WHO CAN FILL THE VOID?

EXECUTIVE LEADERSHIP

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ABSTRACT

The problem which prompted the choosing of this topic as a research project was the fact that Palm Harbor Fire Rescue has no formal succession plan for developing personnel within the organization for advancement to higher positions or ranks.

The purpose of this research project was to develop a succession plan for Palm Harbor Fire Rescue that would better prepare personnel for advancement, and more specifically the position of company officer (lieutenant). The researcher utilized the evaluative and action methodologies to answer the research questions and reach final conclusions. The following research questions were posed:

1. What is succession planning?
2. What are the roles and responsibilities of a company officer?
3. What competencies are needed for the position of company officer within Palm Harbor Fire Rescue?
4. What do other local fire departments do for succession planning?
5. What should a company officer development plan for Palm Harbor Fire Rescue include?

The procedures utilized to complete this research project included a review of printed literature from sources found in the National Fire Academy’s (NFA) Learning Resource Center (LRC), a review of sources available at the local public library, a review of sources available from the Palm Harbor Fire Rescue Library, a review of sources from the author’s personal library, information obtained via the World Wide Wed, personal interviews, surveys and internal documents and information from Palm Harbor Fire Rescue.
Thirteen personal interviews were conducted to determine what information or activities should be or need to be included in an officer development program from their perspective. A survey was conducted of five departments that surround Palm Harbor Fire Rescue to elicit information about any officer development program they may conduct or provide.

The results of this research presented the critical need for organizations to conduct succession planning. The results provided answers as to what a succession plan is and what the plan should include along with what other local departments do for succession planning. The results also provided specific information as to what the officers of Palm Harbor Fire Rescue believe is important to include within a development plan.

Recommendations included the implementation of the company officer development plan that was developed at part of this research project, the continued support of department personnel to attend and participate in educational and training opportunities available from outside of the department and, the need for the organization’s leadership to support the implementation of the succession/development plan.
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INTRODUCTION

An important element of an organization’s strategy is to do succession planning. An organization is more competitive when it has good methods of planning and good employee development programs and practices. Excellence can be achieved through the development of an organization’s workforce (National Fire Academy, 2000).

Palm Harbor Fire Rescue is a fairly small organization providing quality services to the community. These personnel operate out of four fire stations providing suppression, emergency medical, prevention, hazardous materials, water rescue, and a host of other public services (Palm Harbor Fire Rescue Annual Report, 2002). The problem is that Palm Harbor Fire Rescue has no formal succession plan for preparing and developing personnel for advancement.

Succession planning will help improve incumbent personnel along with creating a pool of personnel that are qualified to fill the various positions in the organization that will eventually be vacated (Coleman and Granito, 1988).

The purpose of this Applied Research Project (ARP) is to develop a succession plan that will assist in preparing personnel for the position of company officer.

This applied research paper utilized the evaluative and action research methods to answer the following research questions:

1. What is succession planning?
2. What are the roles and responsibilities of a company officer?
3. What competencies are needed for the position of company officer within Palm Harbor Fire Rescue?
4. What do other local fire departments do for succession planning?
5. What should a company officer development plan for Palm Harbor Fire Rescue include?

BACKGROUND AND SIGNIFICANCE

Palm Harbor Fire Rescue is a fairly small organization that has a total of 63 career personnel. Included within the ranks are the positions of Firefighter/Emergency Medical Technician (EMT), Firefighter/Paramedic, Public Education/Information Officer, Fire Prevention Officer, Lieutenant, Captain/Training Officer, District Chief, Division Chief, Deputy Chief and Fire Chief. Of the 63 personnel, 51 are assigned to shift work and are considered line personnel while the remaining personnel fill the various staff or support positions and functions (Palm Harbor Fire Rescue, 2002).

In 1996, the then chief of the department retired abruptly and there was nobody from within the department that met the minimum requirements for the position. The minimal requirements that a candidate had to possess were a State of Florida Firefighter Certification, State of Florida EMT or paramedic, Executive Fire Officer Certification, a Bachelor of Science degree in a business or fire related field, and at least three years of upper level management experience. Due to this fact, the Palm Harbor Fire Rescue Board of Commissioners were compelled to search outside of the department for the next fire chief. Meanwhile, the members of the department waited for just over six months for the position to be filled.
According to Terry Quinn, in his article for Principal Leadership magazine titled, *Succession Planning: Start Today*, he states “An effective succession plan anticipates administrative vacancies and develops a pool of qualified candidates in advance of critical need” (2002, p. 34).

Currently, there is still no formal succession plan or plans in place. There is, however, a base to work from as there is an article within the labor agreement between Palm Harbor Fire Rescue and Palm Harbor Fire Rescue Association, International Association of Fire Fighters (IAFF) L-2980 that spells out an educational path for firefighters to follow in order to be eligible for financial reimbursement. This same article also lists minimal qualifications for the positions of lieutenant, captain, and district chief (Labor Agreement, 2002).

This research project was completed in accordance with the Applied Research Project (ARP) requirements of the National Fire Academy’s (NFA) Executive Fire Officer (EFO) program. The problem addressed by this research project directly relates to the Succession/Placement Planning unit of the final EFO course, Executive Leadership. Succession planning can help ensure that existing personnel will be qualified fill the positions or vacancies of today as well as long term.

**LITERATURE REVIEW**

The literature review is structured around the following research questions:

1. What is succession planning? Succession planning is a process that allows for organizations to align their goals with their human resource needs. This planning will ensure that the organization can remain on pace with industry changes and customer needs, desires, and
expectations. Succession planning helps an organization prepare personnel within the organization to fill the various roles within it to operate at its highest performance should the unexpected occur, such as a resignation or death (http://cuttsgroup.com/articles/succession-planning-procedures.htm).

All organizations are different from one another and have their own qualities and capabilities. The differences are usually displayed through varying delivery systems, technology utilized, organizational management philosophies, and their level of customer service provided just to name a few. These organizational differences make succession planning a critical element. A succession plan is an organized and systematic way to ensure an organization’s longevity. Preparing employees that are competent, capable, and willing to carry on the organization’s strategic goals will keep the organization competitive. Excellence can be achieved if the organization is well trained and competitive (National Fire Academy, 2000).

A succession plan provides for a coordinated way to identify an organization’s human resources, helps retain personnel that are upwardly mobile, attracts opportunistic personnel from outside the organization, ensures a readily available pool of personnel within the organization, promotes career possibilities, and enhances an overall positive work attitude and environment (Quinn, 2002).

A succession plan would typically include a comprehensive training and personnel development program that will nurture the skills of candidates working within the plan. This is done by using varying methods such as higher education course work, position rotation, project assignments, and assignments to organizational committees (Burstiner, 1997).
In general, a succession plan is a plan that will help to improve the capabilities of incumbent personnel while also developing a group of personnel that will be prepared to fill organizational vacancies that will inevitably be created (Coleman and Granito, 1988).

2. What are the roles and responsibilities of a company officer? The roles of a company officer seem to be ever changing. For the most part, company officers spend their time dealing with people and people issues. The vast percentage of a company officer’s time is spent in this arena rather than handling incidents. While dealing with people is a changing role of a company officer, dedication to duty and courage in the face of some extreme circumstances and stressful situations are as important of a role of a company officer as it ever was (Goodson and Sneed, 1999). He or she is the vital link between an organization’s management and the crew members. The company officer is the grassroots person that supervises a crew and should have the proper experience and education to get the job done whether at an incident scene, responding, or at the station (Angle, 1999). Regardless of whether he or she is a career or volunteer member, their role is just as important. According to the book, Fire Department Company Officer,

Today’s company officers must know about and be able to deal with concepts such as gender equity and cultural diversity. They must know about planning, budgeting, and time management. In short, today’s company officer must be a much more versatile and better informed supervisor than in the past (1999, p. 1).

The responsibilities of a company officer are varied depending on the organization. Today, fire departments are providing services that were not previously imagined or the responsibility of the fire department but, like it or not, these services are now part of the fire service and are provided at the company level. Generally, a company officer is responsible for
ensuring the job or task is completed, keeping the crew members safe, building teamwork, developing the skills and abilities of the crew members, writing reports, and maintaining various forms and other types of documentation (Goodson and Sneed, 1999). A company officer ensures that a crew stays together, maintains accountability, inspects personal protective equipment of the crew, ensures its proper use, and ensures proper policies and procedures are utilized and practiced (Angle, 1999).

3. What competencies are needed for the position of company officer within Palm Harbor Fire Rescue? The position description for company officer (lieutenant) within Palm Harbor Fire Rescue lists the areas of responsibility as responding to all required incidents, assist the district chief with shift planning and directing, develop reports and recommendations to the district chief, inspect station, equipment, and personnel for proper order, complete reports, perform incident management functions as required or assigned, represent the department at meetings, ability to think clearly with good judgement under extreme circumstances, practice and enforce policies and procedures, demonstrate knowledge of policy and procedures, maximize communication between crew and upper management, and perform other duties as assigned (Lieutenant Position Description, 1998).

The competencies needed for the position of company officer within Palm Harbor Fire Rescue are numerous. A company officer must be able to provide instruction and direction to the crew regarding department policies, procedures, and practices (Lieutenant Position Description, 1998). He or she must possess the ability and skills to understand the structure of the organization and how the position of company officer fits into not only the department, but
also how it fits into the larger governmental organization of which it is a part. A thorough understanding of policies and procedures in an essential competency for this position (Goodson and Sneed, 1999).

The work of a company officer requires a thorough knowledge and understanding of approved modern day firefighting techniques (Lieutenant Position Description, 1998). A company officer must be intimately familiar with what types and forms of service, emergency or otherwise, that the department provides to the community. He or she is the person responsible for making the decisions on how the emergency or non-emergency services are provided on the streets on a daily basis. A company officer may not only have to direct and supervise these activities, but depending on staffing levels may also have to directly participate. The skill to develop, evaluate, and maintain the crews abilities in providing the multiple services in a safe and efficient manner is another essential competency (Goodson and Sneed, 1999).

A company officer must have a strong grasp of fire prevention practices and methods (Lieutenant Position Description, 1998). An understanding of why and how fire and life safety visits and inspections are conducted is important. As a company officer of today, much time during normal business hours is spent on prevention activities. Inspections, investigations, public education, community awareness, and public relations are all considered components of the fire prevention arena (Goodson and Sneed, 1999).

The person that fills the role of a company officer is most importantly a supervisor. This is where another key competency comes into play. A company officer must be able to command and lead the personnel that are assigned as part of the company (Lieutenant Position Description, 1998). Applying the principals of human resource management and other elements of
supervision are a must. Company officers have to deal with many things such as group dynamics, personnel counseling, problem solving, and motivational techniques. He or she must understand that there are people and services, such as mental health professionals, that are available to the crew as well as the company officer both internal and external to the organization. Knowing these services exist are useless unless the company officer is competent in these areas to recognize a need along with knowing when they can or should be utilized and how to contact them ((Goodson and Sneed, 1999).

4. What do other local fire departments do for succession planning? Succession planning should occur long before the need arises (Burstiner, 1997). It is a critical element of an organization's strategic plan (National Fire Academy, 2000). Succession planning will provide a continuity of quality leaders. Continuity will preserve the core of the organization which will in turn stimulate progress. Without it, the organization will be forced to look externally to find the next leader (Collins and Porras, 1994). A succession plan is no longer designed just for key leadership positions. According to an article on succession planning by the OPM Employment Service,

With good succession planning, employees are ready for new leadership roles as the need arises, and when someone leaves, a current employee is ready to step up to the plate. In addition, succession planning can help develop a diverse workforce, by enabling decision makers to look at the future make-up of the organization as a whole (http://www.opm.gov/hr/employ/products/succession/succ_plan_text.htm).

5. What should a company officer development plan for Palm Harbor Fire Rescue include? The company officer development plan for Palm Harbor Fire Rescue is essentially a
succession plan for that position. A succession plan is designed to nurture individuals within the organization and improve their talents to effectively move into vacated positions. It should provide a coordinated way to identify and develop an organization’s human resources (Quinn, 2002).

There are several key elements of the succession planning process. The first of these elements is that the plan must be driven by and supported by the organization’s top leaders. It should take into account the organization’s mission, strategic plan, and culture. A succession plan should include a variety of ways to develop the personnel such as utilizing training and experience opportunities from outside the organization, formal educational and training opportunities, various internal assignments, and developing organizational leadership. It should also be built into the employee performance appraisal process and allow for multiple personnel to rate the person or persons that are working within the plan (http://www.family-business-experts/succession-plan.htm).

The literature review influenced the researcher by providing the information needed to develop a succession plan for Palm Harbor Fire Rescue. It also provided information that was specific to the position of company officer to begin to create a Company Officer Development Plan for Palm Harbor Fire Rescue.

**PROCEDURES**

The procedures used in preparing this research project began with a literature review of available printed materials in the Learning Resource Center (LRC) at the National Fire Academy (NFA) in Emmitsburg, Maryland. Further information was obtained from the Internet, personal interviews, the library of Palm Harbor Fire Rescue in Palm Harbor, Florida, internal information
and documents of Palm Harbor Fire Rescue, the author’s personal library, and a review of printed literature available and obtained from the Palm Harbor Library which is also in Palm Harbor, Florida.

During the months of November and December 2002, a web search found many documents on the topic of succession planning. Those reviewed were from varying sources with varying views.

Thirteen personal interviews were conducted. Nine of the persons chosen for these interviews were done so primarily because they are existing company officers within Palm Harbor Fire Rescue with the remaining persons chosen because they are the head of an operational shift or various division within the department, such as fire prevention or training, within Palm Harbor Fire Rescue.

The purpose of all of the interviews was to discuss what material and information should be or needs to be included in an officer development program from each persons varying perspective. All of those interviewed are existing officers of Palm Harbor Fire Rescue.

The first personal interview was conducted with District Chief Dave Cole on September 26, 2002 at Palm Harbor Fire Rescue Station 65. Chief Cole is the Shift Commander of the ‘C’ shift. Another interview with a district chief was conducted on September 27, 2002, at Palm Harbor Fire Rescue Station 65. This interview was with Ron Gray who is the Shift Commander of the ‘A’ shift.

A personal interview was conducted with Lieutenant Tom Fritz on September 26, 2002 at Palm Harbor Fire Rescue Station 66.
The next personal interview was conducted with Lieutenant Kurt Fritz of Palm Harbor Fire Rescue also on September 26, 2002 at Palm Harbor Fire Rescue Station 67.

Several personal interviews were conducted with Captain Tim Pilson of Palm Harbor Fire Rescue who is the department training officer. Interviews with Captain Pilson were all conducted at Palm Harbor Fire Rescue Administrative Offices on the dates of September 27, 2002, October 17, 2002, and October 24, 2002.

Three personal interviews were conducted on October 15, 2002. The first of these was with Lieutenant Michelle Brown of Palm Harbor Fire Rescue at station 65. The second personal interview on this date was conducted with Lieutenant Milton Smith of Palm Harbor Fire Rescue at station 68. The final interview on this date was conduct with Deputy Chief James Olson of Palm Harbor Fire Rescue at the Fire Prevention Offices. Chief Olson is the department Fire Marshal and the head of the Fire Prevention Division.

A personal interview was conducted with Division Chief Mark Snow of Palm Harbor Fire Rescue. The interview was held on October 17, 2002, at the administrative offices of Palm Harbor Fire Rescue.

Two personal interviews were conducted on October 22, 2002. The first of them was with District Chief Dan Zinge of Palm Harbor Fire Rescue at his office at Palm Harbor Fire Rescue station 65. Chief Zinge in the Shift Commander of the ‘B’ shift. The second was with Lieutenant Keith Maciuba also of Palm Harbor Fire Rescue at station 66.

On October 25, 2002, the final two personal interviews were conducted. Lieutenant Charlie Anderson of Palm Harbor Fire Rescue was interviewed at Palm Harbor Fire Rescue station 66 and Lieutenant Rick Grenon of Palm Harbor Fire Rescue at station 68.
A survey of five local fire departments was conducted. The departments were the Dunedin Fire Department, Dunedin, FL; East Lake Fire & Rescue, Palm Harbor, FL; Oldsmar Fire Department, Oldsmar, FL; Safety Harbor Fire Rescue, Safety Harbor, FL; and Tarpon Springs Fire Department, Tarpon Springs, FL. The reasons these departments were chosen begin with their geographic location. Each of these departments border the jurisdiction of Palm Harbor Fire Rescue. Additionally, all of these departments, including Palm Harbor Fire Rescue, work under the same operational policies and automatic aid between them is a daily occurrence. These departments also are of varying sizes ranging from one station to four stations which provided a good cross section of departments that are similar in size to Palm Harbor Fire Rescue.

The information gleaned from these interviews combined with the research conducted and information compiled by the author, helped to develop the officer development program and bring this project to conclusion.

The Publication Manual of the American Psychological Association (APA Manual), fourth edition, was utilized to assist the author with the proper way to use and document and cite references within the paper and the reference section.

Limitations

This research project was primarily limited by one factor. The limitation was trying to schedule and meet with the numerous personnel for interviews. Often, things would pop up to derail a meeting such as emergency incidents, off duty injuries, or mandatory make-up training classes and the like.
RESULTS

1. What is succession planning? Usually, a succession plan takes some promising employees and trains them to take the reins of the company or organization long before the need actually arises. The training and development program is comprehensive and includes higher learning or university courses, the assignment of various positions within the organization, the assignment to committees and associated the duties, and the assignment of specific or special projects to hone the talents of the individual or individuals (Burstiner, 1997).

A succession plan is a process to help an organization align their goals with those of their human resource needs. A succession plan will provide a strategy to identify and develop an organization’s key resource, which is people. Additionally, it will retain employees who are movers and shakers and attract those same type of employees from areas and businesses outside of the organization. It will promote challenging and rewarding career possibilities, enhance a positive work culture of the organization through support of employees, reduce productivity losses or decreases while searching for replacements. Further, and most importantly, it will ensure that there is an available pool of personnel from within the organization that can fill various positions of need (http://cuttsgroup.com/articles/succession-planning-procedures.htm). A succession plan establishes a process for personnel to develop their knowledge, skills, and abilities to prepare for advancement within the organization while retaining their services as a return on the investment of time, resources, and finances of an organization (http://www.opm.gov/hr/employ/products/succession/succ_plan_text.htm). “An effective succession plan anticipates administrative vacancies and develops a pool of qualified candidates in advance of a critical need” (Quinn, 2002, p. 34).
According to the student manual titled, Executive Leadership, which is the course manual for the final EFO course of the same name, it states,

Succession planning is an organized and systematic way to ensure that employees in a particular organization are capable, competent, and willing to replace and/or succeed to strategic roles within the organization (National Fire Academy, 2000, SM 6-3).

2. What are the roles and responsibilities of a company officer? Although the role of a company officer is continually changing, there are two roles that remain constant. The first role is having to deal with people both from within and outside of the organization. The second role is the fact that no matter what time of day it is, no matter what the weather is like, or no matter what the reason for the call, the company officer is on the cutting edge of the service delivery to the public and must provide the service with dedication, courage, and professionalism.

The responsibilities of a company officer will vary with the size and physical location of the department and whether the organization is career or volunteer. Even though responsibilities may vary somewhat, generally a company officer is responsible for making reports and keeping records, developing the skills of the company members, keeping work areas safe and healthy, building teamwork and cooperation, and in a nutshell, just making sure that the job gets done (Goodson and Sneed, 1999). Responsibilities may also include assisting in planning efforts, making recommendations, performing various incident command functions, maximizing communications between the crew and staff, and representing the organization at meetings or similar functions (Lieutenant Position Description, 1998).

3. What competencies are needed for the position of company officer within Palm Harbor Fire Rescue? The competencies required for the position of company officer begin with
the fact that the company officer must be able to provide direction and instruction to crew members, to having a strong understanding of modern day firefighting techniques and practices, and having a strong grasp of fire prevention practices and methods, and providing supervision (Lieutenant Position Description, 1998).

Providing direction and training will help company members perform their jobs more safely and efficiently. Even if a department has a person specified as the training officer, it is still imperative that a company officer perform these functions with the crew. It will further help crew members by having them acquire new knowledge, skills, and abilities while all the while honing and maintaining their existing knowledge, skills, and abilities. Further, a company officer will be able to focus on specific needs of the company that others may not see or be aware of along with helping the company officer get a feel for the crew so as to utilize crew members in areas where they are most effective.

Having a strong understanding of modern day firefighting techniques is a broad statement. To do so, a company officer must spend the extra time and often personal expense to ensure the knowledge, skills, and abilities meet the demands of the position along with developing new ones. A company officer continually applies the basics of firefighting and will need to do so as part of the company. Continued education and training will enhance the abilities of a company officer as the incidents of today can involve hazardous substances, terrorism which involves the potential of nuclear, biological, and chemical concerns, or very elaborate and automated mechanical systems.

For a company officer to have an understanding of fire prevention practices also covers many areas. Many company officers are responsible for conducting building inspections or
safety surveys in locations as simple as the small business office to industrial facilities. These inspections are primarily conducted to identify and correct life safety problems, but also include correction of fire hazards or concerns. Fire prevention also includes public education provided to audiences of all types to promote fire safety through the utilization of such things as smoke detectors or what number to call in case of emergency.

Providing supervision is the meat and potatoes of what a company officer is all about. The company officer is the leader and is responsible for everything the company does, good and bad. On a daily basis, the company officer is the one that must ensure that the proper policies and procedures are followed. Unfortunately, there are times when a member of the crew is not performing properly and corrective actions must be made. This is often difficult considering the closeness and bonds that firefighters often have, but the company officer must be willing to carry out the responsibilities of the position as soon as the badge is pinned on (Goodson and Sneed, 1999).

4. What do other local fire departments do for succession planning? A succession plan that is prepared and used properly will provide the organization with better promotional candidates along with improving the organization as a whole. A succession plan will provide a sense of perspective to members on their own career choices along with providing a career development path and management development path simultaneously (Coleman and Granito, 1988). A succession plan should be an element of an organizations strategy because it will develop employees which will in turn make the organization more competitive (National Fire Academy, 2000).
The surveys of the fire departments chosen for this research project all indicated that there is no formal succession or development plan currently in place. Appendix ‘B’ displays the survey questions and responses. Three of the departments added that although there was no formal plan in place they do occasionally offer some in-house officer and personnel development classes. However, there was no specific time when the training classes were conducted. The remaining two departments had no immediate or short-term plans of creating or conducting succession planning.

5. What should a company officer development plan for Palm Harbor Fire Rescue include? Any type of succession or development plan must have the support of the organization’s leadership and is likely doomed without it. The plan should consider the mission, strategic plan, and culture of the organization (http://www.family-business-experts/succession-plan.htm).

According to the student manual from the Executive Leadership course, titled Executive Leadership, it states,

> Each organization is unique and has a unique set of capabilities different from other similar organizations. This uniqueness can be demonstrated in a variety of ways, including delivery systems, technology, management style, customer service, or a myriad other capabilities. The key is to identify the department’s organization-wide capabilities that are better than anyone else’s (2000, p. SM 6-3).

Much of the results for this research question were gleaned from the personal interviews conducted with many officers of Palm Harbor Fire Rescue. The components that the interviews recommend as part of a company officer development plan were broken down into nine general categories. The categories are: Standard Operating Procedures/rules and regulations,
interpersonal skills, forms/report writing, computer skills, safety, apparatus, grid map/pre-plan reading, radio/dispatch communications, and strategy and tactics. The interview questions and the responses of those interviewed are more specifically shown in ‘Appendix A’.

The top two topics to be included in a development plan, according to those interviewed, are SOP’s/rules and regulations and interpersonal skills/relations. All those interviewed said that SOP’s/rules and regulations should be part of the development plan while six of the group also named interpersonal skills as an important component.

Appendix ‘C’ is the Company Officer Development Plan that was developed as part of this ARP.

A surprising result of the literature review was that a great deal of the information was written for or designed for a family business and little information on succession planning in the fire service. However, the process and information can be applied to the fire service, career or volunteer.

**DISCUSSION**

The results of the literature review clearly establishes the need for organizations to do succession planning. Succession planning must be an important element of an organizations strategic plan in order to continually be a competitive force (National Fire Academy, 2000).

Succession planning is a way or process of training and educating an organization’s existing personnel to efficiently and effectively take on the higher positions and roles within the organization as they are vacated. It is a coordinated way to identify an organization’s personnel resources, retain upwardly mobile personnel, attract qualified personnel, promote career
possibilities, enhance the work environment, and generally ensure a readily available group of qualified personnel within the organizations (Quinn, 2002). A succession plan is a process that will help an organization align their personnel needs with the organizational goals (http://cuttsgroup.com/articles/succession-planning-procedures.htm). It is a process that will develop the knowledge, skills, and abilities of personnel and prepare them for advancement within the organization (http://www.opm.gov/hr/employ/products/succession/succ_plan_text.htm).

A company officer within the fire service of today has a full plate of roles and responsibilities. A company officer must of course lead the crew while handling a variety of emergent or non-emergent incidents, but must, most importantly, be a people person. He or she must have a strong understanding of the organization, his or her role within the organization, and various ways to deal with various people.

According to the book, Fire Department Company Officer, Third Edition, it states, Today’s company officers must know about and be able to deal with concepts such as gender equity and cultural diversity. They must know about planning, budgeting, and time management. In short, today’s company officer must be a much more versatile and better informed supervisor than in the past (1999, p. 1).

The company officer is an important link between the firefighters and the leadership of the organization. A company officer must have the proper mix of experience and education to get the job done. He or she must keep the crew accountable, together, and safe (Angle, 1999). Even though a company officer has to ensure all of these tasks, assignments, duties, and roles are
all completed properly, he or she must also be a competent leader on and off the fireground and must maintain those skills as well.

Just as the roles and responsibilities of a company officer have changed and increased, so to have the competencies that are not only required, but essential to hold the position. He or she must have a strong understanding of modern day firefighting techniques and methods. The company officer and his or her crew are the one’s that directly provide this service on a daily basis. Not only will the company officer simply direct and supervise the crew in this function, but due to staffing shortages may have to be a direct participant while all along ensuring the crew’s and civilians safety (Goodson and Sneed, 1999). Additionally, the company officer must effectively provide instruction and training to the crew to ensure they are competent in the services that they provide (Lieutenant Position Description, 1998).

A company officer must understand fire prevention practices and delivery methodologies. Company officers will often have to conduct building inspections, pre-fire planning, and a multitude of public presentations which all must be conducted professionally and competently. Much of a company officer’s time during what is considered normal business hours, at least outside of the fire service, is spent on these types of activities.

The company officer must be able to lead and supervise. Supervising requires the application of human resource management strategies and philosophies such as group dynamics, motivation, counseling, and problem solving. It is not only important to know these various components exist, but also how and when to apply them along with which strategy or tactic will work best for certain crew members (Goodson and Sneed, 1999). When supervising and dealing
with personnel, especially in the fire service with the strong bonds between crew members and
the family atmosphere, one size does not fit all.

The fire departments that were surveyed by the author all had no formal succession plan. Several however, did offer and conduct some occasional in-house classes for personnel
development. This reinforced the information gleaned from the literature review regarding the
fact that the fire service is lagging behind in the area and must implement this process to ensure
the fire service stays competitive whether for seeking funding or personnel. It further
encouraged the author to create a development or succession plan that could be implemented for
Palm Harbor Fire Rescue.

A succession plan can help an organization have personnel that are prepared to take on
new leadership roles and responsibilities along with developing a more diverse workforce
(http://www.opm.gov/hr/employ/products/succession/suce_plan_text.htm). It will provide
continuity of leadership which will in turn preserve the core of the organization and stimulate
progress (Collins and Porras, 1994). Any form of development or succession plan must have the
support of and be driven from the top of the organization down. The plan should include the
organizations mission, strategic plan, culture, and a variety of ways to develop personnel.
Developing personnel can be accomplished in a variety of ways to include formal education,
committee assignments, and job rotation (http://www.family-business-experts/succession-
plan.htm).

The interviews that were conducted with many of the officers of Palm Harbor Fire
Rescue by the author provided specific areas that they thought should be included in a company
officer development plan. The component of highest priority in a Palm Harbor Fire Rescue
development plan that was listed by all of those interviewed was having a thorough knowledge and understanding of departmental policies and procedures. The second most suggested topic was the importance of having good interpersonal skills/relations. Although there were many responses during the interview process, many of the topics or items listed by them were repetitive or may have just been stated a bit differently.

Not so surprisingly to the author was that the topic(s) of strategy and tactics was the least suggested topic of the nine components that eventually made up the Company Officer Development Plan (see Appendix ‘C’). Most likely, the reason for this is the fact that little of a crew’s time is spent on fire incidents as compared to decades past.

RECOMMENDATIONS

The following recommendations are based on the research derived from the literature review and information derived from personal interviews and surveys. The research information clearly established the need for and utilization of some type of formal succession or professional development plan.

The first recommendation is that the administrators of Palm Harbor Fire Rescue support and implement the company officer development plan that was created as part of this research project.

Secondly, it is recommended that after a period of about six months of the plan’s implementation and several personnel having utilized the company officer development plan, the department staff and company officers who have worked with those utilizing the plan should
meet and evaluate how the program has been working and what changes need to be made. The program may need to be expanded or go into greater detail on various topics.

It is further recommended that Palm Harbor Fire Rescue continue to support and encourage department personnel to attend and participate in external educational or training classes, courses, seminars, and the like. Courses such as those offered by the NFA, which are offered and conducted both at the National Fire Academy and occasionally at off-site training centers. This will further expose personnel to higher learning, differing perspectives and opinions, and varying management theories and practices.

A final recommendation is for the department to continue to do further research on this topic, both internal and external to the organization, to create developmental plans for all of the organization’s positions, up to and including that of the fire chief.
REFERENCES


## APPENDIX A

### Succession/Development Plan Interview Results

1. Did you feel prepared for the position of company officer at the time you were promoted?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Yes</td>
</tr>
<tr>
<td>3</td>
<td>For the most part</td>
</tr>
<tr>
<td>1</td>
<td>No</td>
</tr>
</tbody>
</table>

2. Once you were in the position for a few months, did you still feel that you were sufficiently prepared?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Felt prepared operationally, but not dealing with personnel issues</td>
</tr>
<tr>
<td>2</td>
<td>No, didn’t even know half of the mandatory paperwork/forms existed</td>
</tr>
<tr>
<td>2</td>
<td>Yes, preparation could have been better, but was sufficient</td>
</tr>
<tr>
<td>1</td>
<td>No, could have used more training on dealing with people</td>
</tr>
<tr>
<td>1</td>
<td>No, felt like I made a mistake in taking promotion</td>
</tr>
</tbody>
</table>

3. Name three topics or areas that you wish you had had more preparation or training on prior to becoming a company officer.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>More training on departmental policies and procedures</td>
</tr>
<tr>
<td>6</td>
<td>Interpersonal skills, some role playing for conflict or problem solving</td>
</tr>
<tr>
<td>4</td>
<td>Be assigned to an officer who can show the ropes</td>
</tr>
<tr>
<td>3</td>
<td>Booklet of paperwork/forms and how and when to complete them</td>
</tr>
<tr>
<td>3</td>
<td>Which computer programs are used and how to use them</td>
</tr>
<tr>
<td>2</td>
<td>How to use grid maps and supplemental maps</td>
</tr>
<tr>
<td>3</td>
<td>Radio communication procedures</td>
</tr>
<tr>
<td>1</td>
<td>Some time management training</td>
</tr>
<tr>
<td>1</td>
<td>Safety officer training</td>
</tr>
<tr>
<td>3</td>
<td>More tactics and strategy training</td>
</tr>
<tr>
<td>1</td>
<td>What can or should be said to media</td>
</tr>
<tr>
<td>1</td>
<td>More opportunity to do public speaking</td>
</tr>
</tbody>
</table>
APPENDIX B

Survey Results

1. Does your department conduct formal development or succession planning?

   None of the departments surveyed had a formal plan or outline that they regularly followed.

2. Does your department conduct any form of development or succession planning?

   East Lake Fire Rescue, Dunedin Fire Department, and Safety Harbor Fire Rescue occasionally held 4 to 8 hour development classes on an occasional basis. East Lake’s program was for all employees while Dunedin and Safety Harbor’s program was for officers or acting officers.

3. If no to questions 1 and 2, does your department have any short term plans to conduct development or succession planning?

   Oldsmar Fire Department and Tarpon Springs Fire Department have no plans to do development or succession planning.
APPENDIX C

Palm Harbor Fire Rescue
Acting Officers Training Program

This program is designed to develop firefighters who are interested in promoting to the rank of lieutenant. It will build upon what has been learned during formal education and personal experiences. The individuals participating in this program should have completed all required educational classes listed in the job description which qualify them to act in an higher capacity. Completion of this program will not preclude any individual who otherwise meets the minimum requirements of an acting officer from being able to do so.

This program includes ten different modules that the firefighter will complete. Once the firefighter has successfully completed a module and/or it’s components, it can be checked off by a regularly assigned lieutenant or higher ranking officer.

During the course of working within each module, the firefighter will be required to read and understand different sections of the employee handbook which contains the departmental SOP’s. Almost all sections will refer back to the SOP’s. Please keep in mind, this training program will not include all of the SOP’s, just those that a company officer may have to refer most often. It is the firefighters responsibility to become familiar with all standard operating procedures.

There are several suggested readings recommended for some of the modules. These readings are listed to help the firefighter gather more information about the subject within the module. It will help the firefighter gain added understanding of the module if the added reading is completed. Before moving into the first module, it is recommended that the firefighter read IFSTA Fire Department Company Officer, Third Edition, pages 7-11, entitled, Assuming the Role of a Company Officer. This chapter will give a good overview of what this training booklet is all about. The modules are as follows:

1. SOP’S / RULES & REGULATIONS
2. INTERPERSONAL SKILLS
3. REPORT WRITING/ FORMS
4. COMPUTER SKILLS
5. SAFETY
6. APPARATUS
7. GRID MAP / PREPLAN READING
8. RADIO / DISPATCH COMMUNICATIONS & PROCEDURES
9. STRATEGIC/TACTICAL
10. SEAT TIME WITH OFFICER
MODULE 1
SOP’S /RULES & REGULATIONS

OBJECTIVE
To re-familiarize the firefighter with the Standard Operating Procedures of Palm Harbor Fire Rescue.

To complete module 1, the firefighter must have a good understanding of the General Orders:

The main emphasis of General Order 200 is for the firefighter to know, understand, and utilize the chain of command. The chart will help the firefighter understand this structure. Within the fire service there is a standard of behavior that is expected, this is called the “Code of Conduct.” General Order 203, is the Code of Conduct standards established by Palm Harbor Fire Rescue. The Positive Reinforcement Process is a very important component of the discipline process. Each acting officer must know when and how to use it. The acting officer needs to be familiar with all of the groups of offences and their consequences.

There are many duties that need to be carried out daily. General Order 209, Housekeeping Duties, will give the acting lieutenant a guide for using time wisely and will also help to allow for harmony to exist between the shifts.

General Order 215, Knox Box/Supra Keys is another rule that each acting officer should know. This rule is very important as it allows for the protection of the businesses and residents within the response area. As a public servant, we are entrusted to have entry into buildings, private roads etc. without obtaining permission. The Knox Box and Supra systems give us the keys to gain entry into secured areas. Again, the public has put their trust in us that we will keep these keys secure and protect their property.


(Make sure everyone understands the rules)
MODULE 2
INTERPERSONAL SKILLS

OBJECTIVE

To help the acting company officer with skills needed to accomplish tasks and duties with subordinates while maintaining a harmonious work environment. To assist the acting company officer with time management, problem-solving, and decision making skills.

The firefighter must have a good understanding of General Orders 202 ‘Appearance’, 203 ‘Code of Conduct’, and 902 ‘Housekeeping/Preventative Maintenance’ in order to successfully complete this module.

Suggested reading includes IFSTA Fire Department Company Officer, Third Edition, Chapter 4 ‘The Company as a Group’ and Chapter 5 ‘Theories in Leadership as a Group Influence’ which includes:

· PROBLEM-SOLVING: A CRITICAL SKILL - It takes skill to develop a good method of problem-solving. This section will help you in meeting the challenges of what Company Officers face everyday. Please note the following ...
  · The CO is responsible for efficient service delivery.
  · The CO must allocate available resources where needed.
  · The CO must be sensitive to the company’s needs.
  · The CO must prioritize and balance individual needs versus group needs.
  · The CO must determine whether existing processes are meeting the existing needs. If not, where do the problems exist?

Additional readings come from selected chapters from the National Fire Academy’s course on Interpersonal Dynamics in the Fire Service Organization and Leadership I, Strategies for Company Success. Please read each section carefully and respond appropriately:

· Decision-Making Skills
· Problem Solving Skills
· Conflict Resolution Skills
· Time Management Skills
Most of what officers do is interact with other firefighters. It is very important that each officer or acting officer knows how to accomplish their task through the cooperative spirit of others. In other words, know how to “willingly” get work done through others. Interpersonal skills are necessary for each officer to develop. The acting officer should keep in mind that, in the firehouse, he or she is dealing with adults that all have distinct and different personalities. The acting officer must learn how to relate and communicate to each personality in order to accomplish everyday tasks. Once a working relationship has been established, the job will be much easier.

Within Palm Harbor Fire Rescue, the company officer can go to the district chief in order to obtain and meet needs that are not within his/her immediate reach. When this occurs, it becomes the responsibility of the district chief to ensure that the company officer receives what is needed for the company to accomplish the task, etc.

There will be times when upper management might identify a problem which will start the process of attempting to solve it. Often times, the district chief will address the problem with the company officer. Collectively, problems can be solved in this manner. There may also be times when the district chief will notify the company officer of a problem and rely completely on the company officer to come up with a solution(s).

(Don’t be the judge and jury before getting all the facts)
MODULE 3
REPORT WRITING / FORMS

OBJECTIVE

To ensure that the acting company officer is familiar with and knows how and when to fill out the various forms and reports required within the job.

In order to successfully complete module 3, the firefighter must have a good understanding of the General Orders 350 ‘Accident/Injury Investigation’ and 400 ‘Fire Investigation’.

This section will deal with report writing and interdepartmental forms. There are several different forms that a company officer must complete in the course of his/her duty. This module will be a practice module to become familiar with the most frequently used forms. Please obtain copies of these forms and review them with a company officer.

- Accident / Injury Investigation Packet

This packet needs to be completed as per General Order 350 and includes all the necessary forms that must be completed. These important forms document incidents/accidents of the members of the department. Any injury requiring medical attention must have the forms completed and the process followed. Be sure the on duty district chief is notified as soon as possible.

- Florida Fire Incident Report (State Report)

This report shall be filled out whenever there is an actual fire. There is no need to fill out this report if it was a false alarm or a “smoke scare”. Smoke scares may include, for example, smoke coming from an a/c vent after the first time the resident turned on the heating or cooling unit. Remember, if there was no fire there is no need to do a hard copy report. However, a computer report must be generated on all calls. It is the company officer’s job to attempt to determine cause and origin of fires. If the company officer suspects the fire was intentionally set or that a hazardous condition still exists, a fire inspector should be brought up on the radio for a consult. The inspector will make a determination whether to respond or just give a recommendation and direction.

On illegal burn calls, a state report is not needed however, the company officer can issue a fire safety survey violation for the burning. If it is determined that the person burning illegally is a frequent abuser, then a law enforcement officer may be called and the fire marshal or a fire inspector notified. The company officer may notify fire prevention immediately or a memo may be sent to fire marshal via the computer system.
• **Structure Fire Field Report**

A structure fire field report is an internal report needed to obtain information that the NFIRS report does not cover. This allows for witness statements, insurance information and other vital information needed for follow-up investigations. In addition, a NFIRS report along with a computer report also have to be completed and entered into the computer system.

• **Vehicle Fire Information Form**

Again the NFIRS reporting system does not include certain information. Therefore, PHFR has developed it’s own internal field report. This report should be completed for all vehicle fires. In addition, a NFIRS report along with a computer report also have to be completed and entered into the computer system.

• **Brush / Grass Fire - Field Report**

Whenever there is a fire outside of a structure, this report should be filled out even if the outside fire extends to a structure fire. This report does not include illegal burns. In addition, a NFIRS report along with a computer report also have to be completed and entered into the computer system.

• **Fire Alarm Report**

A fire alarm report should be completed by the unit that arrives first on scene or the unit that actively conducts the investigation as to what caused the alarm. It is important to note that this report is to be done regardless of what caused the alarm or if there was an actual fire. If active fire is discovered or an extinguished fire is discovered, this report still has to be completed along with a structure fire field report and a NFIRS structure fire report.

All of the above reports should be sent to the Fire Prevention Office upon completion. Keep in mind, even if an inspector comes out to your location, it is still the responsibility of the company officer to do a computer, and sometimes a written, report. Ask the inspector if he or she is going to do the report or if you should do it.

• **Missing / Broken Equipment Report**

This is a very important report. First, it aids the department in keeping up with equipment that needs replacing. Secondly, it provides a paper trail to identify equipment that breaks more frequently, therefore allowing the department to evaluate such equipment before purchasing it again. Third, it helps the department pinpoint problem areas, such as a piece of equipment carried in an area that is causing it to break more often. The missing equipment part of this form is just as important. Most equipment we carry is very costly so it is imperative we are able to locate missing equipment as soon as possible.
There are many other forms that company officers use, such as fire supplemental reports, marine rescue supplement reports (this report must be filled out after each marine mission, be it training or an actual call), the various fire inspection paperwork, etc. Most of these forms along with many others are available on-line at the departments web site and can be downloaded in the computer. Included in your booklet are copies of the reports mentioned, along with others.

(All reports needs to be entered and filed in a timely manner)
MODULE 4
COMPUTER SKILLS

OBJECTIVE

To allow for the trainee to learn how to use the county computer (CAD) system. This consists of locating, entering, and researching reports and data.

The firefighter must have a good understanding of General Orders 216 ‘Information Pass Down’ and 218 ‘Computer Use’ in order to successfully complete this module.

The computer has become a vital part of the fire service and is used everyday by the company officer. It is the main source of communication within the department, other than verbal. It is used to pass down information from shift to shift. In the computer the department documents daily activities, monthly training calendar, training records, memos and incidents to name a few. This section is not designed to be an all inclusive walk through the use of the computer, as steps in computer use can change at a moments notice. Please feel free to ask your officer for help in those areas. The firefighter should review and ensure competency in the following areas:

- Enter daily shift notes
- Enter proper pass down notes
- Enter Reports
- Review Reports
- Access training calendar
- Review training notes
- Enter training hours
- Review training hours
- Write memos
- Review memos
- Digitally page a unit or person
- Access and enter the Company Journal (CJ account)
- Review calls prior incidents and prior calls (PI and PC accounts)
- Access internet
- Access and print forms
- Change paper in printers
- Troubleshoot

At the beginning of each shift, the computer should be shut down and restarted. This allows the computer to release itself of the past days activities. No one should leave the computer logged on, after use log off. The computer is a great tool, having the skills to use it will make the job a bit easier for the company officer.
St. Petersburg College, as well as other colleges in the area, offer computer classes.

(This machine belongs to the fire department, everything in it may be public record, use it wisely)

The remaining pages within this module describe the uses of, how to access, and utilization of the most commonly used computer programs of Palm Harbor Fire Rescue
The Company Journal System (CJ Account) maintains, produces and utilizes a significant amount of data. The Computer Aided Company Journal System is not only a useful tool for the Administration Division of a department, but it is of great asset to the Operations Division as well.

The following is an example of some of the various functions and data which are captured in the Company Journal System:

- An on-line log of all the calls which were handled by the department
- Manpower and leave schedule
- Calculates payroll for the department
- Provides immediate review of any personnel's leave history
- Documents equipment which has been lost
- Documents equipment which has been damaged
- Allows requests for ems and station supplies to be entered
- Tracks EMS equipment left at hospitals
- Provides an electronic training calendar

The system automatically identifies those persons who are to be on duty during each hour of each day. Therefore, an employee's complete work history is always instantly available defining reasons for sick leave, overtime assignments, vacation usage, etc.

The company journal system has been designed to automate many of the departmental activities. The system automates the station log, calculation of payroll, the scheduling of 24 hr. manpower shifts, maintains a calendar of schedules, and training activities, tracks supplies which need to be ordered by the station, and logs EMS supplies, which have been left at hospitals.

The Training Records (TR Account) module permits the recording and maintenance of all personnel training records. The system maintains formal training information regarding certificates, college courses, seminars, and college degrees. Notes pertaining to an individual's progress can also be maintained.

In-house or on-the-job training records are maintained by areas such as number of hours, day or night, classroom or practical, instructor and location. These training reports correspond with all current ISO criteria.
Training records can be displayed or printed for the department or a single employee at any time. The system will track certificate expiration dates so the user is aware of approaching dates. A listing of any courses taken between specific dates can also be provided whenever needed. Training records can be purged on an as needed basis.

This manual is designed in a step-by-step fashion to assist the user in understanding all of the features and functions of the module. Upon completion of this manual the user should have sufficient system knowledge to competently use the training records module.

---

IN-HOUSE TRAINING RECORDS

In-house training records will keep track of the different courses that are given within the Department. Selection of option '2' from the Main Menu will cause this sub-menu to appear:

---

TRAINING SYSTEM
IN-HOUSE TRAINING RECORDS
SUB-MENU

1 - ADD OR UPDATE ONE IN-HOUSE TRAINING RECORD
2 - DISPLAY ONE IN-HOUSE TRAINING RECORD
3 - PRINT IN-HOUSE TRAINING RECORDS
4 - YEARLY PURGE

ENTER YOUR SELECTION PLEASE: #

---

ADD OR UPDATE IN-HOUSE TRAINING RECORD

The User is given the option of updating a single employees’ record or a group of employees.

Choosing "S" for single will display the following screen:
TRAINING SYSTEM
IN-HOUSE TRAINING

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROSTER NUMBER...........</td>
<td>:</td>
</tr>
<tr>
<td>DATE OF TRAINING ...........</td>
<td>: MO/DA/YR</td>
</tr>
<tr>
<td>TRAINING COURSE...........</td>
<td>: XXXX (30) XXXXXXXXXXXXXXXXXXXXX</td>
</tr>
<tr>
<td>LENGTH OF SESSION (HOURS)</td>
<td>: ##.##</td>
</tr>
<tr>
<td>CLASS/PRACTICAL (C/P) ......</td>
<td>: X</td>
</tr>
<tr>
<td>DAY/NIGHT (D/N) ............</td>
<td>: X</td>
</tr>
<tr>
<td>INSTRUCTOR ...............</td>
<td>### (30) XXXXXXXXXXXXXXXXXXXXX</td>
</tr>
<tr>
<td>BATTALION/DISTRICT .......</td>
<td>: XXXX</td>
</tr>
<tr>
<td>COMPANY/SHIFT..............</td>
<td>: XXXX</td>
</tr>
<tr>
<td>MULTIAGENCY ...............</td>
<td>: X (Y/N)</td>
</tr>
<tr>
<td>LOCATION ...............</td>
<td>: (30) XXXXXXXXXXXXXXXXXXXXX</td>
</tr>
</tbody>
</table>

ENTER’?’ FOR ROSTER NAME LOOKUP

There is a help screen for roster numbers should it be needed. When at the 'Date of training' the user can input a ’?’ for the display of all in-house courses taken by this employee. This will help eliminate duplicate entry. At 'Training Course' the user is able to identify a particular category of courses to be displayed, or for all course numbers to be displayed. Choosing the line number of the desired course will position that course number and description on the screen. The cursor will now be at 'length of session'. Complete the fields with appropriate input.

When input has been completed, a prompt asking if this is what you want will appear at the bottom of the screen.

Select the proper response:

- **FILE**: This will save data and produce a blank screen, for the next input.
- **N**: This gives the opportunity to change information
- **EXIT**: This will produce a blank screen WITHOUT saving any data.

Option “G” for group update will give the availability of entering up to twenty four (24) roster numbers at a time. This can save time when dealing with a class that everyone or quite a number, had to take part in. The computer will prompt for the same information as for a single roster number.
DISPLAY IN-HOUSE TRAINING RECORDS

PRINT IN-HOUSE TRAINING RECORDS

To look over an employee's training record, select option '2' from the IN-HOUSE TRAINING RECORDS Sub menu. To print records take option 3. The formatting screen will be the same. The printer report will look like the display screens.

The screen format that will appear as follows:

DISPLAY IN-HOUSE TRAINING RECORDS

STARTING DATE : MO/DA/YR
ENDING DATE : MO/DA/YR
COURSE .. OR < RETURN> FOR ALL :
BATTALION ..OR< RETURN> FOR ALL :
COMPANY.. OR < RETURN> FOR ALL :

ALL EMPLOYEES? (Y/RETURN) :

ROSTER NUMBERS : ####

The first screen to display is a summary of all the roster numbers showing their ID number, name, and total number of hours. In the display option, the user would select the actual person to view by inputting a line number and depressing RETURN. In the print mode, the data for each line number would be printed. In each instance the data displayed for each employee would be:

Subject Number Instructor
Description Location & Trng
Date of Trng Agency
# of Hours Battalion
Type of Trng Company
MEMO ACCOUNT

The computer aided memo account (MO Account) has been designed to automate the process of memo distribution and creation. The system allows the user to send memos to one individual, a Group of users, or all users in the memo account.

The memo account has word processing type abilities, allowing the user to edit data during the creation of a memo. The memo account also has a help feature available. The computer will list all users in the account with their corresponding queue numbers to assist the user when he is preparing to send a memo to other terminals. The most dynamic and important feature of the memo account is monitoring the status of each memo the user has sent. The date and time of the original send date, when read by each recipient, when deleted, and when printed are all logged on a review screen that can be printed along with a hard copy of the memo. Such a feature allows the writer the comfort of knowing for a fact whether or not the sent memo has been read. This also provides the user with the documentation required when establishing that specific information has been properly relayed, thus reducing the margin of error sighted as a “Lack of communication”.

The memo system interfaces to the computer aided dispatch system so that a user will know when they log into the CAD, whether or not there are memos waiting for them to read. The calltaker/dispatcher also has all of the options of the memo system available to them while still logged into the CAD.

ACCESSING AN INDIVIDUAL MEMO ACCOUNT

To access an individual memo account, type in the word “memo” at logon please and depress return. The computer will ask for the user’s queue number and, if necessary, password.

Should a password have been required, the system will validate it against the access password previously established for this queue and if it is found to be correct, the memo screen will appear.

MEMO SYSTEM SCREEN

The “Main Screen” lists memos that are waiting to be read, those that have been read and not deleted, and those that this user sent. A line number, status of the memo, the subject matter, the sender of the memo and the date the memo was created are displayed on the screen.
The screen will look like this:

<table>
<thead>
<tr>
<th>Lin S</th>
<th>SUBJECT</th>
<th>SENDER</th>
<th>DATE</th>
</tr>
</thead>
</table>

LINE#, Write, Forward, Back exit:

Lin: if there are memos showing in this users' account, they will be listed here with a line number for access.

S: this stands for status. The status of the memo will be either:
   - U - unread
   - R-read
   - S - sent by this user

Memos will always be in this order on the main Screen.

   SUBJECT: this is the title of the memo.

   SENDER who the author of the memo is.

The options available from this screen are:

Line #: Choose the line number of the memo to be read and depress ENTER: if you wish to write a memo, input 'W. The screen that displays will be discussed shortly.

Forward: if there is more than one page, input ‘F’ to see the following pages.

Back: when on a page other than the first, input 'B' to go back one page at a time.
WRITING A MEMO

As mentioned earlier, to create or write a memo choose option ‘W’ from the main memo screen. A formatted screen for writing your memo, that looks like the following, will display:

RE: ___________________________ Sender (your name)
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.
17.
18.
19.

Send, Hold, Delete, Forward, Back, Line#, Insert line:

Each page of the memo screen has up to nineteen (19) lines available for writing. Regular screen editing commands are used to correct errors.

After writing the memo, the options available are:

Send: this option will be discussed at the end of the rest, as it is a lengthy explanation.

Hold: should it be necessary to break out of the writing of the memo, an 'H' and the memo will be put on hold. It will still be available for the originator to go back into and finish or change what has been written. On the Main screen, the status of the memo will indicate 'S', even though it is actually on hold.
Delete: the input of 'D' will cause a prompt asking which line should be deleted. Indicate the correct one and it will disappear from the screen.

Forward: if there is more than one page, “F” will display each page in sequence.

Back: if the user is on other than page one, 'B' will go back, one page at a time.

Line#: input of an existing line number will take the cursor back to that line, ready for a change of data.

Insert line: should the user have forgotten a line, one can be put in between two existing lines, without having to re-write the entire memo. A prompt will ask after which line to insert the new one. Answer appropriately and the system will make the shift and put the cursor at the proper place for the entry of data.

Editing text: Existing text will be overwritten unless the insert text function is on. This function is activated by pressing the shift key and the (6) key simultaneously. This will cause all existing text from the cursor to the right of the cursor to move to the right as new text is typed. To disable (toggle) the insert mode simply press the shift and A keys again. To delete a character(s) press the backslash (\) key and the character at the cursor will be deleted and all text to the right will move one position to the left.

SENDING A MEMO

If the creator of the memo is ready to send it to other users, choose option “S”. A screen will display with the following heading in the upper left side of the screen.

Queues to receive (name of memo): At the bottom of the screen will be the following options:

NAME: input the name of the person to receive the memo.

QUEUE#: input the number of the queue to receive the memo, if known.

ALL: if every user on the system is to get the memo.”ALL” will send it to everyone at the same time.

?: if the user does not know the names, or queue numbers the input of a ? will display a listing of same.
As each individual queue is indicated, a message will display saying that the queue has been accepted. Once all of the queues have been chosen, and RETURN depressed, the same screen (now with a line number listing of all of the chosen queues and corresponding names) will display. It is at this point that the rest of the options on the prompt line may be used:

**Delete:** input of “D” will allow an individual queue to be deleted from the list before actually sending the memo.

**eXit:** the input of “X” will take the user out of this screen without saving or sending the memo.

**Ship:** input of “S” will actually ship the memo to the indicated queues. A prompt asking if the memo should be printed will display. Respond with either “Y” or by depressing RETURN for no. Another prompt indicating that the memo has been shipped will display. To continue, the RETURN key must be depressed.

**Forward:** the input of “F” will take the user, page at a time, to the additional pages of queue numbers.

**BACK:** If the user is on other than the first page, the “B” will take them back, one page at a time.

**WHAT TO DO WITH A MEMO YOU HAVE SENT**

Once the user has sent a memo, there are options available in regard to it. When at the main memo screen, choose the memo that needs additional attention by line number. That memo will display on the screen with a prompt line of options. Those options and how to use them are as follows:

**Delete:** if, after reading the memo, the user decides to delete it, input “D”; a prompt instructing the user to indicate “OK” to delete the memo will display. If it is “OK” to delete this memo from this account, input “OK” and depress RETURN.

**Forward:** if there is more than one page, ‘F’ will page through the memo.

**Back:** when at other than page one, 'B' will take the user backward page at a time.

**RETURN** to exit: if the user is finished reading the memo, and wishes to leave it in the account, depressing RETURN will take the user back to the main memo screen, and save the memo that was just read.

**reSend:** if the user wants to send this memo to someone other than the original choices, input “S”. This will cause the sending procedure, as already explained, to be repeated.
**Write:** should the user decide to add information to the original memo, the 'W' option should be chosen at this time. As the memo is showing on the screen, there are no line numbers, but when the “W” option is selected, the screen repaints the RE: (subject matter) area blank, and the original text of the memo displaying, with line numbers. This allows the user to change the heading of the memo, and to add or change any of the text. After all additional information is added, the sending procedure will be followed.

**Review:** the original sender of the memo is able to keep track of what those the memo was sent to have done with it. This is tacked on a “review screen”. The screen looks like the following:

<table>
<thead>
<tr>
<th>Lin</th>
<th>QUEUE</th>
<th>NAME</th>
<th>SENT</th>
<th>READ</th>
<th>DELETED</th>
<th>PRINTED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“RETURN” when finished reviewing, Forward, Back:

As the screen indicates, both the queue number and the name of the person, or area, that the memo was sent to will display. Under each of the remaining columns will be the date (mo/da) and time (hr:mn) that this function was preformed.

**Print:** when the 'P' is selected to print a memo a prompt asking if the review data should also be printed will display. Should the user wish to have a hard copy of the above review screen, indicate ‘Y’ and the screen will print out directly under the hard copy of the memo.

**WHAT TO DO WITH A MEMO YOU HAVE RECEIVED**

To know whether or not there are any memos waiting to be read, the user will have to log on to their individual memo account on at least a daily basis. If the user is either a calltaker or a dispatcher, a message telling them that they have memos to read will display when they input their personnel number to sign on to the system. The memo account can then be accessed through the “MO” function, directly from CAD.
Options for a memo that has been received are similar to those for one that the originator has sent. The only option not available to the person receiving the memo is “Review”. A message indicating: "YOU DID NOT WRITE THIS MEMO" will display.

All other options previously described for the original sender of a memo are available to the receiver. All options work the same way.
MODULE 5
SAFETY

OBJECTIVE

To attempt to prevent accidents/injuries before they occur and to encourage the acting company officer to enlist all under his/her supervision to practice safety measures as outlined in the department SOP book, as well as using common sense.


Recommended reading for this module is IFSTA Fire Department Company Officer, Third Edition, chapter 22; IFSTA Fire Department Occupation Safety, Second Edition, chapter 5; Fire Department Incident Safety Officer chapters 2, 6, and 7, and finally, Occupational Safety and Health in the Emergency Services.

The company officer should know that a great deal of responsibility is placed upon him/her regarding the safety and health of the crew. Although safety is something that every member of the team should keep in mind, it is up to the company officer to encourage and ensure that everyone does so. No one wants to go home knowing that a crew member was injured or even worse because of negligence of the part of the company officer or acting company officer. Make no mistake about it, it does not matter whether you are the regular officer or acting the officer, if you are in charge, the burden of safety will fall upon you.
MODULE 6
APPARATUS

OBJECTIVE

To allow for the company officer to comfortably assume responsibility of the driver / engineer to carry out duties properly, to refresh the acting officer of policies and procedures regarding the driver/engineer, and to ensure the acting officer is comfortable with all the equipment carried on the apparatus.

The firefighter must have a strong understanding of General Orders 355 ‘Apparatus Safety’, 900 ‘Apparatus Standards’, 903 ‘Maintenance - Pumps and Water Tanks’, and 904 in order to successfully complete this module.

Most people seeking to become acting officers are already driver/engineers but, as a company officer it is your responsibility to ensure that the driver/engineer complies with his/her duties in the correct and safe manner.

Recommended reading to compliment this section is Occupational Safety and Health in the Emergency Services page 61 to 63.

The company officer should know where every piece of equipment is located on the apparatus and how to use it properly. As an acting officer, become familiar with all equipment carried on the apparatus at each station assigned.

(The acting CO may be held responsible for the actions of the driver)
MODULE 7
GRID MAPS / PREPLAN READING

OBJECTIVE

To become comfortable reading the grid book and direct the driver/engineer to the incident, become proficient in reading and understanding pre-plans and to become familiar with apparatus placement at varying locations and incidents.

Module 7 is more of a hands-on module than the others. It involves grid maps and preplan reading. In this line of work, “getting to the call” is of the utmost importance, therefore, it is essential that company officers know how to read grid maps. This section will deal primarily with the Palm Harbor Grid Book, however company officers should become familiar with grid books from Eastlake, Oldsmar, Safety Harbor, Dunedin and Tarpon Springs.

Grid book ... In the Palm Harbor grid book, locate the following addresses. After locating the address, explain how you would get to that location from the station or location indicated. You will have to use the table of contents to locate a grid.

1310 Woodstock Drive
2665 Waverly Ct.
3855 Wildwood Ct.
68 Gulfwinds Dr.
36750 US19 Building 16
2243 Andover Circle
1312 Cardinal Ave.
1076 Pepper Ridge Dr.

To help assist with locating addresses, there is subdivision map and a mobile home park map in the back of the grid book. Study these valuable additions to the book as well.

To complete part 1 of this module, the trainer should allow the trainee to guide the driver/engineer to locations in the response district. Eventually this process should enable the trainee to direct the driver/engineer when responding to an incident.
Part 2 of this module is utilizing the Preplan Book. The preplan book is very useful when responding to commercial structures, target hazards, and the like. It will be of assistance in determining items such as the Knox Box location, locating the FDC, suggested apparatus placement, or typical number of occupants. In addition, some preplans are very detailed giving floor plans or HVAC operations. This information is useful in two ways. First, it gives information on the layout of the building to including egress points and number of floors and second will assist the incident commander in determining strategy. Review the following preplans and determine where would you place the apparatus if you were first or second on scene, and the proper actions to take. Use the 600 series SOPs to assist in decision making.

St. Marks Village
Stratford Court
Coral Oaks
Coral Oaks Shopping Center
Muvico Theaters
Palm Harbor University High School
Walmart (US 19/Alderman Rd.)

(getting to the call is of utmost importance)
MODULE 8
RADIO / DISPATCH COMMUNICATIONS & PROCEDURES

OBJECTIVE

To understand dispatch procedures and become comfortable while properly communicating with dispatch and other units utilizing the radio system.

The firefighter must have a clear understanding of General Orders 356 ‘Emergency Retreat’, 600-1 ‘Incident Management’, 600-6 ‘Size-Up’, and 600-7 ‘Communications/Dispatch’ in order to successfully complete this module.

The trainer will review SOPs listed above with the trainee. The trainee will be allowed to talk on the radio during training or incidents at the discretion of the company officer.

(Communication is vital to the fire service response)
MODULE 9
TACTICS and STRATEGY

OBJECTIVE(s)

To learn the critical tactical and strategic components of fire, EMS, hazardous materials or other type of incidents.

Know what is expected of the company in different situations.

Understand the chain of command and operational procedures related directly to emergency incidents.


Module 9 is one of the most, if not the most important of all modules. This is where the rubber meets the road so to speak. This chapter is where it is learned what to do when the company is summoned for help.

The 600 series of SOP’s has attempted to cover a variety of situations that may arise. This module has taken a few of the most common situations/responses to practice from, however, it is imperative to be well versed on all of the SOP’s, for they may save a life.

(Time to put it all together)
MODULE 10
SEAT TIME WITH OFFICER

OBJECTIVE

To provide actual experience acting as the lieutenant while in the company and under the direct supervision of a regular lieutenant to gain radio, map reading, command and control experience.

Congratulations, you have made it the module where you will spend time in the right front seat while the company officer is on board to observe and assist. This is the most exciting module of them all.

This is where the grid map training, radio communications and strategic and tactical training all come together. You will look-up the call, direct the driver/engineer to the incident and conduct the radio procedures. Again, the officer is there to assist and keep you on the right track. The officer may allow you to get comfortable with the seat in ways beginning such as having you direct the daily activity of the crew and apparatus to directing the driver/engineer to medical calls or vehicle accidents and eventually to automatic fire alarms and other fire responses.

At the completion of this module the firefighter should be more comfortable, confident, and prepared to take on the duties of a company officer.

(This training should be a partnership between the company officer and the trainee)
At the completion of each module the company officer shall write a list of questions that are appropriate to the module.

MODULE _____ - TEST YOURSELF

1. 
2. 
3. 
4. 
5. 
6. 
7. 
8. 

Evaluation:
1. Does the firefighter understand the SOPs outlined in this module? _____ / _____
2. Can the firefighter explain the main points of this module? _____ / _____
3. Can the firefighter perform the practical parts of this module? _____ / _____

RESOURCE GUIDE

- Palm Harbor Fire Rescue Employee Handbook
- IFSTA Fire Department Company Officer - Third Edition
- NFA Interpersonal Dynamics in the Fire Service Organization
- NFA Leadership I Strategies for the Company Success
- Occupational Safety and Health in the Emergency Services