



**Southern Ozaukee Fire &
EMS Board
AGENDA**

Date:
Wednesday, January 14, 2026

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. November 12, 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. Preliminary Year End Budget Report 2025 (att)

VI. OPERATIONS

- A. Preliminary Year End Statistics (att)
- B. Lexipol Policy & Procedure Implementation (att)
- C. Strategic Plan Update (att)
- D. Community EMS Program (att)
- E. Bi-Monthly Update

VII. MOTION TO ADJOURN TO CLOSED SESSION

A. Closed Session - Review Personnel Evaluation of the Fire Chief: The Board may convene into closed session pursuant to Wis. Stat. § 19.85(1)(c), considering employment, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility and then may reconvene into open session to take such action as deemed appropriate.

VIII. MOTION TO RECONVENE IN OPEN SESSION

IX. NEXT MEETING

- A. March 11, 2026

X. ADJOURNMENT

Colleen Landisch-Hansen, Village Clerk

January 9, 2026

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, November 12, 2025

LOCATION: 250 Elm Street, Thiensville,
WI

TIME: 5:30 PM

I. CALL TO ORDER

Mayor Nerbun called the meeting to order at 5:30 PM.

II. ROLL CALL

Mequon

Mayor Andrew Nerbun

Administrator Will Jones

Alderman Gregg Bach (Not Present)

Alderman William Gebhardt

Citizen Lynn Streeter

Thiensville

President John Rosing

Trustee Kristina Eckert

Administrator Colleen Landisch-Hansen

Citizen Doug Chimenti (Excused)

Alternate Trustee David Lange

III. APPROVAL OF MINUTES

A. September 10, 2025 (att)

MOTION to Approve by President Rosing **SECONDED** by Seconded by Citizen Streeter. **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 Discussion of 3rd Quarter Financial Report (att)

Chief Bialk introduced Jessica Wolff, the new City of Mequon Assistant Administrator & Human Resources Director.

Chief Bialk summarized the third-quarter financial report.

VI. CAPITAL

A. Discussion Regarding Ladder Truck Sale Update (att)

Chief Bialk gave a final update on the department's ladder truck sale. The ladder truck was sold for \$321,000, which is a good deal compared to market prices and the originally offered amount of \$130,000 from the City of Cedarburg.

B. Review and Action Regarding a Replacement Ambulance Purchase (att)

Chief Bialk gave a summary of the current ambulance fleet and noted the age of each ambulance.

There is a two-year production lead time; one new ambulance is expected to arrive in 2026 and the other in 2028.

President Rosing inquired about which vendor produced the chassis and which frame is easier to maintain.

Chief Bialk replied that the department mechanic prefers Ford trucks for servicing.

Alderman Gebhardt inquired about the projected 2025 mileage for the older ambulances.

Chief Bialk reported that specific numbers were not available, but the older ambulances are dispatched third or fourth in the rotation, resulting in limited use.

Administrator Jones inquired which ambulance was intended to be replaced first.

Chief Bialk explained that the intention is to replace the 2017 vehicle due to higher mileage. When the second new ambulance arrives, the fleet will be reduced to 4, based on the mechanic's assessment of which vehicles pose the greatest maintenance challenges.

Chief Bialk noted that the resolution for the ambulance purchase will go before the Mequon City Council and Village Board for approval.

MOTION to Approve a Replacement Ambulance Purchase by President Rosing **SECONDED** by Alderman Gebhardt. **MOTION CARRIED UNANIMOUSLY.**

Aye: 5

No: 0

Abstain: 0

ROLL CALL VOTE

Aye: Nerbun, Streeter, Gebhardt, Rosing, Eckert

No: None

MOTION CARRIED UNANIMOUSLY

C. Discussion Regarding Financial Software Change

Administrator Landisch-Hansen explained that about two years ago, the Village of Thiensville converted to BS&A for accounting software and has been happy with the results. The software is Cloud-based, scales well for smaller organizations, and would address prior issues identified in previous SOFD audits. The department will be utilizing BS&A starting in the 2026 fiscal year.

Trustee Lange Arrived at 5:52 PM.

VII. OPERATIONS

A. Review and Action Regarding Revisions to the Southern Ozaukee Fire & EMS Department Employee Manual (att)

Deputy Chief Boehlke explained that the updates primarily relocate existing provisions to the appropriate sections and correct issues that created challenges in onboarding due to unclear or contradictory verbiage.

Verbiage related to full-time PTO, sick, and paid-on-call time was revised for clarity. The sick leave policy was in place, the language was updated to better explain it's application.

Chief Bialk explained that full-time exempt employees use PTO, while frontline members use vacation and sick leave.

Deputy Chief Boehlke noted that the revisions also formally add a definition for active status. This status had existed, but it had not previously been included in the manual. The definition was developed collaboratively by prior union leadership and management to accurately reflect the available membership; individuals who no longer meet the criteria are no longer considered active.

Trustee Gebhardt inquired if the updated manual had been reviewed by an attorney.

Deputy Chief Boehlke confirmed that the manual had been attorney-reviewed.

Citizen Streeter asked for confirmation that the nature of the changes to the manual was for the purposes of clarity and that the only new policy added was medical leave.

Deputy Chief Boehlke replied that the practices outlined were already in effect and are now formally documented.

Citizen Streeter noted that PTO was now common in most industries and asked whether the distinction between PTO, vacation, and sick leave is common in other departments and municipalities.

Administrator Landisch-Hansen shared that the distinction is one present in the Village of Thiensville and about half of the municipalities in the state.

Administrator Jones noted that the City of Mequon police union operates similarly regarding paid time off and has been resistant to changing it.

MOTION to Approve Revisions to the Southern Ozaukee Fire & EMS Department Employee Manual by Alderman Gebhardt **SECONDED** by President Rosing. **MOTION CARRIED UNANIMOUSLY.**

Aye: 6

No: 0

Abstain: 0

B. Discussion Regarding Lexipol Implementation

Chief Biak explained that consultant Chris Bell recommended Lexipol and that Deputy Chief Boehlke has prior experience working with the company.

Deputy Chief Boehlke noted that Lexipol provides policy management, training, and wellness support with a focus on risk management. Lexipol will assist with policy reviews to ensure appropriate risk management. Any proposed changes will come back to the Board for approval before implementation.

C. Review and Action Regarding the Intergovernmental Cooperation Agreement for Fire Service Mutual Aid in Ozaukee County (att)

Chief Bialk reported that each department previously operated under an agreement, but the department names are now outdated. At the recommendation of City of Cedarburg Chief a new agreement was drafted and extensively reviewed to ensure appropriate responsibility.

MOTION to approve the Intergovernmental Cooperation Agreement for Fire Service Mutual Aid in Ozaukee County by Citizen Streeter **SECONDED** by Alderman Gebhardt. **MOTION CARRIED UNANIMOUSLY.**

Aye: 6

No: 0

Abstain: 0

D. Review and Action Regarding the 2026 Meeting Schedule (att)

Chief Bialk inquired whether six meetings are necessary, as previously done, or if five meetings are acceptable. The Department intergovernmental agreement requires one meeting per quarter, and the July meeting could be eliminated if desired.

The Board agreed to schedule five meetings for 2026.

MOTION to Approve the 2026 Meeting Schedule by President Rosing **SECONDED** by Trustee Eckert. **MOTION CARRIED UNANIMOUSLY.**

Aye: 6

No: 0

Abstain: 0

E. Bi-Monthly Update

Chief Bialk gave the bi-monthly update.

VIII. GOVERNANCE

A. 2025 Workplan Update and Action Items (att)

Chief Bialk summarized the current status of the work plan and action items.

Citizen Streeter noted that it has been four months since support for exploring the paramedicine program was approved and inquired when the Board could expect a more detailed report.

Chief Boehlke answered that a report could be given in the January meeting. The pace of exploration has been slower than expected, but more substantial progress is planned for January.

B. Review and Action Regarding the 2026 Workplan (att)

MOTION to Approve the 2026 Workplan by President Rosing **SECONDED** by Trustee Lange. **MOTION CARRIED UNANIMOUSLY.**

Aye: 6

No: 0

Abstain: 0

IX. MOTION TO ADJOURN TO CLOSED SESSION

MOTION to Adjourn to Closed Session at 6:26 PM by President Rosing **SECONDED** by Alderman Gebhardt. **MOTION CARRIED UNANIMOUSLY.**

Aye: 6

No: 0

Abstain: 0

ROLL CALL VOTE

Aye: Nerbun, Streeter, Gebhardt, Rosing, Eckert, Lange

No: None

MOTION CARRIED UNANIMOUSLY

A. Review Personnel Evaluation of the Fire Chief: The Board may convene into closed session pursuant to Wis. Stat. § 19.85(1)(c), considering employment, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility and then may reconvene into open session to take such action as deemed appropriate.

X. MOTION TO RECONVENE IN OPEN SESSION

MOTION to Reconvene in Open Session at 6:36 PM by President Rosing **SECONDED** by Trustee Eckert. **MOTION CARRIED UNANIMOUSLY.**

Aye: 6

No: 0

Abstain: 0

XI. NEXT MEETING

A. January 14, 2026

XII. ADJOURNMENT

MOTION to Adjourn at 6:36 PM by President Rosing **SECONDED** by Citizen Streeter. **MOTION CARRIED UNANIMOUSLY.**

Aye: 6

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 Commission
FROM: Fire Chief David L Bialk
DATE: January 14, 2026
SUBJECT: Preliminary Year End Budget Report 2025

Background

The 2025 SOFD budget totaled \$3.57 million and was structured with a significant reliance on revenues, which accounted for 49% of the budget, while the remaining 51% was supported by the tax levy. Staffing remained a key focus in 2025, with the budget allocating funds for the hiring of an additional full-time firefighter/paramedic midway through the year, which was successfully accomplished. The budget also absorbed a 15% increase in health insurance costs.

Analysis

As of December 31, 2025, 91% of the expenditure side of the budget had been expensed. At year-end, four days of salary remained to be paid from the 2025 budget, along with less than \$90,000 in outstanding commodity expenses. Even after accounting for these final expenditures, the budget is still projected to close the year with a surplus.

The largest revenue generator for the SOFD continues to be ambulance transports. As of December 31, 2025, the SOFD transported 2,068 patients to the hospital, which is 120 fewer transports than in 2024. Despite the reduction in transport volume, total gross charges for 2025 totaled \$3.199 million, nearly identical to 2024's total of \$3.180 million. The SOFD continues to work closely with its billing company to maximize transport revenues.

Attached are the year-end revenue and expenditure charts of accounts. The revenue account currently reflects 100.71% of budgeted revenues, while expenditures stand at 91% expended.

Fiscal Impact

At this time, the 2025 SOFD budget is projected to come in under budget. Expenditures have been slightly lower than anticipated, and revenues are aligning with expectations. A final review of the budget will not be completed until February; however, the SOFD is projected to end the year with an estimated surplus of approximately \$200,000.

Recommendation

No action is recommended at this time. Staff is awaiting completion of the audit process in early February to finalize budget figures.

Fire Chief David L Bialk

David L Bialk

Southern Ozaukee Fire Department

Southern Ozaukee Fire and EMS Department
Budget vs. Actuals: Budget_FY25_P&L - FY25 P&L Revenue
 January - December 2025 *Preliminary Numbers

	Total			
	Actual	Budget	over Budget	% of Budget
Revenue				
43000 Intergovernmental Revenues			0.00	
43210 Federal Grant (ARPA Local Recovery Funds)		0.00	0.00	
43420 Fire Insurance Dues (2%)	284,920.51	277,000.00	7,920.51	102.86%
43430 EMS Funding Assisting Program	97,728.96	17,358.00	80,370.96	563.02%
43440 Cedarburg Overwatch	83,000.00	62,000.00	21,000.00	133.87%
Total 43000 Intergovernmental Revenues	\$ 465,649.47	\$ 356,358.00	\$ 109,291.47	130.67%
44000 Permits & Licenses			0.00	
44300 Building Inspection (Fire Fees)		0.00	0.00	
44305 Building Permits		4,000.00	-4,000.00	0.00%
44900 Burn Permits	7,440.00	8,000.00	-560.00	93.00%
Total 44000 Permits & Licenses	\$ 7,440.00	\$ 12,000.00	-\$ 4,560.00	62.00%
46000 Public Charges for Services	2,000.00		2,000.00	
46220 Fire Inspections (Annual)	17,640.00	22,000.00	-4,360.00	80.18%
46225 False Alarms	11,100.00	7,500.00	3,600.00	148.00%
46226 Community Education CPR	3,150.00	10,700.00	-7,550.00	29.44%
46230 Ambulance Fees	1,262,395.36	1,354,971.00	-92,575.64	93.17%
46231 Accident Fees	19,959.06	18,000.00	1,959.06	110.88%
Total 46000 Public Charges for Services	\$ 1,316,244.42	\$ 1,413,171.00	-\$ 96,926.58	93.14%
47000 Government Contracts/Charges for Service			0.00	
47320 Municipality Service Contracts			0.00	
47321 City of Mequon	1,478,821.00	1,478,821.00	0.00	100.00%
47322 Village of Thiensville	272,714.00	272,714.00	0.00	100.00%
Total 47320 Municipality Service Contracts	\$ 1,751,535.00	\$ 1,751,535.00	\$ 0.00	100.00%
Total 47000 Government Contracts/Charges for Service	\$ 1,751,535.00	\$ 1,751,535.00	\$ 0.00	100.00%
48000 Miscellaneous Revenue			0.00	
48100 Interest Income	52,970.28	38,117.00	14,853.28	138.97%
48500 Donations	2,563.00		2,563.00	
Total 48000 Miscellaneous Revenue	\$ 55,533.28	\$ 38,117.00	\$ 17,416.28	145.69%
Total Revenue	\$ 3,596,402.17	\$ 3,571,181.00	\$ 25,221.17	100.71%

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Southern Ozaukee Fire and EMS Department
Budget vs. Actuals: Budget_FY25_P&L - FY25 P&L Operations
 January - December 2025 *Preliminary Numbers

Expenditures	Total			
	Actual	Budget	over Budget	% of Budget
51000 Contractual Services			0.00	
51500 Legal Fees	831.50	10,000.00	-9,168.50	8.32%
51550 Audit Services	19,755.75	17,500.00	2,255.75	112.89%
51600 IT Services	27,782.77	25,000.00	2,782.77	111.13%
51650 Billing Services	66,808.41	81,298.00	-14,489.59	82.18%
51700 Advertising/Promotional	682.76	1,000.00	-317.24	68.28%
51900 Misc Contracted Services	24,346.00	21,000.00	3,346.00	115.93%
Total 51000 Contractual Services	\$ 140,207.19	\$ 155,798.00	-\$ 15,590.81	89.99%
54000 Personnel Services			0.00	
54100 Dues & Subscriptions	4,741.58	2,000.00	2,741.58	237.08%
54200 Meetings & Conferences	3,653.10	2,200.00	1,453.10	166.05%
54300 Training	34,103.87	33,000.00	1,103.87	103.35%
54400 Uniforms	16,235.43	35,000.00	-18,764.57	46.39%
54500 Books & Periodicals	611.52	1,500.00	-888.48	40.77%
54600 Pre-Employment Examinations	19,039.50	4,500.00	14,539.50	423.10%
54700 Recruitment		0.00	0.00	
Total 54000 Personnel Services	\$ 78,385.00	\$ 78,200.00	\$ 185.00	100.24%
55000 Commodities			595.49	
55100 Office Supplies	1,179.84	1,200.00	-20.16	98.32%
55200 Telephone	10,898.35	14,500.00	-3,601.65	75.16%
55300 Printing/Copy Machine Supplies	521.73	1,500.00	-978.27	34.78%
55400 Postage	430.48	500.00	-69.52	86.10%
55450 Bank Fees	40.00		40.00	
55700 Work Supplies	110,673.71	92,000.00	18,673.71	120.30%
55800 Utilities	1,181.96		1,181.96	
Total 55000 Commodities	\$ 125,521.56	\$ 109,700.00	\$ 15,821.56	114.42%
56000 Maintenance			0.00	
56100 Building Maintenance	1,764.37	1,000.00	764.37	176.44%
56200 Truck Maintenance	67,941.90	40,000.00	27,941.90	169.85%
56250 Vehicle Maintenance (DPW)	16,535.29		16,535.29	
56260 Vehicle Maintenance Labor (DPW)	57,578.68	58,664.00	-1,085.32	98.15%
56300 Fuel	26,139.27	32,000.00	-5,860.73	81.69%
56400 Equipment Repairs/Small Tools	13,804.92	40,000.00	-26,195.08	34.51%
56600 Radio Maintenance	7,819.00	0.00	7,819.00	
Total 56000 Maintenance	\$ 191,583.43	\$ 171,664.00	\$ 19,919.43	111.60%
57000 Insurance			0.00	
57100 Liability Insurance	34,314.25	43,566.00	-9,251.75	78.76%

57200 Vehicle Insurance	16,695.00	21,596.00	-4,901.00	77.31%
57300 Workers Compensation Insurance	50,943.75	55,354.00	-4,410.25	92.03%
57400 Property Insurance		2,582.00	-2,582.00	0.00%
57500 EAP	6,000.00	6,000.00	0.00	100.00%
57600 Cyber Crime Insurance	2,191.00	0.00	2,191.00	
57700 Accident Insurance	5,489.00	0.00	5,489.00	
57800 Crime Insurance	785.00	0.00	785.00	
Total 57000 Insurance	\$ 116,418.00	\$ 129,098.00	-\$ 12,680.00	90.18%
670100 Personnel Wages			0.00	
670101 Regular Employees-Salary, FT, PT	1,067,092.33	1,437,894.00	-370,801.67	74.21%
670150 EMS Call Wages	224,820.88	349,047.00	-124,226.12	64.41%
670151 Fire Call Wages	144,304.99	145,024.00	-719.01	99.50%
670160 Station Work Wages	16,250.00		16,250.00	
670161 Vehicle Inspection Wages	8,217.35	19,500.00	-11,282.65	42.14%
670162 Training Wages	55,123.28	100,000.00	-44,876.72	55.12%
670171 On Call Hours Wages	109,071.51	129,582.00	-20,510.49	84.17%
670173 Paramedic POP	405,840.64	76,438.00	329,402.64	530.94%
670175 Employee on Premise Wages	54,947.04		54,947.04	
Total 670100 Personnel Wages	\$ 2,085,668.02	\$ 2,257,485.00	-\$ 171,816.98	92.39%
673100 Fringe Benefits			0.00	
673101 Social Security			0.00	
673103 FICA	158,738.87	172,698.00	-13,959.13	91.92%
673105 WRS	196,768.28	275,709.00	-78,940.72	71.37%
673201 Health Insurance	153,292.75	218,844.00	-65,551.25	70.05%
673203 Life Insurance	1,942.62	1,985.00	-42.38	97.86%
Total 673100 Fringe Benefits	\$ 510,742.52	\$ 669,236.00	-\$ 158,493.48	76.32%
Total Expenditures	\$ 3,248,525.72	\$ 3,571,181.00	-\$ 322,655.28	90.97%

Friday, Jan 02, 2026 10:44:33 AM GMT-8 - Accrual Basis



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

TO: SOFD Commission
FROM: Fire Chief David L Bialk
DATE: January 14, 2026
SUBJECT: Preliminary Year End Statistics 2025

Background

At the end of every year the fire department reviews current performance in comparison to prior years. The information presented below is preliminary, as some reports are still under review and certain data points require verification. However, the data is sufficient to provide a meaningful snapshot of the department’s performance in 2025.

Analysis

In 2025, SOFD responded to 3,396 calls for service in the City of Mequon and the Village of Thiensville, representing a decrease of 30 calls compared to 2024. Additionally, the department completed 492 paramedic intercepts for the City of Cedarburg in 2025, which was 90 fewer than in 2024.

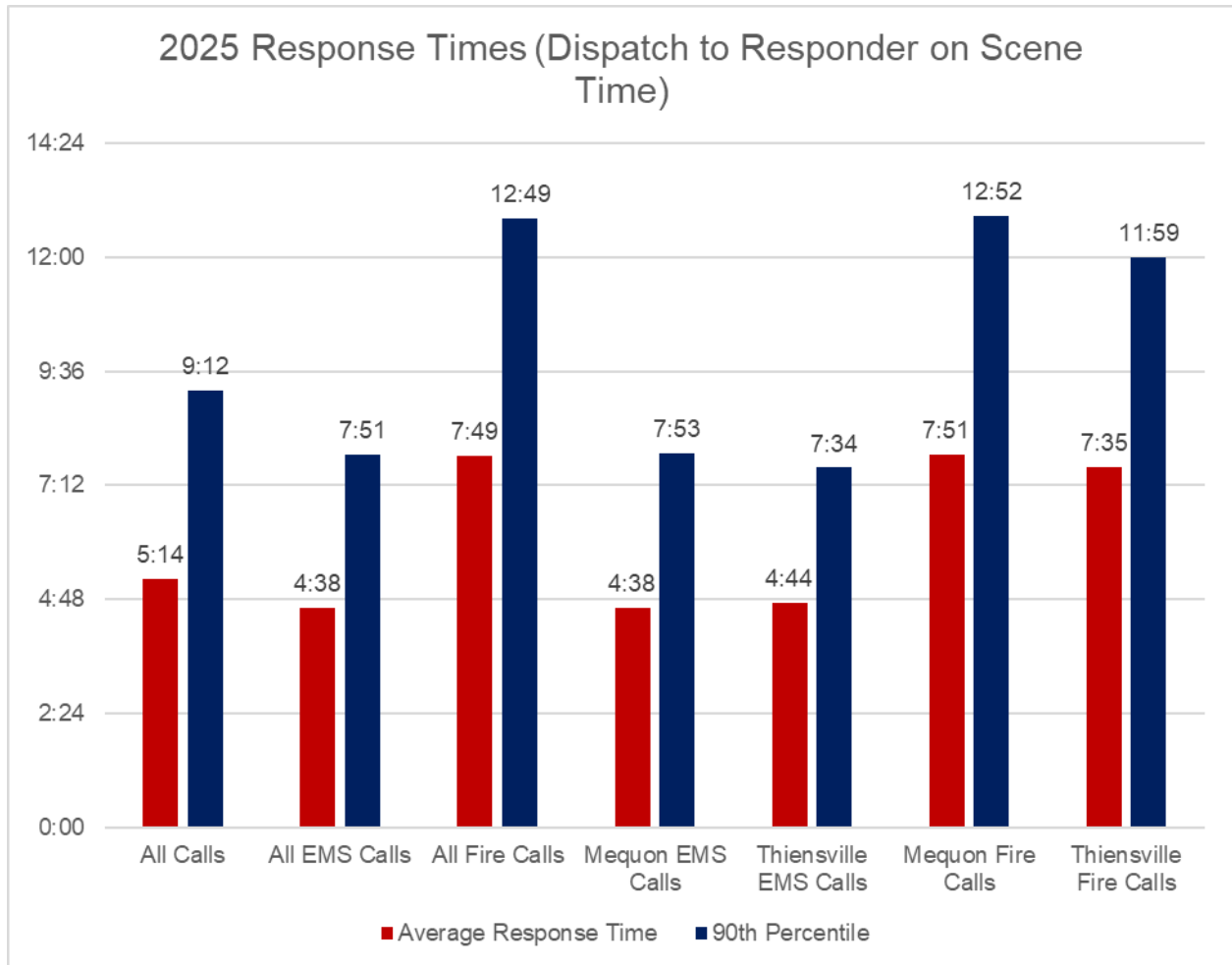
The chart below shows the number of calls for service by call type for the last four years.

Year	Fire	EMS	Intercepts	Total
(2022) Comb. Mequon and Thiensville	562	2,353	353	3,268
(2023) SOFD	649	2,346	464	3,459
(2024) SOFD	673	2,693	582	3,948
(2025) SOFD	656	2,740	492	3,888

The following response time statistics present both average response times and 90th percentile response times for fire and EMS calls, broken down by community. While average response times provide a general measure of overall performance, the 90th percentile response time is a more accurate indicator for evaluating performance against national standards.

The NFPA Standard 1710 establishes response time benchmarks for career fire departments, with goals of a first responder arriving within four minutes and an ALS (Advanced Life Support) unit arriving within eight minutes for 90 percent of EMS calls. These benchmarks are measured from dispatch to arrival and are intended to support effective and timely patient care. Achieving

these standards are influenced by local staffing levels, geography, call volume, and other operational factors.



This will be followed up by a more detailed annual report at the March SOFD Board meeting.

2025	Average Response Time	90th Percentile
All Calls	5:14	9:12
All EMS Calls	4:38	7:51
All Fire Calls	7:49	12:49
Mequon EMS Calls	4:38	7:53
Thiensville EMS Calls	4:44	7:34
Mequon Fire Calls	7:51	12:52
Thiensville Fire Calls	7:35	11:59

2024

	Average Response Time	90th Percentile
All Calls	05:04	08:57
All EMS Calls	04:26	07:33
All Fire Calls	07:39	12:15
Mequon EMS Calls	04:24	07:34
Thiensville EMS Calls	04:47	07:17
Mequon Fire Calls	07:41	12:07
Thiensville Fire Calls	06:36	12:52

2023

	Average Response Time	90th Percentile
All Calls	05:24	09:24
All EMS Calls	04:52	08:03
All Fire Calls	07:36	12:42
Mequon EMS Calls	04:53	08:09
Thiensville EMS Calls	04:41	07:24
Mequon Fire Calls	07:44	12:50
Thiensville Fire Calls	06:41	10:47

Fiscal Impact

None at this time.

Recommendation

None at this time.

Fire Chief David L Bialk

David L Bialk

Southern Ozaukee Fire Department



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: Deputy Chief Nicholas Boehlke
DATE: January 14, 2026
SUBJECT: Lexipol Policies Implementation

Background

In May 2024, Consultant Chris Bell recommended utilizing Lexipol to update department policies and procedures. SOFD purchased a Lexipol subscription which allows access to the Policy Manual.

Lexipol is an online policy and training management system used by fire departments to maintain professional, legally compliant policies. It provides a complete set of pre-written fire department policies that are reviewed by attorneys and updated regularly to reflect changes in state and federal law. For a fire department, Lexipol functions as a centralized, authoritative policy manual rather than a collection of locally written documents that may become outdated over time.

Fire departments use Lexipol primarily to reduce legal and financial risk. The system helps ensure department policies align with current laws and accepted fire service practices, which is critical when responding to complaints, injuries, disciplinary matters, or lawsuits. By relying on professionally maintained policies, departments significantly reduce the risk associated with outdated or legally vulnerable procedures.

Lexipol also provides a formal method for distributing policies to members and documenting acknowledgment. Personnel are required to electronically confirm they have read and understood policies, and the system records when this occurs. This creates a clear and defensible record that policies were communicated, which is often essential during employment disputes, liability claims, or audits.

In addition to policy management, Lexipol includes short, daily training bulletins that reinforce safety, operational expectations, and professional standards. These brief training items require minimal time to complete but provide documented, ongoing education that supports compliance, risk management, and continuous improvement within the department.

Analysis

The Lexipol Policy Manual includes 170 policies, organized into 11 chapters: Fire Service Role and Authority, Organization and Administration, General Operations, Fire Prevention, Emergency Medical Services, Training, Equipment and Technology, Records Management, Safety, Personnel, and Facility.

Lexipol provides an implementation specialist to work with Staff to review policies prior to issuing

the policies to department members. The review allows the implementation specialist to edit policy language to reflect how the department functions by defining command structure, response models, staffing levels, apparatus assignments, training standards, and internal procedures. The review also allows the specialist to further tailor the manual by inserting local references and governance details such as the board or governing authority name, mutual aid practices, and relationships with other agencies. The specialist also works with Staff to integrate any existing policies that may not be represented in the Lexipol manual.

Staff worked with the Lexipol specialist to conduct a comparative analysis of the Lexipol policies and the latest version of the SOFD Employee Manual. There were 35 Lexipol policies that were similar to existing SOFD policies. Lexipol recommends incorporating existing local policies into the Lexipol manual to create one unified policy manual. If Lexipol has a similar policy, preference is given to adopting the Lexipol policy unless it changes what the original policy was meant to accomplish or if it removes important content from the original policy. If Lexipol does not have a policy to match an existing department policy, preference is given to the existing department policy. As an example, the SOFD Employee Manual chapters related to full-time and paid-on-call personnel are department-specific and were incorporated as new policies into the Lexipol manual.

Staff has completed the integration of the SOFD Employee Manual with the Lexipol Policy Manual. As a result of this process, the Lexipol Policy Manual now reflects both nationally recognized best practices and the specific operational, organizational, and employment practices of SOFD. The integrated manual provides a single, comprehensive, and legally defensible policy framework that will support consistent decision-making, reduce organizational risk, and serve as the department's authoritative policy reference going forward.

Fiscal Impact

None

Recommendation

None

Deputy Chief Nicholas Boehlke

Nicholas Boehlke

Southern Ozaukee Fire Department

Chapter	Lexipol
	Mission
	Philosophy and Goals
	Code of Ethics
	Affirmative Action Statement
1	Fire Service Role and Authority
100	Fire Service Authority
101	Fire Chief
102	Management Rights
103	Oath of Office
104	Policy Manual
2	Organization and Administration
200	Organizational Structure
201	Emergency Action Plan and Fire Prevention
202	Departmental Directives
203	Training Policy
204	Liability Claims
205	Electronic Mail
206	Administrative Communications
207	Minimum Staffing Levels
208	Post-Incident Analysis
209	Annual Planning Master Calendar
210	Solicitation of Funds
211	Physical Asset Management
212	Purchasing and Procurement
213	Americans with Disabilities Act (ADA) Compliance
214	Limited English Proficiency Services
215	Open Door Policy
3	General Operations
300	Incident Management
301	Emergency Response
302	Fireground Accountability
303	Rapid Intervention/Two-In Two-Out
304	Urban Search and Rescue (USAR)
305	Tactical Withdrawal
306	Response Time Standards
307	Aircraft Operations
308	Atmospheric Monitoring for Carbon Monoxide
309	Staging
310	High-Rise Incident Management
311	Elevator Entrapments
312	Elevator Restrictions During Emergencies

3	General Operations
313	Swiftwater Rescue and Flood Search and Rescue
314	Confined Space Rescue Response
315	Wildland Firefighting
316	Trench Rescues
317	Carbon Monoxide Detector Activations
318	Newborn Safe Haven Law
319	Hazardous Materials Response
320	News Media and Community Relations
321	Scene Preservation
322	Child Abuse
323	Disposition of Valuables
324	Performance of Duties
325	Adult Abuse
326	Traffic Accidents
327	Line-of-Duty Death and Serious Injury Investigations
328	National Emergency Response Information System (NERIS)
329	Community Volunteer Program
330	Ride-Along Program
331	Grocery Shopping On-Duty
332	Chaplains
333	Active Shooter and Other Violent Incidents
334	Unmanned Aerial System
4	Fire Prevention
400	Fire Inspections
401	Permits
402	Fire Investigations
403	Code Enforcement
404	Alternative Materials and Methods Requests
405	Fireworks Displays
406	Hazardous Materials Disclosures
407	Maximum Occupancy-Overcrowding
408	Juvenile Firesetter Referrals
409	Fire Watch Services
5	Emergency Medical Services
500	Patient Care Reports
501	Medical Supplies
502	Advance Health Care Directives
503	Controlled Substance Accountability
6	Training
600	Fire Apparatus/Driver Operator Training
601	CPR and Automated External Defibrillator (AED) Training

6	Training
602	Communicable Disease Training Program
603	Emergency Action Plan and Fire Prevention Training
604	Hazard Communication Program Training
605	Hazardous Materials (HAZMAT) Training
606	Hearing Conservation and Noise Control Training
607	Heat Illness Prevention Training
608	Health Insurance Portability and Accountability Act (HIPAA) Training
609	National Incident Management System (NIMS) Training
610	Repetitive Motion Injuries and Ergonomics Training
611	Respiratory Protection Training
612	Training Records
613	Firefighter Health, Safety and Survival Training
614	Live-Fire Training
7	Equipment and Technology
700	Use of Department-Owned and Personal Property
701	Personal Communication Devices
702	Vehicle and Apparatus Inspections, Testing, Repair and Maintenance
703	Use of Department Vehicles
704	Information Technology Use
705	Mobile Data Terminal Use
706	Knox-Box Access
707	Communications Operations
708	Public Alerts
709	Photography and Electronic Imaging
710	Non-Official Use of Department Property
711	Department Use of Social Media
8	Records Management
800	Records Management
801	Release of Records
802	Subpoenas and Court Appearances
803	Patient Medical Record Security and Privacy
9	Safety
900	Illness and Injury Prevention Program
901	DSPS Inspections
902	DSPS Notification of Illness, Injury or Death
903	Communicable Diseases
904	High-Visibility Safety Vests
905	Apparatus/Vehicle Backing
906	Heat Illness Prevention Program
907	Respiratory Protection Program
908	Personal Alarm Devices

9	Safety
909	Health and Safety Officer (HSO)
910	Vehicle Seat Belts
911	Fire Station Safety
912	Ground Ladder Testing
913	Personal Protective Equipment
914	Hazardous Energy Control
915	Hazard Communication
916	Personal Firearms
917	Roadway Incident Safety
10	Personnel
1000	Recruitment and Selection
1001	Performance Evaluations
1002	Promotions and Transfers
1003	Position Descriptions
1004	Career Tracks
1005	Fire Officer Development
1006	Reporting for Duty
1007	Emergency Recall
1008	Overtime
1009	Discriminatory Harassment
1010	Conduct and Behavior
1011	Personnel Complaints Procedure
1012	Outside Employment
1013	Personal Projects On-Duty
1014	On-Duty Voting in Statewide Elections
1015	Personnel Records
1016	Commendations and Meritorious Service
1017	Wellness Program
1018	Physical Fitness
1019	Critical Incident Stress Debriefing
1020	Workplace Violence
1021	Lactation Breaks
1022	Smoking and Tobacco Use
1023	Drug- and Alcohol-Free Workplace
1024	Personal Appearance Standards
1025	Uniform Regulations
1026	Badges
1027	Work-Related Illness and Injury Reporting
1028	Temporary Modified-Duty Assignments
1029	Release of HIPAA-Protected Information
1030	Return to Work

10	Personnel
1031	Line-of-Duty Death
1032	Line-of-Duty Death and Serious Injury Notification
1033	Family Support Liaison
1034	Funerals
1035	Family and Medical Leave
1036	Driver's License Requirements
1037	Nepotism and Conflicting Relationships
1038	Military Leave
1039	Member Speech, Expression, and Social Networking
1040	Anti-Retaliation
1041	Sick Leave
1042	Full-Time Personnel
1043	Paid-On-Call Personnel
1044	Grievance Procedure
11	Facility
1100	Facility Security
1101	Emergency Power
1102	Wastewater Discharge
1103	Flag Display
1104	Department Use of Fire Detection and Suppression Systems
1105	Fire Station Living

SOFD Employee Manual	Lexipol Policy Manual
Chapter I: Introduction	
Mission, Vision and Values	Mission; Philosophy and Goals
Purpose and Application	Policy Manual
Affirmative Action Statement	Affirmative Action Statement
Definitions	Policy Manual
Management Rights	Management Rights
Severability	Policy Manual
Attendance and Punctuality	Reporting for Duty
Chapter 2: Procedures	
Employee Commitment	Code of Ethics
Grievance Procedure	Grievance Procedure
Purpose	Grievance Procedure
Definitions	Grievance Procedure
Time Limits	Grievance Procedure
Procedure	Grievance Procedure
Chapter 3: General Policies	
Employee Conduct and Customer Service	Conduct and Behavior
Accident Policy	Traffic Accidents; Line-of-Duty Death and Serious Injury Notification
Personal Relationship Policy	Nepotism and Conflicting Relationships
Dress Code Policy	Uniform Regulations
Drug-Free Workplace Policy	Drug- and Alcohol-Free Workplace
Drug Testing Policy	Drug- and Alcohol-Free Workplace
Communications Policy	News Media and Community Relations; Department Use of Social Media
Conflict of Interest Policy	Outside Employment
Emergency Contact Information Policy	Emergency Contact Information
Employee Access to Personnel File Policy	Personnel Records
Employee Assistance Program Policy	Wellness Program
Family and Medical Leave Policy	Family and Medical Leave
Harassment & Workplace Violence Policy	Discriminatory Harassment; Workplace Violence
Bereavement Leave	Full-Time Personnel
Modified Duty/Return-To-Work Policy	Temporary Modified-Duty Assignments; Return to Work
Nepotism Policy	Nepotism and Conflicting Relationships
Open Door Policy	Open Door Policy
Informal Complaint Procedure	Personnel Complaints Procedure
Smoke-Free Workplace Policy	Smoking and Tobacco Use
Telephone Usage Policy	Personal Communication Devices

SOFD Employee Manual	Lexipol Policy Manual
Chapter 4: Full-Time Employees	
Probationary Period	Full-Time Personnel
Leave of Absence	Full-Time Personnel
Jury Duty	Full-Time Personnel
Paid Holidays	Full-Time Personnel
Sick Leave	Full-Time Personnel
Medical Leave	Full-Time Personnel
Abuse of Leave	Full-Time Personnel
Retirement Payout	Full-Time Personnel
Accumulation Changes	Full-Time Personnel
Vacation/Paid Time Off	Full-Time Personnel
Uniforms	Full-Time Personnel
Wisconsin Retirement Fund	Full-Time Personnel
General Employer Provided Insurance	Full-Time Personnel
Group Health Insurance	Full-Time Personnel
Notification of Group Insurance Continuation Policy	Full-Time Personnel
Car and Expense Allowance	Full-Time Personnel
Chapter 5: Paid-On-Call Staff	
Probationary Period	Paid-On-Call Personnel
Holidays	Paid-On-Call Personnel
Uniform/Clothing Allowance	Paid-On-Call Personnel
Wisconsin Retirement System	Paid-On-Call Personnel
Life & Disability Insurance	Paid-On-Call Personnel
Active Status	Paid-On-Call Personnel
Chapter 6: Standards of Conduct	
Violation of Rules	Conduct and Behavior
Unbecoming Conduct	Conduct and Behavior
Conformance to Laws	Conduct and Behavior
Reporting for Duty	Conduct and Behavior
Attentiveness to Duty	Personal Projects On-Duty; Conduct and Behavior
Reporting for Duty	Reporting for Duty
Leaving Duty Post	Reporting for Duty
Unsatisfactory Performance	Reporting for Duty
Use of Alcohol on Duty or in Uniform	Drug- and Alcohol-Free Workplace
Use of Alcohol Off Duty	Drug- and Alcohol-Free Workplace
Insubordination	Performance of Duties

SOFD Employee Manual	Lexipol Policy Manual
Chapter 6: Standards of Conduct	
Unlawful Orders	Organizational Structure
Gifts, Gratuities, Bribes or Rewards	Conduct and Behavior
Abuse of Position	Conduct and Behavior
Endorsements and Referrals	Conduct and Behavior
Citizen Complaints	Personnel Complaints Procedure
Courtesy	Conduct and Behavior
Requests for Assistance	Conduct and Behavior
Associations	Conduct and Behavior
Visiting Prohibited Establishments	Conduct and Behavior
Gambling	Conduct and Behavior
Personal Appearance	Personal Appearance Standards
Political Activity	Conduct and Behavior
Dissemination of Information	Records Management; Release of HIPAA-Protected Information
Intervention	Conduct and Behavior
Required Reports	Performance of Duties
Use of Department Property	Use of Department-Owned and Personal Property
Operating Vehicles	Use of Department Vehicles
Truthfulness	Performance of Duties
Unauthorized Equipment	Use of Department-Owned and Personal Property; Badges
Civil Actions	Work-Related Illness and Injury Reporting
Public Criticism	Conduct and Behavior
Concealed Recording Devices	Personal Communication Devices
Committing Unsafe Acts or Endangering Self or Others	Conduct and Behavior
Cooperation with other Members, Employees, and Other Officials	Conduct and Behavior
Knowing, Observing, and Obeying all Directives, Rules, Policies, and Procedures	Oath of Office
Personal Use of Property, Equipment or Supplies	Use of Department-Owned and Personal Property
Possession of Weapons	Personal Firearms



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TO: SOFD Commission
FROM: Fire Chief David L Bialk
DATE: January 14, 2026
SUBJECT: Strategic Plan Update

Background

At the September 10, 2025, SOFD Board meeting, the Board formally adopted a five-year strategic plan for the Southern Ozaukee Fire Department. The plan represented the culmination of nine months of work by Board members Lynn Streeter and Doug Chimenti. It incorporated input from both internal and external stakeholders, as well as revisions made by Board members.

Analysis

The strategic plan served as the foundation for the Fire Department's 2026 work plan, and work on its implementation has already begun. At the September 2025 meeting, the Board determined that a tracking mechanism would be incorporated into the strategic plan to allow Board members to monitor progress. The finalized plan (attached) was converted into a public-facing document, uploaded to the fire department's website, and will be updated monthly.

Fiscal Impact

None at this time.

Recommendation

None at this time.

Fire Chief David L Bialk

David L Bialk

Southern Ozaukee Fire Department



Strategic Plan Progress

Strategic Initiative #1: People

Objective 1: Create an employee-driven, individualized development plan tailored to both interest and needs				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
Tactic	Outcome	Accountability	Timeframe							
a) Plan professional development process	Individual plans that are documented, implemented, and periodically evaluated	Deputy Chief	2026							The Deputy Chief met with each Command Officer to assess their needs
Objective 2: Develop a unified culture				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
Tactic	Outcome	Accountability	Timeframe							
a) Conduct internal department assessment of current culture	Data and shared results	Fire Chief	2026							Currently researching employee engagement surveys and feedback tools
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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							

Objective 4: Establish distinctive skills training tailored to groups that ensures a coordinated team response				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
Tactic	Outcome	Accountability	Timeframe							
a) Determine needs of the SOFD	Identify growth opportunities	Fire Chief	2026							3 of the current Command staff have attended the Midwest Leadership Institute, remaining two are scheduled for fall of 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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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	Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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	Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
a) Reduce response times by utilizing CAD and incorporating concepts into future development plans and infrastructure	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							

Objective 3: Establish protocols for succession planning				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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.				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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							February 2025 Advanced Selection delivered a fire station location analysis
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
Tactic	Outcome	Accountability	Timeframe							
a) Space needs analysis	Contract firm to conduct analysis of space needs for SOFD	Fire Chief	Complete							fgm completed a space needs study in early 2025
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				Planned	Initiated	In Progress	On Track	Completed	Paused			
Tactic	Outcome	Accountability	Timeframe									Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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								
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Strategic Initiative #5 Financial Planning

Objective 1: Advocate for legislative review of funding				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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							August 2025 the Fire Chief engaged mgt to update the compensation study completed for the City of Mequon in 2023. The adjustments were implemented in the budget for 2026.
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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				Planned	Initiated	In Progress	On Track	Completed	Paused	Notes
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							
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Southern Ozaukee Fire and
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TO: SOFD Board
FROM: Deputy Chief Nicholas Boehlke
DATE: January 14, 2026
SUBJECT: Community EMS Program

Background

The need for a Community EMS Program was identified while creating the SOFD Strategic Plan. The adopted Strategic Plan Strategic Initiative 3: Community, Objective 1 calls for the development of a Community EMS Program aimed at addressing gaps in preventive and reactive healthcare. The program will focus on providing in-home, follow-up care for at-risk community members who require additional medical attention. Targeted individuals include those with chronic conditions, frequent falls, or those needing post-discharge evaluations. The program aims to improve patient outcomes, enhance continuity of care, and strengthen the relationship between community members and EMS providers.

Analysis

In the initial planning phase, Staff identified three focus areas—staffing, community partnerships, and medical direction.

In 2025, only one SOFD member had the credentials necessary to operate as a community paramedic. Thanks to a generous donation from the Sunrise Rotary, one additional member was able to attend class and is now credentialed. These two members are directly involved with the development of the Community EMS Program. SOFD is looking to send one additional member to class later this year or in early 2027.

Creating community partnerships is a key step to be able to connect patients with resources. Staff identified several key partners including the Aging and Disability Resource Center of Ozaukee County (ADRC), Ascension Columbia St. Mary's Hospital, Froedtert Community Hospital, and Aurora Medical Center. Staff is currently working with these partners to determine potential referral pathways and communication and feedback processes.

Staff has engaged Dr. Jason Staszko to assist in program development. Dr. Staszko currently serves SOFD as the EMS Medical Director and has significant experience with community EMS and mobile integrated health programs. With his assistance, staff will develop protocols, assessments, and an operational plan to submit to the Wisconsin Department of Health Services (DHS). This work is planned for late January.

Fiscal Impact

No impact at this time.

Recommendation

No recommendation at this time.

Deputy Chief Nicholas Boehlke

Nicholas Boehlke

Southern Ozaukee Fire Department