

Finding Success in Succession Training

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CERTIFICATION STATEMENT

I hereby certify that the following statements are true:

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

2. I have affirmed the use of proper spelling and grammar in this document by using the spell and grammar check functions of a word processing software program and correcting the errors as suggested by the program.

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ABSTRACT

The Jefferson Township Fire Department (JTFD) has struggled to grow to meet the needs of the organization and community in the area of personnel development. The department participated in an external evaluation that recommended a hiring process to include both internal and external candidates for a newly created position of Captain. This was based on the evaluator's assessment that the current personnel had not been properly trained for advancement. The problem this research paper will address is the failure of JTFD to prepare their personnel for promotion. Through evaluative research, the author identified proper career pathways for the personnel of JTFD. The author chose resources based on the premise of the creation of an "all-encompassing" program that would focus not only on the technical aspects of the program but also the insight needed to ensure the fostering of personal growth. This approach led to the following research questions: What, if any, educational pathways do departments of similar size currently have in place? Who, in similar sized departments, determines what the minimum standards for promotion eligibility are? What are they? How are departments offering educational incentives, if any are provided? Do those who currently aspire to be promoted and/or those who have been promoted know the requirements of their organization for promotion? Internal interviews were completed with the current fire chief, battalion chiefs, lieutenants, and firefighters and an external survey was distributed. As the internal personnel interviews revealed, the personnel expressed a strong desire to have a "go to" book, person, or guideline that would assist them in their personal goals of career advancement. The result of the research was the Career Advancement Notes & Direction Overview (CANDO) book.

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INTRODUCTION

Statement of the Problem

On August 28th, 2010 three Captains began their careers with the Jefferson Township Fire Department (JTFD). Hired from outside of the organization, these individuals competed against over twenty other individuals for their positions, including two internal candidates from the department. The three Captains were selected based upon their performance in interviews, assessment centers, and overall background and education. Prior to the hiring, the department went through a departmental assessment done by the Ohio Fire Chiefs Association (OFCA) in which they recommended the department open up the process for hiring to include internal and external candidates. This was due to their evaluation that the personnel within the department had not been adequately trained in the area of officer development. *The problem that this research paper will address is the deficiency of educational pathways for the development and advancement of the personnel of the department.*

The personnel within the department have struggled with determining the proper pathways they should be following in order to adequately prepare themselves for future promotional opportunities in the fire service. There is a marked age difference in the personnel and this has created a culture in which the older generation is still accustomed to the old fire service mindset in which years of service or experience should be the defining factor for promotion. The younger generation has therefore been exposed to this mindset, and is struggling in their attempts to determine the proper course of action for self-improvement. Additionally, there is a sense of resentment from some personnel towards other, typically younger, personnel who have attempted to pursue outside or higher education.

The combination of the above events led to the younger firefighters in the organization to choose essentially one of two paths. The first was to do nothing and follow in the footsteps of the older mindset personnel. The second was to attempt to make their own path for success that ultimately lead to difficulty in determining the best course of action to take, leading to the firefighter over analyzing the decision and never making a choice.

Purpose of the Study

The purpose of this research study is to identify clear pathways for educating the personnel of the department both in technical skills and academia. By defining the proper pathways for personnel, internal development can occur thereby eliminating the need for any additional outside hiring. Also, this internal development will provide higher standards of service for the citizens of the area and improve overall job satisfaction for the employees by reinforcing their social and belonging needs (Carter & Rausch, 2008, pg. 276). At the conclusion of this research the department can develop a pathway or “roadmap” for personnel who aspire to advance their careers in the fire service that will eliminate the confusion as to what the proper classes and education are to be completed.

Research Questions

The following questions will be answered by this evaluative research:

1. What, if any, educational pathways do departments of similar make up currently have in place?
2. Who, in similar sized departments, determines what the minimum standards for promotion eligibility are? What are they?

3. How are departments offering educational incentives, if any are provided?
4. Do those who currently aspire to be promoted and/or those who have been promoted know the requirements of their organization for promotion?

BACKGROUND AND SIGNIFICANCE

The JTFD is a rapidly growing district located in the northeast corner of Franklin County, bordering Gahanna, New Albany, Reynoldsburg, the City of Columbus, as well as Licking County. The department serves a population of 8,571 per the 2010 census, an increase of 61% from the 2000 results. The township encompasses 14.2 sq. miles and the department responded to 1,703 calls for service in 2011. Daily staffing consists of one Battalion Chief, Two Lieutenants, four full-time firefighters, and three part-time firefighters. The department regularly staffs one battalion chief vehicle, a Basic Life Support (BLS) 95' aerial tower, a compressed air-foam (CAFS) Advanced Life Support (ALS) engine and two ALS medic units (Jefferson Township Fire Department, 2011, pg. 9).

In January of 2010 the department participated in an Organizational and Fire Station Analysis which was essentially a “top to bottom” review by the OFCA. This analysis was two-fold, first to determine the proper command structure for the department and second to consider the various factors in the development of a second fire station for the township. In the course of this study it was recommended that the department create the position of Captain and complete an assessment center to include internal and external candidates as the evaluators experienced a lacking internal support structure to develop the personnel of the department to become proficient in officer roles. “While the JTFD has a good training program, there was little

evidence noted of a focused officer development program, which includes strategy & tactics and fire ground decision-making training” (Ohio Fire Chiefs' Association, 2010, pg. 10). At the conclusion of the hiring process job offers were given to three external candidates (Jefferson Township Trustee Meeting Minutes. July, 2010), further emphasizing the lack of internal development within the department.

As JTFD continues to progress and lay the groundwork for the future of the department the administration and personnel have realized the importance of internal development. *The potential impact this study could have on the Jefferson Township Fire Department is the development of a program to help direct personnel on the career pathways that will result in a more stable command staff, better prepared officers, and overall improvement in job satisfaction by the personnel.* All of these factors combined will result in a highly trained and motivated staff that readily responds to and mitigates the emergencies encountered by our public.

LITERATURE REVIEW

The task of leadership development cannot be more clearly stated than the following from the International Association of Fire Chiefs’ (IAFC) document *Crew Resource Management – Positive Change for the Fire Service* (2002) “Developing and supporting prospective leaders ensures a departments future” (pg. 8). To ensure the future of an organization is quite the daunting task. Unfortunately, few departments have successfully attempted this undertaking, however; a large majority of departments across the country knows they are lacking in this area.

The lack of development is further illustrated in Edward K. Simeona’ Executive Fire Officer (EFO) paper entitled *For its future, the Honolulu Fire Department really needs a*

validated succession plan. Mr. Simeona identifies several incidents in which sources further emphasize the importance of, and lack of, leadership development. In a pointed example, he details the attention that is paid to new recruit level firefighters within the Honolulu Fire Department in which participants are trained and tested on every imaginable scenario they may face as firefighters. The question is then raised; why are upper levels of management not given the same amount of attention (pg. 23)? It was further discovered in the course of his interviews that none of the local agencies around his department had any type of plan in place to develop the future leadership (pg. 37).

In further literature review, the IAFC publication *Officer Development Handbook* defined the process of officer development, “Professional development is the planned, progressive life-long process of education, training, self-development and experience” (International Association of Fire Chiefs, 2003, pg. 1). This handbook also contains the fundamental roadmap encompassing a wide variety of topics that are used in the development of the Career Advancement Notes and Direction Outline (CANDO) book for JTFD. The handbook is formatted to provide the training, education, experience, and self-development items needed in each role. The two primary areas focused on were the recommendations in the “Supervising Fire Officer” and the “Managing Fire Officer” section. In the Supervising Fire Officer, which was used for the development of the CANDO – Lieutenant Book, the following recommendations are found:

| Training | |
|-------------------------|----------------------------|
| Firefighter I | Instructor I |
| Firefighter II | Inspector I |
| Fire Officer I | Emergency Medical Services |
| Incident Safety Officer | Valid Driver’s License |
| IMS NIMS | HazMat-Operations Level |

| Education | |
|-------------------------------|-----------------------|
| English Composition | Business Computer |
| Public Speaking | Health/Wellness |
| Business Communications | American Government |
| Biology | Human Resources |
| Chemistry | Management |
| Psychology | Fire Behavior |
| Sociology | Fire Administration I |
| Intro to Finite Math; Algebra | Building Construction |

| Experience | |
|--|--|
| Qualified Responder: 3–5 years | Develop teamwork skills |
| Peer coaching | Participate & Budget a small project |
| Small group leadership | Participate in an organizational project |
| Acting officer: 200 hours | Participate in mass casualty training |
| Participate in a planning process | Interact with homeowners associations |
| Instruction Develop / Deliver training classes | Network with others in the service |

| Self-Development | |
|--|--|
| Ongoing health and wellness | Understanding the value/importance of organizational and community diversity |
| Maintain Physical Ability | Understand, demonstrate and promote ethical behavior for the individual |
| Personal and professional inventory | Understand the value/importance of law |
| Identify personal traits, strengths and areas for improvement | Awareness of the importance and value of technology |
| Learn listening; giving/receiving constructive feedback skills | Develop/maintain skills to use technology |
| Customer service skills, teamwork, conflict resolution | Local and/or Contemporary Hazards/Issues |
| Develop awareness and understanding of unique local hazards | Written and Oral communication |

Additionally, for the CANDO – Battalion Chief Book, the items within the Managing Fire Officer were utilized and detailed below.

| Training | |
|--|-------------------------------|
| Fire Officer II | Fire Investigator I |
| Multi-Company Incident Management MCTO and MCI | Public Educator I |
| Public Information Officer | Leadership Development Series |

| Education | |
|-----------------------------|----------------------------|
| Intro to Statistics | Fire Service Management |
| Interpersonal Communication | Introduction to Law |
| Philosophy | Intro to Planning |
| Critical Reasoning | Prevention and Education |
| Professional Ethics | Fire Protection Systems |
| Professional Reporting | Fire Protection Hydraulics |
| Writing | Accounting Analysis |

| Experience | |
|--|--|
| Provide coaching/counseling to new members | Manage a station project or small program budget |
| Involvement in Critical Incident Stress Management | Be responsible for various aspects of a significant project/program |
| Acting officer for multi-company operations | Participate in an interagency committee |
| Supervisor or an aide to the incident | Participate in the development and/or updating of Emergency Response plans |
| Commander of a multi-company operation | Participate in non-fire service groups; e.g., church, charity, youth clubs |
| Implement or manage a planning process | Involvement in local and state professional associations |
| Develop/implement company training plan | Write and distribute performance appraisals |
| Participate in human resource functions | Perform and administer discipline |

| Self-Development | |
|---|--|
| On-going health and wellness program | Understand, demonstrate and promote ethical behavior |
| Maintain Physical Ability | Understanding the value/importance of law |
| Explore career areas of special interest; seek a mentor | Develop/maintain skills to manage the use of technology |
| Speaking before small groups | Develop and communicate a current awareness and local hazards/issues |
| Group facilitation via Coaching/Counseling | Embrace organizational and community diversity |

In *The 360 Degree Leader* author John Maxwell describes his take on personnel development in a more humanistic approach. “I need to make clear the difference between equipping people and developing them” (Maxwell, 2008, pg. 229). There is quite the difference in equipping future fire officers and developing them, although the two components may be easily confused. Learning the rules, procedures, guidelines, and operational standards are simply equipping the person. Whereas influencing someone to change or become aware of personality traits is true development of that person. Maxwell goes on to describe what has become an important leadership trait for the fire service, the ability to have a difficult conversation. “Good leaders get past the discomfort of having difficult conversations for the sake of the people they lead and the organization” (Maxwell, 2008, pg. 234). This insight provides for serious consideration as Maxwell’s writing is geared toward the typical forty-hour workweek business men and women. The fire service presents an additional challenge to having “difficult conversations” as often times the supervisor leading the conversation will eat and sleep in the same room with their subordinate.

In *From Buddy to Boss* by Chase Sargent, a fire service perspective on leaders and leadership offers a viewpoint to consider as an organization attempts various programs for leadership development. In response to the question “Are leaders made or born?” the authors answer with the logic that “most leaders become leaders because they are uncommon and they know it” (Sargent, 2006, pg. 1). He goes on to discuss the principles that once future leaders recognize their uncommon and unique ability to grasp the foundational knowledge, skills, and abilities of the job they quickly gain a following of loyal followers. The goal here is to identify these people in the early stages to exploit their abilities and develop their skills. In terms of

identifying the potential leader, Sargent offers a very applicable quote from Colin Powell “Look for intelligence and judgment, and most critically, a capacity to anticipate, to see around corners. Also look for loyalty, integrity, a high energy drive, a balanced ego and the drive to get things done right” (Sargent, 2006, pg. 70).

In *Lead with Your Customer* Jones and Kober describe how in the private sector many world class businesses approach leadership development as an investment as compared to an expense (Jones & Kober, 2010, pg. 81). Further, successful companies engrain the leadership currently in place within their organization with the idea that it is the responsibility of all leadership to develop their personnel into future leaders (Jones & Kober, 2010, pg. 215). This idea creates a constant pool of qualified and ready candidates to advance with minimal preparation within the company.

A more traditional mentorship approach was reviewed in the National Fire Protection Association (NFPA) text *Management in the Fire Service* book addressing several typical situations in which the officer has the potential to influence their personnel in the way of role-playing exercises and one-on-one coaching sessions (Carter & Rausch, 2007, pp. 235-236). However, even in this very traditional text the lack of leadership development is apparent in the following statement “Many officers do not appreciate the importance of coaching to meet their training responsibilities. Yet, without effective coaching, fire fighters and officers will not necessarily move aggressively toward enhancing their competencies (Carter & Rausch, 2007 pg. 236).

In *It's your Ship* author Michael Abrashoff provides the unique insight of very personal lessons he learned while leading in a very impersonal setting, the military. His text provides

good real-life examples as he took over a ship full of sailors unhappy with their working environment, their bosses, and their conditions in general. Abrashoff dug deep into the root of the problems the ship was experiencing and found it to be a failure of previous administrations to address the fundamental needs of the people. “I prefer to build myself up by strengthening others and helping them feel good about their jobs and themselves” (Abrashoff, 2002, pg. 140). He goes on to address the very personal sides of what can impact the success or failure of a person as an employee.

“I focused on building self-esteem. I know that most of us carry around an invisible backpack full of childhood insecurities. I could make the load heavier or lighter. Instead of tearing people down to make them into robots, I tried to show them that I trusted and believed in them” (Abrashoff, 2002, pg. 141).

Finally the OFCA completed the *Organization and Fire Station Analysis of Jefferson Township Fire Department* in January of 2010. In this evaluation the lack of development within the department was clearly defined. Further detailed was the statement “This proposal has been developed in large part because the current Lieutenants on the shift do not feel comfortable serving as incident commanders at an incident when a Battalion Chief from another jurisdiction arrives” (Ohio Fire Chiefs' Association, 2010, pg. 10).

The above statement provides a brutally honest evaluation on what the conditions within the organization were at the time of the external hiring. With the compiled literature reviews in mind, the direction of internal development becomes clearer. The personnel within the department need guidance and support from multiple fronts. They need not only the traditional and technical requirements for advancement as detailed in the writings of the NFPA and IAFC, but also the personal development detailed in Maxwell, Sargent, and Abrashoff’s writings.

PROCEDURES

The topic and content of this paper began with an acknowledgement within the JTFD that we had a deficiency in the way personnel were being prepared to move forward within the organization. While many organizations have some sort of informal progression for the development of their personnel it was decided, with support of the Fire Chief, to develop a formal, research proven, plan to groom the future leaders of the department. Initially many informal conversations were held within the department with members of various ranks and experience as to what the missing components may be within the departments' development. The information received throughout the informal conversations allowed the author to focus more clearly on the formal aspects needed to sufficiently address the development issues within the department. The overall goal for a successful analysis is to identify areas in which the department must refine and improve its educational programs to develop more clear-cut pathways for the promotion of personnel.

Formal research began with the use of the Learning Resource Center and a search of previous EFO published papers of a similar nature. The review of these various papers provided a variety of avenues that authors had used in addressing leadership development issues. While this information was quite helpful the author found it difficult to utilize several of the papers due to a large disparity in the size and available budgets of the various organizations.

A general internet search through Google for various items related to leadership training, succession training, mentorship, and internal development, resulted in the various journal and editorial articles as well as several books devoted to leadership development some of these were

fire service specific while many others were geared more towards general business yet still held relevance to the fire service.

A significant portion of time was spent in reviewing the IAFC Officer Development Handbook. This product was found to contain essentially a template of information for the starting steps to officer development programs. This book also proved to be helpful when comparing other development programs against some kind of “grading” device to ensure they encompassed the minimums set forth by the IAFC. Additionally, a review of the NFPA standard *1021 Standard for Fire Officer Professional Qualifications* provided a template of standardized guidelines for the development of fire officer I and II programs which was used extensively for the “on the job” experience portions of the CANDO book.

A brief survey developed around the research questions of this paper was sent out to comparable departments in size, budget, and geographical area in hopes of getting additional feedback from agencies who are operating in a similar environment as JTFD. The survey was distributed both internally to the members of the authors department as well as central Ohio departments that are both geographically close and similar in population figures per the 2010 census. This refined the group to six departments within Franklin, Delaware, and Licking Counties serving a population between 9,000 and 11,000. By focusing in on comparable organizations the author hoped to find a program based on a budget comparable to that of JTFD, as well as find those with comparable personnel who have made a pathway program with incentives that is working. Additionally, an internal survey was given to the full-time personnel in an effort to identify any disconnect that may exist with the expectations within the organization.

Limitations of the Study

A limitation which impacted this study is the overall poor response of participation by those departments identified as comparable to the makeup and geographical area of Jefferson Township. The other departments utilized for the distributed survey had a range of forty to sixty members per department. One department did not reply to the survey and only one reply was received by two other departments. The lack of available information as to what other comparable organizations were actively doing, or not doing, to prepare their personnel for advancement, greatly hindered the course of the research.

Because of this hindrance, the focus became the current personnel of JTFD as reflected by the extensive internal survey completed as part of this research project. While the author strongly believes a department must be in tune with what comparable organizations are doing as part of the benchmarking process, without an adequate amount of that information this research was quickly limited.

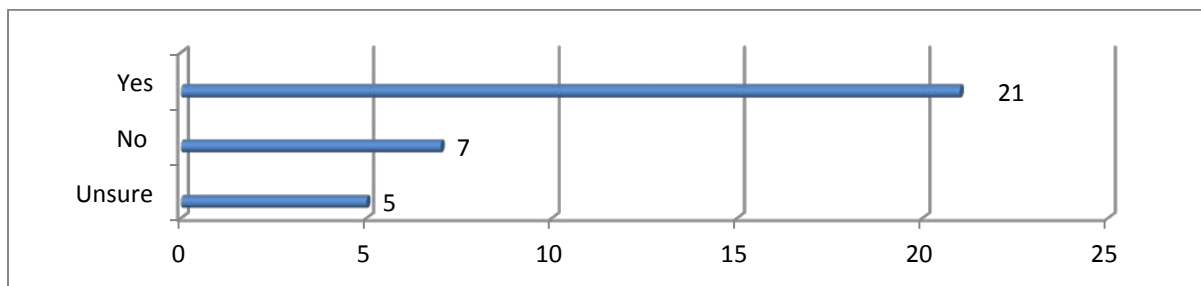
RESULTS

In an effort to benchmark the current education and development programs currently in place with the surrounding departments identified as comparable, a survey was distributed via the SurveyMonkey.com website. Enclosed within this section are the cumulative results of the surveys.

Survey question #1 of the survey refers to research question #1 *“What, if any, educational pathways does departments of similar make up currently have in place?”*

1. Does your department offer any formal succession planning? (I.e. career development, pathway to promotion, etc.)

Table 16.0

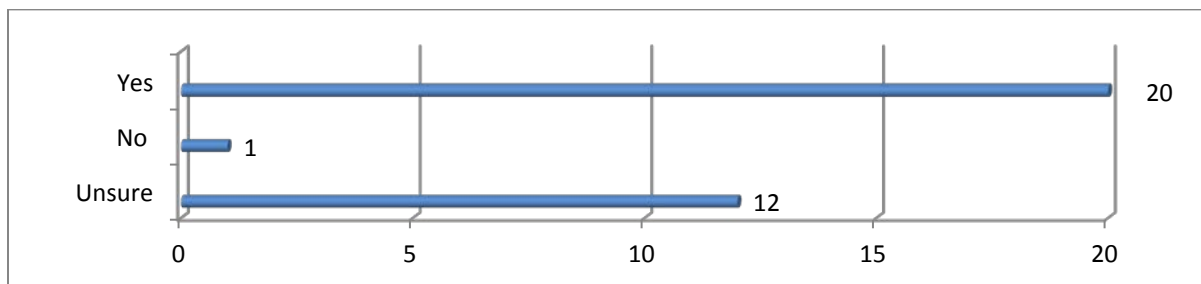


As noted above a large percentage of respondents identified that their department does, in fact, have a program in place. An additional finding of significance was the five respondents who were “unsure” if a program was in place. This finding began to confirm the authors’ suspicions that personnel were not in tune with the available opportunities within their organizations.

Survey question #2 provided additional follow-up in answering research question #1:

2. If your department does not currently provide succession training, are there plans to include it in the future?

Table 17.0



Again, the largest majority answered that a succession plan was in future planning. However, an increased number indicated they were unsure as to future succession planning for their department. This illustrates the disconnect between the plans that an administration may have in place for a department yet never relays to their personnel.

Survey question #3 gave the insight for research question #2: “*Who, in similar sized departments, determines what the minimum standards for promotional eligibility are? What are they?*”

3. Who in your organization determines the minimum standards for promotional eligibility?

Table 18.0

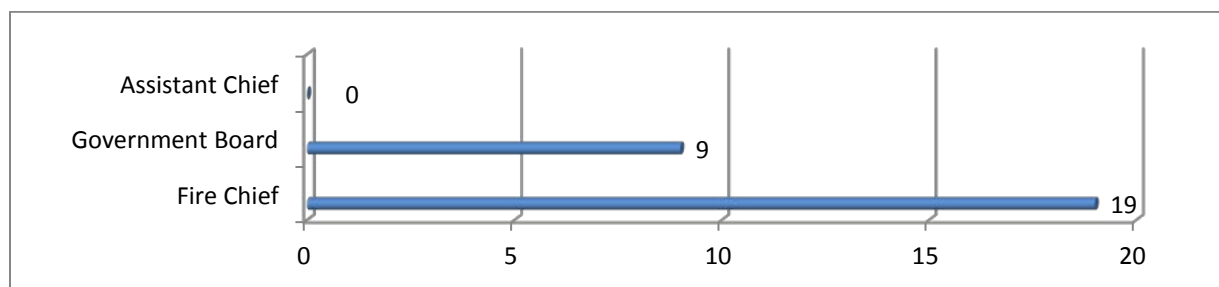


Table 18.1

| Respondents Narrative Answers - Entered as "Other" | |
|---|---|
| 1. | Chief, Assistant Chief, Captains, Trustee |
| 2. | Chief, Ast. chief, duty Capt.'s |
| 3. | Combination of firefighters, company officers, chief, and Union |

It was found that most respondents at the rank of firefighter identified the Fire Chief as the person who determined promotional requirements. In the respondents who held the rank of Lieutenant or higher, the Government Board was often answered.

Survey question #4 related to research question #3: “*How are departments offering educational incentives, if any are provided?*” The research was intended to provide an accurate comparison of the current incentives of the JTFD.

4. What incentives are currently offered by your department to members wishing to advance their careers? (check all that apply)

Table 19.0

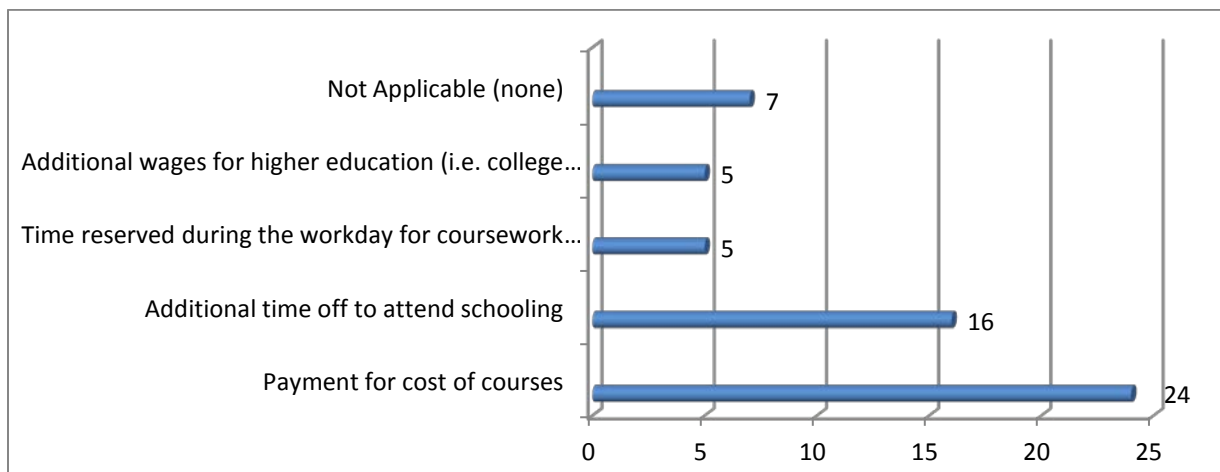


Table 19.1

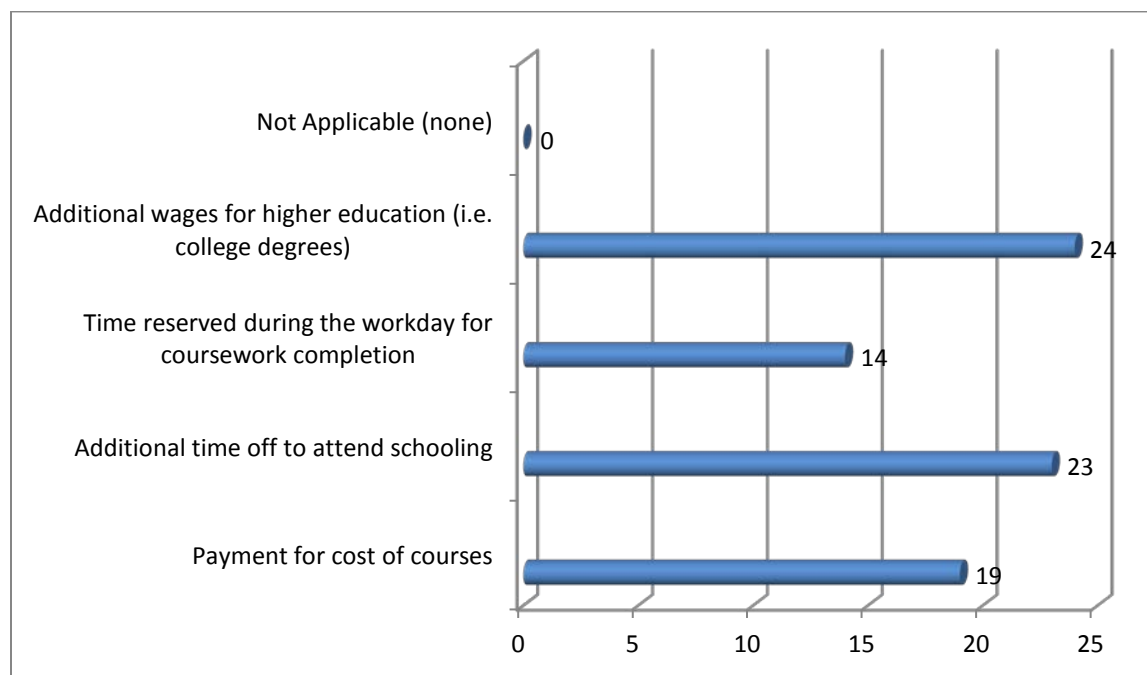
| Respondents Narrative Answers - Entered as "Other" | |
|---|--|
| 1. | Only limited time and financing available. |
| 2. | career advancement in pay and rank i.e. journeyman program |
| 3. | Training time is available but not generally use for formal education. |

The largest majority identified payment for course cost and additional time off to attend schooling which JTFD currently offers but is rarely used by a large percentage of personnel.

In an attempt to determine the incentives most helpful to the respondents for career advancement survey question #5 is as follows:

5. What incentives would help you the most to achieve additional education?

Table 20.0



The results show that the offering of payment and time off, both of which JTFD currently does, hold the 2nd and 3rd highest results on behalf of the survey respondents. The most selected result was the payment of higher wages for higher education.

Research question #6 was initially in place to simply determine the eligibility requirements for the responding departments. However, upon analyzing the results and narrative answers provided an important finding was realized.

6. What are the minimum requirements for a firefighter to promote to the next rank in your department? (Check all that apply)

Table 21.0

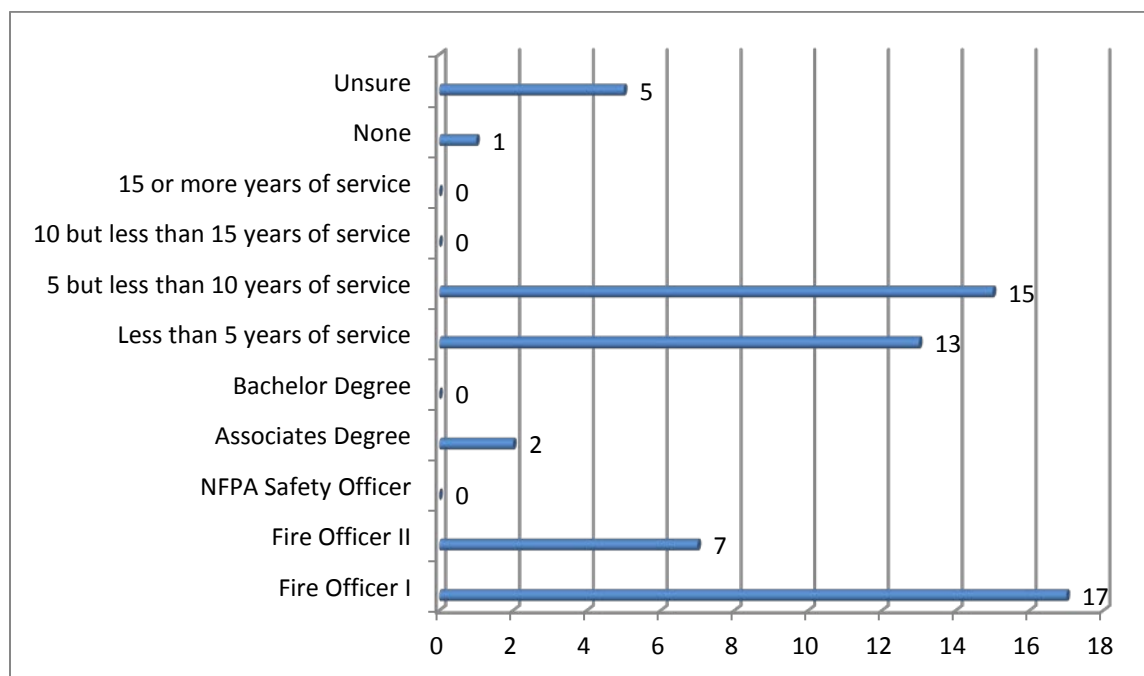


Table 21.1

| Respondents Narrative Answers - Entered as "Other" |
|--|
| 1. Managing Company Tactical Operations series; FEMA courses IS-700, IS-800, IS-100, & IS-200 |
| 2. MCTO Preparation, MCTO Tactics, MCTO Decision Making, ICS Training, Medic Card, The length of service is 3 years at the dept. |
| 3. EMT-P, ICS training, Managing Company Tactical Operations Series, all must be completed to sit for LT exam. |
| 4. 3 Years of service, ICS Training, Managing Company Tactical Operations Series, Maintain EMT-P |
| 5. Firefighter to Lt. |
| 6. Time, as rank is initially based upon advancement level in the firefighter ranks. I am unsure about the officer status of becoming an officer but I believe it is 5 years and associates degree |
| 7. 5 years of service or more |
| 8. At least 5 years fulltime service |

The survey results yielded the fact a large discrepancy existed within the response answers. Consideration must be given to the fact this survey was predominantly answered by members of the authors department and one local agency with only one response from two other agencies. The review of these responses show a wide range of answers for what should be a well-known requirement for an agency. This further reinforces the need for a career path book for personnel.

Survey question #7 allowed respondents the opportunity to self-evaluate their own career pathway and see what they felt was needed to move to the next rank within their organization.

7. Which of the following requirements do YOU think you may need to promote to the next rank (check all that apply)

Table 22.0

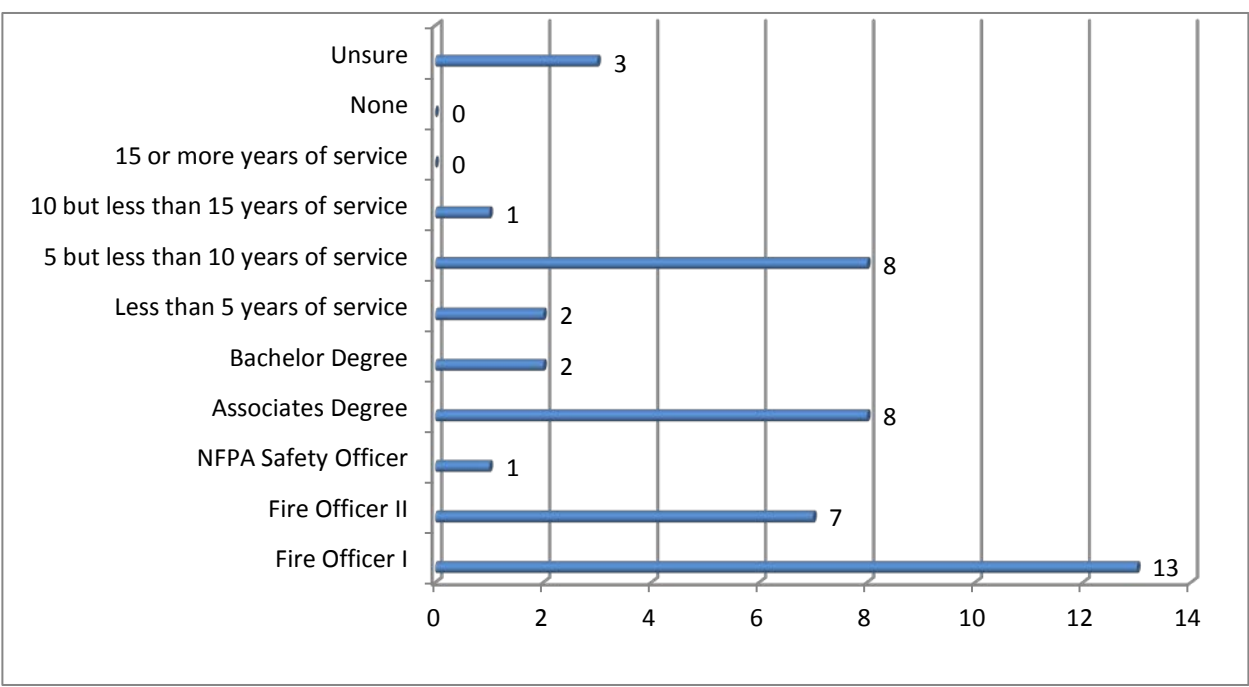


Table 22.1

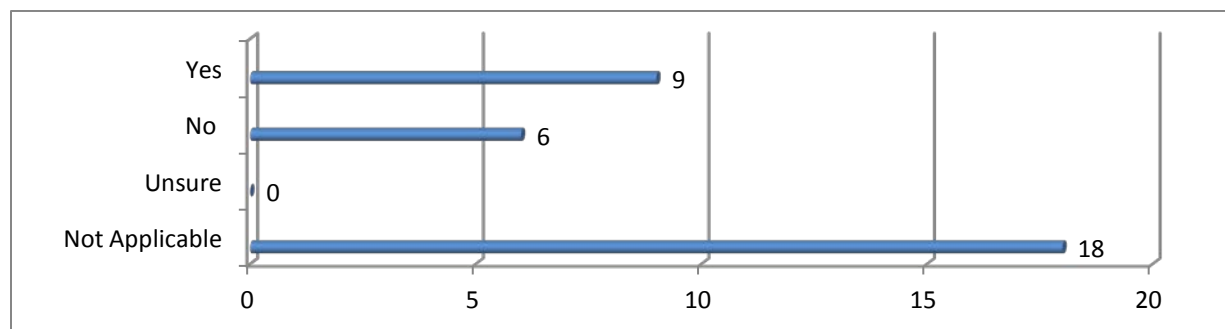
| Respondents Narrative Answers - Entered as "Other" |
|--|
| 1. Blue Card certification, Fire or EMS Instructor certification, Fire Safety Inspector certification |
| 2. I currently meet all requirements for promotion to the next rank |
| 3. Captain's will have in addition to LT requirements FOII, Fire Safety Inspector Cert. and be a Public Safety Service Instructor. |
| 4. Ensure that they are competent in their field, not only able to pass a test and generic interview. |
| 5. length of service and performance objectives based on the journeyman program |
| 6. None |
| 7. Courage to be safe and LACK program. |
| 8. Retirement |

A strong emphasis was given to the completion of Fire Officer 1 schooling, the completion of an Associate Degree, and a length of service between 5-10 years. These results compare very closely to the recommendations provided by the IAFC *Officer Development Handbook*.

To gain insight on the success or failure of current educational programs survey question #8 was included.

8. For those who are currently an officer within your department, Do you feel you were adequately prepared for your position prior to achieving it?

Table 23.0



While the responses were close, the majority of current officers indicated they felt they were adequately prepared for their position in the department. This lead the author to consider if the responses received in this question were truly accurate based on the consideration that many personnel explained they felt unprepared in other areas of the survey. Additionally, the respondents had little trouble identifying areas they felt development programs could be improved.

Survey question #9 gains insight on what the anticipated needs are in the development of a formal education program by those surveyed. Respondents were able to write in their own responses which are detailed in the chart below.

9. If you could create a formal development program for your department, what vital items would it include?

Table 24.0

| Respondents Narrative Answers - Entered as "Other" |
|--|
| 1. Fire Officer 1, College, Tactical classes |
| 2. Fire Officer 1 Fire Officer 2 Leadership Class / Conference Budget money for each candidate to apply towards associates and or bachelor's degree. |
| 3. Mentorship program, degrees, tenure, |
| 4. Competency in skills for being a firefighter a firefighter first, leadership development not just officer development |
| 5. 1. Knowing how many years of service are needed to do so. 2. Attend at least Fire Officer 1 and or 2 classes. 3. Have the dept. pay for those classes. 4. Allow paid time off for those classes. 5. Allow the student to study while on duty. |
| 6. Training |
| 7. unsure. |
| 8. All those elements you mentioned in the prior questions. |
| 9. I think the training academy that the department currently utilizes for new hires is appropriate and beneficial as a good starting point. |
| 10. Fire officer 1 and 2 |
| 11. Leadership |
| 12. Mentorship with an officer It would be voluntary and not based solely on seniority Clear guidelines on what is expected to advance and resources made available by the department to help meet those expectations |

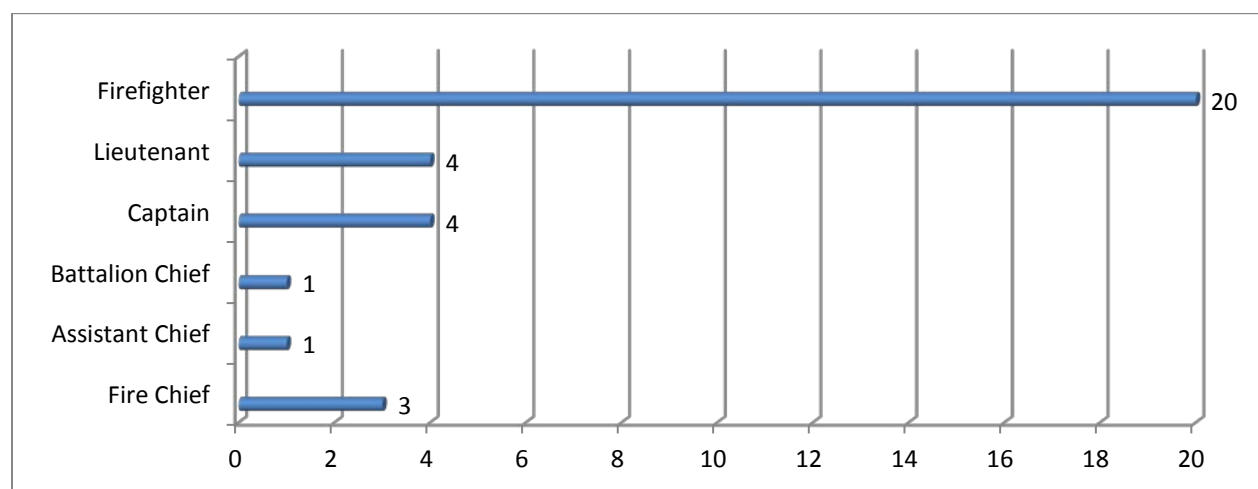
| |
|---|
| 13. formal education, training in the job duties for the next level (mentorship), help working on special projects that are typically done by the next level up in the chain of command. ie: senior firefighters help plan SOG/SOP's, Lt. help work on long term goals for the department, and so on up the chain of command. |
| 14. Mentoring, Ride alongs, Education and Training. |
| 15. Utilize a minimum competency for promotion, including specific course requirements based on the rank they are testing for. Develop a standard curriculum that newly promoted officers must complete within their probationary period, similar to a journeyman program for lieutenant, captain, and battalion chief. |
| 16. Officer training or shadowing |
| 17. All series of fire officer/OFE and degrees |
| 18. Start FF riding out of class sooner and find out who has the drive and knowledge to succeed and be a leader whom people will want to follow, and not just put any one who has years in the front seat. Pulling away from the past and sending FF who want to learn and lead to outside training long before officer school to learn the basics before wearing a red helmet. Do not force leadership upon a person just because he or she has years in the fire service and wants a higher paycheck. |
| 19. Testing of personal just as you would to hire a new FF. So that the other officers can make sure the new officers are able to lead. |
| 20. Fair testing for all. Everyone would need the same requirements to test. |
| 21. Job training for the position, how to talk to the public, how to deal with the public, how to communicate and deal with the firefighters or officers below you, Leadership training |
| 22. Formal education degrees. |
| 23. Mandatory time riding along with person in position in which you want |
| 24. Unsure |
| 25. College Degree |
| 26. We have a formal program in place |
| 27. Service time EMT-P ICS training Fire Officer 1&2 Managing Co. Tactical Operations Fire Safety Inspector Cert. Public Safety Service Instructor Cert. Assoc Degree in Fire Science |
| 28. Some kind of training to enhance a (potential) officer's "people skills", both with dealing with the public (promoting positive customer service) and with firefighters under him/her. You can teach a monkey to run a fire scene... but I think the most "effective officer" is one that can/will discipline when necessary but maintain good working environment by not being an asshole. |
| 29. OFE or EFO, Bachelor's Degree |
| 30. FO I, FO II, OFE, FSO |

Quite clearly, the recurring theme is the need of on the job (OTJ) experience along with the establishment of a mentor. A surprising number of personnel identified many formal educational aspects to include within a program such as fire officer I & II programs and college degrees.

The final question of the survey was simply the rank of the person responding to the survey. This was utilized to help the author investigate possible discrepancies in the responses of personnel. The appearance of any discrepancies were very minimal but were present in responses of who determines the qualifications for promotion as well as the questions on if there were current, or plans of creating, a formal succession plan.

10. What best describes you position within the department?

Table 25.0



DISCUSSION

Internal survey questions were posed to the current firefighter, lieutenants, and battalion chiefs of the JTFD for their own reflection and input. The responses were broken down into three categories: 1. Responses from firefighters currently eligible to be promoted to lieutenant, 2. Responses from lieutenants currently eligible to be promoted to battalion chief, 3. Responses from current battalion chiefs (with the exception of the author) and are available for review in Appendix 3.

In review of the information provided through the internal survey some commonalities were discovered. In the firefighters aspiring for promotion to lieutenant, the educational requirement of an Associate degree and fire officer I classes were consistent. They desired extensive (OTJ) training and any other experiences that would allow them to communicate and gain confidence in their role. Lieutenants and battalion chiefs were similar in wanting no less than an associate degree and fire officer I. Both levels also expressed the need for OTJ experience and communication.

Lieutenants expressed their expectation of associate degree also be required for the promotion to battalion chief whereas the battalion chiefs felt a bachelor's degree may be more appropriate. The lieutenants and battalion chiefs expressed the need for OTJ experience and leading the company trainings as day to day activities. The battalion chiefs also added the need to learn the daily paperwork and computer software used by JTFD. Both levels expressed the need to further training in public relations and public speaking. The lieutenants also expressed the additional need of written communication education.

All levels within the JTFD expressed common needs and expectations of their rank and the rank above them. By determining the basic expectations of the personnel, the author can focus the development process to not only industry standards provided within this document but also address the expressed needs of the personnel within the department.

RECOMMENDATIONS

The long term success of any organization is dependent on the cultivation and development of their personnel for future promotional opportunities, simply put, succession training. As defined by Webster dictionary succession is “**a**: the order in which or the conditions under which one person after another succeeds to a property, dignity, title, or throne **b**: the right of a person or line to succeed **c**: the line having such a right” (Webster, 2012). This need is required on many levels but the intention is two-fold. First, by meeting the needs of the personnel for career pathways and development they will be prepared to step up into the roles within the department as they become open or in an as-needed basis when personnel are on vacation, injured, or otherwise off duty. Second, it will help to instill a sense of personal satisfaction for the employee in knowing they are “on track” with their career development instead of making their best educated guess as to what the department expects of them.

JTFD must reinforce their support in the internal development of their personnel by developing and supporting the items identified for their personnel. This responsibility begins from the top of the organization at the township trustee level in their support of approving training expenditures and allowance of training time, occasional overtime, and other incidental needs for personnel development. The fire chief must support the program by way of policy

development and support for the established pathways as well as flexibility in approving time off and educational requests by the personnel to meet the suggested requirements.

Where significant support is needed falls in the battalion chief and lieutenant levels of JTFD. The battalion chiefs must understand the time and staffing requirements needed to allow personnel the ability to work on career advancement as well as meet staffing needs for personnel job shadowing and other OTJ experiences. Additionally the battalion chiefs will be tasked with meeting the mentoring needs of the lieutenants desiring to promote to the battalion level.

The lieutenants will face additional workload as they will deal with the largest number of personnel desiring to gain the OTJ experiences and mentoring needed to successfully complete the pathways identified. They will quickly need to establish the time requirements to be accessible to their personnel while still meeting the needs of their own job descriptions. This becomes compounded in the event the lieutenant desires to complete their own pathway for the battalion chief level.

Finally firefighters must understand that the career advancement direction given to them is ultimately their own burden to bear. No one within JTFD should be expected to spoon feed the employee into developing themselves. Should an employee choose to not finish their path book that is their own decision. The other consideration to this program is that the CANDO book provides for a benchmark to be evaluated against for the current personnel in their respective positions.

Whether the CANDO is utilized as a tool for the employee to review on their own accord or chose to use in the formal manner will determine their likely success within the program. These books were developed on the industries best practices on the most current standards

available at the time. Additionally, they were developed based on the direct input of the employees who stated their needs in direction and oversight in their career advancement with the goal of their personal success in mind.

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APPENDIX 1 – EXTERNAL SURVEY QUESTIONS AND FORMAT

OFE Class 11 Applied Research Project

Thank you for taking just a few minutes to complete this short 10 question survey. Your results will remain anonymous and I kindly ask your survey be completed by May 5th, 2012.

1. Does your department offer any formal succession planning? (I.e. career development, pathway to promotion, etc.)

- Yes
- Unsure
- No

2. If your department does not currently provide succession training, are there plans to include it in the future?

- No
- Yes
- Unsure

3. Who in your organization determines the minimum standards for promotional eligibility?

- Government board (city manager, township trustees, etc.)
- Fire Chief
- Assistant Chief
- Other (please specify) _____

4. What incentives are currently offered by your department to members wishing to advance their careers? (Check all that apply)

- Payment for the costs of courses
- Additional Time off to attend schooling
- Time reserved during the workday for coursework completion
- Not Applicable (none)
- Additional wages for higher education (i.e. college degrees)
- Other (please specify) _____

**5. Which incentives would help you the most to achieve additional education?
(Check all that apply)**

- Additional wages for higher education (i.e. college degrees)
- Payment for the costs of courses
- Additional Time off to attend schooling
- Time reserved during the workday for coursework completion
- Not Applicable
- Other (please specify) _____

6. What is the minimum requirements for a firefighter to promote to the next rank in your department? (Check all that apply)

- Fire Officer I
- Fire Officer II
- NFPA Safety Officer
- Associates Degree
- Bachelor's Degree
- Length of service of less than 5 years
- Length of service of more than 5 but less than 10 years
- Length of service of more than 10 but less than 15 years
- Length of service of more than 15 years
- None
- Unsure
- Other (please specify) _____

7. Which of the following requirements do YOU think you may need to promote to the next rank? (Check all that apply)

- Fire Officer I
- Fire Officer II

- NFPA Safety Officer
- Associates Degree
- Bachelor's Degree
- Length of service of less than 5 years
- Length of service of more than 5 but less than 10 years
- Length of service of more than 10 but less than 15 years
- Length of service of more than 15 years
- Unsure
- Not Applicable
- Other (please specify) _____

8. For those who are currently officers within the department, do you feel you were adequately prepared for your position prior to achieving it?

- Yes
- Not Applicable
- No
- Unsure

9. If you could create a formal development program for your department, what vital items would it include?

10. What best describes your position within the department?

- Firefighter
- Lieutenant
- Captain
- Battalion Chief
- Assistant Chief
- Fire Chief
- Other (please specify) _____

APPENDIX 2 – ADDITIONAL RESEARCH READINGS

Bierster, G. (2011). *Succession Planning for Staff Chief's for the New York City Fire Department*

(National Fire Academy) Emmitsburg, MD: Executive Fire Officer Program

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APPENDIX 3 – INTERNAL SURVEY RESULTS

These questions and responses were from the firefighters currently eligible for future lieutenant promotions.

Q. What are the educational backgrounds you expect of a firefighter applying for a Lieutenant position? This can include formal and informal classes, degrees, etc.

Table 1.0

| Respondents Narrative Answers |
|---|
| 1. Associate's degree, Fire Officer 1 & 2, Fire Inspector, Blue Card, Classes such that they are "well rounded". |
| 2. An Associate's degree at a minimum, plus Officer 1. They should also be an instructor and Inspector since they will be training their firefighters and conducting inspections. |
| 3. Associates Degree at minimum, Officer 1, and some strategies and tactics courses. |
| 4. I would expect any firefighter wanting to become a Lieutenant to better himself whenever possible through any training class, informal or formal, available to him or her. |
| 5. I would think his or her background should include company operations both in EMS and Fire, as well as management style classes. |
| 6. I would prefer a firefighter with experience and a willingness to learn new things and continuing education over a degree |

Q. What daily activities (day to day) would you expect a firefighter who desires to become a lieutenant to perform and be comfortable with?

Table 2.0

| Respondents Narrative Answers |
|--|
| 1. All duties within the fire department. Response, inspections, etc. |
| 2. They need to find a leadership role. |
| 3. Asking a Lt. to take over some of his duties to get experience possibly riding in charge while the LT is on the truck for advice and guidance. |
| 4. They could try to come up with a new training we haven't done before. |
| 5. Training at company level, team work, and working out. |
| 6. I would expect any firefighter attempting to become a Lieutenant to be able to handle situations above his class when appropriate and take younger firefighters under his wing and make them better as an all-around fire service employee. |

Q. What other experiences would you want a firefighter desiring to become a lieutenant to have experienced in their training? (As an example, telling a family member their loved one has passed away in a cardiac arrest scenario)

Table 3.0

| Respondents Narrative Answers |
|--|
| 1. Experience with counseling members, as you mention – telling a family, public speaking, research projects/committees. Reading smoke and fire ground tactics. |
| 2. Training in discipline issues. |
| 3. They should be well trained for the duties of what type of truck they will be on. |
| 4. I believe experience is the best key to any firefighter wanting to become a lieutenant. |
| 5. I also believe that is more important for a firefighter to not necessarily to have had that moment of an experience like a cardiac arrest or dramatic situation but to want to learn how to handle the situation should it come up in the future, through training when possible and not shy away from the possibility. |
| 6. I want him or her to want to be prepared and have confidence in that person to attempt to do the right thing and keep their company safe. |

The following questions and responses are from current lieutenants, 3 of the 6 who are eligible for future battalion chief promotions.

Q. What are the educational backgrounds you expect of a firefighter applying for a Lieutenant position? This can include formal and informal classes, degrees, etc.

Table 4.0

| Respondents Narrative Answers |
|--|
| 1. Firefighter II / Paramedic |
| 2. Fire Officer 1 and 2 |
| 3. Engine and Ladder Ops |
| 4. Fire Inspector |
| 5. Leadership Series |
| 6. Certified in Blue Card Commander |
| 7. I know there is a push for degrees but I feel that at a company level officer position it shouldn't be a must to have a degree, yes it is important but I don't feel it should be something to disqualify a candidate |
| 8. At least 5 years FT experience with JTFD, Completed NIMS courses, company officer series course(s) or other formal course mandated by JTFD. |

| |
|---------------------------------------|
| 9. Blue Card |
| 10. Officer I |
| 11. Associates degree in Fire Science |
| 12. Instructor |

Q. What daily activities (day to day) would you expect a firefighter who desires to become a lieutenant to perform and be comfortable with?

Table 5.0

| Respondents Narrative Answers |
|---|
| 1. Experience in riding out-of-class on Engine or Ladder |
| 2. Scheduling and running unit company trainings |
| 3. Doing Manpower, Filling Overtime, and other department forms |
| 4. Utilizing Department email system |
| 5. Comfort in leading and giving direction to firefighters, follow up on required training reports, fire reports. |
| 6. Ability to provide instruction along with solid working knowledge of apparatus. |
| 7. Manpower assignments |
| 8. Fire reports |
| 9. Inspections |
| 10. Lead Trainings |

Q. What other experiences would you want a firefighter desiring to become a lieutenant to have experienced in their training? (As an example, telling a family member their loved one has passed away in a cardiac arrest scenario)

Table 6.0

| Respondents Narrative Answers |
|---|
| 1. Interpersonal communication skills |
| 2. Staff Evaluations |
| 3. Diversity & Sensitivity Training |
| 4. Public Relations – Being able to deal with an upset resident |

Additionally, respondents were asked to re-answer the above questions, as they would relate to you as a lieutenant desiring to become a battalion chief within our organization.

Q. What are the educational backgrounds you expect of a lieutenant applying for a battalion chief position? This can include formal and informal classes, degrees, etc.

Table 7.0

| Respondents Narrative Answers |
|---|
| 1. Along with the stuff mentioned above... |
| 2. Ce Fire Instructor |
| 3. Incident Safety Officer |
| 4. Again, I know there is great importance on a college degree, however, I think for this position it should be encouraged (or at least give a length of time to obtain a degree) but it should be a deciding factor. I think there are a lot of great officers out there that would make a great Battalion Chief but since they don't have a degree they are flushed out of the process, so you end up with a book smart person who has a degree but has no clue on the fire ground. |
| 5. Ability to communicate effectively, completion of required paperwork for the shift. |
| 6. Ability to delegate assignments provides follow up on completion of tasks. |
| 7. Firm working knowledge of JTFD equipment along with M/A departments surrounding JTFD |
| 8. Ability to communicate effectively, along with knowing when to say no to requests that otherwise is popular with personnel. |
| 9. At least 5 years Lieutenant experience with JTFD |
| 10. Associates degree desired possibly a under grad degree |
| 11. Completed NIMS series, Company officer series as required by JTFD. |
| 12. Mentoring by current BC's with exposure to M/A BC's. |
| 13. Experience, Experience and Experience no class(s) or education will take the place of experience. |
| 14. Bachelor's Degree in Fire Related field |
| 15. Incident Command |
| 16. Review fire reports |
| 17. Understanding of budgetary process |

Q. What daily activities (day to day) would you expect a lieutenant who desires to become a battalion chief to perform and be comfortable with?

Table 8.0

| Respondents Narrative Answers |
|---|
| 1. Experience in riding out-of-class as Battalion Chief |
| 2. Ability to lead trainings |
| 3. Knowledge on the administration paperwork that the B/C has to do |
| 4. Employee Evaluations |
| 5. How to fill out department forms |
| 6. Ability to communicate effectively |
| 7. Completion of required paperwork for the shift. |
| 8. Ability to delegate assignments provides follow up on completion of tasks. |
| 9. Firm working knowledge of JTFD equipment along with M/A departments surrounding JTFD |

Q. What other experiences would you want a lieutenant desiring to become a battalion chief to have experienced in their training? (As an example, telling a family member their loved one has passed away in a house fire)

Table 9.0

| Respondents Narrative Answers |
|--|
| 1. BC's need better communication skills in addition to writing. Knowing limitations this can include how to get answers (who to call, who to ask, who can assist) |
| 2. Act as a Battalion Aide (work hand in hand with Battalion Chief on daily duties along with Incident Command) |

The following question and responses were given to the current battalion chiefs (with the exception of the author).

Q. What are the educational backgrounds you expect of a firefighter applying for a Lieutenant position? This can include formal and informal classes, degrees, etc.

Table 10.0

| Respondents Narrative Answers |
|--|
| 1. Firefighter II / Paramedic (State of Ohio) |
| 2. Fire Officer 1 (IFSAC/NFPA) |
| 3. Managing Company Tactical Operations (MCTO) Series (NFA) |
| 4. Assistant Fire Instructor (State of Ohio) |
| 5. Basic Fire Investigation (NFPA) |
| 6. 2-year degree or equivalent (60 semester hours or 95 quarter hours) |
| 7. Certified in Blue Card Commander |
| 8. Leadership but the numbers (NFA/OFA) |

Q. What daily activities (day to day) would you expect a firefighter who desires to become a lieutenant to perform and be comfortable with?

Table 11.0

| Respondents Narrative Answers |
|--|
| 1. Experience in riding out-of-class on fire apparatus |
| 2. Experience in leading and assisting in the instruction of formal and informal company / unit level training |
| 3. Interpersonal communication skills (public speaking) |
| 4. Experienced in the utilization of scheduling software and department forms |
| 5. Some form of Public relations training |

Q. What other experiences would you want a firefighter desiring to become a lieutenant to have experienced in their training? (As an example, telling a family member their loved one has passed away in a cardiac arrest scenario)

Table 12.0

| Respondents Narrative Answers |
|--|
| 1. Ability to communicate effectively orally and in writing |
| 2. Ability to work efficiently and prioritize tasks under time constraints |

| |
|--|
| 3. Use of department email and MS Office software (Excel, Word, PPT) |
| 4. Add FO2 |

Q. What are the educational backgrounds you expect of a lieutenant applying for a battalion chief position? This can include formal and informal classes, degrees, etc.

Table 13.0

| Respondents Narrative Answers |
|--|
| 1. (in addition to those listed above) |
| 2. Certified Fire Instructor (NFPA) |
| 3. 4-year degree or equivalent (124 semester hours or 195 quarter hours) |
| 4. Certified Fire Safety Inspector (State of Ohio) |

Q. What daily activities (day to day) would you expect a lieutenant who desires to become a battalion chief to perform and be comfortable with?

Table 14.0

| Respondents Narrative Answers |
|---|
| 1. (in addition to those listed above) |
| 2. Experience in riding out-of-class as Battalion Chief |
| 3. Experience leading formal and informal multi-unit and multi-jurisdictional trainings |
| 4. Mentor new and aspiring officers |

Q. What other experiences would you want a lieutenant desiring to become a battalion chief to have experienced in their training? (As an example, telling a family member their loved one has passed away in a house fire)

Table 15.0

| Respondents Narrative Answers |
|--|
| 1. (in addition to those listed above) |
| 2. Experience in riding out-of-class as Battalion Chief |
| 3. Experience in completing an employee injury report. |
| 4. Shadow and complete a ride-along with another Battalion Chief for at least 12 hours |
| 5. Shadow and observe a dispatcher in the dispatch center for at least 12 hours |

APPENDIX 4 – CANDO BOOK LIEUTENANT SERIES

The Career Advancement Notes & Directions Overview (CANDO) Book

The Jefferson Township Fire Department (JTFD) is committed to the development and career advancement of its personnel. With this commitment in mind, the CANDO Book was developed based on more than one year of research including the review of published standards and literature by the National Fire Protection Association (NFPA), The International Association of Fire Chiefs (IAFC), leading text and books on succession training, and a review of various departments across the country. With that information internal and external surveys were completed to identify the needs of the personnel within the organization.

The result of this research is the CANDO Book. This book is the “best practices” for your career advancement based on past practice and organizational standards. While the completion of this book is in no way a guarantee of future promotion, its successful completion should result in you becoming a more well-rounded fire service professional and provide the opportunity to grow as a person. While the use of this book is voluntary, it is considered to be an invaluable tool for successful performance by the JTFD.

It is important to note that the CANDO book is designed with specific focus on the job position it is wrote for. The book was developed with the presumption that the trainee is fundamentally sound in their current knowledge, skills, and abilities in their current position. This allows for a streamlined book with focused tasks for future opportunities.

Use of this book

The CANDO book can be used as an employee development tool to provide guidance for those wanting to further their education and skill as well as provide a pathway for those wishing to promote to follow. Additionally, the use of this book will allow employees to understand the roles and responsibilities required of them to ride in an “out of class” position. Finally this book may be used as a benchmark for personnel currently in their established position to see how they “measure up” against those working toward achieving their position.

CODES

A-Task can be performed in any situation (classroom, simulation, on the job, etc.)

D-Task can be completed by discussion with evaluator

I-Task must be completed on an emergency incident (EMS, fire, rescue, MVC, etc.)

P-Task completion must include physical performance of task

R-Task completion is required to be eligible for promotion/riding out of class

S-Task completion is strongly suggested for further refinement and education

Responsibilities

The **Trainee** who has requested this book is responsible for:

- Reviewing and understanding the material within the book
- Satisfactorily completing all tasks for the assigned position
- Ensuring the CANDO book is accurately recorded and maintained
- Ensuring the integrity of this book as their own property
- Allowing the learning process to occur and give genuine effort to all tasks assigned
- Understanding the successful completion of some tasks will involve a higher than normal workload as well as honest and sometimes difficult conversations with their evaluator and others

The **Evaluator** is responsible for:

- Being proficient and qualified for the task they are evaluating
- Explaining to the trainee the process involved in the successful completion of these tasks
- Explaining the responsibilities listed above to the trainee
- Accurately, honestly, and fairly evaluating the performance of the trainee on all tasks.
- Making true effort to accommodate the time and mentoring needs of the trainee

| TASK TO BE PERFORMED | CODE | Trainee Signature & Date of completion | Evaluators Signature & Date of Completion |
|--|-------------|--|---|
| Preparation and Administrative Tasks | | | |
| Demonstrates an understating of the use of the CANDO book program <ul style="list-style-type: none"> - Purpose - Performance standards - Use & design - Completion - Task codes | A D | | |
| Understands the responsibilities of the evaluator and the candidate | A D | | |
| Understands the process for completion and obtaining signatures for tasks | A D | | |
| Has completed the required apparatus check off books <ul style="list-style-type: none"> - Medic 141 - Engine 141 - Ladder 141 - Grass 141 | R | | |
| Understands the job description requirements for the position | A D | | |
| Demonstrates an understanding of department policies <ul style="list-style-type: none"> -Sexual Harassment -Drug Free Workplace -Workplace Violence | A D | | |
| Has completed no less than 3 years of full time service as a FF for JTFD | R | | |
| Demonstrate the ability to deliver verbal consoling on the spot of violations for correction | P D A | | |

| | | | |
|---|--------|--|--|
| Demonstrate the ability to complete and administer employee evaluations | P D | | |
| Demonstrate the ability to council subordinates of substandard and exception job quality | P D | | |
| Reporting & Communication Tasks | | | |
| Demonstrates ability to access electronic fire reporting system | P | | |
| Demonstrates ability to access electronic EMS reporting system | P | | |
| Demonstrates the ability to access and compose email via departmental email | P | | |
| Demonstrates the ability to prepare and complete Incident report form for a simulated incident | P | | |
| Demonstrates the ability to complete a pass on maintenance request | P | | |
| Demonstrates the ability to complete training record | P | | |
| Demonstrate the ability to complete Ohio BWC First report of Injury and identifies location of reports -when to write one -associated investigative paperwork | P | | |
| Demonstrate the ability to complete an employee call off sheet and knows the rules associated -pre-0700 call off -post-0700 call off | P D | | |

| | | | |
|--|--------|--|--|
| Demonstrate the ability to find and correct problems with the daily log and payroll | P | | |
| Demonstrate the ability to critic and review fire and EMS reports for content and correctness | P | | |
| Demonstrate the ability to produce written communications in an acceptable format, with proper spelling and grammar <ul style="list-style-type: none"> - Email - Memo | P A | | |
| Training Related Tasks | | | |
| Completes no less than 5 HANDS-ON company trainings as the lead instructor to include <ul style="list-style-type: none"> - Training plan - Needed materials - Referenced material | P R | | |
| Completes no less than 5 LECTURE trainings as the instructor to include <ul style="list-style-type: none"> - Personally developed presentation - Training plan - Reference material | P R | | |
| Demonstrate the ability to deliver impromptu presentations on fire service related materials for the shift <ul style="list-style-type: none"> - This task may be repeated as often as needed until evaluator feels comfortable with speaking skills | P A | | |
| On the Job Experiences | | | |

| | | | |
|--|-------------|--|--|
| <p>Demonstrate the ability to serve as the initial fast-acting IC on various simulations</p> <ul style="list-style-type: none"> - Both in simulation & “live” trainings - To include a wide array of any positional emergency scenes | P I R | | |
| Serves as the acting Lt in true fire incident | I | | |
| Completes daily staffing forms | P | | |
| Hold shift meeting in morning for daily activities | P | | |
| Ensure dept. safety polices are enforced | P A | | |
| Demonstrate the understanding of long checks, daily and weekly chores and ensures their completion | D A | | |
| <p>Demonstrate the ability to perform</p> <ul style="list-style-type: none"> - Short term planning for a given project - Long term planning for a given project | D P A | | |
| <p>Demonstrate the ability to utilize the MDC for day to day operations</p> <ul style="list-style-type: none"> - MECCMAP - Dispatch software | P A D | | |
| Explains procedures for accessing various gates within JTFD | P A D | | |
| Presents public education programs to school age children as lead speaker | P R | | |

| | | | |
|--|-------------|--|--|
| Presents fire safety information/demonstrations to adults | P D A | | |
| Gives a station tour to various age groups of the public | P D | | |
| Demonstrate the ability to handle the media on emergency scenes <ul style="list-style-type: none"> - Legal issues - Confidentiality - Scene security | D A P | | |
| Demonstrate the ability to act as the PIO on an incident | D P A | | |
| Demonstrate the ability to respond to citizen complaints | D P A | | |
| Demonstrate an understanding of response requirements <ul style="list-style-type: none"> - MDC Status and why they are important - In township v. Mutual Aid staffing requirements | D A | | |
| Experience riding as the acting Lieutenant with Lieutenant present <ul style="list-style-type: none"> - No less than 10 shifts | P R | | |
| Emergency Response Tasks | | | |

| | | | |
|--|----------------------|--|--|
| <p>Explains tasks/tactics for the following as the Engine & Ladder IC</p> <ul style="list-style-type: none"> - High rise fire - Big box fire - MCI events - Grass/wild land fire - Haz Mat - WMD events - Residential (small/medium) - Residential (large) <p>All above as 1st and 2nd due</p> | <p>D A</p> | | |
| <p>Demonstrate the ability to handle a found fire violation</p> <ul style="list-style-type: none"> - Non-critical - Critical (overcrowding, etc.) | <p>D A</p> | | |
| <p>Demonstrate an understanding of sprinkler systems</p> <ul style="list-style-type: none"> - Components - Fire service use | <p>D P A</p> | | |
| <p>Demonstrate an understanding of fire alarm systems</p> <ul style="list-style-type: none"> - Panel management - Resets - Trouble alarms | <p>P D A</p> | | |
| <p>Demonstrate an understanding of stand pipe ops</p> | <p>D P A</p> | | |
| <p>Demonstrate an understanding of home alarms</p> <ul style="list-style-type: none"> - Fire - Smoke - CO | <p>P D A</p> | | |
| <p>Demonstrate an ability to accurately pre plan a building for target hazards</p> | <p>P D A</p> | | |

| | | | |
|---|----------------------------|--|--|
| <p>Demonstrate an understanding of fire service hose testing</p> <ul style="list-style-type: none"> - Frequency - Tools needed - Failures - Requirements - Documentation | <p>D</p> <p>A</p> | | |
| <p>Demonstrate knowledge of the following</p> <ul style="list-style-type: none"> - PPE inspection/use/limitations - Issued safety gear use and replacement | <p>D</p> <p>A</p> | | |
| <p>Demonstrate working knowledge of SCBA</p> <ul style="list-style-type: none"> - Inspection - Use - Donning - Record keeping | <p>P</p> <p>D</p> <p>A</p> | | |
| <p>Demonstrate understanding of aerial apparatus strategy and tactics</p> | <p>D</p> <p>A</p> | | |
| <p>Demonstrate an understanding of cascade system</p> <ul style="list-style-type: none"> - Use - Alarms - Filling aerial | <p>D</p> <p>P</p> <p>A</p> | | |
| <p>Demonstrate an understanding of Engine ops</p> <ul style="list-style-type: none"> - Placement - CAFS Systems - Equipment carried | <p>D</p> <p>A</p> | | |
| <p>Demonstrates the knowledge of surrounding jurisdictions equipment and available resources</p> | <p>D</p> <p>A</p> | | |

| | | | |
|--|-------------|--|--|
| Demonstrates knowledge of <ul style="list-style-type: none"> - Departmental SOP's - Tactics - Mission Statement - Vision - Values | D A R | | |
| Educational Tasks | | | |
| Completion of Fire Officer I | S | | |
| Enrollment/progressing/completion of Fire Service Associates Degree | S | | |
| Managing Company Tactical operations (MCTO) | S | | |
| Assistant fire instructor certification | S | | |
| Blue card commander series | S | | |
| Completed Fire Inspector Certification | S | | |
| Maintains current Hazmat operations level certification | S | | |
| Demonstrates working knowledge of / takes course on: <ul style="list-style-type: none"> - Fire behavior - Building construction | S | | |
| Personal Development Tasks | | | |
| Demonstrate the ability to be a positive role model for expected behavior within the fire station | P D | | |
| Demonstrates the ability to maintain personal health and physical ability to perform the duties of the position | P R | | |
| Develops an inventory of personal traits, strengths, weakness with improvement plan | D A | | |

| | | | |
|--|--------|--|--|
| Shows the spirit of humble service by volunteer work | D A | | |
| Can readily identify the traits they position that make JTFD better | D A | | |
| Networks with surround departments personnel in same position | P A | | |
| Has an open and honest conversation with spouse/loved ones/family member about what may change if given this position | S | | |
| Has an open and honest conversation with evaluator about what to expect personally & professionally if given this position | S | | |

Evaluations

Instructions

The CANDO book requires that no less than four hands on tasks be evaluated formally using the enclosed forms. These serve as documentation of the performance of a required task. These evaluations can occur in any setting including emergency scenes, classroom simulations, or during daily activities with or without the candidates knowledge.

The form must be filled completely and the evaluator must ensure the candidate is completing all required benchmarks for the task.

Following the evaluation, the evaluator will meet with the candidate to discuss the results of the evaluation as well as recommendations for future improvements.

Evaluation Record # ___

| Trainee Name | Trainee Position | Date |
|---|------------------|---------------|
| Items to be evaluated: | | |
| | | |
| Objectives expected to be met by the trainee: | | Met? (Y/N) |
| 1 | _____ | _____ |
| 2 | _____ | _____ |
| 3 | _____ | _____ |
| 4 | _____ | _____ |
| 5 | _____ | _____ |

The tasks detailed above have been performed under my direct supervision and have been evaluated fairly. Based on the performance of the candidate I recommend the following

- Candidate has successfully performed all tasks required _____
- Candidate was not able to complete certain tasks / additional assistance needed _____
- Candidate could not finish this task even with additional assistance _____
- Candidate is severely deficient in this task and must revisit this task to advance _____

Comments:

| Evaluator's Name | Evaluator's Signature | Date |
|------------------|-----------------------|------|
|------------------|-----------------------|------|

APPENDIX 5 – CANDO BOOK BATTALION CHIEF SERIES

The Career Advancement Notes & Directions Overview (CANDO) Book

The Jefferson Township Fire Department (JTFD) is committed to the development and career advancement of its personnel. With this commitment in mind, the CANDO Book was developed based on more than one year of research including the review of published standards and literature by the National Fire Protection Association (NFPA), The International Association of Fire Chiefs (IAFC), leading text and books on succession training, and a review of various departments across the country. With that information internal and external surveys were completed to identify the needs of the personnel within the organization.

The result of this research is the CANDO Book. This book is the “best practices” for your career advancement based on past practice and organizational standards. While the completion of this book is in no way a guarantee of future promotion, its successful completion should result in you becoming a more well-rounded fire service professional and provide the opportunity to grow as a person. While the use of this book is voluntary, it is considered to be an invaluable tool for successful performance by the JTFD.

It is important to note that the CANDO book is designed with specific focus on the job position it is wrote for. The book was developed with the presumption that the trainee is fundamentally sound in their current knowledge, skills, and abilities in their current position. This allows for a streamlined book with focused tasks for future opportunities.

Use of this book

The CANDO book can be used as an employee development tool to provide guidance for those wanting to further their education and skill as well as provide a pathway for those wishing to promote to follow. Additionally, the use of this book will allow employees to understand the roles and responsibilities required of them to ride in an “out of class” position. Finally this book may be used as a benchmark for personnel currently in their established position to see how they “measure up” against those working toward achieving their position.

Responsibilities

The **Trainee** who has requested this book is responsible for:

- Reviewing and understanding the material within the book
- Satisfactorily completing all tasks for the assigned position
- Ensuring the CANDO book is accurately recorded and maintained
- Ensuring the integrity of this book as their own property
- Allowing the learning process to occur and give genuine effort to all tasks assigned
- Understanding the successful completion of some tasks will involve a higher than normal workload as well as honest and sometimes difficult conversations with their evaluator and others

The **Evaluator** is responsible for:

- Being proficient and qualified for the task they are evaluating
- Explaining to the trainee the process involved in the successful completion of these tasks
- Explaining the responsibilities listed above to the trainee
- Accurately, honestly, and fairly evaluating the performance of the trainee on all tasks.
- Making true effort to accommodate the time and mentoring needs of the trainee

CODES:

A-Task can be performed in any situation (classroom, simulation, on the job, etc.

D-Task can be completed by discussion with evaluator

I-Task must be completed on an emergency incident (EMS, fire, rescue, MVC, etc.)

P-Task completion must include physical performance of task

R-Task completion is required to be eligible for promotion/riding out of class

S-Task completion is strongly suggested for further refinement and education

| TASK TO BE PERFORMED | CODE | Trainee Signature & Date of completion | Evaluators Signature & Date of Completion |
|---|--------|--|---|
| Preparation and Administrative Tasks | | | |
| Demonstrates an understating of the use of the CANDO book program - Purpose - Performance Standards - Use - Design - Successful Completion - Task Codes | A D | | |
| Understands the responsibilities of the evaluator and the candidate | A D | | |
| Understands the process for completion and obtaining signatures for tasks | A D | | |
| Has completed the required apparatus check off books - Medic 141 - Engine 141 - Ladder 141 - Grass 141 - CANDO - Lieutenant Series | R | | |
| Understands the job description requirements for the position | A D | | |
| Demonstrates an understanding of department policies -Sexual Harassment -Drug Free Workplace -Workplace Violence | A D | | |
| Has completed no less than 3 years of service as a Lieutenant for JTFD | R | | |

| | | | |
|--|-------------|--|--|
| Demonstrate the ability to deliver verbal consoling on the spot of violations for correction | P D A | | |
| Demonstrate the ability to complete and administer employee & supervisor evaluations | P D | | |
| Demonstrate the ability to council subordinates of substandard and exception job quality | P D | | |
| Reporting & Communication Tasks | | | |
| Demonstrates ability to access electronic fire reporting system | P | | |
| Demonstrates ability to access electronic EMS reporting system | P | | |
| Demonstrate the ability to write up recommendations for: <ul style="list-style-type: none"> - Employee suspension - Employee Termination | P | | |
| Demonstrate the ability to prepare and complete Incident report form for a simulated incident | P | | |
| Demonstrate the ability to complete a pass on maintenance request <ul style="list-style-type: none"> -item needing repair -item repaired on shift | P | | |
| Demonstrate the ability to enter completed training records | P | | |
| Demonstrate the ability to complete Ohio BWC First report of Injury and identifies location of reports <ul style="list-style-type: none"> -when to write one -associated investigative paperwork | P | | |

| | | | |
|---|--------|--|--|
| Demonstrate the ability to complete an employee call off sheet and knows the rules associated -pre-0700 call off -post-0700 call off | P D | | |
| Demonstrate the ability to find and correct problems with the daily log and payroll | P | | |
| Demonstrate the ability to critic and review fire and EMS reports for content and correctness | P | | |
| Demonstrate the ability to produce written communications in an acceptable format, with proper spelling and grammar - Email - Memo | P A | | |
| Training Related Tasks | | | |
| Completes no less than 5 HANDS-ON company trainings as the lead instructor to include - Training plan - Needed materials - Referenced material For trainings involving more than one department | P R | | |
| Completes no less than 5 LECTURE trainings as the instructor to include - Personally developed presentation - Training plan - Reference material On advanced topics/development | P R | | |

| | | | |
|--|-------------|--|--|
| Demonstrate the ability to deliver impromptu presentations on fire service related materials for the shift <ul style="list-style-type: none"> - This task may be repeated as often as needed until evaluator feels comfortable with speaking skills | P A | | |
| On the Job Experiences | | | |
| Demonstrate the ability to serve as the initial IC on various simulations <ul style="list-style-type: none"> - Both in simulation & "live" trainings - To include a wide array of any positional emergency scenes | P I R | | |
| Serves as the acting BC in true fire incident | I | | |
| Reviews daily staffing forms | P | | |
| Hold shift meeting in morning for daily activities | P | | |
| Ensure dept. safety polices are enforced | P A | | |
| Demonstrate the ability to hold shift meetings on issues as well as meet with shift officers on expectations | D A | | |
| Demonstrate the ability to perform <ul style="list-style-type: none"> - Short term planning for a given project - Long term planning for a given project | D P A | | |
| Rides with a mutual aid departments Battalion chief no less than 12 hours | P R | | |
| Rides with current battalion chief now less than 48 hours | P R | | |

| | | | |
|--|------------------|--|--|
| Spends no less than 12 hours job shadowing in the dispatch center | P R | | |
| Demonstrates the ability to act as the 2 nd arriving (C-side or interior) Battalion chief <ul style="list-style-type: none"> - Understands role - Knows conditions and situations to report | P D A R | | |
| Demonstrates the ability to serve as the accountability officer on a large incident | P D A R | | |
| Demonstrate the ability to handle the media on emergency scenes <ul style="list-style-type: none"> - Legal issues - Confidentiality - Scene security | D A P R | | |
| Demonstrate the ability to act as the PIO on an incident | D P A R | | |
| Demonstrate the ability to respond to citizen complaints | D P A R | | |
| Demonstrate an understanding of response requirements <ul style="list-style-type: none"> - MDC Status and why they are important - In township v. Mutual Aid staffing requirements | D A | | |
| Experience dealing with public on emergency scenes | P R I | | |
| Emergency Response Tasks | | | |

| | | | |
|--|----------------------|--|--|
| <p>Explains tasks/tactics for the following as the IC</p> <ul style="list-style-type: none"> - High rise fire - Big box fire - MCI events - Grass/wild land fire - Haz Mat - WMD events - Residential (small/medium) - Residential (large) | <p>D A</p> | | |
| <p>Demonstrate the ability to handle a found fire violation</p> <ul style="list-style-type: none"> - Non-critical - Critical (overcrowding, etc.) | <p>D A</p> | | |
| <p>Demonstrate an understanding of sprinkler systems</p> <ul style="list-style-type: none"> - Components - Fire service use | <p>D P A</p> | | |
| <p>Demonstrate an understanding of fire alarm systems</p> <ul style="list-style-type: none"> - Panel management - Resets - Trouble alarms | <p>P D A</p> | | |
| <p>Demonstrate an understanding of stand pipe use</p> | <p>D P A</p> | | |
| <p>Demonstrate an understanding of home alarms</p> <ul style="list-style-type: none"> - Fire - Smoke - CO | <p>P D A</p> | | |
| <p>Demonstrate an ability to accurately use and review pre plans in an emergency</p> | <p>P D A</p> | | |
| <p>Demonstrate the ability to utilize all communication equipment within the BN141 vehicle</p> | <p>D A</p> | | |

| | | | |
|--|-------------|--|--|
| Demonstrate knowledge of the following equipment in BN 141 <ul style="list-style-type: none"> - EMS Bag - AED - File Case / Contents - Camera - HCN Monitor | D A | | |
| Demonstrate working knowledge of SCBA <ul style="list-style-type: none"> - Inspection - Use - Donning - Record keeping | P D A | | |
| Demonstrate understanding of aerial apparatus strategy from IC perspective | D A | | |
| Demonstrate an understanding of current EMS Protocols | D P A | | |
| Demonstrate an understanding of IC Role at MCI | D A | | |
| Demonstrates the knowledge of surrounding jurisdictions equipment and available resources | D A | | |
| Demonstrates knowledge of <ul style="list-style-type: none"> - Departmental SOP's - Tactics - Mission Statement - Vision - Values | D A R | | |
| Educational Tasks | | | |
| Completion of Fire Officer II | S | | |
| EMS Instructor certification | S | | |
| Managing Company Tactical operations (MCTO) | S | | |

| | | | |
|--|--------|--|--|
| Fire instructor certification | S | | |
| Blue card commander series | S | | |
| Fire Inspector Certification | S | | |
| Maintains current Hazmat tech level certification | S | | |
| Bachelor's degree in fire/ems related field | S | | |
| Personal Development Tasks | | | |
| Demonstrate the ability to be a positive role model for expected behavior within the fire station | P D | | |
| Demonstrates the ability to maintain personal health and physical ability to perform the duties of the position | P R | | |
| Develops an inventory of personal traits, strengths, weakness with improvement plan | D A | | |
| Shows the spirit of humble service by volunteer work | D A | | |
| Can readily identify the traits they position that make JTFD better | D A | | |
| Networks with surround departments personnel in same position | P A | | |
| Has an open and honest conversation with spouse/loved ones/family member about what may change if given this position | S | | |
| Has an open and honest conversation with evaluator about what to expect personally & professionally if given this position | S | | |

Evaluations

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The form must be filled completely and the evaluator must ensure the candidate is completing all required benchmarks for the task.

Following the evaluation, the evaluator will meet with the candidate to discuss the results of the evaluation as well as recommendations for future improvements.

Evaluation Record # _____

| Trainee Name | Trainee Position | Date |
|--------------|------------------|------|
|--------------|------------------|------|

Items to be evaluated: _____

| Objectives expected to be met by the trainee: | Met? (Y/N) |
|---|---------------|
| 1 | _____ |
| 2 | _____ |
| 3 | _____ |
| 4 | _____ |
| 5 | _____ |

The tasks detailed above have been performed under my direct supervision and have been evaluated fairly. Based on the performance of the candidate I recommend the following

- Candidate has successfully performed all tasks required _____
- Candidate was not able to complete certain tasks / additional assistance needed _____
- Candidate could not finish this task even with additional assistance _____
- Candidate is severely deficient in this task and must revisit this task to advance _____

Comments: _____

| Evaluator's Name | Evaluator's Signature | Date |
|------------------|-----------------------|------|
|------------------|-----------------------|------|