

Succession Planning for Liberty Township 2015 and Beyond

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A research project submitted to the Ohio Fire Executive Program

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CERTIFICATION STATEMENT

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1. This paper constitutes my own product, that where the language of others is set forth, quotation marks so indicate, and that appropriate credit is given where I have used the language, ideas, expressions, or writings of another.

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ABSTRACT

Liberty Township is a community that is changing. This is cause for the fire service to change as it provides service to this booming community. Like many similar organizations the fire department did not have a succession plan in place and could have faced a leadership crisis as other organizations that have not employed the concept succession planning and management.

The purposes of the Applied Research Project were to investigate is if succession planning is needed within the Liberty Township Fire Department and to make recommendations to implement a succession plan.

The descriptive research was conducted to answer the following questions:

1. Is succession planning needed for the department?
2. What are our future requirements for the department?
3. What models of succession planning are being used today?
4. Which model of succession planning best fits the needs of the Liberty Township Fire Department?

The procedures utilized in this research included a comprehensive literature review of applicable publications, two personal interviews with township trustees, personal interviews with the assistant administrator, and the Liberty Township Fire Chief. Survey instruments were distributed to fire departments in southwestern Ohio and a separate internal survey of employees.

The results concluded that succession planning and management are needed for the organization to address both planned and unplanned future requirements. The research found that few fire department organizations are employing effective succession planning but are investing

in officer development after promotion. The research also found that a formal succession plan would improve long term viability of the organization by improving organizational continuity.

The recommendations of the research included the following:

- Update and enforce current job descriptions for all levels of the organization mapped to NFPA 1021 and accredited training to determine prerequisite qualifications.
- Institute the out grade acting officer detail to provide for experience in positions of increased responsibility.
- Implement tuition reimbursement for fire department employees to provide an avenue for formal education.
- Develop and implement a formal succession plan.
- Implement a talent management pipeline as part of the succession plan to improve bench strength and talent pool in all levels of the organization.

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INTRODUCTION

Statement of the Problem

Currently, the Liberty Township Fire Department is lacks a succession and development plan to meet the changing needs of the community it serves.

Purpose of the Study

The problem this descriptive study will investigate is if succession planning is needed within the Liberty Township Fire Department and to make recommendations to implement a succession plan.

Research Questions

The following questions will be answered by this descriptive research:

1. Is succession planning needed for the department?
2. What are our future requirements for the department?
3. What models of succession planning are being used today?
4. Which model of succession planning best fits the needs of the Liberty Township Fire Department?

BACKGROUND AND SIGNIFICANCE

Liberty Township is located in southwest Ohio's Butler County in the center of the fast-growing Cincinnati-Dayton metroplex. Located along the I-75 Growth Corridor, with Cincinnati 20 miles to the south and Dayton 25 miles to the north, Liberty Township is an attractive community for its 37,000+ residents with a variety of business development opportunities. Liberty Township provides access to quality housing, healthcare and schools. The community's location allows easy access to Cincinnati and Dayton. Both metropolitan areas provide businesses with the assets necessary to recruit and retain a highly-skilled and educated workforce. Liberty Township is a growing, vibrant community that encourages involvement by residents and businesses in planning its future.

Since 2001, when the first five career personnel were hired the community demographic has shifted from primarily a bedroom community with an explosion of planned urban development. This development includes two projects that have established a medical hub anchored by Children's Hospital of Cincinnati's Liberty Campus and a high density mixed use complex developed by the same company that brought Easton and The Green to the Ohio area. Liberty Center is scheduled for an October 2015 opening.

Liberty Township experienced tremendous residential growth during the decade of the 1990's. The township trustees wanted to ensure the highest quality and most efficient emergency services for their residents possible. For this reason, they decided to hire full-time firefighter/paramedics starting in 2001. In the intervening years the department has grown steadily from a volunteer department in 1953 to 24 hour part time paramedics in 1998. Currently

there are 36 full-time employees; 9 of those are Lieutenants. As many as 70 part-time employees are authorized. The current administrative rank structure consists of a fire chief, assistant chief, and EMS captain assigned to headquarters during weekdays.

The operations section consists of a lieutenant in each of the three fire stations with the lieutenant at headquarters serving as the shift supervisor. The daily staffing of 17 personnel includes 3 lieutenants assigned to the engine companies in the respective station. Advanced Life Support Transport is provided from all three fire stations that house an ambulance and engine company. The headquarters station cross staffs a ladder company in addition to the engine company and ambulance.

11 of the 17 duty positions are career positions with the remaining positions being part time. A fourth fire station is planned by 2017 to be built on property purchased in 2014. This will create a need for a minimum of 3 additional Lieutenants. Staffing for this location has yet to be determined.

The current chief and assistant chief were hired as career employees from their respective volunteer positions during the transition to a staffed fire department. Prior to 2007, the only supervision consisted of staff officers that divided responsibility for fire and EMS respectively while assigned to a forty hour week and responding from home off duty.

In 2007 LTFD promoted the first group of lieutenants and an EMS Captain with subsequent lieutenant promotions in 2011 and 2013 to complete the current group of officers. In each group of promotions of 3 Lieutenants were selected from a group of internal candidates that met the minimum eligibility of 5 years of service in the Ohio Police and Fire pension with at

least 3 years being with Liberty Township and certification as a Fire Safety Inspector.

The promotion process consisted of a written exam, assessment center evaluation, and an interview. In 2011 the “out of grade” acting officer rotation was eliminated. Prior to elimination of the out of grade position, firefighters that were eligible for promotion were placed in the acting officer position in the absence of the assigned officer.

The job description for Lieutenant-Shift Supervisor position approved in 2007 requires Ohio certification as both and EMS and Fire Instructor within 18 months of appointment as a required certification. Instructor 1 is a prerequisite for officer 1 certification according to NFPA 1021. Only 2 of the 9 Lieutenants (22 %) are compliant with this requirement. In the job descriptions for lieutenants and captain there is a requirement to complete a minimum of twelve hours of approved officer training but there is no predetermined list of approved and recommended trainings.

These job descriptions approved by the Liberty Township Board of Trustees focus heavily on years of service and basic Ohio certifications. As the rank increases, the years of service and time in positions of management increases respectively. The EMS Captain requires additional certifications specific to EMS, however the chief and assistant chief positions drop the paramedic certification from the requirements with advanced degrees only recommended.

When applying the ProBoard matrix for NFPA 1021 many of the knowledge, skills, and abilities (KSA's) are not addressed either in required duties or prerequisites. The current job descriptions for all officer positions do not correlate to NFPA 1021 certifications such as officer 1, 2, 3, or 4.

An officer 1 class was contracted for and delivered in 2009 by Great Oaks Career Campuses Public Safety Services however, it was not mandatory for attendance. Officer 2 was planned for the following year and quotes have been provided by Great Oaks each year since but the class has not been delivered. Only 2 officers have completed officer 2 certifications.

During the economic downturn in 2008, dedicated training funds remained available but members at all levels are not taking advantage of this valuable resource thus leaving training dollars unspent each year. For example, at the close of the fiscal year 2013 there was \$6442.00 unspent on training. This money was ultimately to be encumbered to partially fund our only student to attend OFE after a training appeal was heard at the trustee level. In 2015, it was discovered that the encumbering did not occur. The collective bargaining agreement currently in place has included a minimum of \$15,000.00 to be spent on career employee training since 2011. This is split between the fire training and ems training budgets and is viewed as the maximum to be spent. The current department budget for the year 2015 according to the Liberty Township Board of Trustees resolution 14-235 totals \$6.7 million dollars. Of that total, \$29,350.00 (.44%) is committed to training for all personnel including administration and part time staff.

Liberty Township has successfully navigated the economic challenges with no losses to personnel, services, or facilities. While maintaining and expanding the training budget the tuition reimbursement and assistance program was cut from the benefits package in 2011 as part of the labor agreement reached in June of that year. Presently few officers are actively pursuing higher education. Currently, only 1 officer has or is enrolled in either the OFE or EFO class. None of the staff have completed either program in their prior service prior to joining Liberty Township.

In the next 2 years the department is forecasting adding a minimum of three Lieutenants when the fourth fire station comes is built and staffed. Both chief officers are eligible for normal service retirement in the next few years. The current assistant chief has announced that he is actively looking into early retirement options in June of 2015. 5 of the existing lieutenants will be eligible to retire in the next 5 years also.

In order to address this issue and formulate a plan several items of information would need to be obtained. Those items range from the actual retirement intentions of current officers, anticipated expansion and or contraction of the organization, educational profiles of the staff, and the intent of the township administration for replacement of positions from either within the organization or outside it.

By developing a talent pipeline Liberty Township Fire Department can judiciously utilize the tax dollars granted and ensure a smooth and uneventful transition. This could realize significant impact on the external stakeholders-the taxpayers in regard to the use of training funds. Additionally, the development of a road map will provide the current and future officers with guidance to focus their efforts at career development.

The significance of this study will evaluate the current status of succession planning and career path training. Recommendations for developing and defining intentions of the current and future officer staff will also be realized from the results.

LITERATURE REVIEW

Succession planning for both the planned life cycle of an organization and the unexpected, sudden dramatic change are a cornerstone trait of successful organizations in both the private and public sector that stakeholders have come to expect.

The United States Constitution provides a predetermined line of succession for the presidency 19 positions deep into the congress and cabinet but has only been used sparingly since ratified in 1967. (U.S. Const. amend. XXV). On April 10, 2010, a Polish government plane crashed killing all 96 persons on board. Included in the fatalities were the President, former president, the Chief of Staff, Deputy Foreign minister, multiple high ranking military officers, and 15 members of the parliament. This is an example of the unexpected event that decapitates a governmental organization (Priborowski 2013, March 1). The tragic events of September 11, 2001 showed the fire service the need to prepare for the worst when 25% of the casualties for the FDNY were officers. This impacted the organization for many years (Lemire, 2011, August 4).

Price (2005) focuses on the need to prepare for this sudden and unexpected change. “When an emergency circumstance does occur, there is an enormous level of stress experienced by the organization’s staff and the recipients of service.” In the Liberty Township Fire Department this sudden and unexpected loss would only have to be 3 officers to reach the 25% proportion that FDNY experienced on 9/11. A normal structure fire response can receive up to 6 officers responding including senior staff and an entire shift’s assigned company officers. A single unplanned or short notice departure of an officer in Liberty Township would be a 33% loss on either an operations shift or the department administration.

The International City/County Management Association (ICMA) reported that only 25% of the member organizations had a succession plan in place. Of those that did not have a plan in place, 67% cited limited staff and preoccupation with short term activities as a reason for not having a formal plan in place. (Center for State and Local Government Excellence 2011).

Even in the most stable municipal organizations there is regular turnover in key leadership (Leland et al. 2012). Fiscal constraints and calls for austerity have helped create a situation that limits the time and capital that be spent on succession planning as human resources and management are focused on the immediate, day to day obligations and view the future with uncertainty (Sweeney 2013). McIlvaine (2015) states that at many companies, “The cupboard of internal candidates bare.” This is due to rampant cost cutting since 2007 resulting in employee development budgets being cut if not totally eliminated. The fire service and Liberty Township followed the business world example in many cases by limiting training budgets and education funding.

Appelbaum et al. (2012) states that large companies and the public sector will face a dramatic turnover of key leaders in the next decade as the baby boomers (those born between 1945 and 1964) withdraw from the workforce in mass. While delayed retirement programs such as the DROP has lengthened the tenure of leadership in the short term, however it conversely interrupts the leadership pipeline long term. An unintended consequence will be a smaller pool of candidates to select from with a longer learning curve (Leland et al. 2012). These delayed retirement programs have curtailed the sharing of institutional knowledge due to a perceived lack of urgency.

In 2006, the ICMA survey found that only 13% of local government managers were below the age of forty. Only 2 of the appointed officers in Liberty Township are below the age of 40. While the DROP program of Ohio Police and Fire Pension has potentially stalled some of these eligible retirements, the current Liberty Township officer core eligible to retire in the next 8 years include the chief, assistant chief, captain, and 3 lieutenant-shift supervisors. This is 50% of the officer corps.

Succession planning was initially conceived as a risk management strategy to mitigate the unexpected loss of key leaders in large organizations (Rothwell 2010). Meisinger (2011) compares success and failures of major companies such as Apple and IBM due to having a plan in place for the unthinkable and the planned events or not doing so. She also notes the difficulty that leaders she interviewed found in facing their own organizational mortality. Rothwell (2010) states, “Amid the twofold pressures of pending retirements in senior executive ranks and the increasing value of intellectual capital and knowledge management, it so much more necessary than ever for organizations to plan for leadership continuity and employee advancement at all levels.” Succession management is investing in employees and the organization by preparing the organization to continue after current leadership moves on.

If the fire chief position and upper staff officer positions are compared to the CEO and other executive positions in the corporate world then it is reasonable to equate that the discussion of planning for their replacement is just as difficult and important. Rothwell (2010) stated, “Organizational leaders should make the effort to determine the retirement plans of key officers. In that way, the organization is better able to identify time spans for specific key positions.”

Having this data may identify the urgency of assuring there are sufficient personnel ready to assume leadership positions. The fire service tends to view this information as a secret and it is not widely shared.

Young (2005) identified that while the Just-In-Time model was adequate in the past it is disconnected from efforts such a recruitment, retention and performance management needed today. She went on to advocate for the Integrated Approach to developing the Leadership Pipeline. This approach does not focus on just the organizational elites but addresses the long term developmental needs of workers at all management levels and across the employee life cycle. This prepares and resupplies the talent pool. Actively promoting and planning for changes and the future.

IFSTA Chief Officer defines succession planning as “a proactive approach that ensures that personnel hired, trained and promoted today will have the skills to meet the challenges of tomorrow.” (*Chief Officer* 3rd ed. 2014).

The National Fire Protection Association standard (NFPA 1021 2013), Standard for Fire Officer Professional Qualifications acknowledges and encourages fire officers to consider formal higher education as part of their educational and professional growth. A fundamental aspect of NFPA 1021 is the certification levels of officers from level 1 to level 4. These easily equate to duty positions in most departments. In Liberty Township the officer 1 would be the engine company officer and so forth. These certifications are readily available from many venues and most do not require a college degree. At the upper levels (officer 3 and 4) a degree is helpful to complete coursework but is not required from any of the institutions locally at this time.

The United States Department of Defense Fire and Emergency Services program provides a working model of adopting NFPA certifications/credentials and upward guidance. In order to qualify for advancement, the required certifications/credentials must be obtained and a minimum service times in the lower rank or position (Time in Grade requirement). Regardless of the current level the individual is expected to be actively pursuing education and training requirements for advancement as a consideration in annual performance reviews. (Department of Defense DOD 6055.66M 2010). (Air Force Operating Instruction AFI-32 2010)

Zepeda et al. (2012) states that because the complex nature of work and business in both the private and public sector, that the organizations cannot rely on the serendipitous replacement of talent. Nor can organizations expect to have a pool of willing and qualified candidates ready and waiting, even during a recession. Fink (2010) notes that individuals are becoming more strategic in their own career development and job searches and thus are willing to move from organization to organization if it is not perceived as opportunity exists. The development of a plan and sharing with the employees the potential opportunities, requirements, and guidance to achieve those is an effective tool to limit attrition of potential top talent. In late 2015 LTFD experienced the first documented loss of personnel to a promotion in another organization.

Cueni-Cohen (2014) notes that career planning is becoming self-service, but employees still need guidance but few organizations provide help to map education and job skills needed for advancement. She continues that employees are free agents stitching skill sets together to move on or up at some point. This makes employers reluctant to invest in those employees for fear of a

reduced return on investment. In the public sector this is magnified in the court of public opinion regarding luxury benefits such as paid college tuition.

Pynes (2004) stated that the internal pool of candidates is influenced by training and development and by transfer, promotion, and retirement policies. Assessing the internal staff competencies is crucial and that agencies should routinely assess all employees' competency levels. This will help determine the pool available and capable of fulfilling future functional requirements. Paul (2012) quotes Dennis Compton that, "The long-term success of an organization is directly related to the on-going investment made in those who will lead it in the future."

Pynes (2004) also advocates the promotion of internal candidates to recoup the investment made by employers and to reward for past performances. By showing the agency is committed to development and advancement the pool of candidates and bench strength will be established. This practice would eliminate the need to consider external candidates.

Paul (2012) references statement one of the Wingspread Conference report that in 1966 said, "The scale of business and government operations today, the complexity of modern technology and organization, and the swift increase in new knowledge, the population explosion, rapid growth of urban communities, need for efficiency and economy on the part of the commercial and industrial community to compete in our private enterprise system, particularly under the pressure of imports of our foreign trade commitments, require that fire executives and administrators be better educated than their predecessors and better prepared to understand and

facilitate change.” He summarizes that the subject of professional development was identified then and continues to be a need to be addressed globally in the fire service.

The Institute of Executive Development found in 2014 that companies continue to plan for succession to reduce risk rather than to find the best successors (The Institute of Executive Development 2014). Many that participated in this study do not know who is next in line to fill senior positions because they lack a connection between the skills and experiences required and while some have succession plans in place on paper they are not connected with coaching and internal talent development programs. Talent development is treated as a distinctly separate activity. 25% of the organizations participating in this study choose outside replacements and this trend is viewed by the majority of respondents as a failure to produce adequate successors internally.

In summary the literature review identified that succession planning is common for successful private businesses and should be a high priority for government as we evolve to running our organizations as businesses. There are multiple components to successful succession planning to establish bench strength and fill the leadership pipeline with potential candidates. While the development of a succession plan is significant and challenging the return on investment to our internal and external stakeholders is exponential.

PROCEDURES

This project began as a research paper proposal for the Ohio Fire Executive program. The first component of research was a Boolean search of the internet. The results of the search provided resources for review pertaining to the topic including several fire service trade publications, Executive Fire Officer Program (EFO) research projects, and Ohio Fire Executive (OFE) research projects

Data was collected through two surveys and interviews with the representatives from the township administration. The internal survey identified the retirement intentions/outlook from current staff and baseline training for all full time staff with a rate of return of 93%. 31 of 33 career employees responded to the survey.

The data from this survey will enable the forecasting when retirements are planned and begin the initial steps of succession planning. Additionally, data obtained on education levels and credentials will allow for the development of a career development plan for use at all levels of the organization.

The external survey was sent to the members of the southwestern chiefs association with a 75% rate of return. By using an electronic format there was a higher rate of completion than previous studies on this topic. The data obtained from this survey instrument allows for comparison to similar organizations in size and structure in regards to career development, funding levels for education, and promotional process.

Interviews with a sampling of the administration, (fire chief, assistant administrator, and two trustees) were conducted. An interview with a subject matter expert in succession

management was conducted in mid-April and from that interview a series of identical questions was developed for use during the administration interviews. The questions were provided in advance of the scheduled interview for review. All of the interviews with the exception of Chief Stumpf were conducted at the township administration building. The interviews ranged in length from thirty minutes to an hour in length.

David Kern served as a township trustee from 1980 until not seeking reelection in 2015. Mr. Kern was also a member of the fire department for an extended time during his tenure. As a trustee he oversaw the transition of the department from a volunteer organization to the department as it is today.

Thomas Ferrell is a first full term trustee, being elected in 2014 after being appointed to serve the remainder of an unexpired term in 2013. Prior to his appointment he served on the township zoning committee for 10 years.

Melanie Hermes is the assistant township administrator and human resources director. Mrs. Hermes has been with the township since 2002 serving in various capacities. She has overseen the promotion of all the officers and members except the chief, assistant chief, and original 5 career members.

Chief Paul Stumpf has been the fire chief since 1985. He has overseen with Mr. Kern the transition from a volunteer department with two fire stations and BLS services to the current department.

David Duckworth is a retired township and city administrator with over 25 years of service. He has lectured for multiple agencies including the Ohio Fire Chiefs Association on

succession planning. Currently, Mr. Duckworth is a consultant with Management Partners Inc. specializing in succession planning.

Definition of Terms

Job Performance Requirement (JPR)- defined within NFPA 1021, a statement that describes a specific job task, lists the items necessary to complete the task, and defines measurable outcomes

Knowledge, skills, ability (KSA)- a cluster of competencies required to do a job

Pro Board- The Board of Fire Service Professional Accreditation- an international accrediting body of training agencies and organizations that use NFPA professional qualification standards.

IFSAC- The International Fire Service Accreditation Commission- an international accrediting body of training agencies and organizations that use NFPA professional qualification standards.

Limitations of the Study

Currently, there is no specific text written for fire service succession planning. There is significant information available from the business world that succession planning is a relevant risk reduction tool. A direct comparison can be made to the size and scope of budgets in many cases to between public entities and private sector enterprises.

The external survey was limited to the area considered Southwestern Ohio by the Ohio Fire Chiefs Association districting to provide a reference geographically. Expanding the area to

the state of Ohio and filtering to departments with similar structure of the fire department and governmental organization could of provided additional information for consideration. A total of 84 responses to this survey were received.

The internal survey was directed on readiness and education attained for promotion based on current conditions dictated in the labor agreement and job descriptions. A total of 41 responses were received. 10 of 12 promoted officers responded to the survey. A number of part time staff disregarded the survey as the instructions led them to the conclusion that it was targeted for career staff only. Considering that career positions are promoted from this pool of employees further evaluation of the development and management of them would be warranted in future research.

RESULTS

A literature review, two survey instruments, and four interviews were used to obtain the answers to the research questions.

Succession planning and management is needed in Liberty Township. In the normal life cycle of the organization planned service retirements will occur in the next 5-10 years. The results of the internal survey show that 52% of the staff plan on retiring when reaching the appropriate age and service requirements. In that group, 5 officers will be eligible in 5 years or less. As a risk management tool, the unexpected departure or event resulting from a loss is also justification to begin the process of succession planning Rothwell (2010),

57% of the workforce has 10 years or less service time in the OP&F pension. That group did not perform the role of acting officer or out of grade riding at any point in their tenure. The

next largest segment of the workforce is distributed in 15-20 year of service. 15 years of service is the vesting point for the pension, making 31% of the workforce eligible for service retirement of varying degree.

The group in the 10-15 years of service demographic is most under represented. Only 12% of the workforce represented. In this segment none of the officers represented have completed officer 2 or have completed a college degree.

Planned retirements as stated in the internal survey will happen in less than five years for most of the senior officers in the organization. The loss of the combined experience of this group exceeds 200 years of service. Only 48% of the surveyed employees intend to enter the deferred retirement option program (DROP) offered currently by the Ohio Police and Fire Pension.

Based on the internal survey and published goals of the township both growth and retirement will happen in the short term. A fourth fire station is anticipated in less than three years. During the interviews it was identified that there is not a uniform vision of when this will occur and what the staffing model for it will be. All were in agreement that the staffing would include a lieutenant for each shift creating a need for three additional promotions to the lieutenant grade and will result in the need for additional career personnel to staff station four ranging from three to six additional positions.

62% of the staff surveyed has not reviewed the job descriptions for lieutenant and captain. Only 2 lieutenants are compliant with all aspects of the job description. The current captain job description contains training and certification requirements are not readily available.

84% of departments in southwestern Ohio survey have no identified succession plan in place for an unforeseen event resulting in a loss of key personnel. Of the 16% that responded to having a plan most (54%) rate that plan as marginal or less than adequate.

In southwest Ohio, only 38% of the respondents have what they would consider an officer development plan or program. Most of these organizations focus on training and certification after promotion to an officer position. These departments continue to subscribe to the Just-In-Time model Young (2015). Only 3.3% of the organizations noted that they focus employee efforts prior to promotion. 65% of organizations provide tuition assistance in varying degrees to encourage pursuit of formal education.

70% of similar external organizations have increased the amount budgeted for training and education of their personnel since 2010. Liberty Township has not increased allocated training funds for career personnel since 2011 based on reported budget figures in annual budget resolutions since 2012.

The average training budget in the southwest Ohio fire departments surveyed of similar demographics is \$45,200.00. By comparison Liberty Township allocates \$15,000.00 for outside training to career union personnel annually since 2011. The total combined training allocation of Liberty Township is \$29,350.00 for all staff (career union, staff, and part time) and training delivered in house as part of EMS continuing education in 2015 from all training line items. In 2016 the total approved training line items total \$22,450.00. 86% of all organizations have increased the training and education budget by an average of 30% since 2010.

When selecting candidates for promotion 47% of the surveyed organizations require a written test for promotions. Only 15% required a minimum degree type for any promotion in their organization and 19% had required certification or credentials. Liberty Township is in line with these results as there is a required written exam, assessment center, and interview. A fire safety inspector certification is a required prerequisite qualifying as a credential or certification required for eligibility for promotion.

Respondents to the external survey showed that there are varying degrees of career development planning ranging from suggested classes to requirements for completion upon promotion. Internal survey results show that there is not a concentrated effort to succession management. 45% of the respondents have completed officer 1 but only 10% of that group meet the NFPA 1021 prerequisite of completing instructor 1.

Duckworth advocates for moving to succession management. The process of succession management of the workforce is all encompassing from recruitment, development, and retention. Zepeda, Young, and Pynes all agree that efforts in succession management should be directed to the development of the talent pipeline at all levels of the organization.

The DOD provides the most detailed and fire department specific talent development plan. It encompasses all the aspects of talent management Cueni-Cohen and The Institute for Executive Development recommend to provide for a system involving both the employee and employer.

DISCUSSION

The literature review shows that succession planning is a critical component for the sustainability of a successful organization in both the private sector and the public sector. The fire service is not blind to this fact. The NFPA, Center for Public safety excellence, Pro Board and IFSAC have devoted significant attention to the standardization of education and certification programs. Oneial (2005) makes this clear in his comments and the actions of the National Fire Academy involvement in the continuing advocacy and development of the FESHE initiatives while he served as the superintendent. All of these entities are contributing components in the career development recommendations published by the IAFC (IAFC 2012).

ICMA and the results of the external survey agree that few organizations have a succession plan in place. The external survey showed less fire departments had an established emergency succession plan in place than the ICMA results that included all levels and types of public government. The lack of a plan will strain an organizations ability to provide service due to the stress of the situation such as the Fire Department of New York faced in 2001 with an unplanned and unexpected event that decimated its officer corps.

As of 2011, ten years after losing 25% of their officer corps the Fire Department of New York has implemented changes to prevent the catastrophic results from occurring a second time Priborowski (2013, March 1). As an emergency service provider fire departments and local governments are expected to continue to function at a high level in spite of disasters.

This is evident today, FEMA has developed multiple continuity of government training courses and recommendations for local governments. Most prevalent of these recommendations

is the concept of being “3 deep” in all critical areas. These are in a direct response to the events of 9/11. Most prominently the highest level of our government has a detailed plan in place with the 25th amendment to the US constitution that details 19 positions deep for a successful transition and continuation of government operations in a time of crisis for the position of the president. Both of these examples are brought to the forefront by the specter of disaster or war on a national level.

At the local level smaller scale disasters and unexpected loss does not have to rise to the magnitude of 9/11. Wind, ice storms or singular deaths and incapacitations can cause significant stress on a public entity.

The normal life cycle of the organization is occurring. Liberty Township is no different than the public organizations Leland et al studied (Leland et al 2012). Regular turnover and retirement is a significant concern. We stand to lose over 200 years of experience in the next 5 years. LTFD will also be expanding the lieutenant level when the fourth fire station comes on line by 3 positions. This is an expected increase of 33% of that level of the organization. Considering that only 2 of the current officers plan to enter the DROP program this creates a need for up to 8 Lieutenants in the next 5 years, assuming that promotions continue to be internal as advocated for by Pynes and Fink. These forecasted promotions would give the current firefighter ranks an opportunity that has not existed since 2011 when the last test was administered.

The desire to promote internally is evident based on our past practices and this desire was affirmed in the interview with T. Farrell to include all upper ranks of the organization. This

concur with Appelbaum et al (2012) results on reducing turnover. Liberty Township continues to promote from part time staff to fill career positions starting this practice in 2010. All the current officers were promoted from internal candidates including the chief officers that were promoted from volunteer positions to full time employees of identical rank.

The current collective bargaining agreement dictates that to be eligible for promotion to the rank of Lieutenant a member must have 3 years of service with Liberty Township as a career employee. In 2007, when the first promotions were finalized just prior to the trustees meeting a last minute change resulted in the creation of the EMS Captain position and a subsequent promotion of another individual. This was the driving force for the article on promotions since there was no posting of this position and thus no competitive process to fill it. Neither party has looked to address promotions above the rank of lieutenant in successor agreements since the captain position was not included in the bargaining unit during the 2006 state employee relations board election.

Even with delayed retirement programs such as we have in Ohio, the urgency to share institutional knowledge is not viewed as urgent and has clogged the talent pipeline. When an individual enters the DROP, this comes with a defined separation date or risking a significant financial penalty. This should force senior officers to accept their organizational mortality that is sometimes referred to by participants as a defined expiration or use by date. This should prompt preparation for the transition to the next officers filling those positions.

Unfortunately, it does not appear to be occurring in the selection of organizations surveyed. Many factors make the designation of a successor difficult ranging from civil service

restrictions to personal attitudes towards the concept of that a leader will eventually have to leave an organization by one means or another. While the preferred departure from service would be a normal service retirement we are reminded on a daily basis that tragedy can and will strike organizations.

As the work force currently exists a large portion of these potential candidates would come from the 5-10 years of experience demographic. These individuals have not been guided on their career development and lack key experience in positions of increased responsibility. This is consistent with the findings of McIlvaine (2015) concerning the cupboard of candidates and the talent pool Pynes (2004) being severely limited by our actions. The current job descriptions do not require any fire officer credentialing or certification. While there was an officer 1 class conducted and well attended, the follow on officer 2 class has not been delivered. Some employees have obtained this certification since through their own efforts. Since there are no requirements for any of the credentials NFPA compliant officer training seems to receive a lower priority for training funds allocation. Comparatively, fire safety inspector certification is approved on a regular basis since it is a requirement for newer employees to obtain in order to achieve the final step promotion in the rank of firefighter.

Most fire department organizations surveyed continue to rely on the Just-In-Time model Young (2005) and continue to focus on training and certification after promotion. An Integrated Approach to development of key leadership positions from recruitment to retirement is hampered by the fire service's tendency to not acknowledge leaders organizational mortality (Messinger, 2011). Liberty Township also falls into this category as requirements for promotion focus on

time in service in the pension and with the organization are the only requirements to sit for the written exam.

Employees taking the exam are given 6 months to prepare for the written exam and subsequent steps of a process. A current eligibility list is not active and has not been since 2011 when the last promotions were conducted. This will severely hamper any attempt to address an immediate unforeseen need to replace a lieutenant. Since there is no defined process for other promotions beyond lieutenant, development of those processes would delay any expansion of ranks or immediate need in those areas.

The instructor requirement after promotion and extending beyond the probationary period may contribute to the lack of pursuit of further education and training before promotion. Considering that the existing job description training and certification requirements are not enforced on the promoted officers at the time of the survey post promotion and that most of the existing staff have not reviewed the current job descriptions the value of the job description would be marginal at best to the writer. It would seem that the collective bargaining agreement has more influence on the promotion to lieutenant than any other item or reference.

Talent management and credentialing such as the Department of Defense program for fire protection is tailored for fire departments to prepare employees for advancement (Department of Defense DOD 6055.66M 2010). (Air Force Operating Instruction AFI-32 2010). This program identifies specific credentials and time in grade requirements to be eligible for every position in the fire and emergency services program. An employee has a clear and concise document to guide them in preparation for advancement. This program does not place formal educational

requirements but provides recommendations for associated officer levels. This program is the most fire service specific program to model a plan after that the writer could find. A similar program with clearly defined eligibility, education, and service requirements could be combined with effective job descriptions to create the foundation of a plan to manage talent from entry to retirement.

This program is the only program that the writer could correlate specifically to the fire service. The IAFC officer development handbook first published in 2002 provides a framework to apply NFPA 1021 levels of certification to the firefighter looking to advance either in their own department or with another (IAFC 2012). Similarly, in the nursing industry the clinical ladder concept combines experience and education requirements along with specialized credentialing. This also serves as a road map to advancement in the organization with job descriptions mapped accordingly.

The concern of the free agent syndrome described by Cueni-Cohen (2014) is evidenced in the organization by the time of service commitment in the township policy governing other township department employees requiring employees to remain with the organization for a specified amount of time to “work off” the tuition reimbursement. It is also demonstrated in the absence of fire department employees not being eligible for participation. Tuition assistance was removed from the benefits package negotiated in 2011 and remains absent today. The negotiation centered on the townships desire to not prepare personnel to leave the organization. That concern was again voiced when the writer entered the Ohio Fire Executive Program. This contradicts with the data from the external survey showing that the majority of organizations in the region

surveyed provide for and encourage continuing or higher education for fire department employees. Currently, a degree is not a requirement for any of the promoted positions in the organization. This could explain the lack of pursuit of a degree by most of the staff.

Liberty has experienced minor losses in the last 7 years since the initial promotion of lieutenants. Most recently in 2015 an employee left to accept an officer position with another organization and in late 2015 a promoted officer began the process of a disability retirement due to an unexpected medical condition. Fink (2010) shows that employees are willing to move to another organization if the perception of opportunity does not exist. Liberty appears to currently be contradicting this as since 2001 when career positions were created there have only been 5 losses. In those 4 departed for promotion with another agency and the last changed careers to law enforcement. The loss of these employees is not viewed as a negative due to the infrequency of occurrence.

Contrary to the fiscal constraints that Sweeney (2013) found most (86%) similar agencies in the survey have increased the funds available for training and development. The survey concentrated on the time frame from 2010 forward while Sweeney's study was focused on the immediate aftermath of the financial downturn of late 2008. The overall training budget and the amount allocated for career personnel has not changed since it was substantially increased in 2011 with the inclusion of a mandatory minimum of \$15,000.00. This is viewed as the maximum amount that the organization is obligated to expend on career development. With a plan to manage and guide staff the dollars could be used in a tangible long term result of assured readiness.

Organizations that are proactive adopt a process of succession management of the employees at all levels of the organization Duckworth (2014). Succession management plans for hiring, training, and promoting personnel to have the skills to meet the challenges of tomorrow Chief Officer (3rd ed.) (2014). Although Liberty Township is a public employer, it shares many similarities to private industry in size and scope of revenues and expenses. Personnel costs make up the majority of incurred expenses in both the public and private sector examples such as Apple and locally Proctor and Gamble validate the importance of having an adequate plan in place (Meisinger 2011).

Rothwell (2010) and Graham (2015) agree that succession planning is a key risk management tool that public entities do not use to their advantage. It should not be a surprise to anyone when an employee retires or leaves the organization for other reasons. With that it falls on organizational leaders to prepare the workforce for future challenges and leadership opportunities. In Liberty Township this would apply to all ranks and grades as the initial promotion to a career employee comes from the part time work force.

By not focusing on just the high talent or organizational elites with an all-encompassing integrated succession management plan for all levels of the organization long term viability can be assured. This will prevent a leadership vacuum on the loss of key officers in both planned retirements and sudden unexpected situations.

The fire service is widely considered an on-the-job training occupation (Jetter 2011). Experience and lessons learned as a firefighter are important in the formation of a foundation of a fire officer. This represents one of the greatest gaps that will be present in future generations of

officers. Equally important are the position specific functions beyond the fire ground. 200 years of experience cannot be replaced easily but the organization can prepare our future leaders for advancement and ensure continuity of operations. Cross training individuals in other areas of increasing responsibility provides opportunities to balance out the individuals experiences. This will build confidence in both the internal and external stakeholders of the organization leading to the next evolution of the delivery of fire and emergency services in Liberty Township.

Many of the departments surveyed are using parts of a succession management plan focusing on emergent replacement needs and after promotion. Planning for the normal life cycle of the organization provides employees with knowledge of potential opportunities and when they can realistically expect them to occur. Only 1 department had a clearly defined succession plan in place and working towards preparing employees for the future needs of the organization. Despite a significant recovery in the southwest Ohio area from the 2008 recession many of the public entities continue to concentrate on daily operations and survival as noted in the ICMA survey from 2011 (Center for State and Local Government Excellence 2011).

RECOMMENDATIONS

The future of Liberty Township Fire Department will continue to bring significant change. Changing demographics, growth, and workforce change will necessitate significant actions to ensure sustain the quality operation the residents have come to expect. To ensure smooth transition versus abrupt and uncoordinated change the following recommendations are submitted based upon the research contained herein.

Update and enforce job descriptions for all officer levels of the organization. The current versions are not mapped to NFPA Standard 1021 (2013). By doing so, it can provide a road map for training and credentialing (Interview M. Hermes August 2015). NFPA 1021 identifies necessary education and training criteria to allow all ranks to prepare for advancement. This in concert with the IAFC Officer Development Handbook provide the framework for developing effective job descriptions that reference back to KSA's and JPR's that all the employees will be familiar with.

The updating and enforcing of current job descriptions will also facilitate the changing of prerequisites for eligibility for promotion to the rank of lieutenant. The criteria should address the prerequisites of NFPA 1021 by requiring the employee to obtain instructor certification and officer 1 prior to promotion to the rank of lieutenant. In Ohio these programs to obtain professional credentialing and certification are readily available from multiple entities and can be held on site, in Liberty Township in some cases. An onsite program could increase the participation and potentially reduce the overall cost of training multiple personnel.

These certifications can potentially be obtained from either a Proboard or IFSAC entity (Onieal 2005). Accredited agencies ensures that NFPA 1021 requirements are met through a validation process of the agencies testing procedures by an outside entity and model the Department of Defense program requirements (DOD 6055.66M 2010). (Air Force Operating Instruction AFI-32 2010). Depending on the options and time frame chosen to implement this recommendation the cost to the organization ranges from \$4,000.00 to \$10,000.00 based on previous quotes provided to the organization.

The first phase of implementation should focus on bringing current promoted officers to meeting existing job description requirements and NFPA 1021. Requiring compliance with current job descriptions has not occurred. Only 2 lieutenants meet all the certification criteria that has been in place since 2007. Compliance with the existing job descriptions will cost approximately \$2,000.00 for addressing the instructor requirement that is the most lacking.

Once the existing officers have addressed the shortfalls in regards to NFPA 1021 personnel currently eligible for promotion would need to be addressed. Based on current funding trends in the training budget for career personnel this group could begin attending classes in 2017. If the programs are delivered on site the overall cost per attendee could be reduced significantly.

These changes to eligibility requirements will have to be negotiated with the local bargaining unit since the eligibility is currently a covered article. The current collective bargaining agreement will expire in May 2016. By negotiating the changes to eligibility for promotion in conjunction with the updating of job descriptions both employees and the employer will have an active role in the development of development pathways and career guides.

Implement an out of grade or acting officer detail when an officer is not assigned to an outlying engine company utilizing personnel eligible for promotion. The Chief feels that the organization is still de facto doing this in the outlying stations since the officer is not replaced currently (Interview P. Stumpf August 2015). This is not cost prohibitive and provides for a designation of responsibility while offering a mentoring opportunity for those members performing the role with an appointed officer immediately available to the employee for

mentoring (LeDuc, T. 2012). Currently a minimum of one lieutenant is assigned daily to headquarters making a promoted officer available at all times and provide valuable on the job training for employees eligible for promotion (Jetter 2011).

Based on the current lieutenants amount of accrued leave annually this cost would total approximately \$3000.00 yearly (sick, FMLA, and injury leave not used in this estimate) based on the annual leave entitlements of the lieutenant rank. Experience in positions of increased responsibility is one of the most important aspects of developing the talent pipeline (Young 2005).

Develop and implement a formal succession plan. The plan should include the following

- A clear line of succession to eliminate any potential confusion in an emergency implementation of the plan (Price 2005).
- Rotation of duty assignments or areas of responsibility for officers to begin cross training and development of the three deep concept advocated by continuity of government recommendations from FEMA (Goldsmith, M. 2009)
- Identifying high talent personnel and managing their experience and education to prevent the loss of institutional knowledge due to attrition.

These individuals should be made aware of the preference or desire to promote from within the organization instead of looking to the outside of the organization (Interview T. Pharrell August 2015). Organizations tend to automatically discount internal candidates and this lack of emphasis on those candidates detracts from the success of the organization (McIlvaine, A. 2015, February 26).

Continuing to promote from within the organization as is done in the case from part time to full time for all levels will encourage employees to stay with the organization as it changes and expands. Since Liberty Township is not a civil service entity internal promotion is not guaranteed beyond the rank of lieutenant.

Higher education has definitive benefits and the cost of this education has increased exponentially. Allowing fire department personnel access to the same benefit as other township employees under the same regulations will be a step towards a joint employee development situation as advocated for by Pynes (2004). The current job descriptions for the position of assistant chief and fire chief cite a preference for an associate's degree but do not specify them as requirements.

The annual anticipated cost of tuition reimbursement could be capped at a maximum amount of dollars annually such as is done in some neighboring organizations. The highest available amount for employees was found to be \$35,000.00. If all career employees utilized the \$3,000.00 per year that the current township policy allows the potential total cost would be \$99,000.00.

Further research is also recommended on officer training in the state. The value of training provided by all the various entities delivering this training in the state can not be quantified as there are currently only 4 entities that provide accredited training by either IFSAC or The ProBoard. In the open comments section of the survey it became clear to the writer that there are vast discrepancies between institutions to content of officer training programs.

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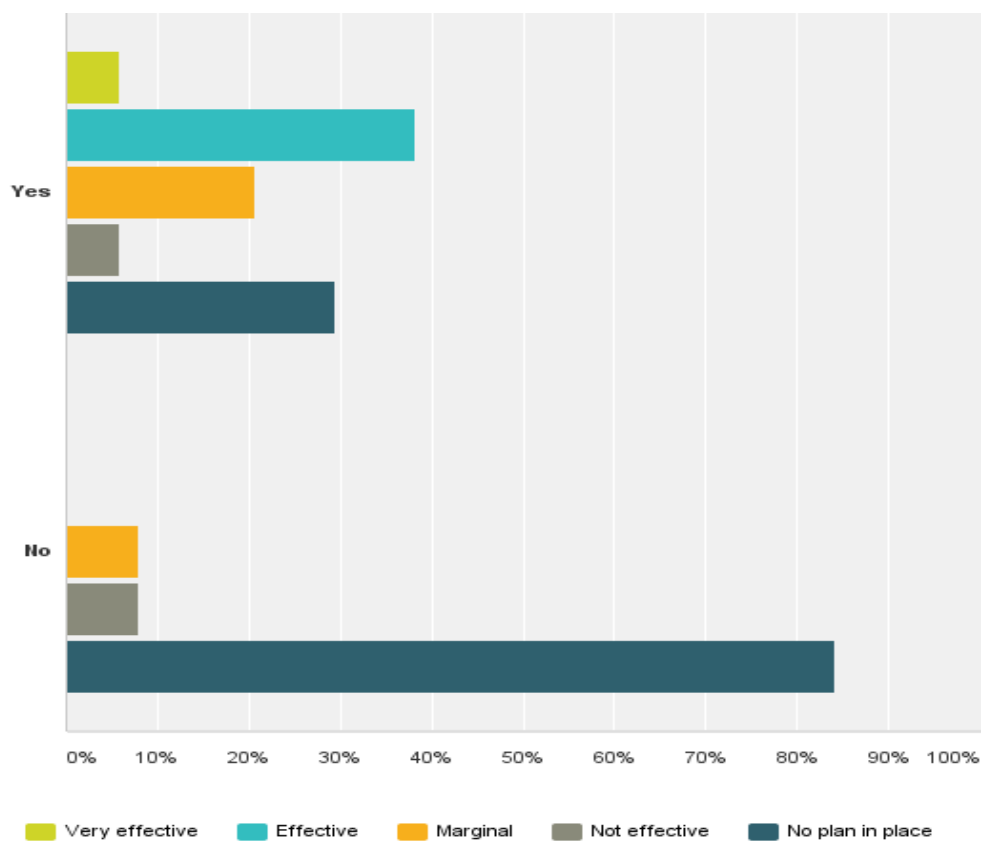
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APPENDIX 1 – GRAPHS FROM SURVEY RESULTS

External survey

Q2: Is there a plan in place for your organization in the event of an unexpected or sudden loss of key supervisory/leadership positions and rate the plan in your opinion?



Q6: Please rate the following in regards to promotions in your organization

	Not important	Somewhat important	Very important	Required	Total Respondents
Written Exam	7.81% 5	28.13% 18	25.00% 16	43.75% 28	64
Assessment Center	14.06% 9	14.06% 9	31.25% 20	46.88% 30	64
Time in service (seniority)	15.87% 10	38.10% 24	28.57% 18	19.05% 12	63
Credentials/Certifications	12.50% 8	26.56% 17	43.75% 28	18.75% 12	64
Formal Education (minimum degree requirements)	20.63% 13	36.51% 23	28.57% 18	14.29% 9	63

Q7: Has your organizations training and education budget changed since 2010 and if so by how much?

	10 %	20 %	30 %	50 %	Greater than 50 %	Total
Increased	55.26% 21	21.05% 8	13.16% 5	2.63% 1	7.89% 3	38
Decreased	58.82% 10	11.76% 2	0.00% 0	17.65% 3	11.76% 2	17

Internal Survey

Answer Choices	Responses
Firefighter	0.00% 0
Lieutenant	80.00% 8
Captain or above	20.00% 2
Total	10

Q4: What is you highest level of education achieved?

Answer Choices	Responses
Career certifications (Firefighter 2 and Paramedic)	30.00% 3
Associates Degree	10.00% 1
Bachelors Degree	10.00% 1
Masters or Higher	0.00% 0
Some college but unstructured or unrelated to a major	50.00% 5
Total	10

NFPA 1021 Certifications for the rank of Lieutenant and Above



APPENDIX 2 – SURVEY INSTRUMENTS

Welcome to My Survey

Thank you for taking the time to complete this survey as part of my applied research project for OFE class. If you are interested in the findings of this survey or have any questions please contact me.

jmason@liberty-township.com

513-678-6776

Ohio Fire Executive Class 14 Survey for Liberty Township Fire Department

* 1. How many years of service do you have in the OP&F pension?

- 0-5
- 5-10
- 10-15
- 15-20
- 20+

* 2. Do you currently plan to enter the DROP (Deferred Retirement Option Program) of OP&F when eligible?

- Yes
- No

* 3. What is your current rank with Liberty Township?

- Firefighter
- Lieutenant
- Captain or above

* 4. What is your highest level of education achieved?

- Career certifications (Firefighter 2 and Paramedic)
- Associates Degree
- Bachelors Degree
- Masters or Higher
- Some college but unstructured or unrelated to a major

* 5. Select the NFPA 1021 Officer training levels you have completed

- Firefighter 2
- Instructor 1
- Officer 1
- Officer 2
- Officer 3
- Officer 4

Please provide the training provider you received the above training from in the space provided

* 6. Did you fill the acting officer role prior to it's elimination?

- Yes
- No

* 7. Have you reviewed or read the Liberty Township job description for the positions of Lieutenant-Shift Supervisor and or Captain - EMS?

- Yes (Lieutenant only)
- Yes (Both)
- Neither

* 8. Select the requirements of the Lieutenant-Shift Supervisor job description you currently meet?

- | | |
|--|---|
| <input type="checkbox"/> Firefighter 2 / Paramedic | <input type="checkbox"/> Ohio EMS instructor |
| <input type="checkbox"/> Fire Safety Inspector | <input type="checkbox"/> 5 years of service time in state pension |
| <input type="checkbox"/> Ohio Fire Instructor | <input type="checkbox"/> Less than 4 points on Ohio Drivers License |

* 9. Select the requirements of the Captain-Emergency Medical Services job description you currently meet?

2 or more years supervisory experience

CPR instructor

2 or more years as a Paramedic instructor

ACLS provider or Instructor

Firefighter 2, Paramedic and Inspector certifications

PHTLS or BTLS certification

5 years of service time in the state pension

PALS

* 10. What age will you be when eligible to retire from Ohio Police and Fire with 25 years of service? (enter the number)

Welcome to My Survey

Thank you for taking the time to complete this survey as part of my OFE research project. Your responses will provide valuable information and if you are interested in the results please contact me via email at jmason@liberty-township.com.

Survey on Succession Planning

1. Does your organization have an officer development plan or program?

Yes

No

If yes please describe

2. Is there a plan in place for your organization in the event of an unexpected or sudden loss of key supervisory/leadership positions and rate the plan in your opinion?

	Very effective	Effective	Marginal	Not effective	No plan in place
Yes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Who is responsible for the career development of personnel in your organization

- The employee
- The organization
- A joint effort of employees and the organization

4. Does your organization offer tuition assistance for employees pursuing college degrees?

- Yes
- No

5. Do you think your organization provides adequate investment in training and education for employees to prepare for promotion?

- Yes
- No

Other (please specify)

6. Please rate the following in regards to promotions in your organization

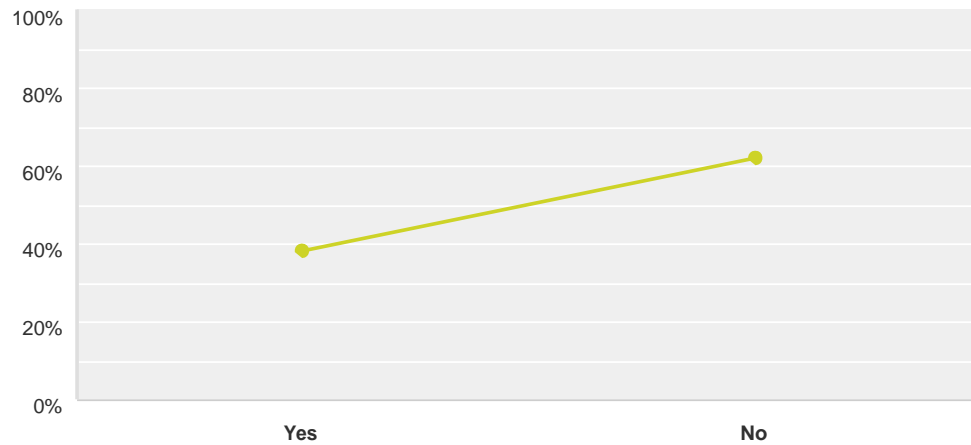
	Not important	Somewhat important	Very important	Required
Written Exam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time in service (seniority)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credentials/Certifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formal Education (minimum degree requirements)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments

APPENDIX 3 – COMPLETE SURVEY RESULTS

Q1 Does your organization have an officer development plan or program?

Answered: 63 Skipped: 0



Answer Choices	Responses
Yes (1)	38.10% 24
No (2)	61.90% 39
Total	63

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	2.00	2.00	1.62	0.49

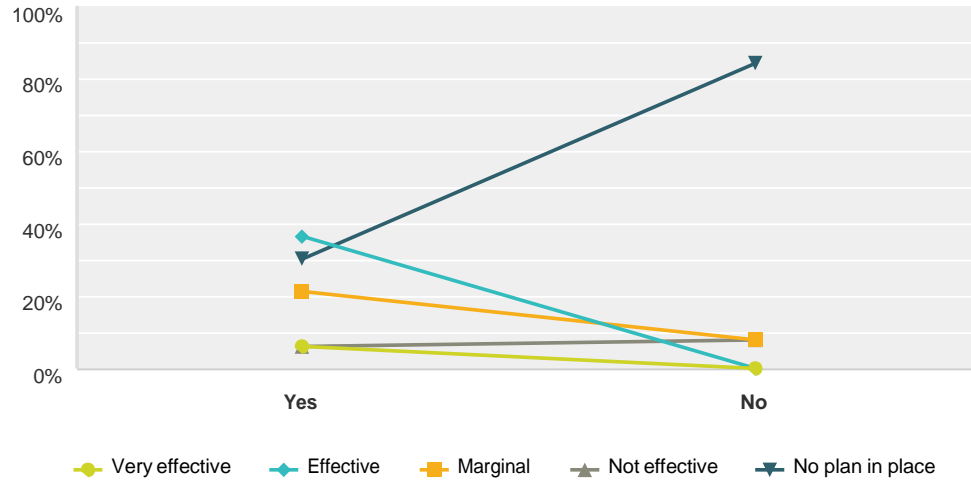
#	If yes please describe	Date
1	Anyone interested can take officer 1 and ride up when the LT is off. EFD will pay for all related courses	6/21/2015 3:52 PM
2	Hold a yearly "officer boot camp" outside instructors are brought in to teach over a 2-3 day period. Everything from leadership to tactics.	6/18/2015 1:16 PM
3	Work on officer development by encouraging to take Fire Officer 1 and II	6/17/2015 1:54 PM
4	The plan includes administrative assignments and specific training requirements be met along the promotional ladder climb.	6/15/2015 10:16 AM
5	We require all officers to have Fire Officer I and II to test for any officer rank at the minimum along with an associates degree or combination of training and experience to equal an associates degree. We have a plan that gives them in steps the order we feel they should develop their formal education. We pay for all FO classes along with al MCO classes that are listed. We have a educational reimbursment scale for college education that ranges from 50% to 70% base on letter grade. Below a C average is no reimbursement.	6/12/2015 1:09 PM
6	We have a shadowing program that involves officer candidates "riding up" in the ranked position. This also has specified content regarding the specific job duties that are rolled out in the classroom portion.	6/12/2015 1:07 PM
7	Thru our Union Contract and Job Descriptions each FT firefighter has five years to complete Fire Inspector, Fire Instructor, Fire Officer 1 and Fire Officer 2. We provide \$1,000 a year per employee to assist with this effort. The minimum qualification of a LT is the above classes plus five years experience as a FT employee so everyone should meet that goal within the first few years. Lieutenants are sent to Fire Officer 3 upon promotion and Captains are to apply to Ohio Fire Executive annually until accepted.	6/12/2015 10:20 AM
8	We are beginning officer training for our perspective Lieutenants	6/12/2015 9:44 AM

OFE Outside Agency Survey

9	All current and promoted officers are required to complete the OFE curriculum within their probationary period. In addition Lt's must complete Fire Officer I and Captains Fire Officer II. Fire Lieutenants assigned training responsibilities must have or obtain a Fire Instructor Certification; Fire Lieutenants assigned EMS responsibilities must have or obtain an EMS Instructors Certification	6/12/2015 9:18 AM
10	Each officer level has a minimum training requirement tied to it. Lt: FO1, inspector, ICS 300, Blue Card Capt. FO2, ICS 400, Instructor Chief: FO3 or OFE or Assc. Degree	6/12/2015 8:56 AM
11	We implemented a career path plan 5 years ago and it list all requirements to promote to lieutenant, captain and Asst. Chief. We also have a 3 month field training program where new lieutenants and captains spend a month with three training officers of their new rank to learn job responsibilities and assure they have guidance in decision making. For the first year they are given a variety of assignments on leadership. They also are assigned a mentor.	6/12/2015 7:15 AM
12	Each officer "to be" must complete a list of classes that make up our career path/ladder. Upon completion of these classes/courses, the individual is then eligible for the officer rank. Once they have obtained the officer rank, there are no other plans in place at this time to continue developing their leadership skills.	6/12/2015 7:14 AM
13	We created a Career Track document based on the IAFC Officer Handbook, 2003. First Edition, November 2003 Published in partnership with the IAFC Foundation Copyright © 2003 International Association of Fire Chiefs Printed in USA We also have mandatory courses for a new officer to complete. Such as Fire Officer I & II, Fire Instructor, Fire Safety Inspector, and Safety Officer.	6/12/2015 7:11 AM
14	we send all officers to fire officer I and II. After that, we specifically target officers for classes at the NFA. In addition, we assign officers specific duties to expand their comfort zone.	6/11/2015 6:24 PM
15	OFE OR EFO	6/11/2015 5:31 PM
16	Sending junior officers to OFE and shadowing senior officers. All members are able to receive tuition reimbursement for job related college courses.	6/11/2015 5:15 PM
17	We do not have a FORMAL OD program, but several years ago, we produced and continue to produce ADVISORY and GUIDANCE materials for Officer Development. These documents are based on the IAFC Officer development series. We have guidance documents for both FO Level 1 and FO Level 2. We have also funded the FO series for those of our members who want to pursue those certs.	6/11/2015 4:49 PM
18	All ranks are developed within a professional matrix. Internal candidates have minimum and preferred qualifications for each rank level. The matrix determines eligibility.	6/11/2015 3:52 PM
19	To attend OFE or Fire Officer 1-3	6/11/2015 3:19 PM
20	In its infancy, consists of several classes including Fire Officer 1, 2, and 3 plus NFA's Leadership 1, 2, and 3. Mentoring by current officers also integral to success.	6/11/2015 3:13 PM
21	Once promoted	6/11/2015 3:11 PM
22	3 week pre promotion training course. Covers tactics, discipline, paperwork, and various issues not otherwise addressed in SOPs.	6/11/2015 3:09 PM
23	We use our employee evaluations on development plans.	6/11/2015 2:50 PM

Q2 Is there a plan in place for your organization in the event of an unexpected or sudden loss of key supervisory/leadership positions and rate the plan in your opinion?

Answered: 63 Skipped: 0

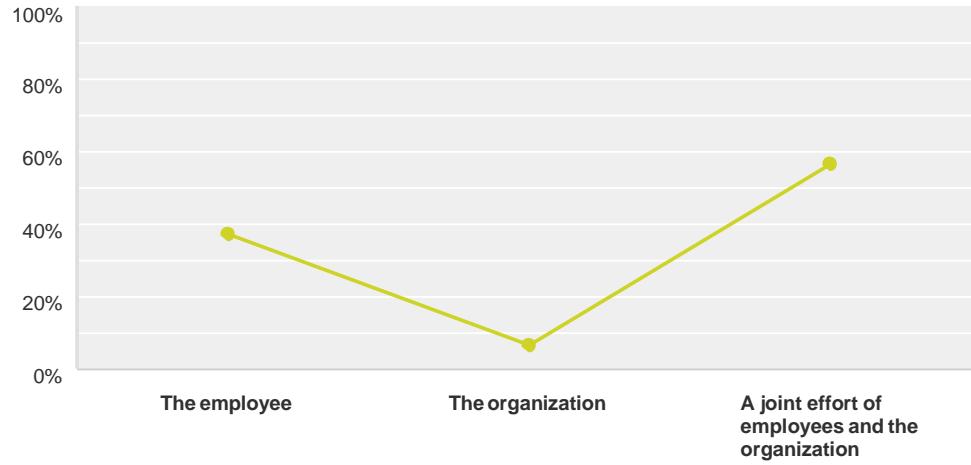


	Very effective (1)	Effective (2)	Marginal (3)	Not effective (4)	No plan in place (5)	Total
Yes	6.06% 2	36.36% 12	21.21% 7	6.06% 2	30.30% 10	33
No	0.00% 0	0.00% 0	7.89% 3	7.89% 3	84.21% 32	38

Basic Statistics						
	Minimum	Maximum	Median	Mean	Standard Deviation	
Yes	1.00	5.00	3.00	3.18		1.36
No	3.00	5.00	5.00	4.76		0.58

Q3 Who is responsible for the career development of personnel in your organization

Answered: 62 Skipped: 1

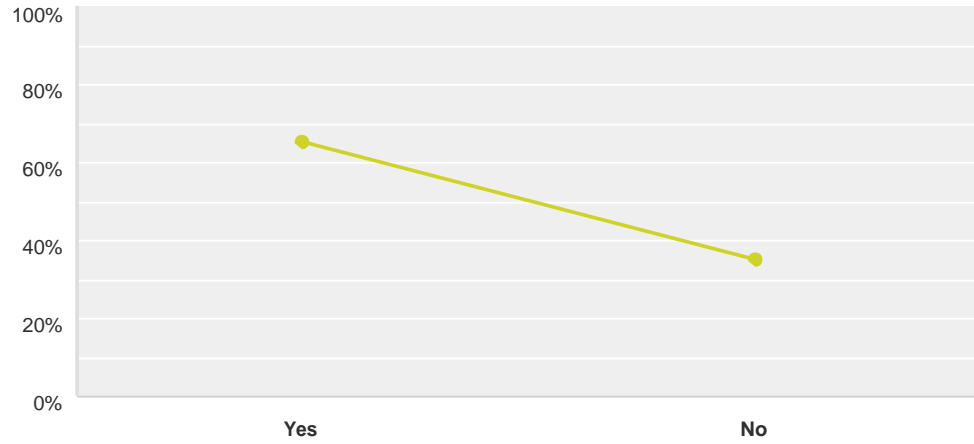


Answer Choices	Responses
The employee (1)	37.10% 23
The organization (2)	6.45% 4
A joint effort of employees and the organization (3)	56.45% 35
Total	62

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	3.00	3.00	2.19	0.95

Q4 Does your organization offer tuition assistance for employees pursuing college degrees?

Answered: 63 Skipped: 0

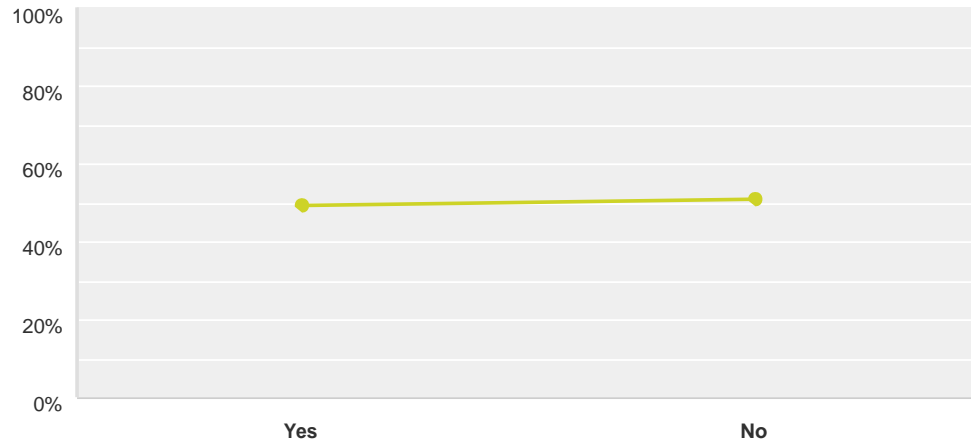


Answer Choices	Responses
Yes (1)	65.08% 41
No (2)	34.92% 22
Total	63

Basic Statistics				
Minimum 1.00	Maximum 2.00	Median 1.00	Mean 1.35	Standard Deviation 0.48

Q5 Do you think your organization provides adequate investment in training and education for employees to prepare for promotion?

Answered: 63 Skipped: 0



Answer Choices	Responses	
Yes (1)	49.21%	31
No (2)	50.79%	32
Total		63

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	2.00	2.00	1.51	0.50

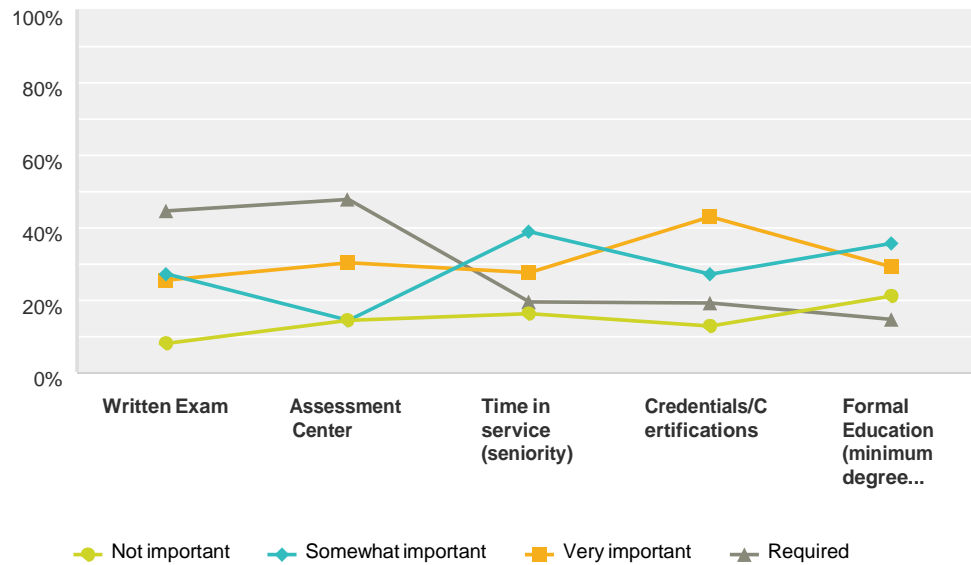
#	Other (please specify)	Date
1	Our training budget has not been cut over the past years as so many others have. It has actually increased.	6/18/2015 1:16 PM
2	NO this is the first cut made to the budget in times of financial hardship. And usually isn't a high dollar amount at anytime.	6/13/2015 10:25 PM
3	Small Dept with limited budget	6/12/2015 11:31 PM
4	Unfortunately public sector does not and is prohibited from functioning like the private sector. Most departments promote internal candidates who are poorly prepared and in some cases poorly motivated to take on additional responsibilities due in part to their age and interest in fire and ems. When a "real" candidate with interest, motivation, and drive to seek additional responsibilities we are prohibited from placing them in educational path for success. That opportunity must be afforded equally to all employees and that results in additional expense and waste of time and energy. Question for you.....How is it we require individuals to obtain both Fire and EMS certifications before hiring, but we promote internal candidates; assign responsibilities and rank and then initiate efforts to train them. A concern is if a department would require certain educational requirements to fill an officer's position, we would have no candidates.	6/12/2015 9:18 AM
5	I would like to see tuition assistance of some kind.	6/12/2015 7:15 AM
6	I think we could do more, or do different things, if a system coule or would be supported that CANDIDATES for Promotion could be identified and those candidates coached, mentored and specially educated, like a US MILITARY OCS. At present time, we do not have any EDUCATION or degree requirements for promotion.	6/11/2015 4:49 PM

OFE Outside Agency Survey

7	As a department we budget \$25,000 for training expenses annually. However, that does not include college credit.....yet.	6/11/2015 3:39 PM
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Q6 Please rate the following in regards to promotions in your organization

Answered: 63 Skipped: 0



	Not important (1)	Somewhat important (2)	Very important (3)	Required (4)	Total Respondents
Written Exam	7.94% 5	26.98% 17	25.40% 16	44.44% 28	63
Assessment Center	14.29% 9	14.29% 9	30.16% 19	47.62% 30	63
Time in service (seniority)	16.13% 10	38.71% 24	27.42% 17	19.35% 12	62
Credentials/Certifications	12.70% 8	26.98% 17	42.86% 27	19.05% 12	63
Formal Education (minimum degree requirements)	20.97% 13	35.48% 22	29.03% 18	14.52% 9	62

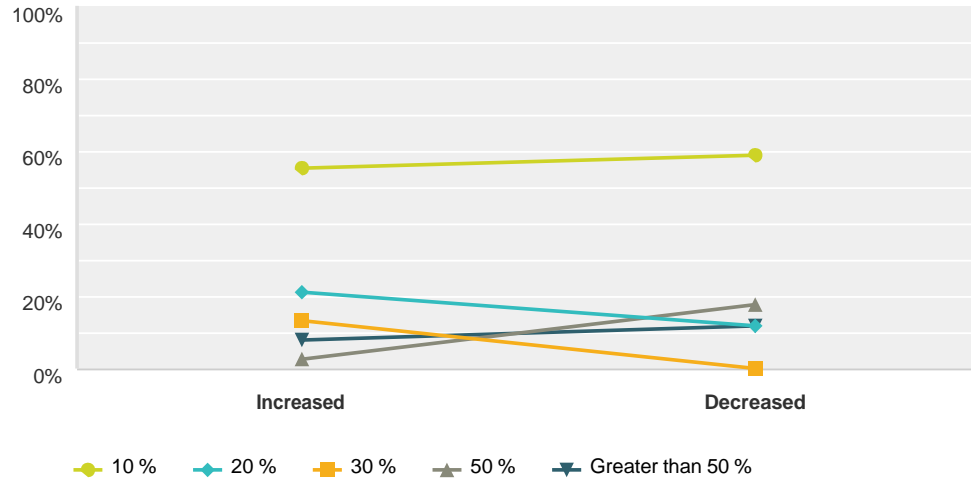
Basic Statistics					
	Minimum	Maximum	Median	Mean	Standard Deviation
Written Exam	1.00	4.00	3.00	3.02	0.99
Assessment Center	1.00	4.00	3.00	3.04	1.06
Time in service (seniority)	1.00	4.00	2.00	2.49	0.97
Credentials/Certifications	1.00	4.00	3.00	2.67	0.92
Formal Education (minimum degree requirements)	1.00	4.00	2.00	2.37	0.97

OFE Outside Agency Survey

#	Comments	Date
1	We, as an organization, have not ut any emphasis on credentials or certifications for promotion. No requirement for educations, either.	6/15/2015 7:11 AM
2	Formal education can be an combination of education and experience based on our guidelines.	6/12/2015 1:09 PM
3	The idea that a given candidate can cite NFPA reg's is of little importance in the day to day operations of the fire department. Place before me a candidate that has problem solving skills, motivational skills, and people skills. The assessment portion of testing allows us to place "pressure" on the candidate to determine how they will react in life & business. I want our employees to be be able to deliver varying messages based upon the age, personality, and needs of each individual staff member. There is no cookie cutter method to motivate staff members that vary in age from 21 to 50.	6/12/2015 1:07 PM
4	Again in our Union Contract and Job description the qualifications and certifications are outlined and our CBA requires a written exam, assessment center and final interview with the Chief, 1 Trustee and a union representative	6/12/2015 10:20 AM
5	Education is important in the Chief ranks	6/12/2015 9:44 AM
6	The Public Sector Management has become degree driven and has placed little value in skill sets and common sense. When asked about pay structure we are often told that department head makes additional monies because they have one or more degrees and should receive a return on their time and investments...Really? Although the Fire Service has become highly driven for the need to obtain higher education, I have seen many "book dumb" individuals fail miserably at being an officer because must like para-medicine, life is not like the book you were trained with.	6/12/2015 9:18 AM
7	The Chief's position requires a minimum of an Associate's Degree. No other position holds a requirement.	6/12/2015 7:11 AM
8	Lieutenants are promoted using a written exam as part of the process. Ranks above Lieutenant have no written exam. Just started awarding points in process for chief officers to those with college credit and/or OFE.	6/11/2015 5:15 PM
9	All stages are required but the rules change in midstream for all hiring and promotional opportunities.	6/11/2015 5:02 PM
10	Written exams up the position of Lieutenant. District / Battalion Chiefs and above require only oral interviews. We have used an assessment center only once within the past 10 years.	6/11/2015 4:49 PM
11	Bachelors Degree needed for promotion to Battalion Chief or higher.	6/11/2015 3:09 PM

Q7 Has your organizations training and education budget changed since 2010 and if so by how much?

Answered: 55 Skipped: 8



	10 % (1)	20 % (2)	30 % (3)	50 % (4)	Greater than 50 % (5)	Total
Increased	55.26% 21	21.05% 8	13.16% 5	2.63% 1	7.89% 3	38
Decreased	58.82% 10	11.76% 2	0.00% 0	17.65% 3	11.76% 2	17

Basic Statistics						
	Minimum	Maximum	Median	Mean	Standard Deviation	
Increased	1.00	5.00	1.00	1.87		1.22
Decreased	1.00	5.00	1.00	2.12		1.53

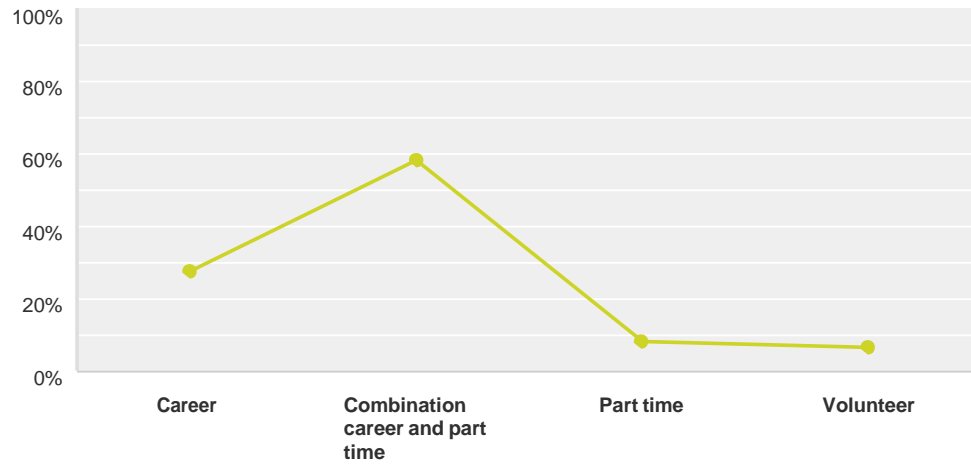
#	Please enter the dollar amount budgeted for 2015 if available	Date
1	training is 20,000. Education is limited to 3 firefighters and provides 80% reimbursement.	6/21/2015 3:52 PM
2	75,000	6/18/2015 1:16 PM
3	\$25,000	6/17/2015 7:46 PM
4	10,000	6/17/2015 1:50 PM
5	64,000	6/17/2015 12:46 PM
6	16000	6/15/2015 10:16 AM
7	0.00 none	6/13/2015 10:25 PM
8	No increase	6/13/2015 6:44 PM
9	\$18,000	6/13/2015 8:36 AM
10	60,000	6/13/2015 8:10 AM

OFE Outside Agency Survey

11	20000	6/12/2015 1:09 PM
12	15,000	6/12/2015 1:07 PM
13	20,000	6/12/2015 10:24 AM
14	\$35,000	6/12/2015 9:44 AM
15	\$12,000	6/12/2015 9:18 AM
16	30000.00	6/12/2015 8:56 AM
17	10,000	6/12/2015 8:46 AM
18	85,000	6/12/2015 7:15 AM
19	69,000.00	6/12/2015 7:14 AM
20	42,000	6/12/2015 7:11 AM
21	\$29,197.84	6/12/2015 6:15 AM
22	4000	6/11/2015 7:06 PM
23	\$50,000.00	6/11/2015 6:24 PM
24	unknown	6/11/2015 5:02 PM
25	\$50,000	6/11/2015 4:49 PM
26	7500	6/11/2015 4:02 PM
27	7,500	6/11/2015 3:59 PM
28	32000	6/11/2015 3:52 PM
29	\$60,000 plus or minus	6/11/2015 3:45 PM
30	Hasn't changed for 5 years	6/11/2015 3:39 PM
31	\$20,000 Fire & EMS	6/11/2015 3:38 PM
32	60000	6/11/2015 3:28 PM
33	55,000	6/11/2015 3:27 PM
34	31500	6/11/2015 3:19 PM
35	100,000	6/11/2015 3:11 PM
36	17500	6/11/2015 3:02 PM
37	50000	6/11/2015 2:58 PM
38	25000	6/11/2015 2:50 PM

Q8 Which best describes your organization

Answered: 62 Skipped: 1

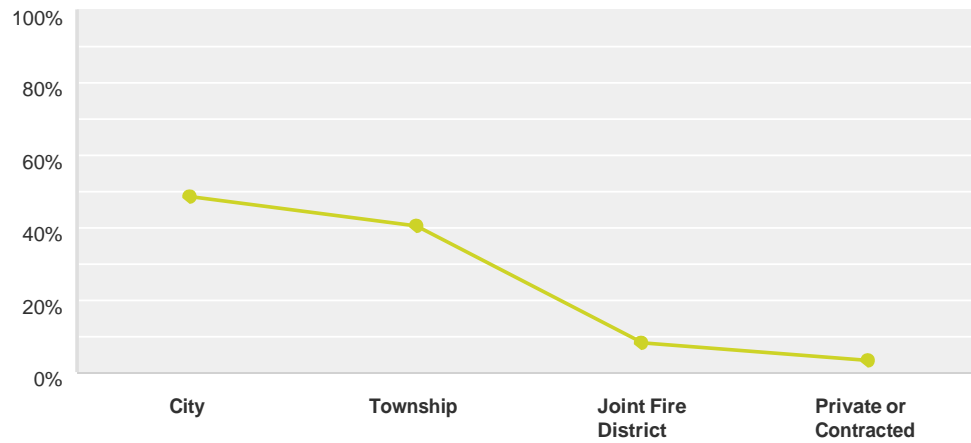


Answer Choices	Responses
Career (1)	27.42% 17
Combination career and part time (2)	58.06% 36
Part time (3)	8.06% 5
Volunteer (4)	6.45% 4
Total	62

Basic Statistics				
Minimum 1.00	Maximum 4.00	Median 2.00	Mean 1.94	Standard Deviation 0.78

Q9 What type of government organization is your department part of?

Answered: 62 Skipped: 1

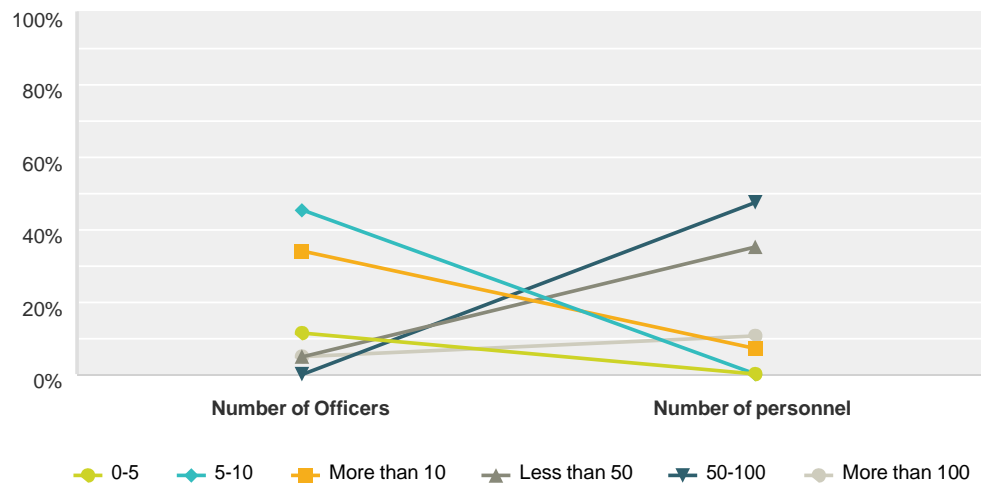


Answer Choices	Responses	
City (1)	48.39%	30
Township (2)	40.32%	25
Joint Fire District (3)	8.06%	5
Private or Contracted (4)	3.23%	2
Total		62

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	4.00	2.00	1.66	0.76

Q10 Please provide some demographic information on your organization.

Answered: 63 Skipped: 0

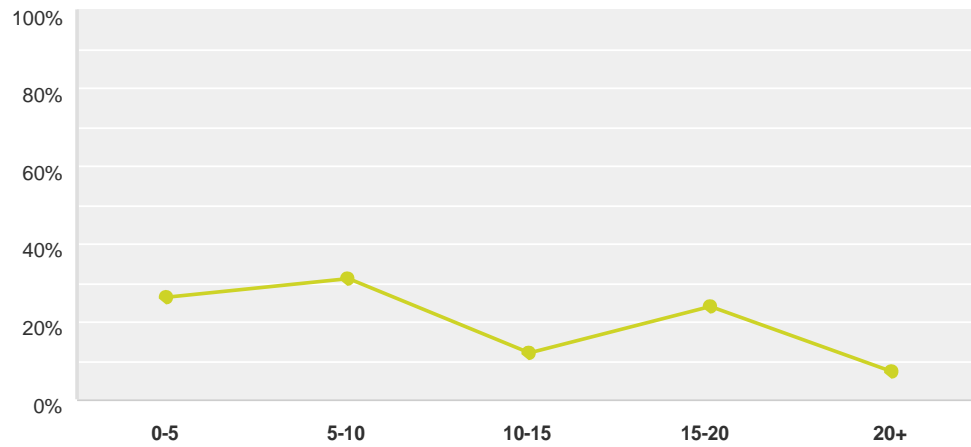


	0-5 (1)	5-10 (2)	More than 10 (3)	Less than 50 (4)	50-100 (5)	More than 100 (6)	Total
Number of Officers	11.29% 7	45.16% 28	33.87% 21	4.84% 3	0.00% 0	4.84% 3	62
Number of personnel	0.00% 0	0.00% 0	7.02% 4	35.09% 20	47.37% 27	10.53% 6	57

Basic Statistics						
	Minimum	Maximum	Median	Mean	Standard Deviation	
Number of Officers	1.00	6.00	2.00	2.52		1.07
Number of personnel	3.00	6.00	5.00	4.61		0.77

Q1 How many years of service do you have in the OP&F pension?

Answered: 42 Skipped: 0

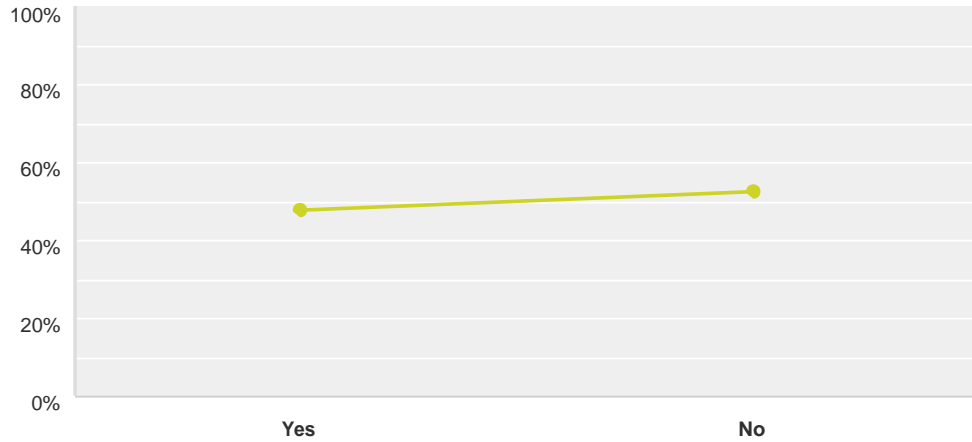


Answer Choices	Responses
0-5 (1)	26.19% 11
5-10 (2)	30.95% 13
10-15 (3)	11.90% 5
15-20 (4)	23.81% 10
20+ (5)	7.14% 3
Total	42

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	5.00	2.00	2.55	1.29

Q2 Do you currently plan to enter the DROP (Deferred Retirement Option Program) of OP&F when eligible?

Answered: 42 Skipped: 0

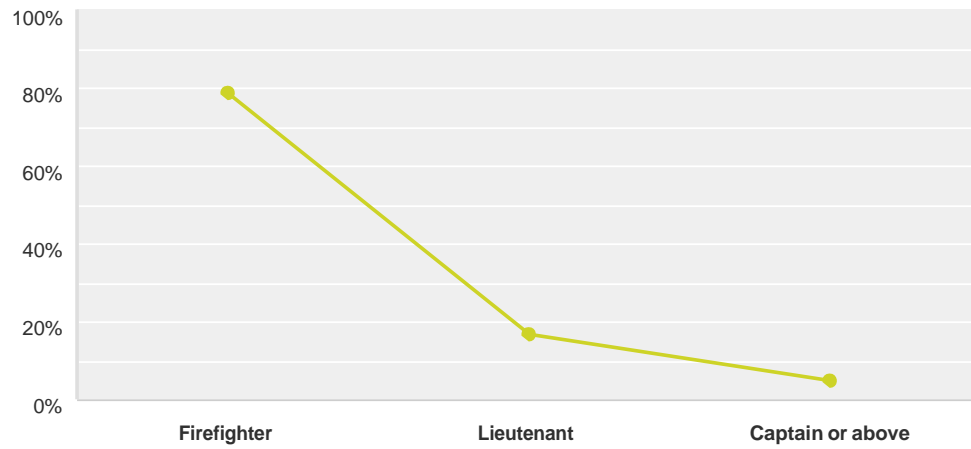


Answer Choices	Responses
Yes (1)	47.62% 20
No (2)	52.38% 22
Total	42

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	2.00	2.00	1.52	0.50

Q3 What is your current rank with Liberty Township?

Answered: 42 Skipped: 0

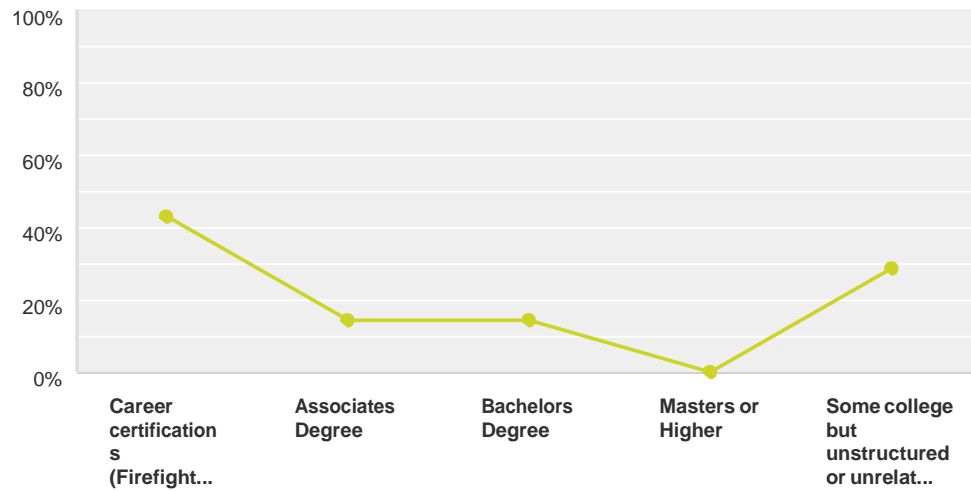


Answer Choices	Responses	
Firefighter (1)	78.57%	33
Lieutenant (2)	16.67%	7
Captain or above (3)	4.76%	2
Total		42

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	3.00	1.00	1.26	0.54

Q4 What is you highest level of education achieved?

Answered: 42 Skipped: 0

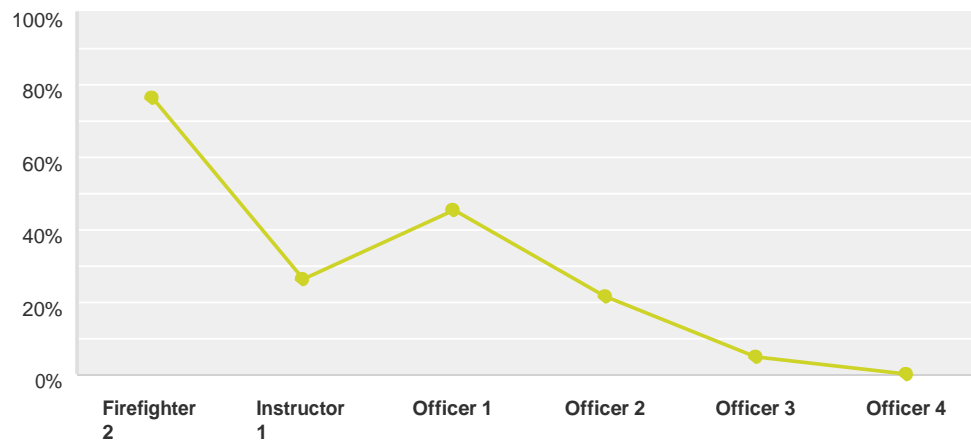


Answer Choices	Responses
Career certifications (Firefighter 2 and Paramedic) (1)	42.86% 18
Associates Degree (2)	14.29% 6
Bachelors Degree (3)	14.29% 6
Masters or Higher (4)	0.00% 0
Some college but unstructured or unrelated to a major (5)	28.57% 12
Total	42

Basic Statistics				
Minimum 1.00	Maximum 5.00	Median 2.00	Mean 2.57	Standard Deviation 1.68

Q5 Select the NFPA 1021 Officer training levels you have completed

Answered: 42 Skipped: 0



Answer Choices	Responses	
Firefighter 2 (1)	76.19%	32
Instructor 1 (2)	26.19%	11
Officer 1 (3)	45.24%	19
Officer 2 (4)	21.43%	9
Officer 3 (5)	4.76%	2
Officer 4 (6)	0.00%	0
Total Respondents: 42		

Basic Statistics				
Minimum 1.00	Maximum 5.00	Median 2.00	Mean 2.15	Standard Deviation 1.19

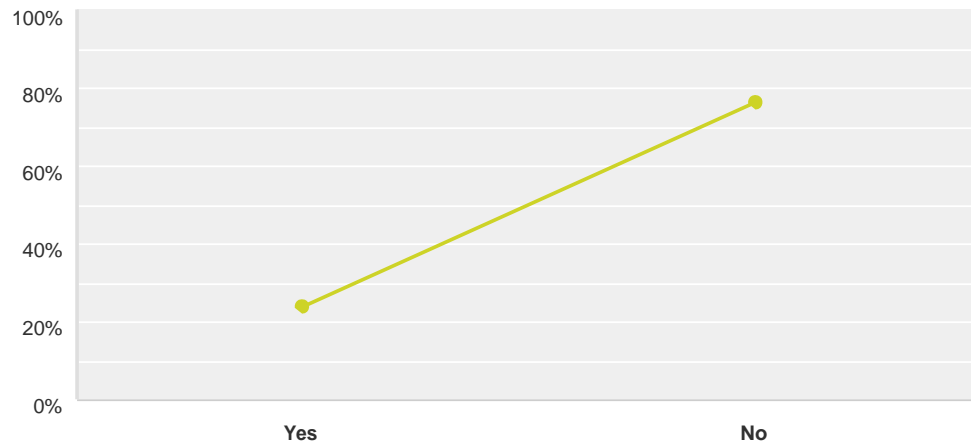
#	Please provide the training provider you received the above training from in the space provided	Date
1	Butler Tech	6/18/2015 8:07 PM
2	middletown fire dept	6/18/2015 2:28 PM
3	Great Oaks Vocational School	6/17/2015 8:12 AM
4	Butler tech	6/16/2015 10:26 PM
5	Macho Man Randy Savage	6/16/2015 8:10 PM
6	Jeff Spaulding	6/13/2015 4:18 PM
7	Great Oaks	6/11/2015 5:08 PM
8	Butler Tech	6/11/2015 4:35 PM
9	Ohio Fire Academy and Scarlet Oaks	6/11/2015 9:55 AM
10	Butler tech and great oaks	6/11/2015 9:54 AM

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11	OFA	6/11/2015 8:45 AM
12	Ohio Fire Academy and Butler Tech	6/11/2015 8:33 AM
13	Butler tech, scarlet Oaks	6/11/2015 7:14 AM
14	Sinclair Community College	6/11/2015 6:38 AM
15	Scarlet Oakes	6/11/2015 12:07 AM
16	Liberty	6/10/2015 11:03 PM
17	OFA, Scarlet, Butler Tech.	6/10/2015 10:49 PM
18	Scarlet oaks, butler tech, ifsta	6/10/2015 10:42 PM
19	Great oaks	6/10/2015 10:41 PM
20	Butler Tech, Cincinnati State, Butler Tech respectively	6/10/2015 10:38 PM

Q6 Did you fill the acting officer role prior to it's elimination?

Answered: 42 Skipped: 0

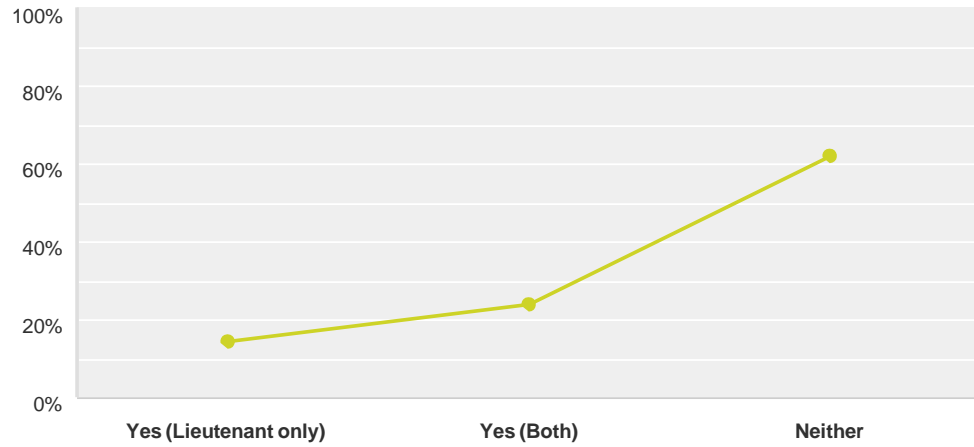


Answer Choices	Responses
Yes (1)	23.81% 10
No (2)	76.19% 32
Total	42

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	2.00	2.00	1.76	0.43

Q7 Have you reviewed or read the Liberty Township job description for the positions of Lieutenant-Shift Supervisor and or Captain - EMS?

Answered: 42 Skipped: 0

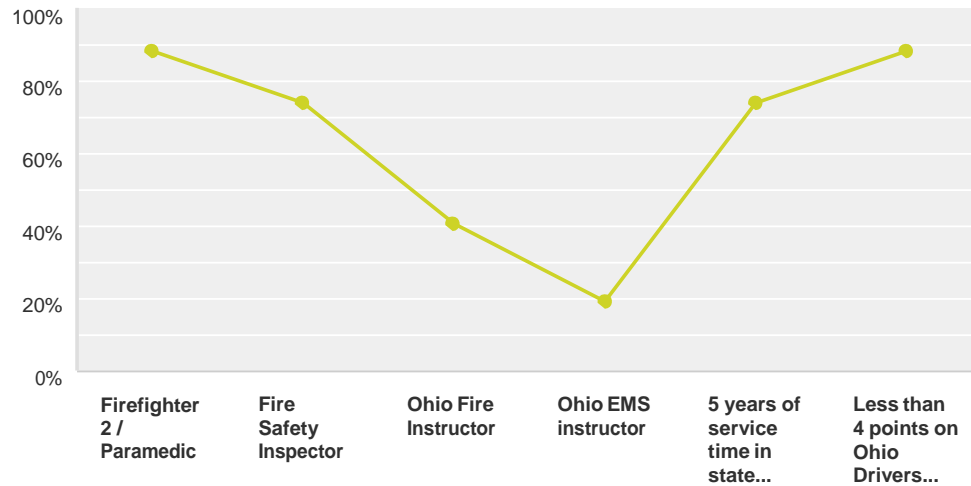


Answer Choices	Responses	
Yes (Lieutenant only) (1)	14.29%	6
Yes (Both) (2)	23.81%	10
Neither (3)	61.90%	26
Total		42

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	3.00	3.00	2.48	0.73

Q8 Select the requirements of the Lieutenant-Shift Supervisor job description you currently meet?

Answered: 42 Skipped: 0

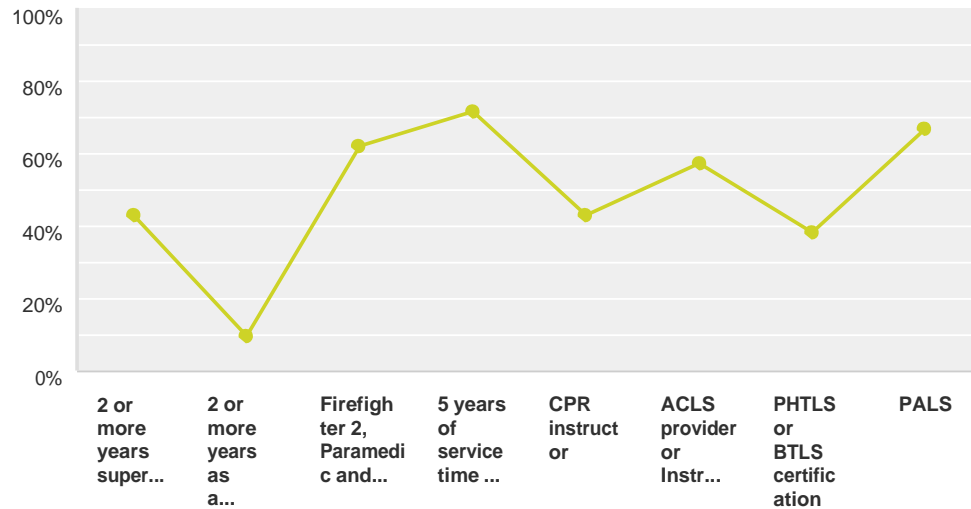


Answer Choices	Responses
Firefighter 2 / Paramedic (1)	88.10% 37
Fire Safety Inspector (2)	73.81% 31
Ohio Fire Instructor (3)	40.48% 17
Ohio EMS instructor (4)	19.05% 8
5 years of service time in state pension (5)	73.81% 31
Less than 4 points on Ohio Drivers License (6)	88.10% 37
Total Respondents: 42	

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	6.00	3.00	3.47	1.94

Q9 Select the requirements of the Captain-Emergency Medical Services job description you currently meet?

Answered: 42 Skipped: 0



Answer Choices	Responses
2 or more years supervisory experience (1)	42.86% 18
2 or more years as a Paramedic instructor (2)	9.52% 4
Firefighter 2, Paramedic and Inspector certifications (3)	61.90% 26
5 years of service time in the state pension (4)	71.43% 30
CPR instructor (5)	42.86% 18
ACLS provider or Instructor (6)	57.14% 24
PHTLS or BTLs certification (7)	38.10% 16
PALS (8)	66.67% 28
Total Respondents: 42	

Basic Statistics				
Minimum	Maximum	Median	Mean	Standard Deviation
1.00	8.00	5.00	4.84	2.20

Q10 What age will you be when eligible to retire from Ohio Police and Fire with 25 years of service? (enter the number)

Answered: 42 Skipped: 0

#	Responses	Date
1	54	6/18/2015 8:07 PM
2	50	6/18/2015 2:28 PM
3	62	6/17/2015 9:47 PM
4	50	6/17/2015 1:53 PM
5	62	6/17/2015 8:12 AM
6	50	6/16/2015 10:26 PM
7	58	6/16/2015 9:25 PM
8	53	6/16/2015 8:34 PM
9	53	6/16/2015 8:10 PM
10	48	6/13/2015 4:18 PM
11	53	6/13/2015 8:55 AM
12	54	6/13/2015 7:46 AM
13	55	6/11/2015 9:40 PM
14	55	6/11/2015 9:36 PM
15	52	6/11/2015 8:57 PM
16	63	6/11/2015 5:08 PM
17	55	6/11/2015 4:35 PM
18	62	6/11/2015 4:29 PM
19	53	6/11/2015 2:29 PM
20	54	6/11/2015 2:17 PM
21	53	6/11/2015 11:36 AM
22	49	6/11/2015 10:49 AM
23	53	6/11/2015 9:55 AM
24	48	6/11/2015 9:54 AM
25	52	6/11/2015 8:45 AM
26	48	6/11/2015 8:33 AM
27	55	6/11/2015 7:34 AM
28	52	6/11/2015 7:14 AM
29	52	6/11/2015 7:00 AM
30	48	6/11/2015 6:38 AM
31	52	6/11/2015 3:25 AM

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32	49	6/11/2015 12:15 AM
33	57	6/11/2015 12:07 AM
34	58	6/10/2015 11:31 PM
35	63	6/10/2015 11:03 PM
36	51	6/10/2015 11:03 PM
37	50	6/10/2015 10:49 PM
38	53	6/10/2015 10:49 PM
39	54	6/10/2015 10:42 PM
40	62	6/10/2015 10:41 PM
41	61	6/10/2015 10:38 PM
42	49	6/10/2015 10:37 PM

APPENDIX 4 – INTERVIEW QUESTIONS

Interview Questions for OFE Applied Research Project

The following questions are the basis of the descriptive research project:

Is succession planning needed for the department?

What are our future requirements for each position?

What models of succession planning are being used today?

What are the most critical positions?

How deep is the talent pool for those positions?

Are there high talent individuals identified for those positions?

Are they prepared or being prepared?

When do you expect vacancies to occur?

Where will the replacements come from?

Is there a recruiting concern?

If you could change one item in regards to Liberty Townships talent management and development what would that be?