



Southern Ozaukee Fire & EMS Board

Date:
Wednesday, September 10, 2025

AGENDA

LOCATION: 250 Elm Street, Thiensville, WI

Time: 5:30 PM

I. CALL TO ORDER

II. ROLL CALL

Mequon

Mayor Andrew Nerbun

Administrator Will Jones

Alderman Gregg Bach

Alderman William Gebhardt

Citizen Lynn Streeter

Thiensville

President John Rosing

Trustee Kristina Eckert

Administrator Landisch-Hansen

Citizen Doug Chimenti

Alternate Trustee David Lange

III. APPROVAL OF MINUTES

A. July 9, 2025 (att)

IV. PERSONAL APPEARANCES AND PUBLIC COMMENT

A. Personal Appearances and Public Comment: Citizens wishing to address the SOFD Board on any matter not on the agenda may do so at this time. If you desire to be heard on agenda items, you may be heard when that item is considered on the agenda. The time limit is FIVE minutes.

V. FINANCE

A. Review and Action Regarding the Ambulance Rate Survey (att)

B. Review and Action Regarding the 2026 Southern Ozaukee Fire and EMS Department Budget (att)

VI. GOVERNANCE

A. Review and Action Regarding the Southern Ozaukee Fire and EMS Department Strategic Plan (att)

B. 2025 Workplan Update and Action Items (att)

VII. CAPITAL

A. Update on Ladder Truck Sale

VIII. OPERATIONS

A. Bi-Monthly Update

IX. NEXT MEETING

A. November 12, 2025

X. ADJOURNMENT

Colleen Landisch-Hansen, Village Clerk

September 5, 2025

Please advise the Thiensville Municipal Hall, 250 Elm Street (262-242-3720) at least 24 hours prior to the start of this meeting if you have disabilities and desire special accommodations.



Southern Ozaukee Fire & EMS Board
MINUTES
DATE: Wednesday, July 9, 2025
LOCATION: 250 Elm Street, Thiensville,
WI
TIME: 5:30 PM

I. CALL TO ORDER

Meeting was called to order by Mayor Nerbun at 5:30 PM

II. ROLL CALL

Mequon

Mayor Andrew Nerbun

Administrator Will Jones

Alderman Gregg Bach (Excused)

Alderman William Gebhardt

Citizen Lynn Streeter

Thiensville

President John Rosing

Trustee Kristina Eckert

Administrator Landisch-Hansen

Citizen Doug Chimenti (Excused)

Alternate Trustee David Lange (Absent)

III. APPROVAL OF MINUTES

A. May 14, 2025 (att)

MOTION to Approve by President Rosing **SECONDED** by Alderman Gebhardt. **MOTION CARRIED UNANIMOUSLY.**

Aye: 5

No: 0

Abstain: 0

IV. PERSONAL APPEARANCES AND PUBLIC COMMENT

A. Personal Appearances and Public Comment: Citizens wishing to address the SOFD Board on any matter not on the agenda may do so at this time. If you desire to be heard on agenda items, you may be heard when that item is considered on the agenda. The time limit is FIVE minutes.

None.

V. FINANCE

A. Review and Action Regarding the 2024 Final Financial Audit for Southern Ozaukee Fire and EMS Department (att)

Alderman Gebhardt inquired about the timing and plan for addressing identified material weaknesses.

Chief Bialk replied that new accounting software that is more suited to the Department's needs would address most of the identified material weaknesses. This software is expected at the beginning of 2026.

Administrator Landisch-Hansen noted that in organizations of the Department's size it is not unusual for there to be some material weaknesses, often due to not having enough administrative staff. New software can help mitigate these challenges, but some material weaknesses may still remain.

Alderman Gebhardt inquired about the increase in invoices being dealt with by the Department and whether that increase raised any concern in regard to appropriate filing practices.

Chief Bialk responded that there is no feeling within the Department that there is a gap in terms of invoicing. Chief Bialk also shared that the Department would be having the ambulance billing company do a rate survey in order to discover if additional hires would be needed in certain areas. That survey information will be considered in the upcoming budget process.

Citizen Streeter inquired how the new software was being chosen.

Administrator Landisch-Hansen replied that the Village of Thiensville was currently using BS&A Software and that there may be an opportunity to add additional funds to the existing service in order to assist the Department rather than investing in brand-new software.

BS&A Software was chosen after an exhaustive implementation process and scales well for the Village and the Department's needs.

MOTION to Approve the 2024 Final Financial Audit for Southern Ozaukee Fire and EMS Department by President Rosing **SECONDED** by Citizen Streeter. **MOTION CARRIED UNANIMOUSLY.**

Aye: 5

No: 0
Abstain: 0

Aye: Nerbun, Streeter, Gebhardt, Rosing, Eckert
No: None

MOTION CARRIED UNANIMOUSLY

B. Review and Discussion of 2nd Quarter Financial Report (att)

Chief Bialk provided the 2nd quarter update.

Administrator Jones inquired about the notably balanced gender distribution among staff members and asked if Chief Bialk had any insights or comments on the matter.

Chief Bialk responded that the split is almost fifty-fifty, which is rare. Most municipalities in the state don't achieve this level of gender parity.

Citizen Streeter mentioned that it was a topic that came up as a positive in staff interviews.

VI. GOVERNANCE

A. 2025 Workplan Update and Action Items (att)

Chief Bialk reviewed the workplan and provided an update on progress made since the last Board meeting.

Chief Bialk provided a handout outlining 18 action items recommended by consultant Chris Bell and highlighted several key points from the document.

B. Review and Discussion of Strategic Plan (att)

Chief Bialk provided an overview of the Strategic Planning process and shared identified objectives.

Citizen Streeter inquired about the timing of the facilities' assessment process. Is there clarification in regard to whether one location would proceed ahead of the other in terms of timing.

Mayor Nerbun replied that a discussion on timing still needed to be had.

Administrator Jones pointed out that the City of Mequon is currently engaged in the civic campus master planning process, which should be taken into consideration when evaluating the SOFD Strategic Plan. That planning is something to consider in relation to the SOFD

strategic plan with regard to timing.

Citizen Streeter asked whether the SOFD Board should focus on learning from the civic campus master planning process at this time, rather than actively influencing it.

Administrator Jones answered in the affirmative.

Chief Bialk asked that any feedback or questions on the plan be emailed.

Citizen Streeter noted that if the strategic plan is approved in September, it is important that the Board feels comfortable that the five objectives match the work that's been done, and that the items addressed during the sessions are reflected in the final product.

President Rosing's initial impression was that the format was easy to understand and the recommendations succinct, leading to easier execution in the end.

Mayor Nerbun shared that there is a very similar document for the City of Mequon that is often referenced and updated and feels this can be treated the same way as a living document.

Citizen Streeter mentioned that there is a monitoring tool that can be used to track when the Board wants to review the Plan and see where its status lies at any given time. Citizen Streeter suggested that in September Chief Bialk come back with an answer to how the strategic plan would be tracked after adoption.

Citizen Streeter also believed that the strategic plan needs to be integrated with the budget.

Administrator Jones agreed, with the caveat that currently there are revenue limitations in place at the State level that impact what can actually be done by SOFD.

Administrator Jones noted that the tempo for implementation is naturally set based on the number of items spread across the timeline. Command staff need to make sure that this is understood and that the goals are achievable within the timeline.

The Board invited command staff to also offer feedback by the end of July, the same as Board members.

Administrator Jones confirmed that July 31 is the feedback deadline.

VII. CAPITAL

A. Discussion Regarding Ladder Truck Sale Update (att)

Chief Bialk shared that the ladder truck is up on the website for sale, and that the Department is seeing interest with a couple of calls being received a week.

Trustee Eckert inquired as to how the price was arrived at.

Chief Bialk explained that the wholesaler offered to buy the truck for \$273,000. Comparable trucks had more mileage and usage, so the asking price here was increased to reflect the lower usage.

Administrator Landisch-Hansen asked if it was possible to see where the inquiries were from.

Chief Bialk replied yes, inquiries have been received countrywide.

VIII. OPERATIONS

A. Bi-Monthly Update

Chief Bialk summarized the bi-monthly update.

Chief Bialk highlighted that since the last meeting of the Board in May there are 3.3% hours uncovered, somewhat expected in the summer, and noted that with the new hires that number will go back down.

B. Presentation and Discussion Regarding Community Paramedic (att)

Heather Kreiger and Deputy Chief Boelhke presented a proposal to explore the implementation of a Community Paramedic program. Ms. Kreiger recently completed a semester-long course, qualifying her to serve in this role. The proposed initiative is intended to support community outreach and address non-emergency medical needs, particularly for high-risk residents. It was noted that Department personnel have shown strong interest in supporting resident education through this program.

Deputy Chief Boelhke stated that initial steps include coordination with the State of Wisconsin to create a licensed service. The current request is to obtain the Board's support to begin planning and fundraising for a pilot program. The estimated cost for a three-month pilot is \$5,000; however, that timeframe may limit the ability to gather comprehensive data. Deputy Chief Boelhke added that the program could be scaled to align with departmental capacity and financial resources.

Trustee Eckert inquired whether this would be the first such program in Ozaukee County. Deputy Chief Boelhke confirmed that it would.

Citizen Streeter noted that similar programs have been studied at Froedtert Hospital and are focused on preventative care, such as fall risk mitigation, to reduce emergency calls. Citizen Streeter expressed support for the program, citing potential benefits for residents and opportunities to connect individuals with additional county resources. It was noted that the program could be implemented in a fiscally responsible manner.

Mayor Nerbun commented that call volumes have increased significantly over the past 15 years and suggested the potential for the program could have a meaningful impact on

addressing that trend.

President Rosing asked how long the proposed pilot could be sustained on the estimated \$5,000 budget. Deputy Chief Boelhke responded that the funds would cover approximately three months but reiterated the limitation on data collection within that period.

Citizen Streeter added that potential grant opportunities and restricted funds from civic organizations may be available to extend the pilot program, enabling more meaningful data collection.

Trustee Eckert clarified that the current request is not for full implementation of a Community Paramedic program, but for approval to proceed with planning and development of a pilot.

Administrator Landisch-Hansen asked whether other agencies with existing programs have assigned full-time staff. Administrator Landisch-Hansen expressed support for the concept but noted concerns about launching a program that cannot be adequately staffed or sustained.

Mayor Nerbun observed that there appeared to be a general consensus among Board members to support Department staff in initiating groundwork for a pilot Community Paramedic program.

Public Comment:

Resident Jerry Deutsch, 11623 N. Grace Ct., Mequon, requested clarification that the proposed pilot is not an immediate implementation but rather an exploration of the program's feasibility. Resident Deutsch also inquired if this program is a paramedic program and not other staff.

Mayor Nerbun confirmed that the purpose of this discussion was to determine if staff should begin gathering information and assess the qualitative value of a pilot program. This could lead to the possibility of a future budget proposal.

Citizen Streeter explained that the program would be paramedic, not paramedicine.

Deputy Chief Boehlke added that while the State of Wisconsin permits both practitioners and paramedics to be involved, the SOFD program would be initially led by Ms. Kreiger.

By general consensus, the Board directed staff to proceed with planning efforts for a Community Paramedic pilot program.

IX. NEXT MEETING

A. September 10, 2025

Administrator Jones noted that the September 10th meeting is important as it will have the Strategic Plan vote and budget discussion.

X. ADJOURNMENT

MOTION to Adjourn at 6:36 by President Rosing **SECONDED** by Alderman Gebhardt. **MOTION CARRIED UNANIMOUSLY.**

Aye: 5

No: 0

Abstain: 0

Submitted by,

Ben Honeck
Deputy clerk

Signed by,

Colleen Landisch-Hansen
Village Administrator/Clerk



Southern Ozaukee Fire and
Emergency Medical Services Department
11300 N. Buntrock Avenue
Mequon, WI 53092
(262) 242-2530
(262) 242-5042 Fax

TO: SOFD Board
FROM: Fire Chief David L Bialk
DATE: September 10, 2025
SUBJECT: Ambulance Fee Rate Survey

Background

The Southern Ozaukee Fire Department (SOFD) depends heavily on revenue to support its operations, with ambulance transport fees serving as a primary source. In 2024, revenues made up 53% of the SOFD budget, and 52% in 2025. Of that revenue, 72% comes from ambulance transport fees, making them a central consideration in the annual budget review.

Analysis

A recent rate survey from our ambulance billing company (see attached) found that SOFD's ambulance transport fees are, on average, \$180–\$245 lower than those of nearby fire departments. Even with an increase of \$150–\$200 on the most common types of transports, SOFD's fees would still remain below the 50th percentile compared to other departments.

Fiscal Impact

With the modest increases recommended by our billing company, SOFD is projected to generate an additional \$10,000 to \$15,000 in annual revenue.

Recommendation

Staff recommends adopting the proposed rate increases outlined in the attached fee schedule, effective October 1, 2025.

Fire Chief David L Bialk

David L Bialk

Southern Ozaukee Fire Department

Southern Ozaukee Fire Department 2025 Rate Survey

Service	City of Brookfield Fire Department	North Shore Fire Department	City of Jefferson Fire Department	City of Johnson Creek Fire Department	City of Waukesha Fire Department	Southern Ozaukee Fire Department	Average	Recommended Rate	Change
Description									
BLS - Transport (Resident)	\$ 1,250	\$ 1,250	\$ 1,900	\$ 1,400	\$ 2,100	\$ 1,300	\$1,580	\$1,450	\$150
BLS - Transport (Non-Resident)	\$ 1,450	\$ 1,450	\$ 1,900	\$ 1,400	\$ 2,100	\$ 1,400	\$1,660	\$1,550	\$150
ALS - Transport (Resident)	\$ 1,625	\$ 1,625	\$ 2,150	\$ 1,400	\$ 2,200	\$ 1,500	\$1,800	\$1,700	\$200
ALS - Transport (Non-Resident)	\$ 1,825	\$ 1,825	\$ 2,150	\$ 1,400	\$ 2,200	\$ 1,550	\$1,880	\$1,750	\$200
ALS2 - Transport (Resident)	\$ 1,825	\$ 1,825	\$ 2,225	\$ 1,700	\$ 2,400	\$ 1,700	\$1,995	\$1,900	\$200
ALS2 - Transport (Non-Resident)	\$ 2,025	\$ 2,025	\$ 2,225	\$ 1,700	\$ 2,400	\$ 1,800	\$2,075	\$2,000	\$200
SCT Transport (Resident)	NA	NA	\$ 2,500	NA	NA	\$ 2,100		\$2,200	\$100
SCT Transport (Non-Resident)	NA	NA	\$ 2,500	NA	NA	\$ 2,100		\$2,200	\$100
BLS On Scene Care (Resident)	\$ 525	\$ 525	\$ 900	\$ 550	\$ 300	\$ 400	\$560	\$450	\$50
BLS On Scene Care (Non-Resident)	\$ 525	\$ 525	\$ 900	\$ 550	\$ 300	\$ 450	\$560	\$500	\$50
ALS On Scene Care (Resident)	\$ 825	\$ 825	\$ 1,400	\$ 1,300	\$ 300	\$ 700	\$930	\$700	0
ALS On Scene Care (Non-Resident)	\$ 900	\$ 900	\$ 1,400	\$ 1,300	\$ 300	\$ 750	\$960	\$750	0
Loaded Mileage (Resident)	\$ 27	\$ 27	\$ 30	\$ 27	\$ 25	\$ 25	\$27	\$27	\$2
Loaded Mileage (Non-Resident)	\$ 27	\$ 27	\$ 30	\$ 27	\$ 25	\$ 25	\$27	\$27	\$2



Southern Ozaukee Fire and
Emergency Medical Services Department
11300 N. Buntrock Avenue
Mequon, WI 53092
(262) 242-2530
(262) 242-5042 Fax

TO: SOFD Board
FROM: Fire Chief David L Bialk
DATE: September 10, 2025
SUBJECT: 2026 Budget

Executive Summary 2026 SOFD Budget

Staffing remains a key focus for the fire department. In 2025, the budget allocated funds for the hiring of an additional full-time firefighter/paramedic midway through the year, and that process is currently underway. Once on board, this new hire will increase the department's daily staffing to four full-time employees, supplemented by three paid-on-call/part-time members.

The proposed budget for SOFD for 2026 is \$3.66 million, reflecting a 4.5% increase (\$84,683) compared to the previous year. Under Wisconsin state statutes, merged fire departments are allowed to raise taxes for the levy portion of their budget by CPI + 2%. This translates to a \$71,497 increase for the City of Mequon and a \$13,185 increase for the Village of Thiensville.

In recent years, health insurance costs have increased by 15-18%. However, for 2026, the increase is only 2.3%. The budget team has reallocated these savings to fund several key priorities, including hiring of one additional full-time firefighter/paramedic, a \$24,000 increase in capital contributions, and the purchase of Lexipol software. Lexipol includes a state-specific policy manual, online training, wellness resources, and grant writing services. The use of Lexipol was recommended by the consultant hired by the SOFD Board in 2024.

The 2024 budget year ended with a surplus of \$236,000, primarily due to unfilled full-time positions. These funds were moved into the fund balance account. While a surplus is also expected at the end of 2025, it is unlikely to match the level seen in 2024.

Fire Chief David L Bialk

David L Bialk

Southern Ozaukee Fire Department

Southern Ozaukee Fire & EMS
 2026 Budget
 All Funds
 Summary of Revenues & Expenditures

Summary of Revenues

Source	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget
Intergovernmental Charges for Services				
City of Mequon	\$ 1,352,374	\$ 2,291,231	\$ 1,478,821	1,529,452
Village of Thiensville	247,883	375,296	272,714	282,051
City of Mequon Capital Allocation	118,202	110,000	110,000	130,867
Village of Thiensville Capital Allocation	21,798	20,285	20,285	24,134
Total Intergovernmental Charges for Services	\$ 1,740,257	\$ 2,796,812	\$ 1,881,820	\$ 1,966,503
Non-Property Tax Revenue:				
Intergovernmental Revenue	\$ 625,294	\$ 721,594	\$ 356,358	\$ 372,500
Regulation & Compliance	69,276	59,880	70,200	70,200
Public Charges for Services	1,582,313	1,488,389	1,354,971	1,355,000
Commercial Revenues	2,192	70,801	38,116	56,000
Miscellaneous Revenues	232,533	43,184	-	16,000
Other Financing Sources	183,226	4,569	-	-
Total Non-Property Tax Revenue:	\$ 2,694,834	\$ 2,388,417	\$ 1,819,645	\$ 1,869,700
Total Revenue	\$ 4,435,091	\$ 5,185,229	\$ 3,701,465	\$ 3,836,203

Summary of Expenditures

Department	SOFD 2023 Actual	SOFD 2023 Actual	SOFD 2024 Budget	SOFD 2026 Budget
Salaries & Wages	\$ 1,987,206	\$ 2,133,040	\$ 2,257,485	\$ 2,338,355
Fringe Benefits	518,642	482,038	669,236	683,045
Personnel Services	56,525	86,526	78,200	91,700
Contractual Services	111,792	203,386	155,798	155,300
Commodities	228,172	295,869	109,700	107,050
Equipment Maintenance	121,364	218,297	171,664	159,770
Property & Liability Insurance	119,037	125,771	129,097	125,982
Unclassified	-	-	-	-
Capital Projects Fund	180,939	-	-	-
Total Expenditures	\$ 3,323,677	\$ 3,544,927	\$ 3,571,180	\$ 3,661,203
Beginning Operating Fund Balance				\$ 236,082
Annual Income / (Loss)				-
Ending Operating Fund Balance				\$ 236,082

Southern Ozaukee Fire EMS
 2024 Budget
 General Fund
 Summary of Revenues and Expenditures

Summary of Revenues

Source	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2025 YTD	SOFD 2025 Projected	SOFD 2026 Budget
Intergovernmental Charges for Services						
City of Mequon	\$ 1,352,374	\$ 2,291,231	\$ 1,478,821	\$ 1,313,651	\$ 1,478,821	1,529,452
Village of Thiensville	247,883	375,296	272,714	-	272,714	282,051
Total Intergovernmental Charges for Services	\$ 1,600,257	\$ 2,666,527	\$ 1,751,535	\$ 1,313,651	\$ 1,751,535	\$ 1,811,503
Non-Property Tax Revenue:						
Intergovernmental Revenue	\$ 625,294	\$ 721,594	\$ 356,358	\$ 97,729	\$ -	\$ 372,500
Regulation & Compliance	69,276	59,880	70,200	20,149	-	70,200
Public Charges for Services	1,582,313	1,488,389	1,354,971	725,942	-	1,355,000
Commercial Revenues	2,192	70,801	38,116	18,560	-	36,000
Miscellaneous Revenues	232,533	43,184	-	12,847	-	16,000
Total Non-Property Tax Revenue:	\$ 2,511,608	\$ 2,383,848	\$ 1,819,645	\$ 875,227	\$ -	\$ 1,849,700
Total Revenue	\$ 4,111,865	\$ 5,050,375	\$ 3,571,180	\$ 2,188,878	\$ 1,751,535	\$ 3,661,203

Summary of Expenditures

Department	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2025 YTD	SOFD 2025 Projected	SOFD 2026 Budget
Salaries & Wages	\$ 1,987,206	\$ 2,133,040	\$ 2,257,485	\$ -	\$ -	\$ 2,338,355
Fringe Benefits	518,642	482,038	669,236	290,819	461,258	683,045
Personnel Services	56,525	86,526	78,200	30,818	81,801	91,700
Contractual Services	111,792	203,386	155,798	158,233	210,963	155,300
Commodities	228,172	295,869	109,700	55,332	98,037	107,050
Equipment Maintenance	121,364	218,297	171,664	128,867	175,254	159,770
Property & Liability Insurance	119,037	125,771	129,097	97,409	186,262	125,982
Unclassified - Transfers	-	-	-	-	-	-
Total General Fund Expenditures	\$ 3,142,738	\$ 3,544,927	\$ 3,571,180	\$ 761,478	\$ 1,213,575	\$ 3,661,203

Southern Ozaukee Fire EMS
 2024 Budget
 General Fund
 Detailed Revenues (continued)

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
Intergovernmental Charges for Services					
43210 City of Mequon	\$ 1,352,374	\$ 2,291,231	\$ 1,478,821	\$ 1,529,452	3.42%
43220 Village of Thiensville	247,883	375,296	272,714	282,051	3.42%
Total Intergovernmental Charges for Services	1,600,257	2,666,527	1,751,535	1,811,503	3.42%
Intergovernmental Revenue					
Cedarburg Overwatch Program	73,000	67,000	62,000	70,000	12.90%
Grants & Aids					
44530 ARPA Local Recovery Funds	300,000	324,000	-	-	0.00%
44510 Fire Insurance Dues (2%)	234,936	257,333	277,000	285,000	2.89%
44520 EMS Funding Assistance Program	17,358	-	17,358	17,500	0.82%
##-##-###-### HSRA Grant	-	73,261	-	-	0.00%
Total Intergovernmental Revenues	625,294	721,594	356,358	372,500	4.53%

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
Regulation & Compliance					
Permits					
40100 Burn Permits	\$ 7,880	\$ 9,902	\$ 8,000	\$ 8,000	0.00%
40300 Fire Fees (plan review, sprinkler, hydro testing)	1,200	2,255	4,000	4,000	0.00%
40500 Fire Inspections	17,500	16,980	22,000	22,000	0.00%
40400 Other Fire Prevention Fees	17,200	9,363	10,700	10,700	0.00%
Total Permits	43,780	38,500	44,700	44,700	0.00%
Other					
40900 Accident Fees	\$ 18,196	\$ 17,680	\$ 18,000	\$ 18,000	0.00%
40800 False Alarms	7,300	3,700	7,500	7,500	0.00%
Total Other	25,496	21,380	25,500	25,500	0.00%
Total Regulation & Compliance	69,276	59,880	70,200	70,200	0.00%

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
Public Charges for Services					
Protection-Persons & Property					
40700 Ambulance Revenue	\$ 1,542,363	\$ 1,479,288	\$ 1,354,971	\$ 1,355,000	0.00%
43310 Paramedic Intercept (Cedarburg)	39,950	9,101	-	-	0.00%
Total Protection-Persons & Property	1,582,313	1,488,389	1,354,971	1,355,000	0.00%
Total Public Charges for Services	1,582,313	1,488,389	1,354,971	1,355,000	0.00%

Southern Ozaukee Fire EMS
 2024 Budget
 General Fund
 Detailed Revenues (continued)

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
Commercial Revenues					
Interest Income					
###-###-###-### Investment Interest	2,192	70,801	38,116	36,000	-5.55%
Total Interest Income	2,192	70,801	38,116	36,000	-5.55%
Total Commercial Revenues	2,192	70,801	38,116	36,000	-5.55%
Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2023 Budget	Budget % Change
Miscellaneous Revenue					
Other Income					
###-###-###-### Fund Balance Applied	\$ -	\$ -	\$ -	\$ -	0.00%
League of WI Dividend/Grants	-	-	-	15,000	#DIV/0!
###-###-###-### Other Income	232,533	43,184	-	1,000	0.00%
###-###-###-### Transfer from Other Funds	-	-	-	-	#DIV/0!
Total Miscellaneous Revenue	232,533	43,184	-	16,000	0.00%
Total General Fund Revenue	\$ 4,111,865	\$ 5,050,375	\$ 3,571,180	\$ 3,661,203	2.52%

Southern Ozaukee Fire EMS
 2024 Budget
 General Fund
 Detailed Expenditures (continued)

**Protection Property & Persons
 Fire & EMS**

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
Personnel					
670101 Salaries	\$ 1,115,640	\$ 1,248,545	\$ 1,437,894	\$ 1,557,310	8.30%
670173 Paramedic POC	161,650	169,184	76,438	153,383	100.66%
670150 EMS Responder	299,578	324,540	349,047	252,820	-27.57%
670151 Fire Call Pay	181,180	195,791	145,024	165,174	13.89%
670171 First Responder On Call Pay	134,513	119,544	129,582	134,082	3.47%
670162 Training Pay	82,894	65,905	100,000	54,378	-45.62%
670161 Vehicle Checks	11,751	9,531	19,500	21,208	8.76%
Total Salaries and Wages	1,987,206	2,133,040	2,257,485	2,338,355	3.58%
Fringe Benefits					
673101 FICA	196,751	163,025	172,698	178,884	3.58%
673201 Health/Dental Insurance	111,698	116,989	218,844	264,211	20.73%
673203 Life Insurance/Disability Insurance	2,842	2,103	1,985	2,012	1.36%
637102 Wisconsin Retirement	207,351	199,921	275,709	237,938	-13.70%
Total Fringe Benefits	518,642	482,038	669,236	683,045	2.06%
Personnel Services					
54100 Dues & Subscriptions	\$ 770	\$ 245	\$ 2,000	\$ 19,000	850.00%
54200 Meetings & Conferences	1,762	2,978	2,200	2,200	0.00%
54300 Training	13,150	28,013	33,000	29,000	-12.12%
54400 Uniforms	33,011	45,746	35,000	35,000	0.00%
54600 Preemployment Examinations	3,393	8,572	4,500	5,000	11.11%
54700 Recruitment	2,580	-	-	-	0.00%
54500 Books and Periodicals	1,859	972	1,500	1,500	0.00%
Total Personnel Services	56,525	86,526	78,200	91,700	17.26%
Contractual Services					
51500 Legal Services	\$ 42,206	\$ 66,281	\$ 10,000	\$ 8,000	-20.00%
51550 Financial Services	6,665	21,292	17,500	24,500	40.00%
51600 IT Services	24,583	31,979	25,000	20,000	-20.00%
51650 Billing Services	37,942	63,681	81,298	81,300	0.00%
51700 Advertising	396	-	1,000	1,000	0.00%
51900 Equipment Testing	-	20,153	21,000	20,500	100.00%
Total Contractual Services	111,792	203,386	155,798	155,300	-0.32%

Southern Ozaukee Fire EMS
 2024 Budget
 General Fund
 Detailed Expenditures (continued)

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
Commodities					
55100 Office Supplies	\$ 396	\$ 465	\$ 1,200	\$ 1,050	-12.50%
55200 Telecommunications	14,259	11,548	14,500	12,500	-13.79%
55300 Printing/Copy Machine Supplies	1,240	729	1,500	1,000	-33.33%
55400 Postage	365	538	500	500	0.00%
55500 Miscellaneous	15,401	198,769	-	-	0.00%
55700 Work Supplies	196,511	83,820	92,000	92,000	0.00%
Total Commodities	228,172	295,869	109,700	107,050	-2.42%
Total Fire & EMS	2,902,337	3,200,859	3,270,419	3,375,450	3.21%

**Protection Property & Persons
 Equipment Maintenance**

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
56000 Maintenance					
56400 Equipment Repairs/Small Tools	\$ 12,588	\$ 5,776	\$ 40,000	\$ 15,000	-62.50%
56200 Truck/Vehicle Parts & Supplies	21,872	127,215	40,000	40,000	0.00%
56600 Radio Maintenance	153	-	-	-	0.00%
56500 Hoses	-	-	-	-	0.00%
56260 Vehicle Maintenance Labor (DPW)	54,502	54,826	58,664	62,770	7.00%
56300 Fuel	31,220	29,454	32,000	32,000	0.00%
56100 Building Maintenance	1,029	1,026	1,000	10,000	900.00%
Total Maintenance	121,364	218,297	171,664	159,770	-6.93%
Total Equipment Maintenance	121,364	218,297	171,664	159,770	-6.93%

Southern Ozaukee Fire EMS
 2024 Budget
 General Fund
 Detailed Expenditures (continued)

**Protection Property & Persons
 Property & Liability Insurance**

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
Insurance					
57100 General Liability Insurance	\$ 40,971	\$ 38,948	\$ 43,566	\$ 40,000	-8.19%
57400 Property Insurance	-	2,556	2,582	2,607	1.00%
57200 Vehicle Insurance	19,084	18,916	21,596	22,250	3.03%
57300 Workers Compensation Insurance	58,982	59,351	55,354	56,875	2.75%
57500 EAP	-	6,000	6,000	4,250	100.00%
Total Insurance	119,037	125,771	129,097	125,982	-2.41%
Total Property & Liability Insurance	119,037	125,771	129,097	125,982	-2.41%

**Protection Property & Persons
 Unclassified**

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2026 Budget	Budget % Change
Unclassified					
### ### # ### Transfers to Other Funds	\$ -	\$ -	\$ -	\$ -	0.00%
### ### # ### Contingency	-	-	-	-	#DIV/0!
Total Unclassified	-	-	-	-	#DIV/0!
Total General Fund Expenditures	\$ 3,142,738	\$ 3,544,927	\$ 3,571,180	\$ 3,661,203	2.52%

Southern Ozaukee Fire EMS
 2024 Budget
 Capital Projects Fund
 Summary of Revenues and Expenditures

Summary of Revenues

Source	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2025 YTD	SOFD 2025 Projected	SOFD 2026 Budget
Intergovernmental Charges for Services						
City of Mequon Capital Allocation	118,202	110,000	110,000	110,000	110,000	130,867
Village of Thiensville Capital Allocation	21,798	20,285	20,285	20,285	20,285	24,134
Total Intergovernmental Charges for Services	140,000	130,285	130,285	130,285	130,285	155,000
Commercial Revenues	-	-	-	-	-	20,000
Other Financing Sources	183,226	4,569	-	-	-	-
Total Revenue	\$ 323,226	\$ 134,854	\$ 130,285	\$ 130,285	\$ 130,285	\$ 175,000

Summary of Expenditures

Department	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2024 Budget	SOFD 2024 YTD	SOFD 2024 Projected	SOFD 2026 Budget
Fire Department	180,939	-	-	-	-	-
Unclassified	-	-	-	-	-	-
Total Capital Equipment Expenditures	\$ 180,939	\$ -	\$ -	\$ -	\$ -	\$ -

Southern Ozaukee Fire EMS
 2024 Budget
 Capital Projects Fund
 Detailed Revenues

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2025 YTD	SOFD 2025 Projected	SOFD 2026 Budget	Budget % Change
Intergovernmental Charges for Services							
### ### ### City of Mequon Capital Allocation	\$ 118,202	\$ 110,000	\$ 110,000	\$ 110,000	\$ 110,000	\$ 130,867	18.97%
### ### ### Village of Thiensville Capital Allocation	21,798	20,285	20,285	20,285	20,285	24,134	18.97%
Total Intergovernmental Charges for Services	140,000	130,285	130,285	130,285	130,285	155,000	18.97%
Commercial Revenues							
Interest Income							
### ### ### Investment Interest	-	-	20,000	-	-	20,000	100.00%
Total Interest Income	-	-	20,000	-	-	20,000	100.00%
Total Commercial Revenues	-	-	20,000	-	-	20,000	100.00%
Other Financing Sources							
### ### ### Sale of Property	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.00%
### ### ### Sale of Vehicles	183,226	-	-	-	-	-	0.00%
### ### ### Sale of Equipment	-	-	-	-	-	-	0.00%
### ### ### Transfer from Other Funds	-	4,569	-	-	-	-	0.00%
Total Other Financing Sources	183,226	4,569	-	-	-	-	0.00%
Total Capital Projects Revenue	\$ 323,226	\$ 134,854	\$ 130,285	\$ 130,285	\$ 130,285	\$ 155,000	18.97%

Southern Ozaukee Fire EMS
 2024 Budget
 Capital Projects Fund
 Detailed Expenditures

Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2025 YTD	SOFD 2025 Projected	SOFD 2026 Budget	Budget % Change
Fire Department							
### ### ### Office Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.00%
### ### ### Vehicles	-	-	-	-	-	-	0.00%
### ### ### Equipment	-	-	-	-	-	-	0.00%
### ### ### Radios	-	-	-	-	-	-	0.00%
### ### ### Fire Apparatus	-	-	-	-	-	-	0.00%
### ### ### Other	180,939	-	-	-	-	-	0.00%
Total Fire Department - Capital	180,939	-	-	-	-	-	0.00%
Unclassified							
### ### ### Contingency	-	-	-	-	-	-	0
Total Unclassified - Capital	-	-	-	-	-	-	0.00%
Account Name	SOFD 2023 Actual	SOFD 2024 Actual	SOFD 2025 Budget	SOFD 2025 YTD	SOFD 2025 Projected	SOFD 2026 Budget	Budget % Change
Other Financing Uses							
### ### ### Transfer to Other Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.00%
Total Other Financing Uses	-	-	-	-	-	-	0.00%
Total Capital Fund Expenditures	\$ 180,939	\$ -	\$ -	\$ -	\$ -	\$ -	0.00%

Southern Ozaukee Fire & EMS
 2026 Budget
 Municipal Contributions

	SOFD 2025 Budget	SOFD 2026 Budget		
<u>General Fund</u>				
Department Generated Revenues (Credit)	\$ (1,819,645)	\$ (1,849,700)		
Total Expenditures	<u>\$ 3,571,180</u>	<u>\$ 3,661,203</u>		
Net Operations - Assessed to Levy	<u>\$ 1,751,535</u>	<u>\$ 1,811,503</u>	\$ 59,967	
<u>Capital Projects Fund</u>				
Department Generated Revenues (Credit)	\$ (20,000)	\$ (20,000)		
Capital Improvement Budget	<u>\$ 130,285</u>	<u>\$ 175,000</u>		
Net Operations - Assessed to Levy	<u>\$ 110,285</u>	<u>\$ 155,000</u>		
Total Municipal Contributions	\$ 1,881,820	\$ 1,966,503	\$ 84,682	
Projected Increase from Prior Year		\$ 84,682	4.50%	
Allowable Levy Limit Adjustment		\$ 84,682	Estimated CPI as of 7/31/2025 2.500%	
	<i>Not Eligible</i>	<i>\$ (0)</i>	Plus: 2.0%	<u>2.00%</u>
				4.50%



**Southern Ozaukee Fire and
 Emergency Medical Services Department**
 11300 N. Buntrock Avenue
 Mequon, WI 53092
 (262) 242-2530
 (262) 242-5042 Fax

TO: SOFD Board
FROM: Fire Chief David L Bialk
DATE: September 10, 2025
SUBJECT: Strategic Plan

Background

At the July 2025 SOFD Board meeting, the fire department’s Strategic Plan was presented for review. Board members were asked to submit any changes to the Fire Chief by July 31st for inclusion in the plan. Input from Board members, fire department command staff, and City and Village administrators was then incorporated into the original Strategic Plan document.

Analysis

Below is a summary of the changes made to the original document. Overall, the revisions focused on extending timelines to make them more realistic, expanding the scope to include additional stakeholders (such as administrators, boards, and councils), removing redundant language, and marking certain items as complete.

◆ Strategic Initiative 1:	People
Category	Key Differences
Staffing Review	Original deadline: 2025; Revision: 2026 (shifted by one year)
Culture Survey	Revision updates wording (e.g., “re-engage” vs. “reassure”) but keeps intent
Skill Training	Revision adds more clarity on “interested individuals” and resource timelines
◆ Strategic Initiative 2:	Operations
Category	Key Differences
Accreditation	Timeframes pushed forward 1–2 years in Revision (2030 → 2032) for longer correction periods
Succession Planning	Deadlines moved from 2025 (Original) to 2026 (Revision); descriptions more job-specific
MATC Collaboration	Identical goals, but Revision formalizes use of regional terms (e.g., “regional enabling agreements”) and adjusts timeline to 2027 (vs. 2026)

◆ Strategic Initiative 3:	Community
Category	Key Differences
Outreach	“Paramedicine program” mentioned in Revision for the first time
Facility Visibility	Timeline moved from 2026 to 2027 in Revision
Business Inspections	Wording modernized slightly, deadlines unchanged except clarity added on proactive management
Senior Living Collaboration	Same actions, but Revision combines and streamlines wording; timeline and intent unchanged
◆ Strategic Initiative 4:	Facilities
Category	Key Differences
Facilities Planning	Some responsibility shared with Deputy Chiefs & Battalion Chiefs in Revision
Benchmarking	Date range updated in Revision
Station Needs	Space needs marked "Complete" in Revision; land acquisition role shifts from Fire Chief → City Administrator
Construction	Start of bidding shifted to 2027 in Revision (vs. 2026 in Original), possibly more realistic
Training Center	Entire schedule delayed by 2 years (starts in 2029 in Revision vs. 2027 in Original)
Governance	Revision includes more detail on operationalizing & marketing the facility
◆ Strategic Initiative 5:	Financial Planning
Category	Key Differences
Legislative Review	Revision pushes back deadlines (from 2025 to 2026–2029), adds more detail on deliverables
Partnerships	Timelines adjusted (Original starts in 2025, Revision starts in 2027); accountability includes both Fire & Deputy Chiefs more clearly in Revision
Compensation Study	Marked “Complete” in Revision; language slightly modernized
Intergovernmental Agreement	Responsibility shifted in Revision from Fire Chief to City & Village Administrators
Resource Sharing	Timeline shifted from 2025/2027 (Original) to 2027/2028 (Revision); aligns with rest of financial planning timeline
Overall Summary	

Area	Summary of Changes
Timelines	Revision pushes several objectives 1–2 years later (accreditation, staffing, construction, legislative advocacy, training center)
Roles & Accountability	Broadened in Revision to include more stakeholders (e.g., administrators, boards, councils)
Clarity & Formatting	Revision modernizes and simplifies some language, reducing redundancy
Completed Tasks	Revision identifies some items as “complete,” showing progress since Original
Terminology	Revision uses slightly more professional/public-sector language (e.g., “operationalize,” “regional agreements”)

Fiscal Impact

The fiscal impact of the adopted Strategic Plan is challenging to summarize, as it involves long-term investments in both personnel and capital purchases.

Recommendation

Staff recommends adoption and implementation of the strategic plan with yearly revision as needed.

Fire Chief David L Bialk

David L Bialk

Southern Ozaukee Fire Department

Southern Ozaukee Fire & Emergency Medical Services Department



2025-2030 Strategic Plan

September 10, 2025

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Executive Summary

The Charge

The Southern Ozaukee Fire & Emergency Medical Service Department (SOFD) was formed on January 1, 2023, to serve the City of Mequon and the Village of Thiensville. An Intergovernmental Agreement provides the framework for the SOFD. A Board of Directors is charged with the governance of the SOFD. Having successfully integrated operations and approved its mission, vision and values, the SOFD engaged in a process to develop a five-year strategic plan. The strategic plan will serve as the organization's guide for the future. Oversight will be the responsibility of the Board of Directors, and execution of the plan will be managed by SOFD's Command Staff.

The Approach

Developing a plan with a multi-tier focus is important. The challenges and opportunities of the Fire & EMS environment suggest the need for five (5) strategic priorities. These priorities were developed through a facilitated, two-day retreat attended by the Board of Directors, representatives from the municipalities served and community leaders. Stakeholder input was critical to the process.

Strategic Priorities

- Exceptional People
- Effective & Efficient Operations
- Community Engagement
- Modern Facilities & Equipment
- Sound Financial Planning

Assessment

A framework will be put in place for assessing progress that emphasizes the measurement of objectives, combining quantitative metrics and qualitative indicators.

Background

The Southern Ozaukee Fire and Emergency Medical Services Department (SOFD) was formed on January 1, 2023, to serve the communities of Mequon and Thiensville. An Intergovernmental Agreement (IGA) provides the framework for the SOFD. Through this merger, the departments have consolidated their equipment and personnel into a single, unified organization. A summary of background information can be found in Appendix A.

The Board of Directors is charged with the governance of the SOFD. In 2023 the Board engaged in a process to define the mission, vision and values of the organization. The process included obtaining input from the SOFD membership and key stakeholders in the community. The Department's Annual Plan for 2025 calls for development of a five-year strategic plan. The strategic plan provides a framework for the integration of strategy, operations and finance, as well as guide the future of this growing Department.

Mission, Vision & Values

Our Mission

The Southern Ozaukee Fire & Emergency Medical Services Department exists to ensure the safety of our communities through fire suppression, response to medical emergencies, professional training and public education. We serve our communities to protect people, property and the environment. We provide our citizens with reassurance, aid and comfort when they are vulnerable.

Our Vision

The Southern Ozaukee Fire & Emergency Services Department will continuously strive to be a trusted community service that is recognized for meeting the needs of our citizens, while being good stewards of our resources. We will be known as a modern department with a professionally trained team that attains best practice standards and ensures a high level of readiness. We will innovate and continuously have an eye to the future.

We will accomplish our vision of a strong combination department by investing in our people, with a workforce of committed career and volunteer team members. We will forge strong partnerships to ensure the safety of the communities we serve.

Our Values

Our culture reflects our shared values, and we have pride in all that we do.

Integrity: We live in accordance with our values, demonstrating sound ethical principles and being honest with ourselves and others.

Trust: We believe that reliability and the strength of our relationships is core to our being. Trust fosters respect, provides safety and earns loyalty.

Empathy: We seek to understand the thoughts, feelings and perspectives of others from their point of view. We show compassion for those who feel vulnerable and suffer a loss.

Grit: We exhibit courage, resolve and selfless devotion to duty.

Excellence: We are professional and exceptional in our skills, continuously striving to improve.

Stewardship: We are responsible in our use of financial and human resources.

Plan Development

The Board of Directors developed a list of individuals to participate in a two-day planning retreat to be held in May of 2025. Those invited included the Board of Directors, SOFD members, as well as municipal and community leaders representing those we serve. Thirty-six (36) individuals were able to commit to the two-day planning event (see Appendix B). In addition to nine interviews that were previously conducted as part of the work to develop our mission, vision and values, five additional individuals were interviewed, including members of the Mequon Common Council, an area Fire Chief and a senior living specialist. To ensure a strong voice in the planning process, two facilitated sessions were held for members of the SOFD. Forty-six (46) members of the Department participated.

Strategic Planning Objectives:

- We will develop a shared understanding of our current state, as well as community and industry changes which will affect service delivery
- We will validate our mission and vision for the future
- We will develop a five-year strategic plan which addresses the key priorities of the SOFD
- We will ensure that our strategic plan aligns with the strategic priorities of the municipalities we serve

Prior to the retreat, participants received a packet of materials which included background materials related to the formation of the SOFD, as well as a profile of the Department's current state. The agenda for the May 1-2, 2025, strategic planning retreat can be found in Appendix C.

Day 1

The stage was set through a learning session that included: An Overview of the History and Formation of SOFD; Trends, Priorities & Challenges of Our Communities; and Current & Future Capabilities of SOFD. At this session, participants reflected on the desired future state of the SOFD and created models for achieving our vision.

Using a collaborative planning model, the following major strategic priorities were identified:

- Retain, train and recruit exceptional people

- Ensure effective and efficient operations by improving our systems and processes
- Enhance our community engagement through strong partnerships, increased visibility and community awareness
- Facilities, equipment and apparatus will be maintained and replaced to ensure a modern department
- Engage in sound financial planning

Day 2

Five table groups were assigned to further develop each of the major strategic priorities. Table groups identified the key objectives to support these priorities, defined outcome measures and determined timeframes.

The strategic plan was then drafted, integrating all input from approximately 100 stakeholders.

Plan Implementation

The approved 2025-2030 SOFD Strategic Plan will be implemented and monitored by the SOFD Board of Directors, the Fire Chief and the Department's Command Staff. Ongoing communications will also occur with both the City of Mequon Common Council and the Village of Thiensville Board of Trustees.

Strategic Priorities

Strategic Initiative #1: People

Objective 1: Create an employee-driven, individualized development plan tailored to both interest and needs

Tactic	Outcome	Accountability	Timeframe
a) Plan professional development process	Individual plans that are documented, implemented, and periodically evaluated	Deputy Chief	2026

Objective 2: Develop a unified culture

Tactic	Outcome	Accountability	Timeframe
a) Conduct internal department assessment of current culture	Data and shared results	Fire Chief	2026
b) Create a culture committee representative of all department members	Recommendations for improvement	Fire Chief	2026
c) Communicate and implement recommendations	Inform staff via clear and concise communications	Fire Chief	2026
d) Re-evaluate/re-engage employees	Data, next steps	Fire Chief	Ongoing

Objective 3: Ensure sufficient personnel to respond to emergencies

Tactic	Outcome	Accountability	Timeframe
a) Review current staffing levels and need for future staffing	Recommendations for current & future staffing	Fire Chief	2026
b) Cost-Benefit Analysis	Complete comprehensive cost-benefit analysis of available options	Fire Chief	2026
c) Determine funding sources; incorporate into annual budget	Funding sources identified	Fire Chief	2026

d) Recruit and hire additional personnel	Hire and on-board staff	Fire Chief	2026
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Objective 4: Establish distinctive skills training tailored to groups that ensures a coordinated team response

Tactic	Outcome	Accountability	Timeframe
a) Determine needs of the SOFD and interested individuals	Identify growth opportunities	Deputy Chief	2026
b) Identify training resources	Specify internal and external resources	Deputy Chief	2027
c) Implement Training	Trained instructors, adequate equipment, trained personnel	Deputy Chief	Ongoing

Objective 5: Establish leadership & soft skills training

Tactic	Outcome	Accountability	Timeframe
a) Determine needs of the SOFD	Identify growth opportunities	Fire Chief	2026
b) Identify training resources on leadership development	Specify resources	Fire Chief	2026
c) Implement leadership training	Group classes and a trained staff	Fire Chief	Ongoing

Objective 6: Partner with educational institutions and formalize agreements that improve hiring pipeline and retention strategies for the Department

Tactic	Outcome	Accountability	Timeframe
a) Develop formal agreements	Agreements with colleges for dual credit, reduced tuition or reimbursement	Fire Chief	2028
b) Shared resources are identified and utilized	Create shared resources like training facilities, housing at CUW	Fire Chief	2028
c) Create community support for aspiring employees	Work with local foundations to create scholarships & programs	Fire Chief	2028

Strategic Initiative #2: Operations

Objective 1: Utilize accreditation process to self-assess strengths, weaknesses, and requirements

Tactic	Outcome	Accountability	Timeframe
a) Utilize Center for Public Safety Excellence Self-Assessment Guide to review accreditation process	SOFD is fully accredited with zero deficiencies	Deputy Chief	2030
b) Identify deficiencies that can be corrected in 12 months or less	Plan established within current budget to correct deficiencies identified in accreditation report	Deputy Chief	2031
c) Identify deficiencies that can be corrected within 12-24 months	Plan established with future budget allocations necessary to correct deficiencies identified in accreditation report	Deputy Chief	2032

Objective 2: Advance technology integration and processes to optimize response times

Tactic	Outcome	Accountability	Timeframe
a) Reduce response times by utilizing CAD and incorporating concepts into future development plans and infrastructure	Additional duty of Technology Integration established, and program established to use AI, CAD and other technological advances to reduce response times	Deputy Chief	2027
b) Develop technology training for current and future equipment and processes	SOFD personnel can operate and maintain all technological equipment and data entry	Deputy Chief	2027

c) Create a data repository that tracks response times, current and future population trends, and other data that helps SOFD meet current and future needs and response times	Capture data, trends and conduct analysis of SOFD's current state, and project where SOFD needs to be in five years	Deputy Chief	2027
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Objective 3: Establish protocols for succession planning

Tactic	Outcome	Accountability	Timeframe
a) Develop staffing plan that includes organizational chart and job position descriptions	Collectively detail the structure, roles, and staffing levels	Fire Chief	2026
b) Establish training and leadership development plan for succession and promotion	Each member has a career progression plan in place and is trained to assume the next higher level of position, responsibility	Fire Chief	2026
c) Create detailed job descriptions for each position so members can assume the activities of a supervisor/manager	Permit subordinates the ability to assume leadership positions in case of unforeseen leadership vacancies	Fire Chief	2026

Objective 4: Leverage regional enabling agreements (e.g., MOU, IGA) to align education & training needs with curricula offered by MATC, etc.

Tactic	Outcome	Accountability	Timeframe
a) Produce list of required classes which are to be provided at MATC	County-wide agreement with MATC to facilitate and guarantee classes semi-annually to meet Fire & EMS needs	Fire Chief	2027
b) Develop county-wide list of personnel requiring classes at MATC for Fire & EMS employment or continuing education	A county-wide list developed to showcase the need to MATC for classes to be added to schedule each semester	Fire Chief	2027

Strategic Initiative #3: Community

Objective 1: Enhance the community's ability to increase personal safety and reduce risk

Tactic	Outcome	Accountability	Timeframe
a) Connect with community in non-emergency settings to reduce emergency calls	Provide preventive, follow-up care, and non-emergency services	EMS Chief	2026
b) Implement a multi-faceted community outreach program (e.g., paramedicine program)	Create databases to track outreach efforts (e.g., schools, parades, local functions, social media)	CRR Chief	2027
c) Make state of current facilities visible in the community	Host adult ride-alongs, citizen Fire/EMS academy, birthday parties	CRR Chief	2027

Objective 2: Promote prevention and safety by conducting thorough inspections of businesses to ensure compliance and minimize risk

Tactic	Outcome	Accountability	Timeframe
a) Make this a positive activity	Highlight successful inspections, create business ambassadors	CRR Chief	2027
b) Manage the inspection process	Share data w/ City and Village permit systems	CRR Chief	2027
c) Create proactive ways to manage inspections	Create best practice tip sheet for the community	CRR Chief	2026

Objective 3: Collaborate with senior living facilities, and train their staff to review practices

Tactic	Outcome	Accountability	Timeframe
a) Review current senior living facility practices	Review care facility call volume data	Deputy Chief	2027
b) Assess data and develop appropriate plan	Review of data from care facilities use of 911	Deputy Chief	2028
c) Develop and implement education plan	Address highest calls, fall prevention, 911 calling	Deputy Chief	2029
d) Re-assess data and modify plans as needed	Determine impact(s) on 911 service	Deputy Chief	2030

Strategic Initiative #4: Facilities

Objective 1: Develop and prioritize partnerships for facility use and development

Tactic	Outcome	Accountability	Timeframe
a) Ensure future station locations are scalable to long-term needs (e.g., community growth, future consolidation?)	Station location(s) meet current and future needs based on long-term plans	Fire Chief	2026
b) Examine opportunities for equipment sharing, joint purchasing, etc.	Coordinate with other agencies to share and maintain excess equipment	Fire Chief	2026
c) Determine training needs, props to be incorporated into any new facilities (e.g., firearms range)	New facility has adequate land and building space for training facilities and/or training props	Fire Chief	2026
d) Complete benchmarking analysis of size & cost of other area public facility construction projects	Inventory of area police & fire facility projects from 2010 - present	Fire Chief	2026
e) Determine other community needs to be or that can be accommodated within new facilities (e.g., Interfaith Caregivers)	Examine opportunities for partnerships, service-sharing with other agencies, not-for-profits, etc.	Fire Chief, Deputy Chief, Battalion Chiefs	2026

Objective 2: Conduct analysis of future station(s) needs & requirements

Tactic	Outcome	Accountability	Timeframe
a) Space needs analysis	Contract firm to conduct analysis of space needs for SOFD	Fire Chief	Complete

b) Determine combined Police/Fire building or stand-alone facilities	Analyze feasibility of a combined public safety center based on available space, needs, cost, response times, etc.	City of Mequon, Village of Thiensville, SOFD Board, etc.	2026
c) Station location analysis	Complete analysis of response times to determine general geographic areas suitable for future station locations	Fire Chief	2026
d) Update inventory of potential sites	Evaluate and determine appropriate sites for further (cost-benefit) analysis	Fire Chief	2026
e) Cost-benefit analysis	Complete comprehensive cost-benefit analysis of available options	Fire Chief	2026
f) Land acquisition	Negotiate, finance and acquire any identified real estate needed for future station construction	City Administrator	2026

Objective 3: Construct/renovate facilities

Tactic	Outcome	Accountability	Timeframe
a) Engage architectural, engineering, other firms as needed	Professional firms engaged to prepare detailed design documents for approval, bidding	Fire Chief	2026
b) Designate internal project team	Project team consisting of representatives from Mequon and Thiensville established	Fire Chief	2026

c) Approve design	Design(s) approved by City, Village, SOFD Board	Fire Chief	2026
d) Finalize project financing	Prepare for and secure debt-issued financing based on approved cost-sharing formula between City, Village & SOFD	Fire Chief	2026
e) Bid project(s)	Project(s) competitively bid for award	Fire Chief	2027
f) Award contracts	Construction contract(s) awarded to low responsible bidder(s)	Fire Chief	2027
g) Manage project & construct facility(s)	Construction management firm & project team oversee facility construction, completion	Fire Chief	2027

Objective 4: Plan regional training center for Fire, EMS & other potential agencies/partners

Tactic	Outcome	Accountability	Timeframe
a) Determine interest & key stakeholders	Solicit interest from area agencies (e.g., police, fire, public works, utilities, etc.) and confirm participants	Fire Chief	2029
b) Site selection/facility	Evaluate and determine appropriate sites for further analysis; complete comprehensive cost-benefit analysis of available options; negotiate, finance and acquire identified real estate needed for future facility	Fire Chief	2029

c) Determine funding sources	Establish financing formulas for facility construction and ongoing operations among project participants; identify available grant funding opportunities to offset initial or ongoing costs	Fire Chief	2029
d) Establish governing structure	Develop intergovernmental agreement, by-laws, operating budget and other documents to specify how facility will be operated	Fire Chief	2030
e) Design-bid-construct	Professional firms engaged to prepare detailed design documents for approval, bidding; competitively bid for award; construction management firm & project team oversee facility construction, completion	Fire Chief	2030
f) Operationalize & market facility availability	Fully outfit newly constructed/remodeled facility for operational use & training; develop materials and market availability of facility to other agencies in region	Fire Chief	2031

Strategic Initiative #5: Financial Planning

Objective 1: Advocate for legislative review of funding

Tactic	Outcome	Accountability	Timeframe
a) Meet with other County departments to determine position/funding needs/goals	Identify unified goals/narratives	Fire Chief	2026
b) Draft and disseminate formal deliverable (position letter, funding analysis)	Communicate funding needs effectively to appropriate officials	Deputy Chief	2027
c) Seek support from external organizations (e.g., League of Wisconsin Municipalities, other organizations to assist)	Build regional or statewide support	Fire Chief	2028-2029

Objective 2: Create financial partnerships

Tactic	Outcome	Accountability	Timeframe
a) Identify goals and explore partnership opportunities internally and externally	Create list of viable financial partnership options; identify internal opportunities; coordinate discussions with other departments for ideas or larger opportunities	Fire Chief, Deputy Chief	2027
b) Identify potential partners and initiate contact	Begin partnership discussions	Fire Chief	2028
c) Negotiate terms with selected partners	Finalize partnership agreement(s)	Fire Chief	2030

Objective 3: Conduct personnel compensation study

Tactic	Outcome	Accountability	Timeframe
a) Review current compensation study and determine if an internal or external update is needed	Define scope and process	Fire Chief	Complete

b) Identify reasonable party to conduct the review (internal staff or external via RFP)	Assign lead for project	Fire Chief	2025
c) Complete study	Final document	Fire Chief	2025
d) Implement recommendations	Implement compensation recommendations into future budget cycles	Fire Chief	2025

Objective 4: Negotiate future intergovernmental agreement

Tactic	Outcome	Accountability	Timeframe
a) Ascertain desire of communities to continue	SOFD/Board/Council directive to negotiate renewal	City & Village Administrators	2026
b) Establish capital funding plan for apparatus, equipment and facilities	Multi-year (5-10) capital budget	City & Village Administrators	2026-2031
c) Explore financing options (bonding, levy, service fees, impact fees, fundraising, municipal funding formulas)	Develop sustainable funding sources/formulas	City & Village Administrators	Ongoing

Objective 5: Resource sharing with neighboring departments

Tactic	Outcome	Accountability	Timeframe
a) Meet with other departments in County to determine and understand shared needs and opportunities	Identify key contacts, list of resources and potential efficiencies	Deputy Chief	2027
b) Negotiate formal resource-sharing agreements with other departments and/or County	Final agreement	Fire Chief	2028

APPENDIX A

Background Information of the Southern Ozaukee Fire Department

The background information provided will offer an overview of the Southern Ozaukee Fire & Emergency Medical Services Department (SOFD), including a brief history of the organization. It will also cover the Department's facilities, staffing structure, personnel, call volume, and budget.

History

On January 1, 2023, the City of Mequon and the Village of Thiensville Fire Departments officially merged to form the Southern Ozaukee Fire & Emergency Medical Services Department (SOFD). Both fire departments boast a long history of dedicated service to their communities, with a combined total of nearly 250 years of experience. Through this merger, the departments have consolidated their equipment and personnel into a single, unified organization. The new department operates with a mix of career staff and Paid-on-Call (POC) members, ensuring a swift response to emergency medical calls, fire incidents, vehicle accidents, and other situations requiring urgent assistance. Included are the original Intergovernmental Agreement between the two communities, along with two subsequent amendments.

Facilities

The Southern Ozaukee Fire & Emergency Medical Services Department is responsible for responding to fire and EMS calls within a 49-square-mile area. The Department primarily operates from two fire stations: Station 1, located at 11300 N. Buntrock Avenue in Mequon, and Station 2, located at 11800 N. Port Washington Road in Mequon. Additionally, Station 3, situated at 250 Elm Street in Thiensville, is specifically designated for water-related incidents on the Milwaukee River and Lake Michigan. While personnel are assigned to Stations 1 and 2, Station 3 is staffed on an as-needed basis for water rescue operations and does not have permanent personnel assigned.

Station 1 (11300 N. Buntrock Avenue)

1. Administrative Offices
2. Equipment
 - Two fire engines
 - Ladder truck
 - Tender truck
 - Two ambulances
 - Brush fire truck
 - Special operations truck
 - First responder car (Med 9)
 - Battalion Chief vehicle
3. Five bunk rooms
4. Kitchen and living quarters

Station 2 (11800 N. Port Washington Road)

1. Equipment
 - One fire engine
 - Ladder truck

- Tender truck
 - Two ambulances
2. Five bunk rooms
 3. Kitchen and living quarters

Station 3 (250 Elm Street in Thiensville)

1. Equipment
 - Rigid hull boat
 - Inflatable boat
 - Utility truck

Staffing

Administrative work is done by the Fire Chief, Deputy Chief, three Battalion Chiefs, and an Administrative Assistant. The Fire Chief and Deputy Chief are responsible for overseeing all departmental operations, personnel, and resources. They manage emergency response strategies, ensure firefighter safety, coordinate training programs, develop policies, and collaborate with local officials on budgeting and resource allocation. Additionally, due to the staffing model at SOFD, many day-to-day operations, including inspections and responses to EMS and fire calls, are critical and essential. The Administrative Assistant, working part-time, handles all accounts receivable and payable, personnel onboarding, employee enrollment in various programs, processing inspection fees, payroll, and addressing inquiries related to ambulance billing. The Administrative Assistant, alongside a Battalion Chief, is also responsible for making journal entries in the accounting software.

Staffing for EMS calls are scheduled for 24-hour coverage. The current goal for staffing is seven staff members on the schedule per day, as follows:

Station 1 (11300 N. Buntrock Avenue)

- Battalion Chief
- 2 EMTs staffing an ambulance
- 1 EMT staffing first responder vehicle

Station 2 (11800 N. Port Washington Road)

- 2 EMTs staffing an ambulance
- 1 EMT staffing first responder vehicle

Of the seven positions assigned daily, two must be staffed by paramedics, with the remaining positions filled by firefighter EMTs or EMTs. In 2023 and 2024, the Department was able to fill nearly all of the required coverage hours, with a shortfall of approximately 1% or about 1,000 hours out of the 60,000 hours needed.

The training requirements for EMS personnel vary significantly depending on their certification level. Currently, EMT-Basic certification requires 144 hours of training, while EMT-Advanced certification demands an additional 180 hours of training, along with clinical experience. Paramedic certification requires over 1,000 hours of training and clinical time.

Personnel

SOFD is a combination department with both full-time and paid-on-call (POC) positions.

1. Full-time
 - Fire Chief
 - Deputy Chief
 - Battalion Chiefs (3)
 - Administrative Assistant (26 hours/week)
 - Paramedic/Firefighters (9)

2. Paid-On-Call
 - The remaining scheduled EMS positions are staffed with POC members

Paid-on-Call (POC) members receive \$3.00 per hour on weekdays and \$7.00 per hour on weekends for being "on call" for EMS services. When responding to an EMS call, they are compensated at an hourly rate ranging from \$28 to \$36, depending on experience. In addition to the POC structure, the Department also utilizes a Paid-On-Premises (POP) program to fill vacant paramedic shifts. Under this program, at least one paramedic is assigned to each side of the City. POP members are paid \$34 per hour and do not receive additional compensation for responding to calls. Firefighters are not scheduled for on-call shifts. They respond to fire calls as needed and are compensated with an hourly rate. All firefighters are required to complete a minimum of 60 hours of Fire 1 certification training.

Call Volume

When combined, the Mequon and Thiensville Fire Departments (now SOFD) have seen double digit increases in call volume over the last 10 years. Calls for service in 2024 were 3,948 calls. See the Department's 2024 Annual Report for more details.

Budget

The SOFD budget for 2025 is \$3,721,465, with 49% of the budget derived from revenue and the remaining 51% funded through tax levies from the two communities. The majority of revenue is generated through ambulance transport. Contributions from each community are established by the intergovernmental agreement, with Mequon contributing 84.43% and Thiensville contributing 15.57%.

Additionally, the SOFD maintains a separate capital fund for future needs. Mequon currently contributes \$110,000 annually, while Thiensville contributes \$20,285. As of January 1, 2025, the capital account fund balance stands at \$930,000.

APPENDIX B

Strategic Planning Participants

Chris Anderson
Brenda Arnett
Gregg Bach
David Bialk
Melissa Bleidorn
Nick Boehlke
Amy Boll
Jeremiah Bradley
Doug Chimenti
Mackenzie Haase
Mike Homme
William Jones
Matthew Joynt
Curt Kleppin
Christy Knowles
Andy LaFond
Colleen Landisch-Hansen
Rick Lemke
Kristen Lundeen
Dale Mayr
Van Mobley
Chas Neman
Andrew Nerbun
Carl Peluso
Mark Riley
John Rosing
Brian Sajdak
Kathleen Schneider
Justin Schoenemann
Lindsay Scholz
Jason Staszko
Lynn Streeter
Steven Taylor
Kim Tollefson
Jeff Vahsholtz
John Wirth

Appendix C

Southern Ozaukee Fire & Emergency Services Department (SOFD) Strategic Planning Agenda May 1-2, 2025

Objectives

- We will develop a shared understanding of our current state, as well as community and industry changes which will affect service delivery
- We will validate our mission and vision for the future
- We will develop a five-year strategic plan which addresses the key priorities of the SOFD
- We will ensure that our strategic plan aligns with the strategic priorities of the municipalities we serve

Day 1

Welcome, Opening Reflection and Overview

Mequon Mayor *Andrew Nerbun* & Thiensville President *John Rosing*

Trends, Challenges and Priorities of our Community

Mequon Administrator *Will Jones* & Thiensville Administrator *Colleen Landisch-Hansen*

SOFD Current Capabilities and Future Trends

Chief *David Bialk*, Battalion Chief *Amy Boll*, Battalion Chief *Rick Lemke*

Assignment 1: Synthesize Our Learning, Our Opportunities

Assignment 2: Designing Our Future State

Day One Closing Remarks

Reception

Day 2

Hot Breakfast Buffet

Opening Discussion

Assignment 3: Identification of Strategic Priorities and Initiatives

Assignment 4: Defining Success: what, how and when

Retreat Conclusion & Thank You

Andrew Nerbun

**Southern Ozaukee Fire Department
Workplan 2025**

Project	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Finalize Employee Handbook (Holdover 2024)												
Finalize Financial Polices (Holdover 2024)												
Hire 1 Fulltime FF/Paramedic (Done)			Complete									
Review Capital Equipment and Funding												
Recruit for and Hire a Deputy Chief (Done)			Complete									
Provide Management Training for Command Staff (Done)					Complete							
Create an Acting Battalion Chief Handbook (Done)												
Provide Training on EMS Documentation (Done)			Complete									
Amend IGA for Building Usage												
Create 2026 Budget (Done)								Complete				
Create Strategic Plan (Done)				Complete								
Create a Fire Commission Handbook												