



**SOUTH METRO FIRE RESCUE
Regular Board of Directors' Meeting
October 5, 2026 at 4:00 p.m.
South Metro Fire Rescue
9195 E. Mineral Avenue, Centennial, CO 80112**

- 1. MEETING CALL TO ORDER**
- 2. PLEDGE OF ALLEGIANCE**
- 3. ROLL CALL**
- 4. APPROVAL OF THE AGENDA**
- 5. CONFLICT OF INTEREST DISCLOSURE**
- 6. PUBLIC COMMENT**

Public Conduct at Meetings. Comments by members of the public shall be made only during the "Public Comment" portion of the meeting or a specified "Public Hearing," and shall be limited to three minutes per individual and five minutes per group spokesperson unless additional opportunity is given at the Board's discretion. Each member of the public wishing to speak shall identify themselves by name, address, and agenda item, if any, to be addressed. Disorderly conduct, harassment, or obstruction of or interference with meetings by physical action, verbal utterance, nuisance or any other means are prohibited. Such conduct may result in removal of person(s) responsible for such behavior from the meeting, a request for assistance from law enforcement, and criminal charges filed against such person(s).

7. CONSENT AGENDA

Consent Agenda items are provided for study in the Board packets and introduced in the General Session for the Board's review. They can be adopted by a single motion. All resolutions and proposed actions must be read by title prior to a vote on the motion. Any Consent Agenda items may be removed at the request of a Director and heard separately or tabled.

1. September 14, 2026 South Metro Fire Rescue Fire Protection District Regular Board Meeting Minutes
2. September 28, 2026 South Metro Fire Rescue Fire Protection District Regular Board Meeting Minutes

8. PRESENTATIONS

1. City of Centennial Update – Steve Carmine, City Council Member District 2 – City of Centennial

9. PROCLAMATIONS

1. A Proclamation by South Metro Fire Rescue Board of Directors in Recognition of Fire Prevention Week – October 6 – October 12, 2026 -

10. ACTION ITEMS

1. Fund Balance and Reserve Policy Amendment (Self Insurance Reserve) -Camie Chapman, CHRO – South Metro Fire Rescue

11. DISCUSSION/POTENTIAL ACTION ITEMS

With a two-thirds (2/3) vote of the board members in attendance, the board has the discretion to amend the Agenda to move any Discussion/Potential Action Item to an Action Item.

1. Strategic Plan Third Quarter Report – Mike Dell’Orfano, Chief Government Affairs Officer – South Metro Fire Rescue
2. 2027 Budget Update – Stephanie Corbo, Chief Financial Officer - South Metro Fire Rescue

12. INFORMATION ITEMS

1. IGA Update – N/A

13. EXECUTIVE SESSION (upon motion)

1. Executive Session pursuant to § 24-6-402(4)(a), C.R.S. to discuss the purchase, acquisition, lease, transfer, or sale of real, personal, or other property interests regarding the South Metro Fire Rescue Fleet Facility.

14. NEXT MEETING(S)

Regular Board of Directors’ Meeting to be held on October 19, 2026 at 6:00 p.m. at 9195 E. Mineral Avenue, Centennial, CO 80112.

15. ADJOURNMENT



South Metro Fire Rescue Fire Protection District
Regular Board of Directors' Meeting Minutes
September 14, 2026
9195 E. Mineral Avenue Centennial, CO 80112

ATENDEES:

Present:

Board

Jim Albee, Chair
Renee Anderson, Vice Chair
William Shriver, Treasurer
Sue Roche, Secretary
Kevin Leung, Director
Rich Sokol, Director
Phil McCart, Director

SMFR Executive Team

John Curtis, Fire Chief
Mike Dell'Orfano, Chief Government Affairs Officer
Kristin Eckmann, Deputy Chief - Communications
Matt Weller, Deputy Chief – Internal Services
Stephanie Corbo – CFO Finance
Camie Chapman, Chief Human Resources Officer
Jake Mayhew, Deputy Chief - Operations

Other Attendees

SMFR Staff

MEETING CALL TO ORDER

Chair Albee called the Regular Meeting of the South Metro Fire Rescue Fire Protection District to order 4:02 p.m.

PLEDGE OF ALLEGIANCE

The Pledge of Allegiance to the Flag of the United States of America was recited.

ROLL CALL

All board members were in attendance and present.

APPROVAL OF THE AGENDA

Motion: Director Sokol motioned to approve the agenda as presented. Secretary Roche seconded the motion to approve. 7 were in favor, 0 opposed. The motion carried.

CONFLICT OF INTEREST DISCLOSURE

Chair Albee asked if there were any changes to conflict of interest affirmation:

- Director McCart – no changes
- Director Roche – no changes
- Director Anderson – no changes
- Chair Albee- no changes
- Director Shriver – no changes
- Director Sokol – no changes
- Director Leung – no changes



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PUBLIC COMMENT

There was no public comment

CONSENT AGENDA

1. August 24, 2026, South Metro Fire Rescue Fire Protection District Regular Board Meeting Minutes

Motion: Director Roche motioned to approve the August 24, 2026, South Metro Fire Rescue Fire Protection District Regular Board Meeting Minutes as presented. Director Shriver second, 7 were in favor and 0 opposed. The motion carried.

ACTION ITEMS

1. Proclamation No. 2026-02: Director Anderson presented the proclamation in recognition of Patriot Day on September 11, 2026. The proclamation honors those who lost their lives on September 11, 2001, and recognizes the courage and sacrifice of the first responders, military personnel, and others who served in the aftermath of the attacks. No action was needed..

DISCUSSION/POTENTIAL ACTION ITEMS

1. 2027 Budget – Stephanie Corbo – South Metro Fire Rescue: Mike Smith, Financial Planning & Analysis Manager presented an update on the proposed 2027 budget, including revenues, workforce and benefit costs, overtime, operating expenses, capital needs, and the 10-year financial plan. Property-tax revenue estimates were conservatively adjusted to account for continued volatility in assessed valuations and collections. Anticipated workforce needs were discussed related to district growth, including additional recruits and future staffing requirements. Benefit costs remain a concern, with current estimates reflecting an approximate 6.3% increase. It was also noted that higher-than-normal attrition and hiring challenges are being experienced for paramedics and firefighters, increasing the need for additional academy capacity and continued recruitment planning.

The long-term financial outlook was discussed, including the projected decline in fund balance over the 10-year planning horizon and the need to balance maintaining appropriate reserves, funding capital needs, and sustaining operations. While the current plan remains above the 23% fund-balance target in the near term, projections indicate the fund balance may fall below the target in future years. The Board requested additional clarity regarding long-term financial assumptions, capital investments, and the impact of future service demands on the General Fund.



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DISCUSSION/POTENTIAL ACTION ITEMS (cont.)

A comprehensive capital replacement plan was shown that identifies District assets, replacement cycles, and long-term funding requirements to provide greater visibility into future capital needs. The Board discussed the relationship between capital expenditures, the General Fund, and the District's long-term financial sustainability. Director Roche suggested we look at a lower capital transfer closer to \$20m. Future district growth and station construction were also identified as significant long-term financial considerations, including the staffing and ongoing operating costs associated with new facilities. The anticipated opening of Sterling Ranch in 2030 will require advance workforce planning, with staffing expenditures beginning prior to the station becoming operational.

The Board discussed the District's projected structural deficit and the long-term sustainability of the current financial plan. Discussion focused on the relationship between revenue growth, salaries and benefits, service levels, capital needs, and future staffing requirements. The Board requested additional information and alternatives to better understand the long-term financial impacts and priorities.

Director Sokol expressed concern regarding the sustainability of the budget over the next five years, with particular attention to salary and benefit costs. He requested a year-over-year comparison illustrating the trajectory of property tax revenue relative to salary and benefit expenditures.

Director Leung also expressed concern regarding sustainability of the budget over the next five years.

Director Roche advised that she would like to see the potential of permit and ambulance fee increases, as well as reducing reserve threshold to 20% by Year 4 (2030).

Staff will continue refining the long-term financial plan and incorporate Board feedback into the proposed budget. Staff will incorporate updated revenue, benefit, workforce, overtime, and capital assumptions into the proposed 2027 budget, which is scheduled to be returned to the Board on October 5, 2026, followed by the required public hearings and adoption process.

2. Overtime Update Series# 2 - Stephanie Corbo, CFO , and Mike Burke, Division Chief – South Metro Fire Rescue: collectively presented historical overtime data and identified that last year's numbers and this year's numbers appear to be a good predictor for the future. Overtime is primarily associated with minimum staffing requirements, project and meeting needs, training, acting assignments, and reimbursable deployments. The Board discussed the use of acting assignments as a cost-effective staffing strategy and a component of succession planning, while recognizing the need to maintain appropriate limits to support operational experience and safety. Chief Burke also emphasized that project and training overtime supports consistent training, communication, and service delivery.



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INFORMATION ITEMS

N/A

Remarks:

Chief Curtis reflected on his appreciation to the board for taking action on the Patriot Day Proclamation and every year in honor of the 25th 9/11 remembrance. He shared a couple of experiences he was fortunate to be invited to due to South Metro Fire Rescue's connection to the events of September 11 and the importance of carrying forward lessons learned to improve firefighter safety and service delivery.

Chief Curtis shared reflections on his recent opportunity to represent South Metro Fire Rescue at the FDNY's remembrance ceremony in New York City honoring the members, families, and individuals who were impacted by the September 11, 2001, terrorist attacks. He described the experience as deeply meaningful and emphasized the importance of remembering not only the nearly 3,000 individuals who lost their lives, but also the actions, decisions, and sacrifices made that day. Chief Curtis noted that his conversations with FDNY leadership reinforced the significance of the continued partnership and connection between fire service organizations. He also recognized SMFR members who responded to Ground Zero following the attacks and emphasized the District's continued commitment to honoring their service and preserving the memory of those who were lost. Chief Curtis reflected on the lessons learned from September 11 and their continued relevance to the fire service, particularly the responsibility to serve the community, continually improve emergency services, and prioritize the safety and well-being of firefighters. He stated that the District's ongoing efforts to strengthen its services and protect its personnel are directly connected to the lessons learned from the events of September 11, 2001.

Chief Curtis announced that there was a special 9/11 tribute screening on Sunday, September 13, 2026, that himself, Chief Dell'Orfano, Chief Eckmann and our pipes and drums attended. Our Emergency Manager, Dan Stutz serve on the panel following the screening, sharing his experiences being deployed for a little over four weeks during the 9/11 rescue efforts. Dan served as a Mobilization Specialist with the Urban Search & Rescue Incident Support Team, among various other roles.

Chief Dell'Orfano announced the great participation in the recent Douglas County Heroes Gala he attended and the community engagement efforts, including SMFR personnel and EMS recognized for their advanced rescue and safety capabilities. Dr. Applebaum and the Community Risk Reduction team were also recognized for their participation and representation of the District. He emphasized the importance of having personnel actively represent SMFR at community events and thanked Chief Burke and EMS leadership for coordinating resources, equipment, and personnel.



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Remarks(cont.):

Chief Dell'Orfano also reported on SMFR's August 26, 2026, hosting of the Colorado Competitive Council, which included demonstrations of wildland firefighting, helicopter water operations, EMS capabilities, public health initiatives, and CPR. The event provided an opportunity to engage business leaders, legislators, and other community stakeholders. Chief Dell'Orfano reminded the Board and Staff of the October 3, 2026, community cleanup along University Boulevard between Arapahoe Road and Orchard Road and encouraged participation.

Board Vice Chair, Renee Anderson shared that she participated in a three-hour ride-along in a Safety 1 vehicle, with Joe Simms. Although no calls were received during the ride-along, the experience provided an opportunity to spend time with the crew and tour the Highlands Ranch area, including the Highlands Ranch Senior Center. She expressed appreciation for the opportunity and interest in participating in additional ride-alongs in the future.

Local 2086 President, Mark Dzenglewski reminded of the upcoming 40th Annual IAFF Fallen Firefighter Award event, on Saturday, September 19, 2026, at 10:00 a.m. at Memorial Park, in Colorado Springs. All Board Members are invited to attend.

He also expressed his appreciation and recognition to all staff who participated in the MDA Fill the Boot annual charity event, noting that the event exemplifies the District's commitment to engaging with and serving the community and reflects the intent behind the passage of 7A.

EXECUTIVE SESSION

Motion: At 8:30 p.m., Chair Albee moved to convene into executive session:

- pursuant to § 24-6-402(4)(a), C.R.S. to discuss the purchase, acquisition, lease, transfer, or sale of real, personal, or other property interests regarding the South Metro Fire Rescue Fleet Facility
- pursuant to § 24-6-402(4)(a), C.R.S., to discuss the purchase, acquisition, lease, transfer, or sale of real, personal, or other property interests regarding the lease between South Metro Fire Rescue and General Services Administration at 9195 E. Mineral Avenue, Centennial, Colorado 80112

Director Anderson seconded the motion. The motion carried unanimously, with all Directors present voting in favor and none opposed. The Board reconvened in open session at 10:33 p.m.

NEXT MEETINGS

Regular Board of Directors' Meeting to be held on September 28, 2026, at 6:00p.m. at 9195 E. Mineral Avenue, Centennial, CO 80112.

ADJOURNMENT

Chair Albee adjourned the meeting at 10:33 p.m.



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SIGNATURE PAGE ONLY

The foregoing minutes of the Board of Directors Meeting held on _____, were approved by the Board of Directors on _____

Attested by: _____ Date: _____



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Regular Board of Directors' Meeting Minutes
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ATENDEES:

Board Present:

Jim Albee, Chair
Renee Anderson, Vice Chair
William Shriver, Treasurer
Sue Roche, Secretary
Kevin Leung, Director
Rich Sokol, Director -
Phil McCart, Director

Board Absent

N/A

SMFR Executive Team Present:

Mike Dell'Orfano, Chief Government Affairs Officer
Kristin Eckmann, Deputy Chief - Communications
Matt Weller, Deputy Chief – Internal Services
Jake Mayhew, Deputy Chief - Operations

SMFR Executive Absent:

John Curtis, Fire Chief
Stephanie Corbo, CFO
Camie Chapman, CHRO

MEETING CALL TO ORDER

Chair Albee called the Regular Meeting of the South Metro Fire Rescue Fire Protection District to order at 6:03 p.m. and welcomed everyone to the meeting.

PLEDGE OF ALLEGIANCE

The Pledge of Allegiance to the Flag of the United States of America was recited.

ROLL CALL

All board members were in attendance and present.

APPROVAL OF THE AGENDA

Motion: Director Anderson motioned to approve the agenda as presented. Secretary Roche seconded the motion to approve. 7 were in favor, 0 opposed. The motion carried.

CONFLICT OF INTEREST DISCLOSURE

Chair Albee asked if there were any changes to conflict of interest affirmation:

- Director McCart – no changes
- Director Roche – no changes
- Director Anderson – no changes
- Chair Albee- no changes
- Director Shriver – no changes
- Director Sokol – no changes
- Director Leung – no changes

PUBLIC COMMENT

There was no public comment



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CONSENT AGENDA

N/A

ACTION ITEMS

N/A

DISCUSSION/POTENTIAL ACTION ITEMS

1. Training Facility Overview – Matt Weller, Deputy Chief – Internal Services – South Metro Fire Rescue: Matt Weller, Deputy Chief and Andy Powell, Division Chief, presented an overview of the District's current and future training facility needs, including the limitations of the JSF and TJ facilities and the potential to relocate fleet operations to allow for expanded training capabilities. The presentation featured a long-term training vision focused on supporting year-round recruit and incumbent training, live-fire and specialized training, indoor training space, decontamination capabilities, classrooms, and additional storage and office space.

Chief Weller expressed that the immediate priority remains relocating Fleet from JSF, which would create additional space and allow the District to begin implementing the broader training vision. Near-term improvements at JSF include upgrades to the burn can, Class A burn building, electrical infrastructure, and hydrants. The District will also continue evaluating TJ and potential alternative sites to determine the best approach for meeting training needs over the next 30–50 years.

Director Sokol expressed interest in the timing of these investments given the District's changing financial outlook and requested further discussion be emphasized on the importance of aligning major facility decisions with available financial resources and revisiting the timing as updated budget and long-term financial information becomes available.

Director McCart inquired whether the proposed training facilities would accommodate training needs associated with the newly approved single-stair building design. The Fire Marshal explained that single-stair buildings remain subject to specific code and design restrictions and noted that the proposed training facility could incorporate a single-stair configuration into a training façade.



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INFORMATION ITEMS

Director Sokol and Director Leung discussed the importance of providing context when comparing South Metro's response times and performance with neighboring agencies and expressed interest in better understanding the relationship between funding levels and service levels, including whether changes in funding may affect response times. Chief Dell'Orfano expressed that all of that information in comparison may not be feasible, however staff is continuing to work on emergency response reports and the transition to NERIS data, with an anticipated early 2027 update.

Remarks:

Mike Dell'Orfano, Chief Government Affairs Officer discussed the upcoming October 5, 2026, Board of Directors' meeting, recommending to start the meeting at 4:00 p.m. to allow additional time for the 2027 proposed budget, long-term financial plan, facility considerations, recognition of Fire Prevention Week, and strategic planning discussions.

Chief Dell'Orfano shared information about the Piney Creek Chapter of the Daughters of the American Revolution, whose mission includes preserving history, supporting education and grants, performing community service, and honoring military members and first responders. The chapter completes approximately 7,000 hours of community service a year. In recognition of September 11, the chapter selected South Metro Fire Rescue for its Day of Service to express appreciation for the District's service to the community. During the visit, members provided breakfast and approximately 50 thank-you notes for staff, dispatchers, and firefighters. The chapter also presented the District with a commemorative shadow box featuring a U.S. flag that had been flown in connection with the dedication of the Pentagon 9/11 Memorial.

Jake Mayhew, Deputy Chief, recognized crews and regional partners for their response to several recent complex incidents and expressed appreciation for the strong working relationships among responding agencies. He also described the IAFF Fallen Fire Fighter Memorial as an "amazing experience" and praised the work involved in the ceremony, noting that it was a strong representation of South Metro.

Roxy Ligrani, Local 2086, reflected on the IAFF Fallen Fire Fighter Memorial, held September 19, 2026, in Colorado Springs, describing it as a meaningful and positive experience. He expressed appreciation for the South Metro Chiefs and PIO who attended and valued the opportunity to spend time with them outside of the regular work setting.



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EXECUTIVE SESSION

Motion: At 7:05 p.m., Chair Albee moved to convene in executive session, pursuant to § 24-6-402(4)(a), C.R.S. to discuss the purchase, acquisition, lease, transfer, or sale of real, personal, or other property interests regarding the South Metro Fire Rescue Fleet Facility. Director Shriver seconded the motion. The motion carried unanimously, with all Directors present voting in favor and none opposed.

The Board reconvened in open session at 8:05 p.m.

NEXT MEETINGS

Regular Board of Directors' Meeting to be held on October 5, 2026, at 4:00p.m. at 9195 E. Mineral Avenue, Centennial, CO 80112.

ADJOURNMENT

Chair Albee adjourned the meeting at 8:05 p.m.



South Metro Fire Rescue Fire Protection District
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*****SIGNATURE PAGE ONLY*****

The foregoing minutes of the Board of Directors Meeting held on _____, were approved by the Board of Directors on _____

Attested by: _____

Date: _____

DRAFT



A Proclamation by South Metro Fire Rescue Board of Directors in Recognition of Fire Prevention Week: October 4 – 10, 2026

Proclamation No. 2026-03

WHEREAS, South Metro Fire Rescue is committed to ensuring the safety and security of all those who live, work, visit, and play in our District; and

WHEREAS, fire remains a serious public safety concern both locally and nationally, and the presence of lithium-ion batteries in many household devices introduces fire risks; and

WHEREAS, most of the rechargeable electronics used in homes daily, including smartphones, tablets, laptops, power tools, e-bikes, e-scooters, and toys, are powered by lithium-ion batteries, which if misused, damaged, or improperly charged, can overheat, start a fire, or explode; and

WHEREAS, the National Fire Protection Association® (NFPA®) reports an increase in battery-related fires, underscoring the need for public education on the safe use of lithium-ion batteries and devices; and

WHEREAS, the way lithium-ion battery devices are charged can make a difference in helping prevent home fires; and

WHEREAS, safe charging includes using the cord and charger that came with your device or one approved by the manufacturer, charging on a hard, flat surface, watching for warning signs like devices that are very hot or start to swell, unplugging when fully charged, and charging larger devices like e-bikes outside and away from exits; and

WHEREAS, residents are encouraged to understand that safe charging means making smart choices every time they plug in; and

WHEREAS, South Metro Fire Rescue's first responders remain dedicated to reducing the occurrence of fires through prevention, safety education, and community outreach; and

WHEREAS, the 2026 Fire Prevention Week™ theme, “Charge into Fire Safety™: Safe Charging Is a Superpower,” serves to remind all residents that safe charging can help reduce the risk of fires in homes and communities.

NOW THEREFORE, BE IT PROCLAIMED that the South Metro Fire Rescue Board of Directors recognizes October 4–10, 2026, as Fire Prevention Week throughout our District and urges all residents to learn about and practice safe charging habits.

ADOPTED this 5th day of October, 2026.

By: _____
SMFR Board Chair

BOARD OF DIRECTORS AGENDA ITEM STAFF REPORT



Meeting Date: 10/5/2026

Agenda Item Type: Action Item

Agenda Item: Fund Balance and Reserve Policy Amendment (Self-Insurance Reserve)

Submitted By: Camie Chapman, Human Resources Director

Approved: John Curtis, Fire Chief

SUMMARY:

The District's current Fund Balance and Reserve Policy establishes a reserve range for the employee self-insurance medical fund of 10% to 30% of budgeted expenditures. At the direction of the Board of Directors, staff evaluated the current reserve requirement to determine whether the established range remains appropriate for the District's employee medical plan and to ensure the reserve is maintained at a level that is both financially prudent and consistent with industry best practices.

Following this evaluation, and in consultation with the District's benefits consultant, Gallagher Benefits Services, staff recommends establishing a defined reserve target of two (2) months of budgeted expenditures, or approximately 16.7% of annual budgeted expenditures. This approach provides a sufficient reserve to support the payment of claims and manage fluctuations in medical expenses while avoiding the accumulation of excess funds that could otherwise be used to offset future medical insurance premiums.

BACKGROUND:

The current Fund Balance and Reserve Policy was adopted by the Board of Directors on May 2, 2022. The policy is intended to promote responsible and sustainable financial management by maintaining appropriate fund balances and reserves. For the employee self-insurance medical fund, the policy currently requires the District to maintain a reserve between 10% and 30% of budgeted expenditures. The employee self-insurance medical fund is funded through medical premiums established annually for the District's employee medical insurance plan. Premiums are established based on anticipated medical claims and other plan expenses; however, actual claims experience can vary from year to year. Maintaining an appropriate reserve provides the District with the financial capacity to address fluctuations in claims, meet cash-flow requirements to pay claims, and promote greater stability in premiums for both the District and its employees.

In recent years, the Board has requested that staff evaluate the medical self-insurance reserve to determine whether the established funding level remains appropriate. Staff worked with Gallagher Benefits Services to evaluate the current reserve requirement and consider an appropriate funding level based on the District's plan structure, anticipated claims obligations, financial considerations, and generally accepted reserve practices.

Based on this review, staff recommends replacing the current 10% to 30% reserve range with a defined reserve target of two (2) months of budgeted expenditures, equivalent to approximately 16.7% of annual budgeted expenditures. Establishing a specific target provides greater clarity and consistency in

managing the fund while maintaining a prudent level of financial protection for the self-insured medical plan.

The proposed change would also allow the District to more effectively use fund resources when the reserve exceeds the established target. Rather than maintaining an unnecessarily large reserve, excess funds may be used to offset future medical insurance premiums, benefiting both the District and its employees.

FINANCIAL IMPACT:

The employee self-insurance medical reserve is designated as restricted fund balance and is available for the payment of employee medical claims and related plan obligations. The current reserve balance is approximately \$4.6 million. Based on current budgeted expenditures, a reserve equal to two (2) months of budgeted expenditures would be approximately \$3.3 million. The proposed change would therefore result in approximately \$1.3 million being available above the recommended reserve target.

Staff recommends that the excess funds be responsibly utilized to offset future medical insurance premiums for the District and its employees rather than retaining funds in excess of the Board-established reserve target.

Establishing the reserve at two months of budgeted expenditures also provides a clear and measurable standard that can be reviewed annually as part of the District's budget and medical plan renewal process. The reserve target should continue to be evaluated periodically based on claims experience, plan design, premium requirements, and other factors that may affect the financial needs of the self-insurance fund.

STRATEGIC INITIATIVE:

Maintaining an appropriately funded employee self-insurance medical fund supports the District's strategic initiative of Organizational Health by promoting a sustainable and competitive employee benefits program. Establishing a prudent reserve level provides the District with the financial capacity to meet medical claim obligations while helping maintain greater stability and predictability in medical premiums for both the District and its employees.

The proposed reserve threshold supports the strategic goal of Hiring, Retaining, Developing and Growing the Right People for the Long Term by helping ensure that SMFR can continue to provide competitive and financially sustainable medical benefits as part of its overall employee compensation and benefits package.

RECOMMENDED ACTION/MOTION:

Recommended motion: I move to approve the Fund Balance and Reserve Policy Amendment, dated October 5, 2026, that modifies the self-insurance fund's reserve target and processes.

ALTERNATIVE OPTIONS:

The Board may elect to maintain the current policy, which establishes a medical self-insurance reserve range of 10% to 30% of budgeted expenditures.

ATTACHMENTS:

Fund Balance and Reserve Policy - Redlined

SOUTH METRO FIRE RESCUE POLICIES & PROCEDURES



Subject: Fund Balance and Reserve Policy

Division: Board of Directors, Business Services, Finance

Effective Date: 5/2/2022

Revision Date: 10/5/2026

Purpose:

This Fund Balance and Reserve policy promotes responsible and sustainable financial management by maintaining sufficient fund balances and reserves. In doing so, the District will be well positioned to provide financial security and sustainability ensuring the continued delivery of District services, protect the District's creditworthiness and potential bond rating, provide flexibility to respond to unanticipated opportunities, and consider long-term financial planning needs.

Scope:

This policy outlines required reserves for several of the District's funds.

Definitions:

The terms "fund balance" and "reserves" are used interchangeably in this policy and in practice. Fund balance is an accounting term to describe the difference between a fund's assets and liabilities. Fund balance is intended to serve as a measure of the financial resources available in any given fund.

As defined by GASB Statement No. 54, Fund Balance Reporting and Governmental Fund Type Definitions, the District will reserve funds in the following designations:

Non-Spendable Fund Balance

Inherently non-spendable portions of net resources that cannot be spent because of their form or portions of net resources that cannot be spent because they must be maintained. Examples include inventory and prepaid items.

Restricted Fund Balance

Externally enforceable limitations on the use of funds that are imposed by creditors, grantors, contributors, or laws and regulations of other governments or limitations imposed by law through constitutional provisions or enabling legislations. Examples include fund balances related to TABOR, excise taxes, and medical self-insurance.

SOUTH METRO FIRE RESCUE POLICIES & PROCEDURES

Committed Fund Balance

Self-imposed limitations on the use of funds that are set in place prior to the end of a period. Limitations imposed at the highest level of local decision making that requires formal action at the same level to remove. Examples include fund balance for capital projects and operations.

Assigned Fund Balance

Limitations resulting from intended use that is established by the highest level of decision making or intended use established by the Board of Directors for a specific purpose. Examples include fund balance related to the building rental fund.

Unassigned Fund Balance

Residual fund balance that does not fit one of the other designations. The general fund is the only fund that reports an unassigned fund balance.

Policy/Procedure:

District Reserves:

The District shall maintain the following reserves:

TABOR Emergency Reserve:

The TABOR Amendment to the State Constitution requires the District to establish a TABOR emergency reserve fund equal to 3% of “fiscal year spending” which the District interprets as 3% of budgeted General Fund revenues. The use of the TABOR reserve is limited to declared emergencies only and therefore cannot be used to compensate for economic conditions, revenue shortfalls, or salary or benefit increases. The TABOR emergency reserve will be designated as restricted fund balance on the District’s financial reports.

Operating Reserve:

The District shall maintain a fund balance of 20% of budgeted general fund expenditures as an operating reserve. 20% of expenditures is the estimated amount of reserves necessary to cover two months of general fund expenditures. This estimate should be reevaluated on a periodic basis. Operating Reserves will be designated as committed fund balance on the District’s financial reports.

Maintaining an adequate level of operating reserves is a prudent financial management practice. It is expected, however, that the District may need to use operating reserves from time to time. Operating reserves may be utilized at

SOUTH METRO FIRE RESCUE POLICIES & PROCEDURES

the discretion of the Board of Directors to:

- Provide temporary resources in the event of an economic downturn.
 - Reserves should only be used to provide a short-term solution to maintaining service levels until projected revenue growth or necessary expenditure reductions are achieved to balance the budget.
 - The District should first seek to offset revenue declines with expenditure reductions. Reserves should only be used when further reductions in expenditures would affect essential District service levels.
- Provide resources for expenditures in the case of an unexpected event such as natural disaster or an accident.
- Provide resources for one-time capital outlay expenditures.
- Make strategic expenditures as part of the District's long-term financial plan.

Operating reserves may be utilized at the discretion of the Chief Financial Officer to:

- Provide cash flow to pay budgeted expenditures when due and unassigned reserves are unavailable. This is common from November – March while the District waits to receive property tax collections.
- Provide cash flow to pay for expenditures related to major incidents.

Any reserves utilized at the discretion of the Chief Financial Officer shall be replenished as soon as revenue becomes available by either tax collections or reimbursement for major incidents. The Chief Financial Officer shall inform the Board of Directors of any use of operating reserves.

Should the Board authorize a use of operating reserves, the District will strive toward replenishing the reserve to its 20% threshold during the next budget cycle, or as dictated in the District's long-term financial plan approved by the Board.

Excess operating reserves (reserves above the 20% of general fund expenditures) may be appropriated by the Board for one-time expenditures

SOUTH METRO FIRE RESCUE POLICIES & PROCEDURES

with emphasis on achieving future operating cost reductions, capital asset investments, transferred to replenish or supplement other reserves, or prepaying existing debt. The use of excess operating reserves will be determined by the Board of Directors through a budget amendment or during the following budget cycle.

Capital Projects Reserve:

The District shall maintain a reserve in the Capital Projects fund that is sufficient to provide for expenditures outlined in the District's various long-term planning documents, collectively known as the Capital Improvement Plan (CIP), that supports the District's strategic priorities.

The Capital Improvement Plan is derived from and informed by the following supporting schedules:

- Long-Term Financial Plan

The District shall develop and maintain a rolling 10-year financial plan that incorporates the District's sources of revenues and both operating and capital expenditures. The Long-Term Financial plan is intended to serve as the District's comprehensive, forward looking financial planning tool.

- Fleet Capital Replacement Schedule

The District shall develop and maintain a rolling 10-year acquisition and replacement schedule for all the District's vehicles and apparatus. The FCRS was approved by the Board in its original form on July 7, 2020.

- Facilities Operating, Maintenance, and Capital Replacement Schedule

The District shall develop and maintain a rolling 10-year planning tool that facilitates the proper resources to be allocated to the operating, maintenance and capital replacement of the District's facilities in order to meet the District's strategic goals.

The Chief Financial Officer is responsible for the maintenance of the Capital Improvement Plan and its supporting schedules and incorporating them into the District's planning processes and procedures.

The Capital Projects Fund shall maintain the following revenue sources in order to fund the District's ongoing capital expenditures:

- Annual Transfer from the General Fund

The District shall transfer a minimum of fifteen million dollars annually from the General fund to the Capital Projects fund.

SOUTH METRO FIRE RESCUE POLICIES & PROCEDURES

- Sales of Assets
Proceeds from the sale of assets such as vehicles, apparatus, or equipment.
- Wildland Equipment Reimbursement
Reimbursements derived from the use and deployment of apparatus and equipment on federal or state incidents.
- Excise Taxes / Impact Fees
Excise taxes or impact fees received from other jurisdictions for the sole purpose of capital project expenditures.

Self-Insurance Reserve:

The District intends to establish and maintain a defined reserve target in its employee medical self-insurance fund equal to of between 10% and 30% two (2) months of budgeted expenditures, or approximately 16.7% of annual budget expenditures. Maintaining a reserve in the self-insurance fund is prudent to accommodate ~~for~~ cash flow needs, unanticipated claims, fluctuations in claims experience, and stabilized premiums.

~~It is anticipated that once the fund has reached the reserve threshold, a consistent, stable, annual increase of 5% to 6% in premiums will maintain an appropriate reserve level. These estimates should be periodically reviewed and reevaluated. The reserve target and premium funding levels shall be periodically reviewed and reevaluated based on claims experience, projected medical expenditures, plan design, and other factors affecting the financial needs of the self-insurance fund.~~

~~Should the fund fall below 10% reserves, the plan shall increase premiums the following year to replenish the reserves to 10% of budgeted expenditures. If the fund exceeds 30% of reserves, premiums may be held flat or reduced to maintain reserves at 30% of budgeted expenditures. If the fund falls below the established reserve target, the District shall evaluate premium levels and other funding requirements as part of the annual budget and medical plan renewal process and may adjust premiums as necessary to restore the reserve to the established target. If the fund exceeds the established reserve target, excess funds may be used to offset future medical insurance premiums for the District and its employees, subject to annual review and approval through the established budget process.~~

The self-insurance reserve will be designated as restricted fund balance on the District's financial reports.

SOUTH METRO FIRE RESCUE POLICIES & PROCEDURES

Other Reserves

The Board of Directors can establish other reserves through Board action. The list of reserves in this policy are requirements but is not intended to be an exhaustive list.

Fund Balance and Reserve Policy Adoption

This policy shall be adopted and amended by action of the Board of Directors. The Chief Financial Officer shall review the policy periodically and recommend any amendments to the Board of Directors for their considerations and approval.

BOARD OF DIRECTORS AGENDA ITEM

STAFF REPORT



Meeting Date: 10/5/2026

Agenda Item Type: Discussion Item

Agenda Item: Strategic Plan – 3rd Quarter Report

Submitted By: Mike Dell’Orfano, Chief Government Affairs Officer

Approved: John Curtis, Fire Chief

SUMMARY:

Staff will provide a strategic plan update that highlights significant initiatives that support the plan’s Key Focus Areas, goals, and objectives.

BACKGROUND:

SMFR’s website includes a copy of the strategic plan and real-time reports for each Key Focus Area. Each quarter, staff will provide a formal update to the Board on major initiatives that have progressed or are completed. That update will be in the form of a full report showing all goals, objectives, and action items, and a 2-page summary that includes highlights and will be in a distributable format.

FINANCIAL IMPACT:

Click or tap here to enter text.

STRATEGIC INITIATIVE:

Click or tap here to enter text.

RECOMMENDED ACTION/MOTION:

Click or tap here to enter text.

ALTERNATIVE OPTIONS:

Click or tap here to enter text.

ATTACHMENTS:

Strategic Quarterly Report Overview

2026 Strategic Plan Update



South Metro Fire Rescue

Strategic Plan Quarterly Report

3rd Quarter 2026

Purpose

In 2025, South Metro Fire Rescue embarked on a comprehensive, long-range strategic planning process to assess current efforts and status, build upon successes and partnerships, continue momentum in positive growth and services, and solidify a united path to further accomplishments and a vision for the future. The deliverables included a full Strategic Plan document with a Vision, Mission, Values, Key Focus Areas, Outcomes and Strategic Goals. A separate Implementation Plan with SMART Objectives, Action Steps and Metrics was built on that foundation; and a quarterly reporting structure is part of the overall process.

The purpose of a quarterly report is to update the Board of Directors on the most significant and strategic progress being made in the Key Focus Areas of the strategic plan, to share information about the important work moving forward, and to continue to integrate the budget and long range planning work into the overall strategic plan of the organization.

Summary of Strategic Planning

A strategic plan is your guide and a roadmap to help the organization plan for future success. It describes a clear vision, with community-focused priorities that serve as a resource for the Board and staff to make decisions, allocate resources, and consider new and innovative approaches to service delivery. The plan sets high level policy direction about what is most important based on information we have available today and the trends, challenges, obstacles, and opportunities that may happen in the future. The Strategic Plan also provides a longer-term view of major projects and issues facing the community as it informs critical budget conversations.



Strategic Plan Framework



The above graphic is an easy-to-understand overview of the Strategic Plan framework. The **Vision Statement** is the aspirational future for SMFR and is the achievement of all the challenging work in the strategic planning process. The **Mission Statement** is the purpose of the organization and provides guidance for each of the components. The **Key Focus Areas** are listed in priority order and are the most critical areas (the “big buckets”) for the organization to spend time and resources to achieve success and realize the Vision for the future, and the **Key Goals** are the major areas that integrate across those Strategic Priorities to provide direction.

Implementation and Action Plan

The Implementation Plan is the tactical, operational, and administrative document that will guide the accomplishment of Strategic Goals through establishing and tracking SMART Objectives and Action Steps. In short, it takes the overall policy direction from the plan and puts actions to those words. Always following the Mission to gauge the right approach, an Implementation Plan adds context and detail to the big picture. It is an internal document which is consistently being added to, updated, and improved each time a team meets, so it is a separate document and not a part of the Strategic Plan.

Over the course of the last 6 months, the leadership team and staff at SMFR have been working on the creation of the Implementation Plan that has actionable SMART Objectives, Action Steps and Metrics. There is a focus on both current strategic projects as well as projects for future budget conversations. The implementation is built on the policy direction in the strategic plan, and together the strategy and implementation serve as a communication tool for the Board, staff,



and community, directing operational decisions about projects, funding services, budgets, staffing and more. The name of the software used to input and track the implementation is called Ellio.

The Report

This is not the first update or report on the strategic plan, but it is the first quarterly report where a full document will be created that shows all of the updates for each Key Focus Area. Since that report is extensive and detailed, a separate report highlighting the most important accomplishments and updates has also been created.

A few notes of interest for the Board:

Monitoring and Measuring Progress

An important part of the implementation of the Strategic Plan is the monitoring and measuring of progress. Over the course of several years, as the plan continues to improve and become a part of the culture of SMFR, the Outcomes will be further refined, and relevant Metrics will continue to be refined to provide analytical insight into the measurement of achieving those Outcomes.

Metrics will not be the focus of this specific report, as we continue to craft, refine and determine what the most relevant and important metrics are for each of the Key Focus Areas. In some cases, the team will need to create metrics and begin to measure the data over the course of time.

Integration of the Strategic Plan

The budget is directly related to and informs the Strategic Plan – it is the Strategic Plan with resources attached. As such, during each budget cycle the strategic plan should be considered, discussed, amended, and improved to make sure the budget reflects the priorities of the organization.

Fully integrating a budget into the strategic plan might take years, but is one of the most significant decision-making points that will allow the staff and Board to focus on those priorities and policy level directions that the Board sets as part of the plan.

SOUTH METRO FIRE RESCUE

2026 Strategic Plan Update

September 22, 2026

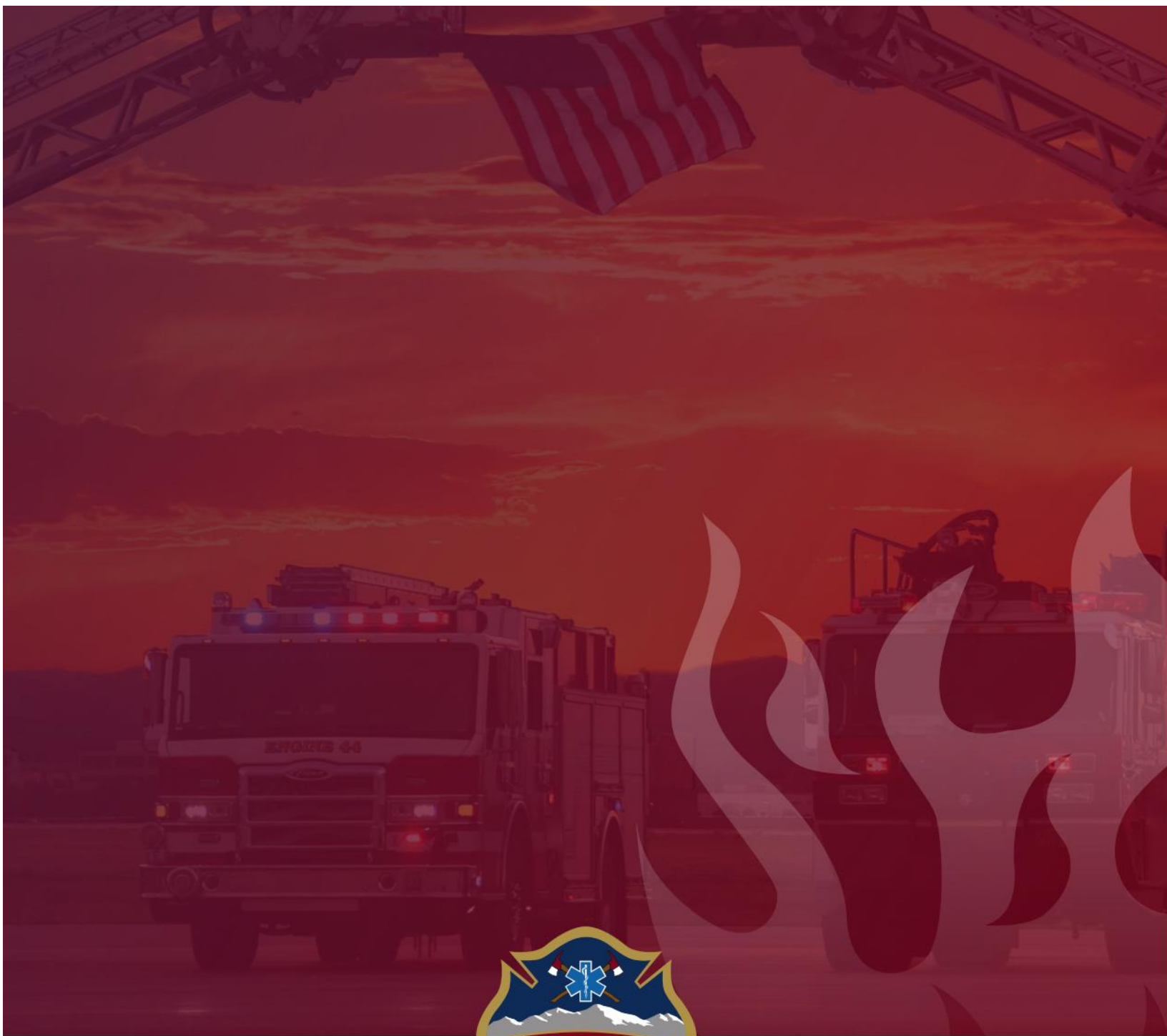


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Plan Overview

Vision

A fire service leader setting the highest standards in prevention and emergency response services, positively impacting lives with every encounter.

Mission

We save lives, protect property, and serve our community.

Values

Excellence through professionalism, accountability, compassion, and engagement

Key Focus Areas and Strategic Goals

Service Delivery



- Deliver the right resources to the right call at the right time
- Commit to innovative approaches that improve services
- Invest in infrastructure and enhance and support the delivery of services

Financial Health



- Responsible stewards of public funds
- Comprehensive long range financial planning

Organizational Health and Culture



- Hire, retain, develop, and grow the right people for the long term
- Expand on culture of caring for employees
- Remain aware of employee challenges and opportunities

Community Health and Safety



- Increase emergency preparedness across our communities
- Improve the prevention of crises

Partnerships



- Be an active, engaged member of communities and organizations we serve
- Pursue regional all hazard partnerships to reduce risk
- Influence collaborative policymaking at the local, state, and national levels

Communication and Engagement



- Enhance trust
- Develop strategies to make our communication more targeted and engaging
- Ensure we create and demonstrate value in our services





Key Focus Area: Service Delivery

Lead: Jake Mayhew

Service delivery at South Metro is a forward-thinking process that leverages industry-wide innovation and data to optimize every response. We are a customer-centered organization that remains open to new ideas and is not anchored by tradition, allowing us to adapt our resources to meet changing community needs, risks, regulations, and environmental factors. Through efficient growth and a willingness to embrace novel technologies, we ensure that our services remain the benchmark for excellence and intentional, outcome-based service.

Latest Comment: Sarah Lentz, 9/16: Note to team - brainstorm metrics; max 25

Strategic Goal:

Deliver the Right Resources to the Right Call at the Right Time **39% progress**

Lead: Mike Burke

SMART OBJECTIVE:

Evaluate alternative response models **50% progress**

Lead: Jake Mayhew

Latest Comment: Maddie Shea, 8/27/2026: Decided to table single-cert

Action Step	Deadline	Status
Create a Response Committee	4/1/2026	Complete
Update operational standards and deployment plan	12/31/2026	In Progress
Research and evaluate ALS deployment model	12/31/2026	In Progress
Evaluate an EMS single certification program	1/1/2027	Complete



Action Step	Deadline	Status
Explore alternative response vehicles, apparatus, and crews to minimize suppression response	12/31/2028	Not Yet Started
Explore best practices used by other agencies	12/31/2028	Not Yet Started

SMART OBJECTIVE:

Explore deployment of blood products **63% progress**

Lead: Jens Pietrzyk

Latest Comment: Jens Pietrzyk 9/16/26 -Grant of \$50K secured and awaiting final contract signature. - Met with dispatch on drone delivery options - update to follow - collaborate with West Metro Fire for shared blood product delivery based on the go live date with closest unit.

Action Step	Deadline	Status
Explore drone delivery	9/30/2026	In Progress
Pursue grant funding	12/31/2026	In Progress
Investigate viability of expanded blood locations	12/31/2026	In Progress
EMS 14 for additional blood resource West Side	12/31/2026	Complete

SMART OBJECTIVE:

Develop the Incident Support Team (IST) & Department Operations Center **38% progress**

Leads: Mike Burke, Daniel Stutz

Action Step	Deadline	Status
Establish the Incident Support Team	12/31/2026	In Progress



Action Step	Deadline	Status
Start providing baseline training for Incident Support Team	6/1/2027	Not Yet Started
Evaluate the facilities to support the Department Operations Center	6/30/2027	In Progress
Establish the Department Operations Center	12/31/2027	In Progress

SMART OBJECTIVE:

Update Agency Performance Benchmarks 21% progress

Lead: Scot Swindall

Action Step	Deadline	Weight	Status
Identify and engage key stakeholders	12/1/2026	Medium	Not Yet Started
Review current benchmarks and standards	1/15/2027	Medium	In Progress
Analyze historical performance data	1/15/2027	Medium	In Progress
Integrate NERIS Incident Categories and Types	1/15/2027	High	In Progress
Develop updated performance measures	3/15/2027	Medium	Not Yet Started
Present recommendations to Executive Team	4/15/2027	Medium	Not Yet Started
Present recommendations to the Board	5/15/2027	Medium	Not Yet Started
Publish in Annual Compliance Report in 2027	7/15/2027	Medium	Not Yet Started

Strategic Goal:

Commit to Innovative Approaches That Improve Service 22% progress

Lead: Scot Swindall



SMART OBJECTIVE:Develop appropriate training strategies to support innovation **0% progress**

Lead: Andy Powell

Latest Comment: Sarah Lentz, 9/16/26: Team will build out action items over next few days

Action Step	Deadline	Status
Define training needs based on direction	12/31/2027	Not Yet Started

SMART OBJECTIVE:Research the scalability of public health and community paramedicine **40% progress**

Lead: Jens Pietrzyk

Latest Comment: Jens Pietrzyk, 9/16/26 - Met with PH MGR and created a 1,3,5-year strategic plan. - explore the locations for a site visit.

Action Step	Deadline	Status
Hire a community paramedic	9/1/2026	Complete
Create a workforce plan	12/31/2026	In Progress
Present strategic 1, 3, and 5-year plan to Executive Team	12/31/2026	Not Yet Started
Explore best practices used by other agencies	6/30/2027	In Progress
Determine alternative public health response vehicles, apparatus, and crews to minimize suppression response	12/31/2028	Not Yet Started



SMART OBJECTIVE:

Evaluate the opportunity for dispatch to establish better utilization of resources **50% progress**

Lead: Mike Burke

Latest Comment: Sarah Lentz, 9/16/26: New Emergency Comms director will build out more action steps over next few months

Action Step	Deadline	Status
Hire Emergency Communication Center Director	9/30/2026	Complete
Investigate industry standards and impacts on NENA/APCO accreditation	12/31/2026	Not Yet Started

SMART OBJECTIVE:

Maintain Accreditation with the Center For Public Safety Excellence - 2030 **22% progress**

Lead: Scot Swindall

Latest Comment: 09/16/2026 (Scot Swindall)- Discussed moving this SMART Objective to a different KFA. Per Chief Mayhew, wait to consult Chief Dell'Orfano.

Action Step	Deadline	Status
Annual Program Appraisals	12/31/2026	Operationalized
Annual Compliance Report	7/15/2027	Operationalized
Complete CPSE Peer Team Recommendations	7/18/2030	Not Yet Started
Self-Assessment Module	12/31/2030	Not Yet Started



Action Step	Deadline	Status
Community Risk Assessment / Standard Of Cover (CRA-SOC)	3/15/2031	Not Yet Started
Strategic Plan	3/15/2031	Not Yet Started
Accreditation Document Upload	3/20/2031	Not Yet Started
Site Visit	4/15/2031	Not Yet Started
Commission Hearing	7/18/2031	Not Yet Started

Strategic Goal:

Invest in Infrastructure to Enhance and Support the Delivery of Services **42% progress**

Lead: Matt Weller

SMART OBJECTIVE:

Ensure land assets meet current and future district needs **50% progress**

Lead: Mike Dell'Orfano

Action Step	Deadline	Status
Secure land for Tanterra fire station	1/1/2026	Complete
Secure land for Ridgeway East	1/1/2026	Complete
Secure land for Sterling Ranch fire station	12/31/2026	In Progress
Secure land for The Canyons (station 36 relocation)	12/31/2026	In Progress
Evaluate Quartermaster	12/31/2026	In Progress
Secure land for training (TJTC alternative)	12/31/2026	In Progress
Evaluate Titan Rd	12/31/2027	Not Yet Started



Action Step	Deadline	Status
Evaluate Buffaloberry	12/31/2027	Not Yet Started

SMART OBJECTIVE:

Ensure sufficient facilities and capacity for fleet maintenance **50% progress**

Lead: Matt Weller

Action Step	Deadline	Status
Evaluate current and future needs	1/1/2026	Complete
Explore partnership options	12/31/2026	Complete
Secure land and evaluate developer proposals	12/31/2026	In Progress
Design	6/1/2027	Not Yet Started
Construction	12/31/2028	Not Yet Started

SMART OBJECTIVE:

Ensure sufficient facilities for training **21% progress**

Leads: Jake Mayhew, Matt Weller

Action Step	Deadline	Status
Finalize plan for current fleet maintenance space	12/31/2026	In Progress
Explore options for TJTC	12/31/2026	In Progress
Explore alternative site locations or other government partners	12/31/2027	In Progress
Determine renovation versus liquidation of TJTC	12/31/2028	Not Yet Started



Action Step	Deadline	Status
Design future JSF	12/31/2028	Not Yet Started
TJTC construction	12/31/2030	Not Yet Started
JSF construction (phases)	12/31/2030	Not Yet Started

SMART OBJECTIVE:

Secure budget for new stations & apparatus to meet growth demands **25% progress**

Lead: Matt Weller

Ensure that the 10-year budget plan accounts for new stations and apparatus.

Latest Comment: Sarah Lentz, 9/16/26: Point to consider in December - How do we develop criteria for establishing new uses at both new and existing facilities to accommodate innovation; consider adding new objective under innovation goal

Action Step	Deadline	Status
Work with strategic services to identify priority response gaps	7/31/2027	Not Yet Started
Determine metrics to open new stations	7/31/2027	Not Yet Started
Determine metrics to add new apparatus	7/31/2027	Not Yet Started
Ensure 10-year plan accounts for station and apparatus needs	12/31/2030	Operationalized

SMART OBJECTIVE:

Maintain facilities to support district needs and operations **64% progress**

Lead: Matt Weller



Action Step	Deadline	Status
Conduct a needs assessment for the Mineral building	8/31/2026	Complete
Conduct emergency structural repairs at Station 41	9/30/2026	Complete
Renovate St. 23 bathrooms	10/31/2026	In Progress
Develop station replacement and major renovation schedule	8/31/2027	In Progress
Conduct a facilities condition assessment	12/31/2027	In Progress
Renovate Station 16 to meet operational needs	12/31/2027	In Progress
Renovate Mineral Building to meet current and future needs	12/31/2028	In Progress

SMART OBJECTIVE:

Complete construction of the new Station 33 **25% progress**

Lead: Matt Weller

Action Step	Deadline	Status
Contract with design consultants	12/31/2026	In Progress
Contract with General Contractor	10/30/2027	Not Yet Started





Key Focus Area: Financial Health

Lead: Stephanie Corbo

We maintain financial health through customer-focused, efficient, data-informed long-term planning that aligns with our strategies, major projects, and initiatives. We ensure a culture of fiscal responsibility and cost-efficiency by using best practices and constant evaluation to demonstrate our value as stewards of public funds. This disciplined approach ensures that our budget remains predictable and resilient, allowing us to meet community needs today while remaining adaptable for the future.

Latest Comment: Maddie Shea, 5/22/2026: We have achieved an unmodified opinion on ACFR and maintained designation of Low Risk Auditee since 2022.

Strategic Goal:

Responsible Stewards of Public Funds **59% progress**

Lead: Stephanie Corbo

SMART OBJECTIVE:

Plan and report out on how we spend our money **63% progress**

Lead: Stephanie Corbo

Latest Comment: Sheryl Trent, 5/15/2026: 7A reporting structure here is for Board reports and information, the public facing communication is addressed in SMART Objective #3.

Action Step	Deadline	Status
Quarterly report for 1st quarter	5/1/2026	Complete
Prepare annual comprehensive financial report (ACFR) and achieve unmodified opinion	6/30/2026	Complete



Action Step	Deadline	Status
Quarterly report for 2nd quarter	7/30/2026	Complete
Quarterly report for 3rd quarter	11/16/2026	Not Yet Started
Prepare annual budget	12/15/2026	In Progress
Quarterly report for 4th quarter	2/15/2027	Not Yet Started
Report on 7A revenue spending - for Board report	6/30/2027	In Progress
Enhance content of quarterly report (add cost savings, add projects, add disposal)	6/30/2027	Complete

SMART OBJECTIVE:

Improve procurement process: maximize value and realize savings through competition
 82% progress

Lead: Mike Smith

Action Step	Deadline	Weight	Status
Update Procurement Policy within Standardization Manual	7/3/2026	High	Complete
Create Schedule for Solicitation	12/31/2026	Medium	Complete
Solicit Highest Risk Expenditures	12/31/2026	Medium	Operationalized
Create and Maintain Centralized Document Management System	12/31/2026	Medium	In Progress
Train Budget Owners on Procurement Process	2/28/2027	Medium	In Progress



SMART OBJECTIVE:Create transparent reporting on all revenue **25% progress**

Lead: Marina Takacs

Latest Comment: Sheryl Trent, 5/15/2026: Internal report on 7A is included in SMART Objective #1

Action Step	Deadline	Status
Set up annual report that shows what 7A revenue funded or assigned - on our website	4/1/2027	In Progress
Partner with Communication to get community update polling every 1-2 years	11/1/2028	Not Yet Started

SMART OBJECTIVE:Incorporate Reporting and Tax Law for Employee Overtime **100% progress**

Lead: Stephanie Corbo

Big Beautiful Bill

Action Step	Deadline	Status
Research Implications of Big Beautiful Bill	12/31/2026	Complete
Incorporate Payroll System Updates for Big Beautiful Bill	12/31/2026	Complete

SMART OBJECTIVE:Discover opportunities to meet service delivery at lower costs **17% progress**

Lead: Mike Smith

Action Step	Deadline	Status
Evaluate right resource for job: example approvals and vehicle being used for the job	12/31/2026	In Progress



Action Step	Deadline	Status
Define cost of service deployment for all division bureau	12/31/2028	Not Yet Started
Utilize technology or AI to improve efficiency and effectiveness of our services	12/31/2028	Not Yet Started

SMART OBJECTIVE:Standardize financial policies **100% progress**

Lead: Mike Smith

Action Step	Deadline	Status
Conduct outreach with stakeholders	4/17/2026	Complete
Establish a cross functional review team	5/1/2026	Complete
Bind all financial policies in one comprehensive manual	8/3/2026	Complete

SMART OBJECTIVE:Improve the ERP Financial System and Processes **53% progress**

Lead: Marina Takacs

Action Step	Deadline	Weight	Status
Change ERP consultants	7/15/2026	High	Complete
D365 System Architect	11/2/2026	High	In Progress
System Diagnostics	11/30/2026	Medium	In Progress
Improve inventory management system	12/31/2026	Medium	In Progress
Financial Reporting Solution	2/1/2027	Medium	Not Yet Started
Training and guides for end users	2/22/2027	High	In Progress



Strategic Goal:

Comprehensive Long-Range Financial Planning **50% progress**

Lead: Mike Smith

SMART OBJECTIVE:

Funding requirements identified for all assets and services **67% progress**

Lead: Mike Smith

Action Step	Deadline	Status
Extend Long-Range Financial Planning to Full Replacement Cycle	6/30/2026	Complete
Define Fund Balance Targets	10/30/2026	In Progress
Balance expenditures with expected revenues	11/23/2026	In Progress

SMART OBJECTIVE:

Configure financial systems for efficiency and effective financial management and reporting **50% progress**

Lead: Marina Takacs

Action Step	Deadline	Status
Address Finance Team Capacity by hiring an Analyst	9/1/2026	Complete
Reestablish quarterly meeting cycle	10/30/2026	In Progress
Build Reporting Functionality for End Users and Finance	12/31/2026	Not Yet Started
Refine Data Components that Integrate into ERP System (i.e., UKG, TeleStaff, banks, purchasing cards, Logistics inventory, Invoices, etc.)	12/31/2026	In Progress



Action Step	Deadline	Status
Foster proactive ownership of divisional budgets	12/31/2027	In Progress

SMART OBJECTIVE:Analyze Long-Range Capital and Asset Needs **80% progress**

Lead: Mike Smith

Action Step	Deadline	Status
Define how costs increase over time - inflation	6/30/2026	Complete
Identify full capital replacement schedule - new capital needs too	11/30/2026	Complete
Full inventory of all assets - deal life; maintenance; cost of replacement	11/30/2026	Complete
Define growth needs - population; demographic changes; linked growth factors	11/30/2027	In Progress
Capture links between service & support needs - triggers/drivers	11/30/2027	In Progress

SMART OBJECTIVE:Seek additional opportunities for revenue **20% progress**

Lead: Stephanie Corbo

Action Step	Deadline	Status
Create System for Strategic Grant Acquisition and Tracking	6/30/2027	Not Yet Started
Pursue congressionally directed spending grants	7/1/2027	In Progress
Pursue grant opportunities through research	8/31/2027	Not Yet Started
Develop a philosophy of cash vs. borrowing (debt/bonds)	5/15/2028	Not Yet Started



Action Step	Deadline	Status
Pursue inclusion of properties within district boundaries	12/31/2028	In Progress

SMART OBJECTIVE:

Evaluate overtime trends and identify efficiencies **83% progress**

Lead: Matt Weller

Action Step	Deadline	Status
Create data model for UKG, Telestaff and D365 data	5/1/2026	Complete
Identify overtime reporting variables and categories	7/1/2026	Complete
Quarterly Board education	12/31/2026	In Progress

SMART OBJECTIVE:

Establish clear processes and expectations for the budget **75% progress**

Lead: Mike Smith

Action Step	Deadline	Status
Develop budget request templates	5/1/2026	Complete
Host Board workshop to establish expectations for budget guide parameters and use	6/15/2026	Complete
Publish budget instructions (OPEX, On Call, Project / Meeting OT)	6/15/2026	Complete
Update Budget Guide (Power DMS)	5/30/2027	Not Yet Started

SMART OBJECTIVE:

Identify industry standards and community expectations **0% progress**

Lead: Mike Smith



Action Step	Deadline	Status
Identify levers that can be used to adapt to changing financial picture	5/31/2027	Not Yet Started

SMART OBJECTIVE:

Establish Board philosophy on long-range planning 0% progress

Lead: Mike Smith

Action Step	Deadline	Status
Establish Board philosophy on revenue	12/31/2026	Not Yet Started
Establish Board philosophy on salaries	12/31/2026	Not Yet Started
Establish Board philosophy on benefits	12/31/2026	Not Yet Started
Establish Board philosophy on capital planning	12/31/2026	Not Yet Started





Key Focus Area: Organizational Health and Culture

Lead: Matt Weller

We take care of our people so that they can take care of our community. We are committed to being an employer of choice by cultivating a culture of trust, psychological safety, and holistic wellness encompassing the fiscal, mental, and physical health of our team. We foster an environment where accountability, shared values and mission-focus lead to long-term stability and employee loyalty.

Strategic Goal:

Hire, Retain, Develop and Grow the Right People for the Long Term **50% progress**

Lead: Camie Chapman

SMART OBJECTIVE:

Provide development opportunities for our employees **45% progress**

Lead: Andy Powell

Latest Comment: Sheryl Trent, 9/15/2026: Promotion planning starting with the line, then Captain.

Action Step	Deadline	Status
Identify incumbent supervisor continuing education annually	12/31/2026	In Progress
Identify executive training program to develop future leaders	12/31/2026	In Progress
Identify post promotion development strategies	12/31/2026	In Progress
Develop the framework for staff Task Book Program by outlining required competencies for each role, drafting task	3/31/2027	In Progress



Action Step	Deadline	Status
book content, and if possible piloting the program with select team members		
Develop executive training program to develop future leaders	12/31/2027	Not Yet Started
Develop post promotion development strategies	12/31/2027	Not Yet Started
Develop incumbent supervisor continuing education annually	12/31/2027	Not Yet Started
Develop South Metro University education program: Identify partners	12/31/2028	In Progress
Develop South Metro University education program: Create LMS in Canvas	12/31/2028	Complete
Provide annual promotional training and assessment centers to ensure adequate candidates for promotion	12/31/2028	Operationalized

SMART OBJECTIVE:

Design and execute an innovative paramedic recruitment and retention process that incorporates new strategies **60% progress**

Lead: Camie Chapman

Action Step	Deadline	Status
Develop incentive program for internal employees to promote to paramedic	12/31/2026	Complete
Develop outreach and engagement strategy to identify internal paramedic candidates during academy and probationary period	1/1/2027	In Progress
Develop lateral hiring process for experienced paramedics for 2027 recruit class	1/1/2028	Complete
Identify alternative paramedic onboarding process	1/1/2028	In Progress



Action Step	Deadline	Status
Evaluate effectiveness of lateral hiring process and identify alternative strategies for 2028 recruitment class	1/1/2028	Not Yet Started

SMART OBJECTIVE:

Ensure compensation is aligned department-wide with market and Board philosophy
50% progress

Lead: Camie Chapman

Action Step	Deadline	Status
Annual evaluation of total compensation for all employees	12/31/2026	Operationalized
Continue Development of Board Conversation	9/30/2027	Not Yet Started

Strategic Goal:

Expand Culture of Caring for Employees 50% progress

Lead: Camie Chapman

SMART OBJECTIVE:

Identify opportunities to allow employees to drive future culture initiatives 25% progress

Leads: Camie Chapman, Matt Weller

Latest Comment: Sarah Lentz, 9/15: Will add more action steps once committee is created

Action Step	Deadline	Status
Work with leadership to develop employee committee focus	12/31/2026	In Progress
Recruit employees to be a part of the employee culture committee	4/1/2027	Not Yet Started



SMART OBJECTIVE:

Evaluate and strengthen opportunities in employee behavioral health and well-being program **67% progress**

Leads: Camie Chapman, Matt Weller

Latest Comment: Sarah Lentz, 9/15: Add more action steps and metrics in December with new member

Action Step	Deadline	Status
Analyze current behavioral health program and identify future direction	6/1/2026	Complete
Recruit and hire behavioral health and wellness program manager	11/1/2026	Complete
Evaluate current behavioral health programming and identify opportunities for program enhancements	12/31/2027	Not Yet Started

Strategic Goal:

Remain Aware of Employee Challenges and Opportunities **50% progress**

Lead: Camie Chapman

SMART OBJECTIVE:

Identify and implement strategies to gather regular, constructive employee feedback **67% progress**

Leads: Camie Chapman, Matt Weller

Latest Comment: Maddie Shea, 8/31/2026: Monthly meetings with Executive Team and Union E Board Regular staff-manager engagement with policy development and changes



Action Step	Deadline	Status
Continual investment to ensure strength and positivity of Labor-Management relationship	12/31/2028	In Progress
Develop structured staff leadership-management relationship	12/31/2028	In Progress
Conduct monthly Labor-Management meetings	12/31/2028	Operationalized

SMART OBJECTIVE:

Expand the use of employees to assist with organizational decision-making **33% progress**

Leads: Jake Mayhew, Matt Weller

Action Step	Deadline	Status
Review and update all committee charters and active membership rosters	6/1/2027	In Progress
Implement a tracking and communication tool for all committees	6/1/2027	In Progress
Create working groups, as appropriate, for specific causes	6/1/2027	Not Yet Started





Key Focus Area: Community Health and Safety

Lead: Kristin Eckmann

We are dedicated to saving lives and protecting property with a flexible approach to meeting the needs of our community, understanding that safety is not only calling 911. Through a risk-based approach rooted in data, we prioritize prevention, mitigation, and alternative response models to address both physical and mental health needs. By fostering buy-in, communicating, and educating, we empower our community to take personal responsibility, creating a resilient environment to live, work, learn and play where resources are accessible and risks are identified before they become emergencies.

Latest Comment: Sarah Lentz, 9/16/26: recommending remove "alternative response models" from description; more appropriate in the Service Delivery (public health & community paramedicine)

Strategic Goal:

Increase Emergency Preparedness Across Our Communities **50% progress**

Lead: Chelsea Molitor

SMART OBJECTIVE:

Assess and deploy annual safety messaging plan **83% progress**

Lead: Chelsea Molitor

Action Step	Deadline	Status
Identify seasonal risks and determine appropriate communication channels for 2026	12/31/2026	Complete
Create content for each risk for 2026	12/31/2026	Complete



Action Step	Deadline	Status
Disseminate monthly safety messages	12/31/2026	In Progress

SMART OBJECTIVE:

Assess risks and develop mitigation strategies on a regional level **36% progress**

Lead: Daniel Stutz

Latest Comment: Sarah Lentz, 9/21/26: Relocated SMART Objective from Partnerships to Community Health and Safety

Action Step	Deadline	Status
Participate in the Arapahoe County Hazard Mitigation Plan development	4/30/2026	Complete
Participate in the Douglas County Hazard Mitigation Plan development	12/31/2026	In Progress
Participate in the Jefferson County Hazard Mitigation Plan development	12/31/2026	In Progress
Continue cross collaborate with county plans to evaluate risk assessment and mitigation strategies	12/31/2026	In Progress
Collaborate with counties and municipalities on other emergency plans	12/31/2026	Not Yet Started
Participate in development of county and municipality development of Community Wildfire Protection Plans	12/31/2028	Not Yet Started
Align emergency management efforts internally and externally	12/31/2028	Not Yet Started



SMART OBJECTIVE:

Maintain and improve relationships with partners that increase emergency preparedness **50% progress**

Lead: Daniel Stutz

Latest Comment: Sarah Lentz, 9/16/26: Could move "align emergency management efforts internally and externally" to Partnerships or to other SO within Community Health KFA

Action Step	Deadline	Status
Assist the Partnerships Team in defining and identifying community partners	12/31/2027	In Progress
Assist the Partnerships Team in defining and identifying partner agencies	12/31/2027	In Progress
Continue to build relationships established with community partners	12/31/2028	In Progress
Continue to build relationships established with partner agencies	12/31/2028	In Progress
Support Local Hospital Training and Exercises - Daniel Stutz	12/31/2028	In Progress
Establish a re-occurring Law Enforcement touch point with all agencies that operate in SMFR - Daniel Stutz	12/31/2028	In Progress

SMART OBJECTIVE:

Improve internal and external emergency preparedness **50% progress**

Lead: Daniel Stutz



Action Step	Deadline	Status
Operationalize the SMFR Incident Support Team	12/31/2026	In Progress
Complete Continuity of Operations Plan	12/31/2027	In Progress
Enhance collaboration with law enforcement for operations, special events, planning	12/31/2027	In Progress

Strategic Goal:

Improve the Prevention of Crises **64% progress**

Lead: Tyler Everitt

SMART OBJECTIVE:

Implement current codes within the District **100% progress**

Lead: Tyler Everitt

Latest Comment: Sarah Lentz, 9.16.26 In December meeting, consider adding action step about ongoing evaluation

Action Step	Deadline	Status
Evaluate the Colorado Wildfire Resiliency Code	1/1/2026	Complete
Prepare documents for adoption of the Colorado Wildfire Resiliency Code for SMFR, cities, counties	4/1/2026	Complete
2024 Fire Code adoptions within Cities where they are moving to the 2024 I-codes	7/1/2026	Complete

SMART OBJECTIVE:

Conduct and evaluate fire investigations to prevent future crises **60% progress**



Lead: Tyler Everitt

Action Step	Deadline	Status
Launched NERIS module	1/31/2026	Complete
Share cause data with risk reduction for ongoing educational efforts	12/31/2026	In Progress
Comply with all statutory requirements for fire investigations	12/31/2026	In Progress
Improve the tracking and capturing of fire cause data	12/31/2026	In Progress
Assess and continue to participate in NERIS committee to improve fire reporting data	12/31/2027	In Progress

SMART OBJECTIVE:

Align risk reduction programs with identified community risks **56% progress**

Lead: Chelsea Molitor

Action Step	Deadline	Status
Identify and align risk reduction strategies for older adults	12/30/2026	In Progress
Identify and align risk reduction strategies for home fires	12/30/2026	In Progress
Identify and align risk reduction strategies for wildfires	12/30/2026	In Progress
Identify and align risk reduction strategies for water hazards	12/30/2026	In Progress
Identify and align risk reduction strategies for motor vehicles	12/30/2026	In Progress



Action Step	Deadline	Status
Identify and align risk reduction strategies for school-age children	12/30/2026	In Progress
Identify and align risk reduction strategies for lithium ion batteries	12/30/2026	In Progress
Reduce risks for water hazards through messaging for 2026	12/30/2026	Complete
Assess and continue to participate in NERIS committee to improve data collection and reporting to drive community messaging	12/30/2027	In Progress

SMART OBJECTIVE:

Utilize fire codes to support safe structures **63% progress**

Lead: Tyler Everitt

Latest Comment: Sarah Lentz, 9/16/26: consider removing "Adopt current fire codes in all jurisdictions" in 2027; shift last 3 action items to operationalized in 2027

Action Step	Deadline	Status
Adopt current fire codes in all jurisdictions	7/4/2026	Complete
Complete code compliance inspections of 100% of all inspectable occupancies	12/31/2026	In Progress
Review all permit applications within 5 business day, 90% of the time	12/31/2026	In Progress
Fulfill all inspection requests within one business day	12/31/2026	In Progress





Key Focus Area: Partnerships

Lead: Mike Dell'Orfano

Partnerships at South Metro mean being a trusted resource and a proactive collaborator with a diverse network of partners from local neighborhoods to public, private and non profit organizations and service providers. By aligning with shared goals and our regional stakeholders, we serve as leaders to bridge gaps, solve complex problems and set shared standards for a safer community. Our commitment to these relationships allows us to leverage regional expertise and collective action to achieve outcomes that no single organization could reach alone.

Strategic Goal:

Be an Active, Engaged Member of the Communities and Organizations We Serve
53% progress

Lead: Mike Dell'Orfano

SMART OBJECTIVE:

Increase awareness of strategic plan through multiple channels 75% progress

Lead: Mike Dell'Orfano

Latest Comment: Sheryl Trent, 9/14/2026: Need to update "Brought to you by 7A" to be more clear about what 7A is

Action Step	Deadline	Weight	Status
Evaluate strategy with Board Community Outreach Committee & Communications Bureau	4/30/2026	Low	Complete
Modify website for access to strategic planning documents	7/10/2026	Low	Complete
Implement approach for integrating strategic plan into our communications	7/1/2027	Medium	In Progress



SMART OBJECTIVE:Enhance partnerships with government agencies **55% progress**

Lead: Mike Dell'Orfano

Latest Comment: Sheryl Trent, 9/14/2026: Operationalize attending all states of the cities and chamber annual events at the end of the year update for 2026

Action Step	Deadline	Status
Annually meet with at least three partner building departments to strengthen coordination on development and code issues	12/31/2026	Operationalized
Strategic memberships and participation in chambers of commerce and economic development organizations and government partnerships	12/31/2026	Operationalized
Strategic membership and participation in state industry representative organizations	12/31/2026	Operationalized
Attend all states-of-the-cities and chamber annual events	12/31/2026	In Progress
Enhance periodic data and service information provided to agencies	7/1/2027	In Progress
Enhanced liaison strategy	7/1/2027	Not Yet Started
Conduct judicial outreach meetings with municipal and county courts for alignment on legal and compliance processes	12/31/2027	In Progress
Communicate on shared high-level issues with law enforcement on a regular basis	12/31/2027	In Progress



Action Step	Deadline	Status
Collaboration with city and county emergency management partners on shared regional issues	12/31/2027	In Progress
Provide update to all cities at least once every 2 years using liaison list	12/31/2030	Not Yet Started

SMART OBJECTIVE:

Enhance partnerships with community organizations **38% progress**

Lead: Kristin Eckmann

Latest Comment: Sheryl Trent, 9/14/2026: A list exists of hospitals, law enforcement.

Action Step	Deadline	Status
Improve state highways through CDOT's Adopt-a-Highway program	12/31/2026	In Progress
Create a current status of partnerships and work in progress.	12/31/2026	In Progress
Enhanced liaison strategy.	7/1/2027	Not Yet Started
Re-evaluate our partnership parameters with the safety foundation annually	9/1/2027	In Progress

SMART OBJECTIVE:

Conduct a Community Survey Biannually

Lead: Kristin Eckmann

Statistically significant survey

This smart objective has no action steps.



Strategic Goal:

Pursue Regional All-Hazards Partnerships to Reduce Risk **43% progress**

Lead: Scott Richardson

SMART OBJECTIVE:

Enhance regional formal partnerships for collaborative service delivery **50% progress**

Lead: Scott Richardson

Latest Comment: Scott Richardson, 8/5/26: Auto aid responses adjusted with WMFR for HazMat and technical rescue incidents versus investigations to not pull resources out of their jurisdiction simply to run investigation. Chief D has been designated for IGA final approval and signature.

Action Step	Deadline	Status
Enhance Aurora auto aid agreement	12/31/2026	In Progress
Refine special teams response models with external departments	12/29/2027	In Progress
Improve the management of IGAs	12/31/2027	In Progress

SMART OBJECTIVE:

Identify emerging hazards and improve collaboration **38% progress**

Lead: Scott Richardson

Latest Comment: Sheryl Trent, 9/14/2026: This objective might move to Community Health and Safety, or maybe be deleted and the Action Steps are combined into a larger issues.

Action Step	Deadline	Status
Collaborate with CDOT on Lithium Ion (MOU and legislation)	12/31/2026	In Progress



Action Step	Deadline	Status
Review our emerging hazards on a national scale	12/31/2026	In Progress
Be a partner in the WICC development for our wildfire strategy	12/29/2027	In Progress
Review community risk assessments	12/31/2028	Not Yet Started

Strategic Goal:

Influence Collaborative Policymaking at the Local, State, and National Levels
35% progress

Lead: Mike Dell'Orfano

SMART OBJECTIVE:

Improve connectivity with state and national representatives 67% progress

Lead: Mike Dell'Orfano

Action Step	Deadline	Status
Outreach to Congressional representatives annually	12/31/2026	In Progress
Outreach to incoming State legislative and administrative representatives	12/31/2026	In Progress
Participate in FMAC, CSFC, SDA legislative activities	5/31/2027	Operationalized

SMART OBJECTIVE:

Influence policymaking during the Colorado legislative session 20% progress

Lead: Mike Dell'Orfano

Action Step	Deadline	Status
2026 Session	5/15/2026	Complete



Action Step	Deadline	Status
2027 Session	5/31/2027	Not Yet Started
2028 Session	5/31/2028	Not Yet Started
2029 Session	5/31/2029	Not Yet Started
2030 Session	5/31/2030	Not Yet Started

SMART OBJECTIVE:

Represent partner fire districts on strategic boards/commissions **43% progress**

Lead: Mike Dell'Orfano

Latest Comment: Mike Dell'Orfano, 6/26/26: 2026: SMFR was not chosen for a board seat on Arapahoe E911 Authority

Action Step	Deadline	Status
DCCF Board	12/31/2028	In Progress
Castle Pines URA Board	12/31/2028	In Progress
Centennial URA Board	12/31/2028	In Progress
Lone Tree URA Board	12/31/2028	In Progress
Arapahoe E911	12/31/2028	Not Yet Started
Douglas E911	12/31/2028	In Progress
Metro Denver Chiefs	12/31/2028	In Progress

SMART OBJECTIVE:

Influence policymaking during the Congressional legislative session **25% progress**

Lead: Mike Dell'Orfano



Action Step	Deadline	Status
119th Congress	12/31/2026	In Progress
Congressional Fire Services Institute	12/31/2030	Not Yet Started

SMART OBJECTIVE:

Increase involvement in evolving hazards policymaking **50% progress**

Lead: Scott Richardson

Latest Comment: Sheryl Trent, 9/14/2026: This SMART Objective will go away after [Participation action step] moved.

Action Step	Deadline	Status
Participation in NFPA/FSRI Committees	12/31/2026	In Progress
2026: Provide fire service and industry education on lithium ion battery hazards at CSFC	12/31/2026	In Progress

SMART OBJECTIVE:

Evolve legislative philosophies **21% progress**

Lead: Mike Dell'Orfano

Action Step	Deadline	Status
Review legislative philosophies document	10/1/2026	Not Yet Started
Improve communication with Local 2086	5/31/2027	In Progress
Improve internal stakeholder awareness	5/31/2027	Not Yet Started
Annually renew relationship with professional lobbyist 2027	5/31/2027	Complete
Annually renew relationship with professional lobbyist 2028	5/31/2028	Not Yet Started



Action Step	Deadline	Status
Annually renew relationship with professional lobbyist 2029	5/31/2029	Not Yet Started
Annually renew relationship with professional lobbyist 2030	5/31/2030	Not Yet Started





Key Focus Area: Communication and Engagement

Lead: Connor Christian

We practice proactive and intentional communication that builds trust through honesty, consistency, and two-way listening. By remaining approachable and receptive to both our internal team and our external community, we deliver prioritized, multifaceted messages that are clear, concise, and relevant to our diverse audiences. We ensure our communication is not only educational and timely but also innovative, interesting, and adds context for everyone we serve.

Latest Comment: Maddie Shea, 5/8/2026: Note only Strategic Goal 1 had a clear owner in original implementation plan, added Connor as default for the rest. Most of these also didn't have dates, put 12/31/28 as placeholder

Strategic Goal: Enhance Trust **50% progress**

Lead: Connor Christian

SMART OBJECTIVE:

Increase the consistency and transparency of internal and external communication through standardized messaging and regular updates. **25% progress**

Lead: Connor Christian

Action Step	Deadline	Status
Build a quarterly communication calendar for internal and external messaging.	12/31/2026	In Progress
Create standardized templates for internal updates, district news releases, and partner briefings.	12/31/2026	In Progress
Launch a quarterly "State of SMFR" internal message drafted collaboratively with leadership based on feedback themes.	12/31/2027	Not Yet Started



Action Step	Deadline	Status
Conduct regular communication audit reviews internally to assess clarity, consistency, and reach.	12/31/2028	Not Yet Started

SMART OBJECTIVE:

Establish a data-informed storytelling program that highlights SMFR's operational impact, prevention efforts, and financial stewardship. **50% progress**

Lead: Connor Christian

Action Step	Deadline	Status
Create a storytelling intake process for divisions to submit ideas, outcomes, and visuals.	8/31/2026	Complete
Produce at least one story per month demonstrating measurable impact or value delivered.	12/31/2026	In Progress
Evaluate engagement metrics (views, shares, partner feedback) and adjust story types every 90 days.	12/31/2026	In Progress
Develop 5–7 recurring content themes (Recruitment, SMFR Stories/Behind the Scenes, First Due/Ride Alongs, About SMFR - History/Culture/Throwbacks, Community Outreach/Engagement, Academy)	12/31/2027	In Progress
Build a PIO data driven dashboard in partnership with Strategic Services/GIS that provides regular metrics for story content (incidents, saves, risk reduction impact, etc.).	12/31/2027	In Progress
Implement a quarterly external community update that highlights service delivery, finances, and improvements.	12/31/2028	Not Yet Started

SMART OBJECTIVE:

Expand two-way listening efforts with SMFR personnel, partners, and the community. **63% progress**



Lead: Nicky Spinar

Action Step	Deadline	Status
Create digital forms for SMFR personnel and community members to provide feedback for communication follow-through	8/31/2026	Complete
Conduct regular opportunities to meet with external agency partners and municipalities to improve relationship building and working relationships.	12/31/2027	In Progress
Build a “You Said, We Did” internal communication strategy to close feedback loops.	12/31/2027	In Progress
Develop a strategy for two-way listening sessions open to SMFR personnel across divisions.	12/31/2028	In Progress

SMART OBJECTIVE:

Partner strategically to support change management **75% progress**

Lead: Nicky Spinar

Action Step	Deadline	Status
Send Communications Team members to Prosci training to learn more about how to be a strategic arm in the change management process.	12/31/2026	Complete
Alignment with leadership on upcoming changes (when, why, how, who, etc.)	12/31/2028	In Progress

Strategic Goal:

Develop Strategies to Make Communication More Targeted and Engaging **63% progress**

Lead: Connor Christian



SMART OBJECTIVE:

Assess and map SMFR's audience segments to redesign targeted communication strategies. **75% progress**

Lead: Matthew Assell

Action Step	Deadline	Status
Develop and implement a Crisis Communications Plan with emergency notification templates, RAVE alerts and holding statements.	12/31/2027	In Progress
Create and launch the AppArmor application for SMFR personnel and community members to increase engagement and communication.	12/31/2027	In Progress
Conduct a communication audit identifying current audiences, languages, and message gaps.	12/31/2028	Operationalized
Research various opportunities for community focused personalization for community members to feel more connected.	12/31/2028	Operationalized

SMART OBJECTIVE:

Modernize communication tools and processes to improve engagement, including analytics, technology, and content delivery methods. **83% progress**

Lead: Matthew Assell

Action Step	Deadline	Status
Evaluate and select an analytics platform that measures reach, engagement and trends.	8/31/2026	Complete
Continue utilizing various communication formats including short-form videos, infographics and podcasts	12/31/2026	Operationalized



Action Step	Deadline	Status
Evaluate potential new communication formats, such as StoryMaps and drone visuals, for furthering outreach and education opportunities.	12/31/2027	In Progress

SMART OBJECTIVE:

Strengthen PIO preparedness and resilience through full 24/7 coverage and redundancy plans. **63% progress**

Lead: Brian Willie

Latest Comment: Sarah Lentz, 9/15/2026: Consider adding action item: Work with emergency management to prepare communication readiness with internal and external communication; see if best within this KFA or Community Health & Safety

Action Step	Deadline	Status
Create standardized PIO response playbooks for major incident types.	8/31/2026	Complete
Conduct regular PIO readiness tabletop drills including scenario-based media responses.	12/31/2027	Operationalized
Establish a rapid-activation communication plan for high-risk events (weather, WUI, major incidents).	12/31/2027	Not Yet Started
Cross-train additional internal staff to support PIO on call depth through on call only position to provide district-wide PIO coverage rotation	12/31/2027	In Progress

SMART OBJECTIVE:

Partner with other SMFR divisions to improve overall communication strategy for the organization. **38% progress**

Leads: Brian Willie, Nicky Spinar



Action Step	Deadline	Status
Collaborate with special teams to create training videos	12/31/2026	Operationalized
Develop communication training with Learning & Development focusing on clear messaging and role-based communication expectations.	12/31/2028	Not Yet Started
Partner with HR to add communication components to onboarding for new hires.	12/31/2028	Not Yet Started
Develop internal guidance for the use of Communication tools (AI assistance, email best practices, organizational communications).	12/31/2028	In Progress

Strategic Goal:

Ensure Our Customer Service Creates and Demonstrates Value **50% progress**

Lead: Connor Christian

SMART OBJECTIVE:

Increase community understanding of SMFR governance, funding sources, and service delivery model. **13% progress**

Leads: Brian Willie, Matthew Assell

Action Step	Deadline	Status
Build online general SMFR Board governance information page	12/31/2026	Not Yet Started
Create simple, visually engaging materials explaining SMFR's governance as a special district.	12/31/2027	In Progress
Host community education sessions dedicated to explaining governance and service delivery.	12/31/2027	Not Yet Started



Action Step	Deadline	Status
Develop a “How SMFR Works” campaign distributed through city newsletters, boards, HOAs, and social media.	12/31/2027	Not Yet Started

SMART OBJECTIVE:

Transparently communicate outcomes associated with Ballot Measure 7A, including deployment of funds and improvements to service. **67% progress**

Leads: Brian Willie, Matthew Assell

Action Step	Deadline	Status
Build a location on the SMFR website to communicate 7A progress through capital projects, staffing, apparatus investments, facilities and operational impacts.	8/31/2026	Operationalized
Create short stories, videos, and graphics showing improvements made possible by 7A funding.	12/31/2027	Operationalized
Partner with Finance and other relevant departments to develop a communication strategy around sustainable revenues and level of service delivery	12/31/2028	Not Yet Started

SMART OBJECTIVE:

Launch proactive, creative public awareness campaigns focused on risk reduction, preparedness, and SMFR value. **100% progress**

Leads: Brian Willie, Matthew Assell

Latest Comment: Sarah Lentz, 9/15/26: moved action item "Partner with cities, school districts, and community organizations to amplify campaign reach" to Partnerships KFA

Action Step	Deadline	Status
Collaborate with Community Risk Reduction, Public Health, and EMS to identify high-risk groups and tailor messaging.	12/31/2027	Operationalized



Action Step	Deadline	Status
Design a rotating calendar of awareness campaigns tied to seasonal risks and community needs (wildfire season, winter preparedness, behavioral health, fall prevention, etc.).	12/31/2028	Operationalized

