4/24/08

Answers to questions submitted to the Fire & Emergency Medical Services Department (Fire & EMS) by Local 3721 AFGE and Local 36 IAFF in reference to the implementation of Recommendation 1 of the Task Force on Emergency Medical Services: *The Department of Fire and Emergency Medical Services shall transition to a fully integrated, all hazards agency.*

Note: All answers are preliminary based upon the information available to Fire & EMS as of this date. Due to the complex nature of this initiative, the answers to some of these questions may change due to legal, fiscal, or administrative issues beyond the control of Fire & EMS.

Part I: Local 3721 Questions:

Pay Issues

1. What is the $4.9 million earmarked for specifically?

The $4.9M covers the estimated increased District contribution to the Police and Fire Fighter's Retirement Plan ("Plan") that will be required to fund those members who choose to enter the Plan. This cost only covers funding them from the date that they are sworn in and enter the Plan, and does not include any retrospective contribution. (See attachment: "*EMS Service Analysis*" March 7, 2008, EFI Actuaries.).

2. How and where are the employees represented by this Local going to be "plugged-in" to the existing Firefighter Pay Schedule?

Questions related to calculation of salary conversion will be addressed in a future meeting, currently scheduled for Friday, May 2, 2008.

3. Is Longevity Pay included?

Questions related to calculation of salary conversion will be addressed in a future meeting, currently scheduled for Friday, May 2, 2008.

Retirement Issues

1. Will the roll into the retirement be year for year?

No. The employee's date of entry as a Department employee will be used for calculation of retirement eligibility, but the calculation of benefit eligibility if employees move into the Plan will be based upon their date of entry into the

Plan. There is a possibility that employees may be able to purchase previous years of service for purposes of benefit eligibility calculation. This will be addressed on a case-by-case basis by DCHR/OPRS and to the extent required Federal OPM.

2. Is there a differentiation for those employees hired before October 1, 1987 and those hired after?

Yes. The Mayor's proposed $4.9 million increase in the Police and Fire Retirement Fund is sufficient to pay for both pre- and post-1987 employees' entry into the Plan. However, there are several different retirement plans that personnel are currently participating in, based upon their date of entry into District Government service. These include the Civil Service Retirement System (CSRS), the District 401 (a) plan, and optional programs such as the 457 (deferred compensation). Employees participating in the 401(a) plan will be required to join the Police and Fire Retirement Plan. Employees participating in the CSRS plans will have to make a choice regarding whether to join the Police and Fire Retirement Plan based upon their individual circumstances and what the CSRS plan allows. Eligible employees may still continue or initiate 457 (deferred compensation) contributions, even after entering the Plan.

3. Will the city be seeking any contribution from the employees for buy-in?

The District will not require employees to do so. A final decision has not been made on how (or if) employees entering the Plan will be able to purchase prior service if that is their preference, however the Department supports this option for employees, should it be achievable.

4. What percentage will the employee's ongoing contribution be?

If an employee enters the Plan, their contribution would be based upon the standard formula used for a Tier III entrant at their salary level.

5. Into which tier of the retirement system will the employees be placed?

The tier in existence at the date they enter the Plan: Tier III.

Organizational Issues

1. Provide an org chart detailing training compliance and oversight.

2. Provide an org chart for EMS operations.

3. Provide an org chart for the agency.

Org charts will be furnished under separate cover.

4. Provide details of the promotional process.

Fire & EMS, working in partnership with the Office of Labor Relations and Collective Bargaining (OLRCB); Department of Human Resources (DCHR); Office of the City Administrator (OCA); the Office of the Attorney General (OAG), and labor representatives representing Department employees; as well as other relevant stakeholders, will develop and implement a revised and improved EMS Supervisory Promotion Process.

The opportunity to compete for EMS supervisory positions will be open to all qualified Fire & EMS employees, regardless of former single-role or current multi-role status or bargaining unit representation.

EMS supervisory positions will require a minimum medical certification level of National Registry EMT-Paramedic (NREMTP). Minimum service requirement shall be five cumulative years of certification as a NREMTP, of which at least three cumulative years of service must have been with DC Fire & EMS at the EMT-P level (single-role, multi-role, or combination of both).

When appropriate, the Department may also open EMS supervisory positions to qualified external applicants. The decision to open supervisory positions to qualified external applicants shall be made when, in the judgment of the agency, considering relevant objective factors, an insufficient number of qualified internal candidates exists to meet the need for a broad and/or diverse applicant pool.

The revised promotional process for EMS supervisors is modeled on the revised promotional process for fire officers and will include, at a minimum, an externally developed and validated written examination and assessment center. Because the next fire officer's promotional examination (2008) has already been developed, it will be necessary for the initial round of EMS supervisory testing to be conducted independently of the fire officer promotional process. By the time of the next scheduled fire officer's promotional exam (2010), it shall be the goal to create a unified process for exam development and administration.

Consistent with the Department's efforts to align its training and professional development process with national standards, the requirements for EMS supervisory positions will be informed by the Fire and Emergency Medical Services Higher Education Conference (FESHE) model EMS curriculum and professional development model, as well as the Chief Medical Officer (CMO) designation process.

The Three Track Process Explained:

Three tracks will exist for EMS supervisors. The three track system is designed to provide professional development opportunities for former single-role providers who are qualified to perform EMS supervision, but are not able to become multi-role providers. In addition, the three track system provides opportunities for multi-role providers who are qualified to perform EMS supervision, but do not wish to become fire officers. Finally, the three track system opens up opportunities for qualified firefighters and fire officers who had previously been excluded from competing for EMS supervisory assignments.

The goals of the three track process are to:

- Fully leverage the talents and abilities of the Department's EMS providers
- Ensure that a wide range of professional development opportunities exist for personnel with a passion for patient care, and
- Guarantee that members who are entrusted with the role of EMS supervision have passed through a rigorous selection and training process and are the best-qualified personnel for these responsibilities.

EMS Supervisory positions, which will consist of EMS Shift Supervisor (Battalion Chief) and EMS Battalion Supervisor (Captain), will exist in three different tracks. Each track carries a similar level of EMS supervisory responsibility and there is no hierarchical difference between them:

1. EMS Supervisor, EMS Specialist/Firefighter Candidate only: This track is open to qualified paramedics who are not certified as multi-role personnel. Personnel in this track will be authorized to perform EMS supervision consistent with their position description, but will not be authorized to serve as fire officers.[1]

2. EMS Supervisor, Firefighter, Non-Fire Officer: This track is open to qualified paramedic/firefighters who are certified as multi-role personnel, but are not fire officers. Personnel in this track will be authorized to perform EMS supervision consistent with their position description, but will not be authorized to serve as fire officers.

3. EMS Supervisor, Firefighter, Fire Officer: This track is open to qualified paramedic/firefighters who are certified as multi-role personnel, and are also fire officers. Personnel in this track will be authorized to perform EMS supervision consistent with their position description, and will also be authorized to serve as fire officers at the appropriate level.

Personnel in tracks 1 can enter track 2 at any point in their career by completing the Department's requirements to become a multi-role provider

[1] This means that they cannot serve as a unit officer on an engine, ladder truck, or rescue squad, for instance. In addition, certain EMS supervisory positions requiring firefighter and/or fire officer status may not be open to personnel in this track.

(paramedic/firefighter). In addition, once after entering track 2, they can enter track 3 by successfully competing for promotion for fire officer, once eligible.[2]

Personnel in track 2 can enter track 3 by successfully competing for promotion for fire officer, once eligible.

It is the goal of the Department to create a single-tier level of EMS field supervision at the battalion level. This role is currently filled by single-role EMS supervisors at the MSS Grade 11 level, who are now known as "EMS Lieutenants." Under the revised supervisory structure, the newly classified battalion level EMS supervisor (one per battalion on duty at all times) would be the functional equivalent of a Captain, and would have increased responsibilities from current single-role Lieutenants. Under the proposed implementation plan, current single-role EMS Captains would be grandfathered as Battalion EMS Supervisors (Captain). Current single-role lieutenants would be placed in an acting status as Battalion EMS Supervisors (Captain) and receive the commensurate pay, pending the administration of the revised promotional exam.[3] The Department proposes that all acting Battalion EMS Supervisors (former single-role EMS Lieutenants) who achieve the minimum passing score on the promotional exam will be guaranteed promotion to Battalion EMS Supervisor (Captain), with the remaining vacancies to be filled from the promotion register in rank order. This shall be a one-time variance from the competitive promotion process. All future promotions will be made in strict rank order, regardless of previous status as a single-role supervisor.

Once the immediate short-term needs of the Department are met, it will be the long-term goal to create a unified promotion pathway whereby the distinction between "fire" and "EMS" supervisors no longer exists, and personnel promoted as EMS supervisors will have simultaneously met all the requirements for promotion as fire officer. The speed at which this happens will be dependent upon the rate of attrition or cross-training of the remaining EMS specialist/firefighter candidates within the agency.

The tier currently referred to as "EMS Sergeant" (single-role CS, schedule X10, Grade 10) will not be utilized for any new positions, as it does not support the effective administration of supervisory authority. Single-role personnel in this grade will be placed in administrative Sergeant status at the appropriate step with no loss in pay. No new entrants will be created in this category. Incumbent personnel will still have the ability to compete for promotion to Battalion EMS Supervisor if they meet the eligibility criteria.

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[2] The Department also proposes consideration of a revised service eligibility requirement for multi-role personnel who have extensive previous experience at the paramedic level as single-role providers, such as some personnel who participated in the "lateral transfer" process. Under one possible scenario, a multi-role firefighter/paramedic who had five or more years of cumulative service at the CS Grade 9 (paramedic) level or higher as a single-role provider, would be eligible to take the Fire Sergeant's exam after three years of service as a firefighter, rather than the current five.

[3] Please note that the Department and the Office of the City Administrator are in the process of indentifying funds for these supervisory promotions and implementation will be dependent on authorization from the Office of the Chief Financial Officer.

Short-term Goal: A "Bridge" Process to Fill the Immediate Need

The short term goal is to develop a "bridge" exam to fill the immediate need for new EMS supervisors and to acknowledge the supervisory talent that already exists among current single role employees. The timeline for this exam would be driven by the speed at which notification is provided and any necessary agreements executed with the labor representatives. The Department proposes publishing an advance notification and list of study material no later than April 31, 2008. The contract with a qualified outside vendor to develop and deliver the exam should be in place as soon as possible, and the exam should be completed no later than September 31, 2008.[4]

Long-Term Goal: a Unified Promotional Process:

By 2010, the process for development and administration of the promotional exam for all Fire & EMS supervisors in the Department shall be combined and unified. Because the core competencies and knowledge areas for supervision, personnel regulations, administration, incident management, SOP's, Haz-Mat, etc. are the same for both fire officers and EMS supervisors, synergies and efficiencies can be achieved by development of a unified exam. This is also consistent with the goal of a unified all-hazards Department.

To the extent that the fire officer and EMS supervisory exams require testing of specific and unique technical areas, additional questions will be developed that are specific to the relevant supervisory positions. Nonetheless, a candidate who is eligible and wishes to participate in multiple tracks will be able to complete both exams at the same time. For example a Fire Lieutenant (who is also a paramedic) competing for Fire Captain could also take the EMS supervisor's exam at the same time, which might be an additional 30 EMS supervisor questions added to the core base of 70 questions that are common to both exams, as well as the 30 questions that are specific to the Fire Captain's exam. After completing the assessment centers for both positions, this candidate could potentially be placed on two separate promotion registers, and in turn become eligible to serve as both a Fire Captain and EMS Supervisor.

5. Define "orientation to all hazards"

The orientation to All-Hazards operations class will be a 2-4 week curriculum (some of which may be delivered through distributive methods, such as on-line) that will be designed for former single-role employees who do not wish to or who are not able to become operationally certified as all-hazards employees (which requires completion of National Registry and DC DOH Emergency Medical Technician-Basic or Paramedic; CPR; Firefighter I & II (NFPA); Hazardous Materials Awareness & Operations; Emergency Vehicle Operator; and Technical

[4] Please note that the Department and the Office of the City Administrator are in the process of indentifying funds for such a contract and implementation will be dependent on authorization from the Office of the Chief Financial Officer.

Rescue Awareness). The curriculum is projected to cover content such as Hazardous Materials Awareness and Operations, ICS/SOPs/NIMS, rules and regulations, respiratory protection, support of fireground operations, water supply operations, personnel rules and regulations for uniformed employees, etc. The course will fairly and reasonably accommodate the possible physical limitations of incumbent employees and is not projected to involve strenuous physical activity. An example of a physical task that would be performed during this class might include the donning of SCBA and Level A HazMat protection during the HazMat Operations certification course. An example of a physical task that would not be performed during this course would be interior fire fighting operations or strenuous physical training. The orientation class would provide sufficient training that the employee could engage in fire protection activities consistent with their physical abilities and could respond to emergency situations and function as a support team member in the prevention, control, extinguishment of fires and other emergencies.

6. Outside of operations, will promotions require certification as a firefighter?

No. The EMS supervisory exam outlined in the answer to question 4 does not require firefighter certification for participation. Once the immediate short-term needs of the Department are met, it will be the long-term goal to create a unified promotion pathway whereby the distinction between "fire" and "EMS" supervisors no longer exists, and personnel promoted as EMS supervisors will have simultaneously met all the requirements for promotion as fire officer. The speed at which this happens will be dependent upon the rate of attrition or cross-training of the remaining EMS specialist/firefighter candidates within the agency.

7. What exactly does swearing the single role providers accomplish? What are the benefits to the employee? Describe what happens after the member is sworn in?

Swearing in all current single-role employees as uniformed firefighters enables these employees to have fair pay and the same benefit opportunities as the current multi-role members, as outlined in EMS Task Force Recommendation 1(d): *All employees shall have the same basic pay and benefits. The City Administrator shall develop a plan, no later than March 31, 2008, to transition to pay and benefits parity between current single-role medical providers and dual-role providers.*

In addition, all employees will now be under the same operational system, in support of the EMS Task Force's over-arching Recommendation 1: *The Department of Fire & Emergency Medical Services shall transition to a fully integrated, all hazards agency.*

Part II: Local 36 Questions:

Note: Due to space limitations, some of the questions submitted by Local 36 have been combined in order to avoid duplication. Some others have been removed as extraneous to the topic under discussion, and can be addressed through other labor-management forums.

1. Is there a written 'plan'?

There are several written documents that outline or explain the recommendations of the Mayor's Task Force on Emergency Medical Services. These documents include: the *Task Force on Emergency Medical Services Report and Recommendations, 9/27/07*; agency commentary and testimony on progress in achieving Task Force recommendations; this document, *Answers to questions submitted to Fire & EMS by Local 3721 AFGE and Local 36 IAFF, 4/24/08;* and the attached summary *Plan for Implementation of Recommendation 1 of the Task Force on Emergency Medical Services, 4/24/08.*

2. Is it a complete 'plan', or work in progress 'plan'?

The plan is a work in progress.

3. Does it have a projected cost?

The pension parity part of the plan is projected to cost $4.9 million in FY 2009 and is included in the Mayor's FY 09 proposed budget. Funds are currently being identified by the Department, Office of the City Administrator and Office of the Chief Financial Officer to pay the salary transition costs for impacted bargaining unit employees and EMS supervisors.

4. When is its set-up to start date?

Assuming that you are directly speaking to recommendation (1d.), the plan is to have a swearing in ceremony after the Council approves the budget on May 13th. This is only the first part of the implementation process; each individual member will then be scheduled to meet with DCHR and OPRS to discuss the different options for retirement afforded them and will also be informed of any pay scale issues.

5. Is it by one single large move or in stages?

The transition will occur in stages. The swearing in ceremony is not optional and will be done all at once, however members unable to attend as a result of illness/injury/leave status will have additional opportunities. The process of training members as all-hazards employees has begun; there is an EMT training

class currently in session to train firefighters who are not EMT's up to the minimum standard. Firefighter and orientation to all-hazards operations classes will begin immediately, but will be conducted over a period of time thus minimizing the impact on service delivery.

6. If in stages, is there a timeline?

The timeline will depend on several factors to include but not limited to; training space, available instructors, service delivery needs, budget and other scheduled activities.

7. Number of members effected?

The number of civilian single role providers who will be sworn in and have new pay and pension opportunities is approximately 220. The number of Firefighters needing EMT training is approximately 195.

8. Is there an organizational chart showing changes?

Most of the structural changes on the agency organization chart related to improvements in the delivery of EMS have already occurred, however the Department will make current and future organizational charts available.

9. Is there a new chain of command for effected employees?

A unified chain of command for operational employees already exists. Most of the structural changes on the agency organization chart related to improvements in the delivery of EMS have already occurred, however the Department will make current and future organizational charts available.

10. Can Local #36 have a copy of the 'plan'?

See question 1.

11. Does Local #3721 have a copy?

The Department is submitting the written answers to the questions to both Locals simultaneously.

12. Who has reviewed this 'plan'?

Implementation of Task Force recommendations is being developed with the input of all stakeholders, including participants in the weekly EMS Path Forward meetings. Policy decisions with respect to implementation of recommendation 1 have been under discussion by the senior staff of the Department, the City Administrator, the Office of Labor Relations and Collective Bargaining, the

Department of Human Resources, the DC Retirement Board and the Office of the Attorney General.

13. Since Local #36 has not had a chance to approve this 'plan', has Local #3721 approved it?

Neither of the unions has been asked to approve implementation of this plan.

14. Has the City Council approved the 'plan'?

The Council has not been asked to approve implementation of this plan.

15. Has the City Administrator approved the 'plan'?

Mayor Fenty and the City Administrator have approved implementation of all recommendations of the Task Force, including those recommendations covered by the unification plan.

16. Has the Mayor approved the 'plan'?

Mayor Fenty and the City Administrator have approved implementation of all recommendations of the Task Force, including those recommendations covered by the unification plan.

17. What are the legislative requirements needed to implement this 'plan'?

This is still under review.

18. How many members are affected by the 'plan'?

Answered above. See response to Local 36 question number 7.

19. Who will represent these effected members?

The Department has no position on the issue of representation.

20. How many new positions will be created by the 'plan'?

The Mayor has proposed adding 31 new positions in FY 2008 to improve the delivery and administration of EMS and implement the recommendations of the Task Force. These positions were outlined in detail in the Mayoral press release dated 2/11/08.

21. Are these new positions funded?

Not yet, but they are part of the Mayor's proposed FY 09 budget. The Mayor has also requested operational reserve funding in FY 08 for these positions.

22. How many positions will be re-classified by the 'plan'?

See answer 7.

23. How many are with a bargaining unit?

Positions are classified based on the duties, responsibilities, knowledge, skills and abilities required for the job. Bargaining unit status is determined after positions are classified. Nevertheless, the Department has no position on the issue of representation.

24. Will the 'plan' create an 'EMS only' path for promotion within the Department?

See attachment *Plan for Implementation of Recommendation 1 of the Task Force on Emergency Medical Services, 4/24/08,* for details of the proposed revised promotional process for EMS supervisors. The long-term goal of the Department is a unified promotional process.

25. Will there be an examination that has to be administered for some of the positions?

See attachment *Plan for Implementation of Recommendation 1 of the Task Force on Emergency Medical Services, 4/24/08,* for details of the proposed revised promotional process for EMS supervisors.

26. When will it be given?

The Department proposes publishing an advance notification and list of study material no later than April 31, 2008. The contract with a qualified outside vendor to develop and deliver the exam should be in place as soon as possible, and the exam should be completed no later than September 31, 2008. [5]

27. Who will be eligible for the examination(s)?

The opportunity to compete for EMS supervisory positions will be open to all qualified Fire & EMS employees, regardless of former single-role or current multi-role status or bargaining unit representation.

The Department proposes that the 2008 special exam for EMS supervisory positions will require a minimum medical certification level of National Registry

[5] Please note that the Department and the Office of the City Administrator are in the process of indentifying funds for such a contract and implementation will be dependent on authorization from the Office of the Chief Financial Officer.

EMT-Paramedic (NREMTP). Minimum service requirement shall be five cumulative years of certification as a NREMTP, of which at least three cumulative years of service must have been with DC Fire & EMS at the EMT-P level (single-role, multi-role, or combination of both).

28. Will the examination meet the requirements of Article #20 of the CBA?

Article 20 of the Collective Bargaining Agreement covers members of Local 36 and does not address promotion criteria for the new position of EMS Battalion Supervisor, so this would not be proper application. However, the proposed promotion process for EMS Battalion Supervisor does include a qualifying job-related examination and an evaluation by an assessment panel.

29. What will happen to the member who fails to successfully complete/pass the examination for the position they currently holding?

No member under this plan will lose any rank or base pay; therefore any person who does not successfully pass the promotional process will remain at their prior rank and pay class and could be assigned on a transport unit or other assignment that meets the needs of the Department.

30. Which retirement plan will the effected members be placed in the 'plan'?

There are several different retirement plans that affected personnel are currently participating in, based upon their date of entry into District Government service. These include the Civil Service Retirement System (CSRS), the District 401 (a) plan, and optional programs such as the 457 (deferred compensation). Employees participating in the 401(a) plan will be required to join the Police and Fire Retirement Plan ("Plan"). Employees participating in the CSRS plans will have to make a choice regarding whether to join the Police and Fire Retirement Plan based upon their individual circumstances and what the CSRS plan allows. Eligible employees may still continue or initiate 457 (deferred compensation) contributions, even after entering the Plan.

31. If the P/F Retirement Plan, into which Tier will members be placed, or will a new Tier be created?

There will not be a new tier created, all employees who transition will be placed in the current tier III category.

32. Are these changes to the P/F Retirement Plan fully funded?

The $4.9M covers the estimated increased District contribution to the Police and Fire Fighter's Retirement Plan ("Plan") that will be required to fund those members who choose to enter the Plan. This cost only covers funding them from

the date that they are sworn in and enter the Plan, and does not include any retrospective contribution. (See attachment: "*EMS Service Analysis*" March 7, 2008, EFI Actuaries.). Members choosing to purchase their prior time will need to do so at their expense.

33. Has there been an actuarial study done concerning the changes to the P/F Retirement Plan?

Yes and it has been completed and transmitted to the retirement board. (See attachment: "*EMS Service Analysis*" March 7, 2008, EFI Actuaries.)

34. Has it been submitted to and verified by the P/F Retirement Plan's actuaries?

Yes; it was conducted by the same actuaries.

35. What will happen to a member of Local #3721 who feels this is not in their best interest, and choose not to make the move over?

Being sworn in as an EMS Specialist/Fire Fighter Candidate is not optional for any member. The pay component is not optional, nor is the pension component for members enrolled in the 401(a) plan. The pension component is option for members enrolled in the CSRS plan. If any employee is interested in pursuing a promotion from this point forward, he or she will have to participate in the new promotional process.

36. Who is going to explain all the changes to the members of Local #3721, and answer their questions?

The Department is implementing this plan in partnership with OCA, OLRCB, DCHR, OPRS and the DCRB.

37. What class will members have to complete to become part of our 'all hazards' Department?

Incumbent members will have to complete either Firefighter Recruit Training *or* Orientation to All-Hazards Operations. New hires must complete firefighter recruit training to include: National Registry Emergency Medical Technician-Basic; CPR; Firefighter I & II (NFPA); Hazardous Materials Awareness & Operations; Emergency Vehicle Operator; and Technical Rescue Awareness.

38. Will they have to complete it prior to taking an examination for a promotion position?

See attachment *Plan for Implementation of Recommendation 1 of the Task Force on Emergency Medical Services, 4/24/08,* for details of the proposed revised

promotional process for EMS supervisors. The long-term goal of the Department is a unified promotional process.

39. Will this 'plan' effect our current EMS staffing plan?

No. The EMS staffing plan is an independent initiative from Task Force Recommendation1—it is derived from Task Force Recommendation 4.

04/24/08

Plan for Implementation of Recommendation 1 of the Task Force on Emergency Medical Services ("Task Force")

Recommendation 1: The Department of Fire and Emergency Medical Services shall transition to a fully integrated, all hazards agency.

(a) All entry-level candidates for operational positions shall be required to have the same minimum qualifications. All operational employees shall be cross-trained at basic levels of EMS, fire prevention, fire suppression, hazardous materials and technical rescue.

(d) All employees shall have the same basic pay and benefits. The City Administrator shall develop a plan, no later than March 31, 2008, to transition to pay and benefits parity between current single-role medical providers and dual-role providers.

The District of Columbia Fire and Emergency Medical Services Department (Fire & EMS) has two categories of operational employees: "single-role" employees who perform only Emergency Medical Services (EMS) duties, and "multi-role" employees who are trained in all hazards, including EMS, fire suppression, hazardous materials, and technical rescue. Maintaining these two entry paths into the agency has contributed to what Mayor Fenty described in the Task Force's final report as "a cultural divide that has persisted within the agency for too long – a divide that has created two performance standards, competition between divergent missions, and inequities in pay and benefits among employees."[6] Recommendation 1, therefore, "seeks to treat all of the Department's employees fairly and equitably, and to unite them behind one mission: the delivery of the best EMS and all hazards service in the nation."[7]

Effective September 27, 2007 the D.C. Fire and Emergency Medical Services (FIRE & EMS) ended the hiring of single-role operational employees. All existing single-role vacancies have been converted to paramedic/firefighter positions. From this date forward all new hires for operational positions are required to achieve the following minimum certification requirements during initial recruit training: National Registry Emergency Medical Technician-Basic; CPR; Firefighter I & II (NFPA); Hazardous Materials Awareness & Operations; Emergency Vehicle Operator; and Technical Rescue Awareness. New hires who are already certified as National Registry EMT-Paramedics will also be required to complete the requirements for DC state paramedic certification and Fire & EMS deployment as a Paramedic-Firefighter. When possible, reciprocity for FF I & II and HazMat Awareness and Operations certifications from accredited

[6] *A Letter from the Mayor*, p.3, Task Force on Emergency Medical Services Report and Recommendations, September 27, 2007.
[7] Id.

programs will be granted in accordance with the current guidelines for Accelerated Recruit Training (ARC).

Under current District law, benefits under the Police and Fire Fighter's Retirement Plan are reserved for uniformed fire fighters. Therefore, in order to effectively implement Recommendations 1(a) and (d), all single-role EMS employees of Fire & EMS will be sworn in as Group 2, uniform firefighters. Single-role EMS employees will move to the firefighter's pay scale with no loss in base pay from their current grade and step, and shall be placed in the Police and Fire Fighter's Retirement Plan. This conversion shall be a one-time event that will only apply for the approximately 220 single-role employees who are still employed by FIRE & EMS as of the effective date of the conversion.

These converted employees will be classified as EMS Specialist/Firefighter Candidates and will have a couple of options to pursue for the remainder of their careers:

1. They may elect at any time they are physically able to do so to participate in the firefighter recruit training process and become fully operational all-hazards employees, at which point they will no longer be classified as Firefighter Candidates, but instead will be classified as fully operational Firefighters.

2. Those who are unable or unwilling to successfully complete firefighter recruit training will receive an orientation to all-hazards operations, and then function as EMS providers. These employees will still have the opportunity to pursue additional professional development as EMS supervisors and compete for promotion under the three-track system outlined later in this plan. This pool of employees will be eligible to complete the firefighter recruit training at any time, if they choose to do so.[8] This open-ended option will be a one-time exemption that will apply to these employees only, and not to new hires or reinstatements.

1 (b) The Department shall offer current single-role providers basic training for all hazards on a phase-in basis. The Department shall allow single role providers to meet adjusted fitness standards that fairly and reasonably accommodate their incumbent status, including their age and level of experience.

Upon being sworn in as EMS Specialist/Firefighter Candidates, former single-role employees will go through a three-phase screening process to determine their eligibility to participate in firefighter recruit training. Note that these phases are separate from background review, which was already in progress independent of the conversion plan:

[8] Subject to medical and/or physical limitations.

1. Phase 1: Medical fitness screening. This screening will use established standards developed by the Police and Fire Clinic to determine if it is medically safe for the EMS Specialist/Firefighter Candidate to participate in physical capability testing and firefighter recruit training.

2. Phase 2: Statement of intent. The EMS Specialist/Firefighter Candidate must decide if he or she wishes to participate in the physical capability test (PAT) and become a candidate for firefighter recruit training. This decision is completely voluntary and no employee will be forced to choose to participate.

3. Phase 3: (Only for employees who have completed Phase 1 & 2 and chosen to become candidates for firefighter recruit training.) Physical capability testing. The EMS Specialist/Firefighter Candidate must successfully complete the PAT within the established standards.[9]

Candidates who successfully complete all three phases will become eligible for participation in firefighter recruit training. Those who successfully complete firefighter recruit training according to the established guidelines will then be deployed to fire companies to complete the probationary firefighter evaluations. Upon successful completion of the probationary firefighter evaluations, these personnel may elect to stay in fire companies, or they can request reassignment to transport units or other positions, dependent upon availability and the needs of the Department. They may also participate in the EMS Supervisor promotional process outlined later in this plan.

Converted single-role employees who are unable to successfully complete any portion of phase 1—3, *or* who are unable to successfully complete firefighter recruit training, *or* who do not wish to participate in the PAT or firefighter recruit training, will receive a mandatory orientation to all-hazards operations class, currently projected at two-to-four weeks in length, and return to assignments that do not require certification as a firefighter. Examples of career opportunities that will be available to these employees include paramedic, medical quality officer/investigator, instructor, training specialist, public health outreach worker, quality assurance, etc. They may also participate in the EMS Supervisor promotional process. These employees will not be placed in operational assignments that require firefighter certification.

1 (c) The Department shall continue to maintain a cadre of personnel who are specialized EMS providers at various levels of training who serve primarily in patient care. The overall size of the Department's workforce creates an opportunity for specialization among employees, permitting the inclusion of those with a passion for patient care without compromising

[9] It is the understanding of the Department that the new IAFF/IAFC Candidate Physical Ability Test (CPAT) cannot be used for incumbent employees, therefore the older proprietary FIRE & EMS Physical Ability Test (PAT) developed by IO Solutions will be used. This is the same instrument utilized to screen the previous single-role lateral transfers. This test is already age and gender-referenced to incumbent employees.

excellence in fire suppression, rescue, hazardous materials response, and other services.

The D.C. Fire and Emergency Medical Services Department (FIRE & EMS) is establishing additional EMS supervisory positions, as well as increasing the responsibilities and requirements for its existing EMS supervisory cadre.[10] The current procedure for selecting and promoting EMS supervisors does not meet the needs of the Department for an equitable, merit-based, and competitive process that will be open to all qualified employees (as well as qualified external candidates, when applicable) and enable the agency to select the candidates best-qualified to provide high-quality EMS supervision, incident management, quality management, and patient care.

Fire & EMS, working in partnership with the Office of Labor Relations and Collective Bargaining (OLRCB); Department of Human Resources (DCHR); Office of the City Administrator (OCA); the Office of the Attorney General (OAG), and labor representatives representing Department employees; as well as other relevant stakeholders, will develop and implement a revised and improved EMS Supervisory Promotion Process.

Basic Characteristics of the Revised Promotional Process:

The opportunity to compete for EMS supervisory positions will be open to all qualified FIRE & EMS employees, regardless of single-role or multi-role status or bargaining unit representation.

EMS supervisory positions will require a minimum medical certification level of National Registry EMT-Paramedic (NREMTP). Minimum service requirement shall be five cumulative years of certification as a NREMTP, of which at least three cumulative years of service must have been with DC FIRE & EMS at the EMT-P level (single-role, multi-role, or combination of both).

When appropriate, the Department may also open EMS supervisory positions to qualified external applicants. The decision to open supervisory positions to qualified external applicants shall be made when, in the judgment of the agency, considering relevant objective factors, an insufficient number of qualified internal candidates exists to meet the need for a broad and/or diverse applicant pool.

The revised promotional process for EMS supervisors is modeled on the revised promotional process for fire officers and will include, at a minimum, an externally developed and validated written examination and assessment center. Because the next fire officer's promotional examination (2008) has already been developed, it will be necessary for the initial round of EMS supervisory testing to be conducted independently of the fire officer promotional process. By the time

[10] Mayor's Task Force on Emergency Medical Services, Recommendations 2 (b), 2 (c), 3 (b), 3 (c), 3 (d), 3 (i), 3 (j).

of the next scheduled fire officer's promotional exam (2010), it shall be the goal to create a unified process for exam development and administration.

Consistent with the Department's efforts to align its training and professional development process with national standards, the requirements for EMS supervisory positions will be informed by the Fire and Emergency Medical Services Higher Education Conference (FESHE) model EMS curriculum and professional development model, as well as the Chief Medical Officer (CMO) designation process.

The Three Track Process Explained:

Three tracks will exist for EMS supervisors. The three track system is designed to provide professional development opportunities for former single-role providers who are qualified to perform EMS supervision, but are not able to become multi-role providers. In addition, the three track system provides opportunities for multi-role providers who are qualified to perform EMS supervision, but do not wish to become fire officers. Finally, the three track system opens up opportunities for qualified firefighters and fire officers who had previously been excluded from competing for EMS supervisory assignments.

The goals of the three track process are to:

- Fully leverage the talents and abilities of the Department's EMS providers
- Ensure that a wide range of professional development opportunities exist for personnel with a passion for patient care, and
- Guarantee that members who are entrusted with the role of EMS supervision have passed through a rigorous selection and training process and are the best-qualified personnel for these responsibilities.

EMS Supervisory positions, such as EMS Shift Supervisor (Battalion Chief) and EMS Battalion Supervisor (Captain), will exist in three different tracks. Each track carries a similar level of EMS supervisory responsibility and there is no hierarchical difference between them:

4. EMS Supervisor, EMS Specialist/Firefighter Candidate only: This track is open to qualified paramedics who are not certified as multi-role personnel. Personnel in this track will be authorized to perform EMS supervision consistent with their position description, but will not be authorized to serve as fire officers.[11]

5. EMS Supervisor, Firefighter, Non-Fire Officer: This track is open to qualified paramedic/firefighters who are certified as multi-role personnel,

[11] This means that they cannot serve as a unit officer on an engine, ladder truck, or rescue squad, for instance. In addition, certain EMS supervisory positions requiring firefighter and/or fire officer status may not be open to personnel in this track.

but are not fire officers. Personnel in this track will be authorized to perform EMS supervision consistent with their position description, but will not be authorized to serve as fire officers.

6. EMS Supervisor, Firefighter, Fire Officer: This track is open to qualified paramedic/firefighters who are certified as multi-role personnel, and are also fire officers. Personnel in this track will be authorized to perform EMS supervision consistent with their position description, and will also be authorized to serve as fire officers at the appropriate level.

Personnel in tracks 1 can enter track 2 at any point in their career by completing the Department's requirements to become a multi-role provider (paramedic/firefighter). In addition, once entering track 2, they can enter track 3 by successfully competing for promotion for fire officer, once eligible.[12]

Personnel in track 2 can enter track 3 by successfully competing for promotion for fire officer, once eligible.

It is the goal of the Department to create a single-tier level of EMS field supervision at the battalion level. This role is currently filled by single-role EMS supervisors at the MSS Grade 11 level, who are commonly known as "EMS Lieutenants." Under the revised supervisory structure, the newly classified battalion level EMS supervisor (one per battalion on duty at all times) would be the functional equivalent of a Captain, and would have increased responsibilities from current single-role Lieutenants. Under the proposed implementation plan, current single-role EMS Captains would be grandfathered as Battalion EMS Supervisors (Captain). Current single-role lieutenants would be placed in an acting status as Battalion EMS Supervisors (Captain) and receive the commensurate pay, pending the administration of the revised promotional exam.[13] The Department proposes that all acting Battalion EMS Supervisors (former single-role EMS Lieutenants) who achieve the minimum passing score on the promotional exam will be guaranteed promotion to Battalion EMS Supervisor (Captain), with the remaining vacancies to be filled from the promotion register in rank order. This shall be a one-time variance from the competitive promotion process. All future promotions will be made in strict rank order, regardless of previous status as a single-role supervisor.

Once the immediate short-term needs of the Department are met, it will be the long-term goal to create a unified promotion pathway whereby the distinction between "fire" and "EMS" supervisors no longer exists, and personnel promoted as EMS supervisors will have simultaneously met all the requirements for

[12] The Department also proposes consideration of a revised service eligibility requirement for multi-role personnel who have extensive previous experience at the paramedic level as single-role providers, such as some personnel who participated in the "lateral transfer" process. Under one possible scenario, a multi-role firefighter/paramedic who had five or more years of cumulative service at the CS Grade 9 (paramedic) level or higher as a single-role provider, would be eligible to take the Fire Sergeant's exam after three years of service as a firefighter, rather than the current five.

[13] Please note that the Department and the Office of the City Administrator are in the process of indentifying funds for these supervisory promotions and implementation will be dependent on authorization from the Office of the Chief Financial Officer.

promotion as fire officer. The speed at which this happens will be dependent upon the rate of attrition or cross-training of the remaining EMS specialist/firefighter candidates within the agency.

The tier currently referred to as "EMS Sergeant" (single-role CS, schedule X10, Grade 10) will not be utilized for any new positions, as it does not support the effective administration of supervisory authority. Single-role personnel in this grade will be placed in administrative Sergeant status at the appropriate step with no loss in pay. No new entrants will be created in this category. Incumbent personnel will still have the ability to compete for promotion to Battalion EMS Supervisor if they meet the eligibility criteria.

Short-term Goal: A "Bridge" Process to Fill the Immediate Need

The short term goal is to develop a "bridge" exam to fill the immediate need for new EMS supervisors and to acknowledge the supervisory talent that already exists among current single role employees. The timeline for this exam would be driven by the speed at which notification is provided and any necessary agreements executed with the labor representatives. The Department proposes publishing an advance notification and list of study material no later than April 31, 2008. The contract with a qualified outside vendor to develop and deliver the exam should be in place as soon as possible, and the exam should be completed no later than September 31, 2008. [14]

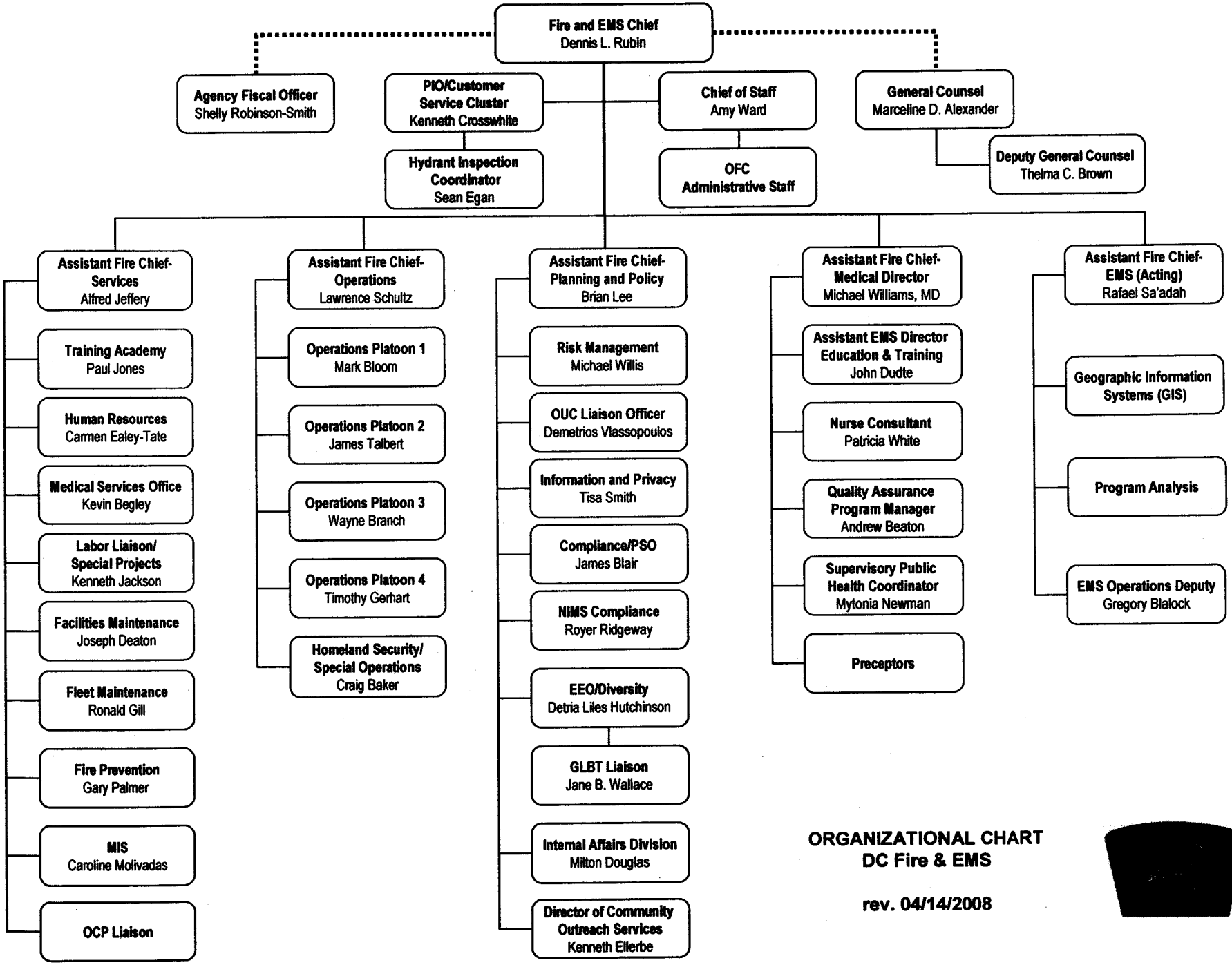
Long-Term Goal: a Unified Promotional Process:

By 2010, the process for development and administration of the promotional exam for all Fire & EMS supervisors in the Department shall be combined and unified. Because the core competencies and knowledge areas for supervision, personnel regulations, administration, incident management, SOP's, Haz-Mat, etc. are the same for both fire officers and EMS supervisors, synergies and efficiencies can be achieved by development of a unified exam. This is also consistent with the goal of a unified all-hazards Department.

To the extent that the fire officer and EMS supervisory exams require testing of specific and unique technical areas, additional questions will be developed that are specific to the relevant supervisory positions. Nonetheless, a candidate who is eligible and wishes to participate in multiple tracks will be able to complete both exams at the same time. For example a Fire Lieutenant (who is also a paramedic) competing for Fire Captain could also take the EMS supervisor's exam at the same time, which might be an additional 30 EMS supervisor questions added to the core base of 70 questions that are common to both exams, as well as the 30 questions that are specific to the Fire Captain's exam.

[14] Please note that the Department and the Office of the City Administrator are in the process of indentifying funds for such a contract and implementation will be dependent on authorization from the Office of the Chief Financial Officer.

After completing the assessment centers for both positions, this candidate could potentially be placed on two separate promotion registers, and in turn become eligible to serve as both a Fire Captain and EMS Supervisor.



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DC Fire & EMS

rev. 04/14/2008

EFI
addressing public pension issues of today
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March 7, 2008

Ms. Amy Mauro
Public Safety Program Analyst
Office of the City Administrator
1350 Pennsylvania Avenue, NW, Suite 533
Washington, DC 20004

Re: EMS Service Analysis

Dear Amy:

As requested, we have updated the actuarial calculations associated with the transfer of District of Columbia Emergency Medical Services (EMS) employees to the District of Columbia Police Officers' and Fire Fighters' Retirement Plan(the Plan; the Police/Fire Plan). All of the calculations herein are based on the actuarial assumptions used for the most recent valuation, as of October 1, 2007.

Background

When an EMS employee becomes a member of the Police/Fire Plan, he begins accruing service credit under the Plan. Prior EMS service will be added to this service to determine vesting of retirement benefits as well as benefit eligibility[1]. The transferred member will also be eligible to purchase their prior EMS service[2] based on an actuarial calculation of the value of the benefit attributable to the additional service.

Based on the foregoing and data collected from the DC Department of Fire and Emergency Medical Services, three separate calculations have been performed:

1. The actuarial cost of those who have already transferred to the Plan.
2. The estimated cost if the remaining EMS employees were to transfer to the Plan.
3. Service purchase calculation software to be used for individual calculations.

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[1] § 5-704(h)(2)(D)(i)(2) – "Solely for the purposes of determining vesting and retirement eligibility, members shall receive credit for prior service with the District of Columbia Fire and Emergency Medical Services Department."

[2] § 5-704(h)(2)(D)(i)(3) - "Members shall be eligible to purchase benefit accrual service for some or all of the time they were employed by the District of Columbia Fire and Emergency Medical Services Department. The member shall deposit to the credit of the District of Columbia Police Officers and Fire Fighters' Retirement Fund an amount that is equal to the dollar increase in the present value of future benefits which results from crediting the prior service...."

1. Transferred EMS personnel

There are currently 66 transferred EMS employees who remain active in the Police/Fire Plan. Among these members, the average age is 36, and the average service before and after transfer are 5.8 years and 2.4 years, respectively.

Since most of these individuals were in the Plan as of October 1, 2007, the impact of their prior EMS service on eligibility and vesting has already been accounted for as part of the most recent valuation, which was used to determine District contributions to the Police/Fire Fund for fiscal year 2009. Prior EMS service is not considered in the valuation for the purpose of projecting future retirement benefit amounts, unless it has already been purchased. The following represents a summary of the calculation results for these transferred individuals.

Present Value of Benefits as of October 1, 2007		
Police/Fire Service	Police/Fire Service; EMS Service for Eligibility and Vesting	Purchasable EMS Service[3]
$32,100,000	**$33,600,000**	**$6,500,000**

What this tells us is that of the total present value of benefits computed for the last actuarial valuation (approximately $1.3 billion for Fire members), approximately $33.6 million was attributable to these transferred members with prior EMS service. The total present value would be slightly lower ($32.1 million) if only Police/Fire service were counted towards benefit eligibility and vesting. A portion (about $1.5 million for fiscal year 2009) of the required contribution to the Police/Fire Fund is based on the projected benefits for these individuals.

The $6.5 million above labeled as Purchasable EMS Service represents the total present value of additional benefits that would be expected if all members were to receive credit for their prior service for the purpose of the determination of benefit amounts.

2. Current EMS personnel

There are approximately 220 current EMS employees, 70 of which are in the Civil Service Retirement System (CSRS). Among these 70 members, the average age is 52 and the average service is 24 years. All of these members are eligible to transfer to the Police/Fire Plan and to purchase their service under provisions which require them to contribute to the Police/Fire Fund past CSRS contributions with interest. Since these amounts are generally much lower than the actuarial equivalent of the additional Police/Fire Plan benefits based on purchased service, the Police/Fire Plan incurs an actuarial loss when each such transfer occurs. These losses can be well over $500,000 per person, depending on the age, service, and salary of the transferring member. The total present value of granting all EMS service in the Police/Fire Plan for these CSRS members is approximately $43.1 million.

Among the remaining 150 members, the average age is 38, and the average service is 9.2 years.

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[3] 409(a) account balances cannot be transferred to the Police/Fire Fund to offset service purchase amounts. Only § 457 account balances can be transferred.

The following represents the estimated cost of the current EMS members transferring to the Police/Fire Plan.

	Present Value of Benefits as of October 1, 2007		
	EMS Service for Eligibility and Vesting	Purchasable EMS Service[4]	Total Including All Service
Non-CSRS Others	**$61,400,000**	**$24,300,000**	**$85,700,000**
CSRS Members	**$15,300,000**		

Impact on Annual Contributions

When a member transfers, the liabilities associated with their projected benefits (including eligibility and vesting credit for EMS service) are taken into account during the next valuation. So if transfers continue to occur gradually, increases in District contribution levels due to EMS transfers will also occur gradually.

If the entire group is transferred to the Police/Fire Plan at one time, the additional liability shown in the table above would be spread out over time in the form of increased annual contributions. The following table shows the estimated annual contribution impact based on using prior service for eligibility and vesting only, as well as the impact due to granting of all EMS service ("All Service" column).

	Additional Annual Contribution to the Police/Fire Fund	
	Vesting/Eligibility	All Service
Former EMS who Transferred to the Police/Fire Plan	N/A	$400,000
Non-CSRS Others	$3,200,000	$4,900,000
CSRS Members	$1,700,000	$4,900,000
Total	**$4,900,000**	**$10,200,000**

The amounts above have been determined using the standard actuarial cost method (Aggregate Method) used for the annual valuation of the Plan. This method spreads out benefit costs over the future payroll of active Plan members. The additional costs shown above under "All Service" do not take into account any offsetting amounts, such as service purchase amounts from employees.

[4] 409(a) account balances cannot be transferred to the Police/Fire Fund to offset service purchase amounts. Only § 457 account balances can be transferred.

3. Service Purchase Software

In order to determine the cost to the individual associated with the purchase of EMS service, an actuarial calculation is done, in which the present value associated with the additional service is computed. A Service Purchase Module was previously developed by EFI for this purpose. We have updated the model to reflect recent changes in actuarial assumptions that resulted from the most recent periodic review of such.

An Excel spreadsheet is contained on the enclosed CD to accommodate these calculations. The information to be input includes pay history, dates of birth, service, and transfer. The cost to the individual of purchasing service is automatically computed, and the output of the Module is a lump sum amount to be paid by the transferring member. Two sample calculation output reports are also included on the enclosed CD.

Please contact me if you have any questions regarding the above, or if further analysis is required.

Sincerely,

Gregory M. Stump, FSA

Enclosure

cc: Rafael Sa'adah – DC FEMS
Joan Passerino – DCRB
Eric Stanchfield - DCRB

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Appendix: Actuarial Assumptions

The actuarial assumptions used for this analysis are the same as those used for the most recent valuation of the Police and Fire Retirement Plan, as of October 1, 2007.

Rate of Return	The annual rate of return on all Fund assets is assumed to be 7.50%, net of investment and administrative expenses.
Cost of Living	The cost of living as measured by the Consumer Price Index (CPI) is assumed to increase at the rate of 5.00% per year.
Increases in Pay	Assumed pay increases for active Members consist of increases due to cost of living adjustments and promotion and increases due to longevity and retention incentives. Cost of living increases are assumed to result in a general wage increase of 5.0% for all employees. An additional 2.5% increase per year is also assumed due to promotion and longevity. Fire Fighters are assumed to receive retention incentives of 5%, 10%, 15%, and 20% applied to individual base pay after 15, 20, 25, and 30 years of service, respectively.
Mortality	1994 Uninsured Pension (UP94) Tables (sex distinct) with generational improvement using Projection Scale AA, with a two-year age set forward (three year for active employees).
Disabled Member Mortality	Rates of mortality among disabled Members are specified for male and female members. Sample rates are as follows:

Age	Male	Female
40	0.9033%	0.5616%
50	0.9033%	0.5616%
60	1.3029%	0.8310%
70	2.6405%	1.7147%
80	6.4974%	4.2282%
90	15.6801%	12.2128%

EFI

Service Retirement

Retirement is assumed to occur in accordance with the tables below.

Service	Rate
25-29	12%
30-34	25%
35+	Age based rates shown below

Age	Rate
50	13%
51	15%
52	20%
53	25%
54	30%
55-59	35%
60+	100%

Disability

Age	Rate
25	0.1447%
30	0.1898%
35	0.2805%
40	0.4125%
45	0.6479%
50	1.0725%
55	1.9058%
60	2.7225%

It is assumed that 75% of the disabilities are due to accidents in the line of duty.

Withdrawal

Withdrawal rates are not applied to Members eligible for service retirement.

For all members with less than 5 years of service, terminations are assumed to result in the withdrawal of contributions, with no further benefits payable. For those terminated with at least 5 years of service, 20% of Fire members are assumed to receive a deferred vested benefit, with the remaining members are assumed to receive a refund of accumulated contributions.

Age	Rate of Withdrawal	
	<2 Years Service	2+ Years Service
20-24	9.0%	2.80%
25-29	9.0%	1.87%
30-34	9.0%	1.24%
35-39	9.0%	0.83%
40-44	9.0%	0.55%
45-49	9.0%	0.37%
50-54	9.0%	0.25%
55-59	9.0%	0.00%
60+	9.0%	0.00%

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