

WLAD / SVFR Administrative IGA January 2017 Objectives

TYPE	TASK	Responsible	STATUS / UPDATE
Financial 1	Develop a manageable and reliable payroll process that is error free. 1. There will be no repeats of the failure to notify the Administrative Division Chief about promotional and new hire payroll issues (see HR Objective-1). <i>NOTE: This objective will remain in place until the Management Team is confident that we have addressed this issue and these practices have become routine.</i>	Management Team	In progress and ongoing.
Financial 2	Assign Administrative Assistants to assist in financial responsibilities.	Admin Div. Chief	Cindy is entering PERS info for each district monthly. Karin is doing Accounts Payable and Payroll Mary is working with WLA Supervisor and Julie in Payroll prep. Cindy is entering accounts receivables.
Financial 3	Research and identify finance / payroll software. <i>Deferred from September</i>	Admin Div. Chief	We have received a demo from Logics Software on 1/1/17. Will receive a demo from Caselle on 1/18/17.
Financial 4	Establish Baseline numbers for Life Med to determine a plan to have a net gain in membership each year.	Admin Div. Chief	Completed
Financial 5	Make master schedule for preparing and executing the Life Med Program.	Admin Div. Chief	In progress and due at second Admin Team mtg. in February.
Financial 6	Write an SOG to capture all the procedures necessary to process Accounts Payable from receiving the mail to mailing the payments.	Admin Team	In process
Administrative 1	Begin using Aladtec Scheduling Software to assist in payroll.	Admin Div. Chief	FTE's for SVFR began using in Dec. was used to match to payroll and vacation/sick days and comp time tracking. Will be evaluated for efficiency at the end of Jan.

WLAD / SVFR Administrative IGA January 2017 Objectives

<p>No 1 cont.</p>			<p>After evaluation of using Aladtec for capturing sick, vacation and comp time requests, it was determined that the OPS Chief would arrange a meeting to make modifications to the forms.</p> <p style="text-align: center; color: red;">Ongoing</p>
<p>Administrative 2</p>	<p>Map our network filing system in a logical, accessible, useful way.</p> <ol style="list-style-type: none"> 1. Ensure every Admin and Management Team Member has access to the server drives they need. 2. Ensure every Admin and Management Team Member knows where to locate the files they need access to. 	<p>Admin Division Chief</p>	<p>In progress and will be ongoing.</p>
<p>Administrative 3</p>	<p>Create a joint policy manual that is organized and contains up-to-date and relevant information.</p> <ol style="list-style-type: none"> 1. Separate policies and SOGs and begin creating a logical filing system. (this portion completed) 2. Creation of indexes and separating SOG's from policies 	<p>Admin Div. Chief and Fire Chief</p>	<p>In progress and will be ongoing</p>
<p>Administrative 4</p>	<p>Create an Intranet employee portal that contains useful information for our employees and members.</p> <ol style="list-style-type: none"> 1. Identify the categories of the contents to be added. 2. Begin adding the contents. 3. Involve WLAD Supervisor and SVFR St. 1 Capt. 	<p>Admin Div. Chief</p>	<p>We have begun adding information to the employee portal, this will be ongoing.</p>
<p>Administrative 5</p>	<p>Create and document a process and SOG for processing Accounts Payables for both districts.</p>	<p>Admin Div. Chief</p>	<p>Ongoing see Financial No. 6</p>
<p>Administrative 6</p>	<p>Forecast Pay dates for the year and notify all employees of both districts.</p>	<p>Admin Div. Chief</p>	<p>Completed and Memo sent to all employees</p>

WLAD / SVFR Administrative IGA January 2017 Objectives

Administrative 7	Develop SOP's for Accounts Receivable Process	Admin Div. Chief	In progress
Human Resources 1	<p>Create and implement an identical employee / volunteer in processing system for both organizations.</p> <ol style="list-style-type: none"> 1. Have each Management Team Member bring an overview of the required information they use to in process their new members at the January 11th Management Team Meeting. 2. Create a DRAFT in processing SOG that can be reviewed and discussed at the January 11th Management Te3am Meeting. 3. Finalize and implement a New Member In Processing SOG. 	Management Team	In progress SVFR is demoing a new form and then it will be customized to fit WLAD and demoed there. Once it has been vetted by the people using the form an SOG will be written.
Human Resources 2	Create a form for the Recruitment and Retention Coordinator to on board potential candidates.	Admin/OPS Chiefs	Completed
Training 1	Schedule MS Outlook Training for Mary and Cindy	Admin Division Chief	Completed on 1/12/17
Training 2	Create a training schedule for the rest of the fiscal year for the Admin Team.	Admin Division Chief	In progress-February training is on Excel Basics and is on Feb 20 th from 1-4 pm.
Training 3	Identify the training needs of the Admin Team	Admin Division Chief	Needs have been identified for the remainder of the year. <p style="text-align: center;">Excel Publisher Photos Website Maintenance OneNote Sharepoint Intermediate Word Intermediate Excel</p>

WLAD / SVFR Administrative IGA January 2017 Objectives
