fire Performance Measures to include:
  - Ensuring basic training is provided to maintain appropriate state certification
  - Providing advanced training for continuing advancement of skills, focusing on continuous learning

- Including executive and leadership training for supervisors and administrators
- Developing mentoring program for potential promotional candidates to fill future vacancies
- Create committee to evaluate Administrative structure of the District:
  - Evaluate roles for the Board and the three direct report administrators to the Board
  - Identify gaps or redundancy
  - Recommend structural and/or responsibility shifts or support the continuation of the current structure by the end of 2021
  - Consider community member inclusion in the analysis
- Develop/improve metrics for workplace satisfaction, including regular surveys of district personnel.
  - Define and approve metrics at the Board level
  - Established metrics in place by end of the first half of 2021
  - Board review of gathered data on an annual cadence
- Health and wellness plan for all District personnel

## **Facility and Equipment**

### **Background:**

The District currently utilizes leased facilities for 100% of its operation. All of the facilities used for normal operations are owned by the Sunriver Owners' Association. The Fire Station was built in 1995, and originally staffed for a crew of two male firefighters. A few of the major deficiencies include improper storage of bio-hazards, improper storage of turn-out gear, lack of a decontamination area to clean gear and equipment, and a facility ill-equipped to meet standards for mixed-gender crews. District Administration occupies an office in the Fire Department, and has need for a more segregated space for operational efficiency.

The Police Department is housed in a portion of the SROA's administrative building that was never designed for police services. Security is critical in police facilities including the exterior of the building, parking and internal spaces. There are confidential records, computer systems, evidence, weapons and staff that require security protection. Privacy is lacking for confidential staff discussions and victims making sensitive reports, such as sex offenses.

In 2014 a conceptual drawing was made to expand the current Fire Station, creating a public safety building to house both departments. In 2019 a more detailed discussion occurred with the District Managing Board after engaging Mackenzie Consultants to provide an assessment of an ideal facility for District operations. This document evaluated both a re-work of the existing Fire Station building owned by SROA, as well as a new building that would serve the needs of the District. Because SROA is the owner of the facilities, they will be intimately involved in the analysis in the development of plans to move forward. Funding options will be considered at the same time as the optimal facility designs are evaluated.

Functional equipment for the District is important for the safety of personnel and the community. Some of the larger fire apparatus costs over \$1 million each. Ensuring reserves are adequate to meet replacement cycles is important. The last reserve study was completed in 2016 and another has begun and is scheduled to be completed early 2021.

Any changes to the existing structures would have to be completed with the permission of SROA as the owner of the property. SROA has, in the past, offered to help the District with additional construction or leases in the interest of the homeowners and businesses that both organizations serve.

### **Key Action Items:**

- Complete reserve study by June 2021:
  - Provide current inventory list
  - Anticipate future equipment needs
  - Reviewed on an annual basis by the departments with adjustments made on replacement dates
  - Board action to ensure budgetary reserves are provided to meet recommendations of the reserve study

- Creation of a multi-stage Task Force to evaluate and recommend future building options:
  - Identify members of the task force, incorporating a broad spectrum of stakeholders, complete by spring of 2021
  - Develop a plan of community education and input
  - Establish timelines for proposal and implementation
  - Analyze funding options
  
- Consider interim facility mitigation if combined public safety building feasibility is pushed out more than three years.
  
- Engagement plan for Deschutes County to partner with SSD to create/support facility development
  - Regular engagement plan with facilities as a part of discussion

## **Financial Diligence**

### **Background:**

The majority of the District's revenue comes from property tax assessments. The current millage rate is \$3.31/\$1,000 of assessed valuation. The District's cap of this assessment rate is \$3.45/\$1,000, as established by the voters when the District was created in 2002. Increases in revenue have been trending at approximately 3% per year. Other less significant revenue sources are ambulance service charges, fines, SROA payment for rules enforcement and partial funding of the summer bike patrol, and federal reimbursement for Medicaid patient transport or occasional grants. Because the boundary of Sunriver is set and there are very few vacant lots, any significant expansion of revenue growth rate is unlikely. Of concern are the increasing PERS retirement program rates and health insurance costs. Both are increasing at rates significantly higher than 3% per year.

An annual five-year financial forecast is done after the budget is approved. This forecast shows a downward trend of reserves if there are no mitigating adjustments in revenue or expenditures.

The District has an Operating Fund and a Reserve Fund. The Operating Fund transfers money to the Reserve Fund annually. In FY 2020/21, the Reserve Fund is approximately \$1.1 million of which \$338,750 was contributed from the Operating Fund. This reserve contribution amount was increased 3% the last several years.

Two Firefighter/Paramedic positions were added in FY 2020/21, with a desire to add one more position in order to staff each of the three shifts with four career staff, rather than three. Projections were for significant reductions in overtime costs with this added staff. Annual fiscal analysis of these and other actions is expected.

### **Key Action Items:**

- Evaluation and recommendation of a potential rework of the finances to separate allocated and unallocated reserves
  - Recommendation to the Board for 2021/22 budget funding strategy
  - Balance of reserves for a building and equipment with the need for additional personnel
  - Create a financial analysis of all the district financial accounts
- Annual budget process to address the strategic issues and action items
  - Impact analysis of additional Fire Department staff
  - Evaluate a ten-year plan on personnel and organization changes
- Evaluation of employee health care costs and recommendation of cost mitigation options
- Five-year financial outlook in conjunction with annual budget development
  - Continue on yearly cadence

- Explore additional sources of revenue
  - Analysis of fees for service
  - Service area expansion if the opportunity is presented

## **Emergency Preparedness**

### **Background:**

While the Sunriver Service District is primarily focused on day-to-day public safety, the likelihood of a regional emergency remains high. Sunriver itself is a conglomeration of homeowners and their association, businesses, rental properties and resort facilities that require complex planning in response to an emergency. Many of the entities have individual emergency plans specific to their areas. In an emergency affecting the broad community, participation of these entities in the District's emergency response is critical. Public safety personnel of the District must assume the leadership in emergency response and as it follows preparedness efforts.

The District has an overarching Emergency Operations Plan that was created in conjunction with state and regional partners. An emergency in Sunriver, likely would expand to other regional partners and effective coordination is critical. The community stakeholders mentioned above are signers to this plan. However, there are gaps in the current plan that address specific issues facing our community, such as an evacuation plan, safe zones, etc. Actual egress from the community is limited to two main roads and sub-standard secondary routes. Community education and outreach on the plan, as well as actions to take in the event of an emergency, are important features of the Sunriver specific plan.

### **Key Action Items:**

- Update the Emergency Operations Plan, in coordination with county and state agencies:
  - Engage with the proper consultants
  - Engage stakeholder support with Memorandum of Agreements, complimenting and coordinating with their plans
  - Target end of 2021
  - Specific target to increase communications options/capability in an emergency
- Regular preparedness test plans and drills:
  - Annual drill
  - Facilities and equipment testing
- Extended community engagement on the Emergency Operations Plan:
  - Education and outreach to residents, homeowners and visitors
  - Communication plan with SROA, the Village, Sunriver Resort and vacation rental companies
  - Update materials and plan of distribution

## **Stakeholder Relationships**

### **Background:**

Permanent residents in the area are well under 2000, but over 5% of those residents are, or have previously been, volunteers for the District in the form of Citizen Patrol or in other capacities. The community is heavily invested in the District, and the District should strategically align with that community. In addition, the area has a significant number of return vacation renters, many of whom may eventually consider buying in Sunriver. The professional public safety coverage is a draw if residents and visitors see the District and its personnel professionally engaging as members of the community.

Police and Fire programs currently focus on community engagement and have positive relationships. These relationships have generally improved with the recent senior staff changes and additions. During the development of the Strategic Plan, community stakeholders meetings were held and many of this engaged group were unaware of the District's previous outreach efforts. Continued collaboration and coordination with stakeholders such as the Sunriver Resort, Village and Sunriver Homeowners Association are important for effectiveness in service delivery.

Recently, the COVID-19 pandemic has markedly changed the number of residents and guests in Sunriver on any given day, with a larger number of people being here in the "offseason." With an increase in permanent residents, there is a corresponding increase in expectations of communication and service as a result.

Additional relationships include the professional partners District staff interact with to include Mutual Aid partners, Deschutes County Emergency Management, Forest Service, Police and Fire Chief's organizations, Special District's Association, and other county and state elected officials.

### **Key Action Items:**

- Departments to annually include specific community education and engagement plans on their annual Performance Measures
- Visibility of the District as an entity
- Service level evaluation and survey by the community of District effectiveness
- Formal agreements with partners reviewed and updated on a regular schedule
- Joint SSD/SROA board discussion/engagement on improving stakeholder relationships