

FD to ESD Transition Checklist

Pre-Transition

- Know why you are transitioning
 - Forced Transition:
 - Legal issues
 - Bad press
 - ESD loss of trust in contractor leadership
 - Difference in future service delivery strategy
 - Planned Transition
 - If you have time, it's an evolution
- Identify all Stakeholders
- Ensure alignment between ESD and FD
 - Requires planning
 - Cannot have personal agendas
 - Stay customer focused
- Form committee of 1 or 2 members of each stakeholder group
 - Consistent meetings with structured agenda
 - Utilize information from trusted outside agencies who were successful in transitioning
- Stakeholder communication is imperative
 - Early, and constant communication
 - Periodic updates if extended time before actual transition
 - All communication must be authentic, sincere, and unbiased
- Transfer title of all property, buildings, vehicles, assets
- Decide on Transition Model
 - Top-down (Hire ESD Fire Chief, hire command staff personnel)
 - Bottom-up (If current leadership is strong) you may choose to hire Full-time Firefighters first
- Potential Roadblocks
 - Sometimes volunteers don't want to support the transition because they will lose power and control

Legal

- Will you keep the non-profit company? If so, it may need to be restructured since its primary function will change
- If not, you will need to dissolve it properly

New Fire Organization

ESD must become recognized by the State of Texas as a Fire Department

- A new FDID# is not needed - Have ESD agency added to the FDID # of the current department through the State Fire Marshal
- Write letter to TCFP attaching the District to the Spring FDID number and FIDO account
- SFFMA – Decide on whether to keep or not
- Decide on branding, ESD branding or FD branding (The public doesn't understand ESD, they understand Fire Department), some agencies are called County ESD #, but most are know as X fire department

New EMS Organization

Texas Department of State Health Services if providing EMS

- Establish a First Responder Organization
 - FRO by filing application with TDSHS for FRO
 - Cannot transfer FRO from contractor to ESD

Financial

- Bank Accounts
 - General Fund account (usually already established)
 - Operations account
 - Payroll account
 - Setup new Chart of Accounts
- Credit Cards/Debit Cards
- Purchasing/Procurement processes

Staffing

- Decide on internal staff or outsourcing:
 - Bookkeeping
 - Human Resources
 - CPA
 - Auditor
 - Legal

Company Documents

- Employee Handbook
- Standard Operating Guidelines
- Organizational Chart
- Job Descriptions
- Written processes for everything

Employer

- Payroll
 - Transfer Employee data to new account
 - Add Commissioners as employees
 -
- Employee Benefits
 - Worker's Compensation
 - Health
 - Supplemental Health/Gap
 - Dental
 - Vision
- Insurance
 - Accidental Death and Dismemberment
 - Short-term disability
 - Long-term disability
- 401k (if previously established through contracting agency)
 - Roll into a 457B
- TCDRS
 - Obtain Census data
 - Await calculations and basic plan documents
 - Decide
 - % of income to contribute
 - Agency Match – 0.0 - 2.5 to 1?
 - Vesting – years - 5, 7, 8, 10, 15?
 - Retirement – 20 years, or 30 years
 - There is no Buyback of time option for employees
 - Decide on movement of employees
 - All (Full-time, Part-time, and Volunteer)
 - Full-time only
 - Full-time, and part-time only
 - All employees including Administrative and Support staff must participate
- Social Security
 - Cannot opt-out of paying Social Security

Vendor Accounts

- Notify vendors
- New Account setup if so desired
- Provide new tax-exempt documents