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NEWS & RISK MANAGEMENT REVIEW

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SUMMER 2019

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## SDAO Mission

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The mission of the Special Districts Association of Oregon is to assist special service districts in providing cost-effective and efficient public services to the people of Oregon.

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— SDAO Board of Directors —

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**Vice President**

Keith Hobson, Tualatin Hills Park & Recreation District

**Secretary**

Michele Bradley, Port of Tillamook Bay

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**Past-President**

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Shawn Gerdes, Arnold Irrigation District

Todd Heidgerken, Clackamas River Water

Stephen Schelb, Klamath 9-1-1 Communications

Ben Stange, Polk County Fire District #1

Doug Waugh, Water Environment Services

— Executive Director —

Frank Stratton

— Services —

Awards, Education and Training, Internship Grant, Legislative, Research and Technical Assistance, and SDAO Advisory Services, LLC

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Workers' Comp Email: [wc@sdao.com](mailto:wc@sdao.com)

# welcome

## NEW BOARD MEMBERS

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FROM: FRANK STRATTON, EXECUTIVE DIRECTOR

As a newly elected official, you may not know where to begin or what resources are available to you. One thing I want to stress is that we are here to support you in your transition to your new role. As a board member of one of our member districts, you have access to a wide variety of benefits including informative publications, education and training, research and technical assistance, and much more.

One of the important first steps in accessing these resources is to set up a login on our website. To do this, visit [www.sdao.com](http://www.sdao.com) and select Create Account at the upper right-hand side of the screen. Within two business days, your account will be verified by one of our staff members and you will receive a confirmation email.

My first suggestion to all new board members is to review the SDAO Board Member Handbook. This publication covers important things to know as a special district board member such as power and authority of special districts, delegation of power, commitment and responsibilities, accountability, political activities, board meeting information, and more. The Administrative Handbook is also a great resource and is intended to assist with the operations of a special district. It can be used as a daily reference tool and is an excellent orientation guide for new board members and staff. To access both of these handbooks and other available publications, sign in to our website and select Publications in the menu bar.

Next, I recommend that you attend a board member training. Your education as a board member is a crucial part of your new role with your district. Each

year, SDAO develops various training programs in response to member input as well as external developments and influences. We offer a variety of training opportunities including in-person regional trainings offered throughout the state, online programs accessible from your computer, our annual conference held each February, webinars, and recordings of past trainings available on both DVD and our website. Members enrolled in the Special Districts Insurance Services property and liability programs also have access to our onsite risk management trainings. You can learn more about our training programs by signing in to our website and selecting Trainings in the menu bar.

For those day-to-day questions or times that you are looking for sample documents, we have the SDAO Reference Library available to you. The Reference Library has a wealth of information for special districts including sample policies, budget forms, personnel resources, links to statutes and more. You can access this library by signing in to our website, hovering your mouse over Resources in the menu bar, and selecting Reference Library.

SDAO can offer you even more than I have previously mentioned. To review a more comprehensive list of all of our programs and services, visit [www.sdao.com](http://www.sdao.com) and select Programs & Services in the menu bar. If you ever have any questions, please give us a call at 800-285-5461.

Congratulations on your new position and we look forward to seeing you at an upcoming SDAO training or event!

# SDAO INTERNSHIP GRANT PROGRAM

# AWARD RECIPIENTS

This year, the SDAO Awards Committee awarded \$38,324 in funding to 14 special district members through the 2019 Internship Grant Program. These grants are used by award recipients to help fund district projects and provide local government work experience to college students.

Districts must submit applications outlining the details of their project, the benefits it will bring to the district, and how they will utilize a summer intern. The maximum grant is \$3,000 and must be matched by the district at 50%. For example, a project that will cost \$6,000 or more is eligible for a \$3,000 grant. At the end of the summer, recipients must submit a project summary and receipts to SDAO.

Information about next year's program will be sent to members in early spring. For more information about internship grants, please visit our website at [www.sdao.com/S4/Programs/internship\\_grant.aspx](http://www.sdao.com/S4/Programs/internship_grant.aspx).

*All SDAO members were invited to apply. The following districts were selected:*

***Banks Fire District #3***

***\$2,225***

***Cannon Beach Rural Fire District***

***\$3,000***

***Chiloquin Fire & Rescue***

***\$2,880***

***Evans Valley Fire District #6***

***\$2,300***

***Highland Subdivision Water District***

***\$3,000***

***Junction City Rural Fire Protection District***

***\$3,000***

***LaPine Rural Fire Protection***

***\$3,000***

***Multnomah County Drainage District #1***

***\$2,469***

***North Morrow Vector Control District***

***\$3,000***

***North Unit Irrigation District***

***\$3,000***

***Port of Hood River***

***\$3,000***

***Rainier Cemetery District***

***\$2,700***

***Scio Fire District***

***\$1,750***

***Sheridan Fire District***

***\$3,000***



*Save the Date!*

**2019 SDAO MEMBER SCHOLARSHIP  
GOLF TOURNAMENT**

**SEPTEMBER 13, 2019**

**Join SDAO for our 2019 Member Scholarship Golf Tournament  
at Chehalem Glenn Golf Course in Newberg.**

**Cost:** \$35 per person/\$140 per team of four

**Maximum of 4 golfers** (1 team) per district or agency

**Includes:** Lunch, 18 holes of golf, shared use of cart, and dinner

**Registration is now open** and will close when teams are full. Teams with fewer than four members will be assigned additional players. *Space is limited and is expected to fill up quickly.*  
**Tournament proceeds will go to fund member training scholarships.**

**Register today at [www.cvent.com/d/myqkh3](http://www.cvent.com/d/myqkh3)**





## KEEP US UPDATED

In May, we mailed our annual membership database update forms to all member districts. These forms are essential to keeping us apprised of your district contact information as well as your current annual budget numbers. All departments of SDAO rely on this information each day, so it is imperative that we have accurate data. Please complete these forms and submit to us by mail, fax, or email by August 30<sup>th</sup>.

## SDAO ADVISORY SERVICES

### *Have a Financing Need?*

#### **Explore your Funding Options with SDAO Advisory Services**

Jackson County Fire District No. 3 recently secured a 10-year loan to finance the construction of a new fire station at a rate of 2.09% with the help of SDAO Advisory Services. At SDAO Advisory Services we are member driven to provide advice and guidance on your municipal financing needs. New money, refinancing, or restructuring. Put the SDAO Advisory Services team to work for you.

*For more information contact:*  
*David Ulbricht, Director of Advisory Services*  
*P: 503.701.7774 E: [dulbricht@sdao.com](mailto:dulbricht@sdao.com)*



# *Special Districts* CONSULTING SERVICES

The Consulting Services Program would like to thank all of the districts that showed interest in the Board Practice Assessment (BPA) this year. We continue to get positive feedback on the BPAs. The need for this service is apparent. We will be revamping our BPA process for 2020 and adding more consultants so that we are able to better serve our districts in the coming years.

It is our continued vision to be the premier choice and the first call by our members for exceptional consulting services. We are ready to take your call and assist you with organizational assessments, management recruitments, basic planning, special projects and more. Even if you are not sure if we can help, please call or email us and we will be happy to point you in the right direction for services. We are here for you! And don't forget that we offer up to **eight hours of free consulting services** by one or more of our consultants. Some issues may require more time. After your first eight hours are exhausted, you will have the option of continuing at an hourly rate.

Our consultants are all experienced, professional practitioners who have worked in leadership roles in special districts throughout Oregon for a minimum of 25 years each. Their hands on experience provides them with a depth of knowledge, experience, and professional connections that will help members address troubling personnel, board, community, financial, and operational issues.





# Meet Bill Anderson, Senior Consultant



## How did you come to be a consultant for SDAO?

I was newly retired when I was recruited by SDAO to become part of an interim management team to provide transitional leadership to a fire district and hire a new fire chief. The district was going through a bit of turmoil at the community, staff and board levels. We

soon recognized in order for the new fire chief to be successful we needed to resolve some of the lingering issues facing the fire district. We were able to assist the district by working through the pending issues allowing the new fire chief to focus forward without being overly burdened by what occurred in the past.

The success of that assignment lead to several more interim appointments and additional work with a variety of districts (park & recreation, transit, port and water).

## What excites you most about the work you do for SDAO?

A lot of the work we do consists of assisting districts with working through planning, financial, legal and personnel challenges. The variety of work requires collaboration with professionals covering the full management spectrum. What excites me the most about the work I do for SDAO is contributing to a district being better off when we are finished than when we started.

## Tell us about your life outside of your day job(s).

My wife and I recently moved full-time to the Oregon Coast. We are a stone's throw from some of the best fishing and outdoor activities in the Pacific Northwest.

For more information about the Consulting Services Program, please contact us at [sdaoconsultingservices@sdao.com](mailto:sdaoconsultingservices@sdao.com) or call us at 800-305-1736. We look forward to talking with you.



# CPR

## Saves Lives



When Bob Ringering (recently retired risk management consultant and current CPR trainer for SDAO) was out golfing, he was expecting to play a nice leisurely game and enjoy the beautiful weather. What he wasn't expecting was to utilize his many years of CPR training to help save someone's life. Here is Bob's story:

"I was approaching the number 5 green when this guy behind me was yelling at me to get my attention. I saw a man lying in the number 1

fairway next to me. I ran over with my golf cart and found him unconscious and not breathing. The other man didn't know what to do. I didn't know who the man lying on the ground was.

Experience from all my classes kicked in and after trying to get some response from the man, I just began compressions and breaths. After about three repetitions of these he began to breathe. I watched him for a short time and then was going to roll him on his side, but he stopped breathing again. I started over with compressions and breaths and after one repetition he started breathing again. But I didn't roll him this time. I just watched him. Again, he quit breathing and I had to start over once more. This time he seemed to keep breathing very faintly. By now the EMTs

were pulling up and they took over."

This is an amazing testament to the power of CPR and to Bob being the incredible person that he is. Bob has spent the last several years teaching these skills to our members and is continuing to do so during his retirement because he understands the value of his trainings.

If your district is interested in CPR training, please contact SDAO Risk Management at [riskmanagement@sdao.com](mailto:riskmanagement@sdao.com) or 800-285-5461.

*(Photo by KTVZ)*

# SDAO

## 2019 AWARDS PROGRAM

*Help us celebrate the ingenuity, creativity, and diversity of our members by nominating an individual or special district for the SDAO Awards Program! This program recognizes the outstanding accomplishments of member districts as well as district board members, managers, employees, and volunteers.*



### **Outstanding Special District Program – (District)**

This award category recognizes innovative projects and programs, outstanding safety, public information, public involvement in a district decision making process, and outstanding achievement.

*Three subcategories have been established for this award:*

- Districts with 5 or fewer employees
- Districts with 6 to 25 employees
- Districts with 26 or more employees

### **Outstanding Special District Service – (Individual)**

This award category recognizes individuals who have contributed substantially to the improvement and successful operation of their special district.

*Four subcategories have been established for this award:*

- Board Member
- Manager (*Nomination must be submitted by the district's board of directors.*)
- Employee (*Nomination must be submitted by the district's manager.*)
- Volunteer

SDAO Board of Directors and SDIS Board of Trustees members are ineligible to be nominated for this award. Winners will be recognized at the 2020 SDAO Awards Banquet in Seaside on February 8<sup>th</sup>.

The nomination form will be sent via email and mail in August. It will also be available on our website at: [www.sdao.com/s4/programs/awards.aspx](http://www.sdao.com/s4/programs/awards.aspx)



# LEGISLATIVE UPDATES

*By: Mark Landauer and Hasina Wittenberg, SDAO Government Affairs*

*Please note: Due to the timing of this newsletter, this article had to be written prior to the adjournment of the session.*



The 80<sup>th</sup> Legislative Assembly is constitutionally required to conclude by June 30<sup>th</sup>. At the beginning of session, leadership set the target date of June 21<sup>st</sup> as their desired date to wrap up the session. Yet, with just a few days left to finish, there remain a number of important high profile issues unresolved.

For a couple of weeks, the Republican minorities of each chamber exerted the few powers available to them in order to get concessions by the super-majority Democratic leadership. The Senate Republicans staged a seven floor session walk-out in protest and to delay a vote on HB 3427 which creates a new corporate activity tax. They agreed to return and vote on the measure when the majority party agreed to no longer pursue a few bills including greater restrictions and requirements on firearms as well as a bill that would have removed non-medical exemptions for immunizations that are required for children to attend school. Republicans also asked that a paid family medical leave measure be passed by the Assembly prior to adjournment. Other demands were ultimately rejected. With the super-majority passage of HB 3427, one of the last remaining revenue questions facing the Assembly was settled.

Some of the remaining high-profile bills that are being considered by the assembly include: HB 2020, a carbon Cap and Trade proposal that has been discussed and debated for years in the assembly. However, with super-majorities in both chambers, it is expected that this legislation will pass prior to the conclusion of this year's session.

Another bill still making its way through the process would provide paid family medical leave to Oregonians. Currently, Oregon requires unpaid family medical leave for employers with 25 or more employees. Leave can be taken for a serious illness, care for a family member who is ill, or bonding with a newborn or newly adopted child. More than half of Oregon workers are eligible for unpaid family and medical leave benefits under the federal Family and Medical Leave Act of 1993 (FMLA) and the Oregon Family Leave Act (OFLA).

HB 2005 creates an insurance program to provide employees with a portion of wages while on family and medical leave or military family leave. It requires the employee to have received at least \$1,000 in wages during base year and to have contributed to the fund in an amount determined by Director of Employment Department to be eligible

for the benefit. The bill directs the Employment Department to set contribution rates, collect payroll contributions and otherwise administer the program.

Under the bill, beginning on January 1, 2022, premiums would begin to be collected and on January 1, 2023 employees could access paid leave. Employers with 25 or more employees will pay 40% of 1% of payroll and employees will be responsible to pay 60% of 1% of payroll. Employers with less than 25 employees will not be required to pay the "employer premium" (40% of 1% of payroll). Furthermore, a cap for premiums is tied to the Social Security tax cap of \$132,900.

Other details permit employees to use accrued paid leave (i.e., vacation leave, sick time) in addition to receiving paid family and medical leave insurance benefits to further supplement their income during the leave. The bill also makes it clear that the passage of the measure does not in any way require any collective bargaining agreements to be reopened.

Other unfinished business includes consideration of a bill to refer a \$2 per pack increase and expansion of the tobacco tax to vaping devices, a bill that will prohibit the use of older diesel powered mid-duty and heavy-duty trucks in the state, and special appropriations and bonding for various programs and projects.

As for bills impacting SDAO members there has been quite a bit of activity in the last two weeks.

HB 2174, a bill to amend the urban renewal statute to give overlapping taxing jurisdictions more say in the types of public building projects has passed the House and is set to be voted on in the Senate. This bill has been introduced as a result of over a year of negotiations between SDAO, the League of Oregon Cities and the Oregon Economic Development Association.

Another bill that has been introduced and defeated in three previous sessions, would have created children's services districts. SB 543 was overwhelmingly passed by the Senate but was defeated on a rare House floor vote of 38-21. We anticipate that the sponsor of the bill will return with a similar proposal again for a fifth time.

HB 3099, which would have permitted cities to withdraw territory of a district into a city unilaterally



and passed by the House, was defeated in the Senate. The bill was introduced by the City of Happy Valley as a result of a dispute with the North Clackamas Parks and Recreation District.

SB 1049, the PERS reform measure, received the bare minimum number of votes to pass the legislature; the Governor has signed the bill. The bill authorizes any proceeds the state generates from sports betting (not yet authorized by the Legislature) to be placed into the Employer Incentive Fund (a matching fund to assist local governments with unfunded actuarial liabilities of more than 200% with a 25% state match); \$100 million in General Fund dollars was also allocated to this account under the bill's provisions. The bill extended the PERS unfunded actuarial amortization rate from 20 to 22 years and institutes a \$195,000 final average salary cap (begins in 2020). On July 1, 2020, (for employees who earn more than \$2,500 per month) 2.5% of

Tier 1 & Tier 2 employees and 0.75% of OPSRP IAP accounts will be redirected to fund PERS unfunded liability. Finally from 2020 to 2024, PERS retirees will be able to work back for PERS employers without limits (the current limit is 1,039 calendar hours in a year); however, employers will be required to make pension payments on those employees to fund PERS unfunded liability (meaning it will be more expensive to rehire PERS retirees than it used to be). Prior to passage of this legislation, employer contribution rates (system wide) were expected to increase by 5.76% (2021-2013 biennium). With the passage of SB 1049 rates are only expected to increase by 0.33% in the same biennium. It is expected that there will be litigation filed challenging several portions of this legislation.

The remaining days will likely result in marathon floor sessions to complete the business before the constitutional June 30<sup>th</sup> Sine Die deadline.

## New Board Members?

Does your district have new board members? Our experienced consultants can help you get them ready for their new role. We offer a wide range of services including board training, meeting and process facilitation, special projects and more. As an SDAO member, your first eight hours of consulting services are **free!** View our brochure at [ref.sdao.com/general/csp-brochure.pdf](http://ref.sdao.com/general/csp-brochure.pdf) or contact Shanta Carter at [scarter@sdao.com](mailto:scarter@sdao.com) for more information.



## Special Districts *Radio Interview*

Prior to the May election, SDAO Executive Director Frank Stratton was interviewed as part of the Willamette Wake Up segment of KМУZ Radio in Salem. He described why special districts are formed and how they operate. If you'd like to listen to the interview, please visit the KМУZ website at <http://bit.ly/2laYAjo>.



Oregon Safety and Health Section

# HONORARY DIRECTOR AWARD

At the Oregon Fire Chiefs Association Spring Conference, SDAO Risk Management Consultant Jason Jantzi was presented with the title of Honorary Director from the Oregon Safety and Health Section. With a foundation as a volunteer and career firefighter, Jason has been an advocate for, and partner in, Oregon firefighter safety and health for many years. Prior to his current position, Jason worked for Oregon OSHA from 1998-2013. He was a Safety Compliance Officer, Public Education Program Coordinator, and the Public Education Manager during his tenure. After fifteen years at Oregon OSHA, SDAO hired Jason and he hit the ground running.

Jason is ever-present in the Oregon fire service. Whether being on site at fire districts, participating in or presenting at trainings and conferences, or attending state-level fire service meetings, Jason is always there for us. The Oregon



Safety and Health Section has found Jason to be an invaluable partner. His consistent presence at our meetings, prompt follow through and support on our activities, and willingness to share his experiences and knowledge with our directors and members shortens our timelines and enhances our decision-making. Jason's involvement with the board and our members, directly

and substantially contributes to our goals of delivering health and wellness programs, responder safety protocols, and risk management practices that improve the lives of first responders and their families.

It is in recognition of Jason's consistent effort, constant enthusiasm, and service-above-self approach, that the Oregon Safety and Health Section's board of directors is honored to confer the title of Honorary Director upon Jason Jantzi.



# SDAO HR Alliance

Have you heard? SDAO now has a network for our members' human resources professionals called the SDAO HR Alliance. We currently have over 75 professionals participating from a wide variety of districts.

**The HR Alliance** provides all participating members a chance to collaborate with others via email using the SDAO HR Alliance listserv. With this listserv, you can send an email out to others who do what you do, day in and day out, for their thoughts and opinions. You can receive quick responses from people who have been in your shoes. Our topics of conversation have ranged from job descriptions, rehire eligibility, ACA, probation extensions, policy samples, recommendations for trainers, performance appraisals, salary schedules and much more.



## The SDAO HR Alliance offers:

**Collaboration** - An opportunity to connect with other HR professionals who work for districts. Pose questions and seek input regarding situations that someone else may have specific experience with.

**Feedback** - Group responses and opportunities for discussion on various topics, including feedback from the SDAO pre-loss department.

**Networking** – Join us for the first **SDAO HR Alliance Roundtable scheduled for September 26<sup>th</sup> in Salem.** The roundtable will provide an excellent networking opportunity, the chance to gather with HR colleagues and build working relationships with other HR specialists who have “been there and done that”.

**SAVE THE DATE**

Thursday, September 26, 2019

**1<sup>ST</sup> HR ALLIANCE  
ROUNDTABLE DISCUSSION**

Chemeketa Community College  
Chemeketa Eola  
215 Doaks Ferry Rd. NW  
Salem, OR 97304

*Details to follow.*  
*To attend, please RSVP to [mharrison@sdao.com](mailto:mharrison@sdao.com)*

This group is for professionals that provide HR services to districts. We know there are many other terrific organizations out there that provide trainings and opportunities that can, and should, be taken advantage of; however, SDAO HR Alliance is an additional resource meant specifically for the members of SDAO to meet their unique needs.

Email SDAO HR Manager Monica Harrison at **[mharrison@sdao.com](mailto:mharrison@sdao.com)** with your name, position, district, mailing address, email address, and phone number to join.

*The SDAO HR Alliance is not intended for obtaining legal advice and will not replace the pre-loss services SDAO offers or any other trainings or resources you have already known and utilized.*



# SDAO Members *in the* news

Find additional news clippings online at [www.sdao.com](http://www.sdao.com) > Newsroom

## DVWD buries time capsule to commemorate 100 years

The Madras Pioneer | 5/1/2019

A standard piece of white water pipe with the letters "DVWD" etched in the side followed by, "open in 2069" was placed in a hole next to the Deschutes Valley Water District office and covered with sand on April 22. Capped on each side and packed full of things important to the company's 100-year history in Jefferson County — including a water meter, photos from throughout the years and an anniversary card written for the openers in 2069 — the capsule was designed to mark the centennial of the district in a tangible way. "This is a good landmark moment to look back on the past 100 years of change and expansion of our district, and in 50 years, we hope there will be another landmark moment, opening this time capsule, and reflecting on the last 50 years," said Ed Pugh, general manager of the district.

Please visit <http://bit.ly/31uFdte> to read more.

## Baby cow born with the help of TVF&R firefighters

KOIN 6 News | 5/1/2019

Tualatin Valley Fire and Rescue firefighters can add a new skill to their resumes -- helping a cow give birth! The firefighters were on their way back from a drill

when they spotted a cow in distress with a farmer by her side. The crews pulled over and quickly realized that the cow was having trouble delivering her calf on her own. For about 15-20 minutes, firefighters worked with the farmer to deliver the calf. The new mother and her calf were resting and waiting for a veterinarian checkup when crews left the farm.

Please visit <http://bit.ly/2F6llxP> to read more.

## Port of Morrow helps transport massive turbine blades

East Oregonian | 4/16/2019

Morrow County is a growing clean energy hub, but on Tuesday it was just one of many links in the chain. Almost 200 massive turbine blades, each 67 meters long, were delivered by rail to the port and unloaded by crane. The blades, the largest in the state of Oregon, will be transported by truck to the Montague Wind Power Facility near Arlington, where they will be used for turbines that will provide 560,000 megawatt-hours of electricity to Apple data centers in Prineville. The port was a key part of the transportation process for the equipment. Arlington couldn't get clearance on the blades because they were too big, but the Port of Morrow had the infrastructure to handle it.

Please visit <http://bit.ly/2Wx5UKl> to read more.



## Stay Connected

Are you receiving emails from us? If not, you are missing out on information important to special districts and updates from the association. Many of our communications are sent via email. For example, our ever-popular SDAO Weekly Update is sent each Friday, only by email. These updates include association announcements, insurance information, upcoming trainings and events, messages from other organizations, and a list of news articles from the week that involved Oregon's special districts.

To stay connected with us, send your name, district, and email address to [memberservices@sdao.com](mailto:memberservices@sdao.com) and we will get you added to our distribution list.

## SDAO Board Member & SDIS Trustee

# Spotlights



*Carl Tappert*, SDAO Board President

**What role do you serve at your special district and how long have you been with them?**

I am the general manager for Rogue Valley Sewer Services (RVSS). I have worked for RVSS since 1998 and became manager in 2011.

**How did you get involved with your special district?**

In 1998, I was working for a small engineering firm in Tillamook County that seemed to be a professional dead-end. We had just lost one of our most promising young engineers and were having difficulty attracting a new one. I looked in the want ads to see what we were competing against and stumbled on an advertisement for an engineering position for a sewer district in Phoenix, Oregon. I had never considered working for a public agency before, but the timing and circumstances were right so I took the position and haven't looked back.

**Why did you seek to join the SDAO Board of Directors?**

As one of the largest sanitary authorities in the state, we have always believed that we should have a significant state-wide presence. Members of our district have been actively involved in SDAO dating back to the late 1970s when SDAO was formed. My predecessor, Chuck Root, held the sanitary seat on the SDAO Board for many years. When he stepped down, he encouraged me to run for the position.

**What excites you most about SDAO?**

Of all the services SDAO offers, I think the one that excites me most is the policy guidance. I've used this to create our personnel and board policies and to keep them updated in compliance with changes in the law.

**How has SDAO helped you or your district?**

Our district has taken advantage of just about every service SDAO offers including insurance, legal services, online training, board assessment, onsite risk management, policy guidance, and background checks.

**Tell us about your life outside of your day job(s).**

My wife Tracy and I recently celebrated our 25th anniversary. Two of our four children have moved out and are going to college (University of Montana and Oregon Tech). Number three is still at home going to community college and number four is still in high school. We have a small rural property south of Ashland where we raise sheep and feed dogs.

## Doug Waugh, SDAO Board Member



### **What role do you serve at your special district and how long have you been with them?**

I have been the Finance Manager at Water Environment Services (formerly Clackamas County Service District No. 1, Tri-City Service District, and Surface Water Management Agency of Clackamas County) for 20 years.

### **Why did you seek to join the SDAO Board of Directors?**

I looked to join the SDAO Board once I got to know the organization and the high-quality services they provide to their membership.

### **What excites you most about SDAO?**

I am most excited about how SDAO truly reaches out to help all districts, especially the smaller ones, with their wide range of services. I'm particularly excited about the consulting services and how SDAO is looking to help districts with temporary leadership or similar support such as budgeting, planning, etc.

### **How has SDAO helped you or your district?**

For us, it has been the excellent insurance-related services. Timely responses, great service, and great customer support.

### **Tell us about your life outside of your day job(s).**

Outside my day job, I love to travel. I want to see as much of the world as I can. I read extensively and enjoy time with my very busy family. Hiking the Columbia Gorge or almost anywhere in Oregon is another great pleasure!

## Stacy Maxwell, SDIS Treasurer

### **What role do you serve at your special district and how long have you been with them?**

I have been with Jackson County Fire District 3 going on 20 years now, in the position as Chief Financial/Administrative Officer.

### **How did you get involved with your special district?**

20 years ago, I made the move from the private sector to public service and have thoroughly enjoyed it ever since.

### **Why did you seek to join the SDIS Board of Trustees?**

I looked at this role as an opportunity to serve further, help other special districts, and expand my knowledge.

### **What excites you most about SDAO?**

The synergy and professionalism of the SDAO team, the depth of knowledge in staff and their willingness to help and ensure that all of us special districts are equipped with the tools and resources needed to flourish in our communities.

### **How has SDAO helped you or your district?**

SDAO has been vital in helping our district with all aspects of services they provide, but most specifically in pre-loss legal and workers' compensation.

### **Tell us about your life outside of your day job(s).**

My husband and I really enjoy traveling, learning new cultures and history, cooking and sharing in food experiences, wine tasting, spending time with family and friends, and when time and energy permit, working on home and landscape projects.



*Providing reasonable, stable rates, and  
broad coverage to Oregon's public entities*

## SDIS Board of Trustees

- Chair:** Andrea Klaas, Port of The Dalles
- Vice Chair:** Ted Kunze, Molalla RFPD #73
- Secretary :** Mark Hokkanen, Tualatin Hills Park & Recreation District
- Treasurer:** Stacy Maxwell, Jackson County Fire District 3
- Trustees:** David Lindelien, Lane Transit District  
Mike Jacobs, Tualatin Valley Water District

## Services

- Background Checks
- Claims Administration
- Drug-Free Workplace
- Management Consulting Services
- On-site Loss Control Consultations
- Pre-Loss Legal Services
- Safety and Security Grant Program
- SDIS Insurance Programs

## Next SDIS Board of Trustees Meeting

September 4, 2019 | 10 a.m. | SDAO Tigard Office



We know that you and your colleagues have been working hard to achieve all of the available credits for this year's Best Practices Program. Now it's time to get those requirements checked off on the survey and submitted for credit!

**Steps to complete the survey:**

- Visit [www.sdao.com](http://www.sdao.com) and sign in
- Click or tap on Insurance Site
- Then, click or tap on Insurance located on the left
- Next, click or tap on Best Practices located on the left
- Click or tap Take Survey
- Once in the survey, check all of the applicable boxes. After you have completed, click or tap **Save** at the top right of the screen.

After you select Save, our underwriters have your survey. The best part is, if you complete more credits you can come back and edit the survey all the way until the **November 1<sup>st</sup> deadline**.

Don't procrastinate! Your district can't receive any credit for your hard work unless the Best Practices Survey is filled out and submitted (saved) on the Insurance Site.

For more information about the Best Practices Program, please visit [www.sdao.com/S4/Programs/bestpractices.aspx](http://www.sdao.com/S4/Programs/bestpractices.aspx).

If you have any questions, please contact Jaime Keeling at [jkeeling@sdao.com](mailto:jkeeling@sdao.com) or 800-285-5461.



**S | D | I | S**  
SPECIAL DISTRICTS  
INSURANCE SERVICES

2019  
**Best Practices  
Program**  
*Survey Open!*

*Deadline: November 1, 2019*





# EFFECTIVE HIRING

Hiring the right person for the job does not come naturally to everyone, not even to the most accomplished HR professional and recruiter. Without the right team, the leader is powerless. So what can you do to increase the odds that your hiring is effective?

## Hire for Character, Alignment, and Competence.

Functional skills and experience constitute "**Competence**," which is the easiest to screen for and is often the sole criterion upon which candidates are chosen. Yet failure in the job is rarely based on a lack of competence. It is usually because of the other two criteria. "**Character**" refers to work ethic, professional honesty, absence of hidden agendas, the courage to speak up, and enough humility to admit when one does not have all the answers. It is also a part of effective leadership, insofar as the latter requires respect for others and a strong drive to help them learn and grow. Determining "**Alignment**" requires first being clear on the culture of the organization and assessing each candidate's work style and priorities.

## Look for Achievement Motivation.

David McClelland of Harvard claimed there are three motivational factors impacting leadership: **Achievement, Affiliation, and Power**. All people have all three in varying degrees. McClelland's studies showed that for the most effective leaders, **Achievement** which is (the desire to accomplish tasks and achieve goals, was their strongest driver, with **Affiliation**, or concern for people, the next highest. Leaders for whom **Affiliation** is the highest factor tend to be overly concerned with being liked and consequently have difficulty making tough decisions. They often end up being neither respected nor liked. **Power** motivation often shows itself as excessive concern with status symbols and trappings of

power, including very high compensation and control of others. Ask yourself, how much relative emphasis does a candidate's resume place on  
a) accomplishments, i.e., bottom line results;  
b) affiliations with positions and employers; or  
c) titles, promotions, degrees and honors?



## Hone Your Interviewing Skills.

Interviews are the most widely used screening method, yet are shown by studies to be the least reliable. The reason? Most interviewers have not acquired the needed skills. This is akin to a mortgage loan underwriter having no skills in assessing credit worthiness. Many interviewers spend most of the time **selling the candidate** on the organization. The goal is to probe and learn.

## The Purpose of the Interview—

primarily to obtain information and secondarily to provide it. It is also the time to begin building a relationship. We need to be asking “Can they do the job? Will they do the job? Are they in alignment with our organization?” Interviewers should seek specifics. We need to ask good questions that not every other employer is asking. However, more importantly you need to know what is a good answer for your organization. There are plenty of good behavioral questions to ask and we need to look for the answer given to have a specific situation, a task, an action taken (behavior), and a result or outcome. Unfortunately, there are some who are great at interviewing and

may very well land the job but may not be the best at doing the job!

## Don't Hire in Desperation.

Look for enthusiasm and commitment. If you are just hiring a body, you get what you paid for. Fast-tracking your process or decision-making can also lead to disaster. Hiring should be strategic, so hire for today and for tomorrow. Be prompt, but don't rush so that you skip steps and don't do your due diligence.

## Compare Notes from Multiple Interviews.

Organizations frequently request that many people individually interview candidates, but then fail to compare notes afterwards. While it is reasonable to expect that any individual interviewer will mention any “red flags” without being asked, it is the joint evaluation process of all interview results that can be the most revealing. One interviewer's gut feeling can be confirmed or disconfirmed by a more specific observation made by another.



## When Employees Leave, Find Out Why.

Many people are surprisingly candid in exit interviews, if only they are asked why they decided to leave. Insight into these factors will help you do a better job of screening candidates and reducing turnover.

*Article by HR Answers*

# We Received a BOLI Complaint. *Now What?*

By Jens Jensen, PC Claims Manager

Employment practices litigation, or EPL, is one of the largest exposures that members of the SDIS Trust face. Many employment claims are either brought in Federal Court or make allegations of violations of federal statutes. While our members currently have monetary cap protections for state tort claims presented, these same caps do not apply to the federal statutes. Basically, this means that a jury can award whatever they want in a verdict at trial – even if the district has done nothing wrong. EPL cases are expensive to defend and even if we win the case, we aren't reimbursed our defense costs.



Most all employment cases start with a Bureau of Labor and Industry (BOLI) or its federal counterpart, an Equal Employment Opportunity Commission (EEOC) complaint. Both commissions will investigate the allegations made by the complainant. The responses you provide in the investigation are critical because the commissions often render a determination based on the investigation. Typically, the commissions will either find evidence to substantiate the allegations or have no findings. If there is a finding, the complainant will get to present that information at trial, whereas we don't normally get to let the jury know that there was no finding of discrimination or violation.

Therefore, the responses to these complaints are a critical first step in the successful defense of an EPL case. This is also why the Trust has elected to provide your district with an attorney to help respond to the BOLI or EEOC complaint. It doesn't guarantee a "no finding" but ensures we put the best foot forward. If you receive a BOLI or EEOC complaint, please contact the claims office ([claims@sdao.com](mailto:claims@sdao.com)) as soon as possible so we can provide the best assistance.



## New Regence ID Cards *Coming Soon!*

All members enrolled in the SDIS health plan will be receiving a new Regence identification card in the mail. After discussing member feedback regarding our vision coverage, the SDIS Board of Trustees approved switching back to Regence as the vision carrier and no longer working with VSP as of July 1, 2019. Your new card will reflect this change, and your ID number will remain the same. With this change in vision coverage, you can see any vision provider you like!

### ***More Benefit Plan Enhancements and Coverage Reminders***

- There will be no member cost-share for using an in-network provider for colonoscopy screenings.
- SDIS will continue to cover the cost of telehealth visits which means you can use MDLive at no cost.
- Out-of-pocket maximum adjustments will take effect for members on January 1, 2020.

If you have any questions, please contact Shelly Barker at [sbarker@sdao.com](mailto:sbarker@sdao.com) or 800-285-5461.







# Public Safety EAP Update

Thank you to the districts who returned their enrollment forms for the Public Safety Employee Assistance Program (EAP)! Beginning July 1<sup>st</sup>, we will be adding 1,300 volunteers and administrative staff to the program. Due to the generosity of 19 of our member districts, we will be able to fund all requests of districts that wanted to add volunteers and administrative staff but did not have the funds to do so. We are excited to be able to offer this valuable program to all districts that would like to participate.

*Thank you to the following districts for their generous donations!*

**Chiloquin-Agency Lake R.F.P.D.**

**Coburg Fire District**

**Columbia 911 Communications District**

**Crescent R.F.P.D.**

**Crook County Fire and Rescue**

**Jackson County Fire District #5**

**Keno R.F.P.D.**

**Lyons R.F.P.D.**

**Mist-Birkenfeld R.F.P.D.**

**Monroe R.F.P.D.**

**North Gilliam County Health District**

**North Lincoln Fire & Rescue District #1**

**Philomath Fire and Rescue**

**Pleasant Hill Goshen Fire & Rescue**

**Polk County Fire District #1**

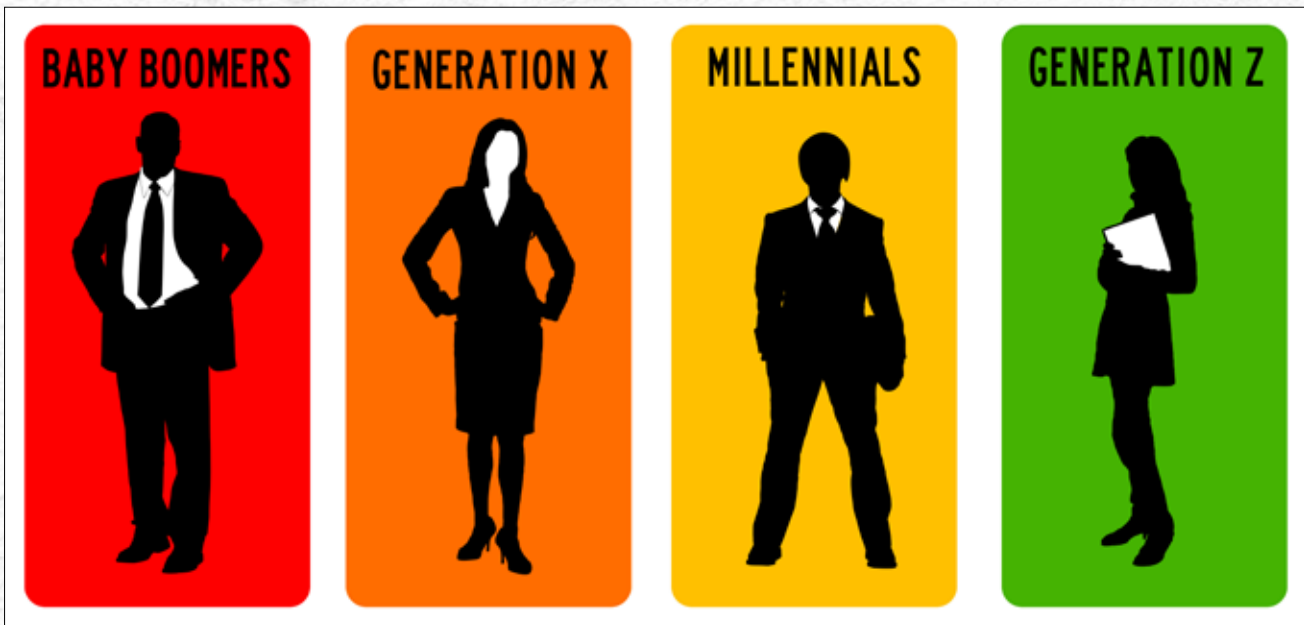
**Scappoose R.F.P.D.**

**Silverton R.F.P.D. No. 2**

**Tillamook County Emergency Communications District**

**Umatilla R.F.P.D. #7-405**

Your EAP can help. Please call 888-327-1060 or visit [www.PublicSafetyEAP.com](http://www.PublicSafetyEAP.com) at any time for assistance.



# My Generation

By: Brian Wolf, SDAO Risk Management Consultant

When it comes to longevity in the modern workplace, 60 is now the new 40. We're living longer and working longer—either by choice or necessity (it's hard to finance a 30-year retirement with a 40-year career). The fastest-growing age demographic of employees in the workplace is 65 and older, which has experienced a 35% jump over the past half-decade. While 60 may be the new 40 physically in the workplace these days, 30 is the new 50 regarding which generation now grasps the reins of power. Nearly 40% of Americans report to a younger boss today, and this will become the majority by 2025.

In the summer of 2015, I retired into Oregon's PERS system after a 37-year career in public education and entered the private workplace as a Risk Management Consultant for Special Districts Association of Oregon (SDAO). I was a 60-year-old "Baby Boomer" at the time and eagerly seeking a healthy change of pace, although not without some degree of fear and trepidation.

As an outgoing school district superintendent, I had grown somewhat accustomed to the responsibilities and privileges of rank. Now, I would be laboring under the direct supervision of 40-something "whippersnappers" who were young enough to be my own progeny. However, as it turned out, those worries proved to be groundless. I am blessed to be governed at SDAO by "Generation X" bosses who treat me with kindness and respect and who sincerely treasure the skills and experiences I bring to the organization. Thankfully, my "Millennial" workplace colleagues have graciously accepted me into the fold as well.

Now that we have four generations actively engaged in the workplace, some would prefer to view this as a generational war. I beg to differ. My personal experiences over the past four years have convinced me that a mutually beneficial relationship between generations can be created – like an intergenerational potluck – to help take organizations to even great heights.

## HOW CAN OLDER WORKERS ADAPT TO THE MODERN WORKPLACE?

**Evolve** - Strategically edit your historical knowledge and work identity. Find creative ways to integrate your own unique set of skills and experiences into your new organization. Be willing to change and adapt, even (or especially) if it means cutting your ego down to size. Remember, you're not trying to prove yourself—you're trying to *improve* yourself with a growth mind-set.

**Learn** - Recognize your limitations and strive to improve upon them. This will be particularly important if you are pursuing a new and different career track late in life. Be the most curious person in the room. Ask questions that require more than a simple "yes" or "no" answer to help spark meaningful dialogue and promote big picture thinking

**Collaborate** - Work is a team sport. We may lionize brilliant, individual, tech-savvy "whiz kids" but "seasoned citizens" can foster "invisible productivity" by using their wealth of life-experience to help teams and individuals avoid common pitfalls and achieve greater success.

**Counsel** - If you've taken these first three steps, you may find younger colleagues seeking out your mentorship. However, you may also be pleasantly surprised to discover that you have just as much to learn from them as they do from you.

## WHAT CAN ORGANIZATIONS DO TO SUPPORT HEALTHY GENERATIONAL DIVERSITY?

### Value wisdom as much as you do disruption.

Spread the wealth. Find ways to integrate those bearers of institutional wisdom throughout the various departments and levels of your organization. There may be a few awkward growing pains along the way, but the potential for positive disruption is worth well the effort.

### Think of age as an essential element of diversity.

Honoring the strengths and benefits that your senior employees bring to the table can help their

younger co-workers to accurately perceive them as an asset rather than a liability.

### Encourage mutual mentorship.

Look for ways to connect people across generations. Informal late-night elbow-bending sessions can be problematic for older workers, many of whom particularly cherish a good night's sleep, and shouldn't be the only cross-cultural means of connecting with one another. Daily group wellness walks or workday outings, for example, can be excellent means of building healthy intergenerational relationships.

### Rethink retirement.

In his farewell address to Congress on April 18, 1951, General Douglas MacArthur famously remarked that "*old soldiers never die; they just fade away.*" Many organizations view their staff members over 50 years of age to be on a steady downward glide path toward retirement when, in fact, most older employees would prefer to continue working into their golden years. Eighty percent of HR directors voice support for retaining employees past age 65, but only 30% of their organizations offer a viable part-time option for senior personnel who would relish an opportunity to phase out over time. Flexible work schedules and duties can help to keep your highly esteemed "*historians*" fresh and productive well past their perceived expiration date.

In a 1948 speech to the House of Commons, British Prime Minister Winston Churchill opined that, "*Those who fail to learn from history are condemned to repeat it.*" The costliest error in judgment fledgling managers can make is to ignore the value of experience and instead learn the painful lessons of their own, otherwise avoidable, youthful indiscretions. Nurturing an inclusive workplace where older workers can freely share their wisdom while also learning from their younger colleagues is good for all parties involved, including the organization itself – and for society at large as well.





**GOVERNMENT AFFAIRS**

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**UNDERWRITING**

Toll-Free: 800-285-5461

Email: [underwriting@sdao.com](mailto:underwriting@sdao.com)

Fax: 503-371-4781

**REPORT AN SDIS WC CLAIM**

Toll-Free: 800-305-1736

Email: [wc@sdao.com](mailto:wc@sdao.com)

Fax: 503-620-6217

**CONTACT SDAO**

*Administrators for SDIS*

Toll-Free: 800-285-5461

**MEMBER SERVICES**

Toll-Free: 800-285-5461

Email: [memberservices@sdao.com](mailto:memberservices@sdao.com)

Fax: 503-371-4781

**RISK MANAGEMENT**

Toll-Free: 800-285-5461

Email: [riskmanagement@sdao.com](mailto:riskmanagement@sdao.com)

Fax: 503-371-4781

**REPORT AN SDIS P/C CLAIM**

Toll-Free: 800-305-1736

Email: [claims@sdao.com](mailto:claims@sdao.com)

Fax: 503-620-9817

# MEMBER CALENDAR

- July 3 | First Thursday (Wednesday) Webinar: De-Escalation Training
- July 4 | ***SDAO Offices Closed***
- Aug. 6 | Board of Directors and Management Staff Training – ***Tigard***
- Aug. 7 | Board of Directors and Management Staff Training – ***Newport***
- Aug. 8 | Risk Management Forum – ***John Day***
- Aug. 13 | Board of Directors and Management Staff Training – ***Redmond***
- Aug. 21 | Board of Directors and Management Staff Training – ***Medford***
- Aug. 21 | Low Pressure Boiler Training – ***Bend***
- Aug. 22 | Board of Directors and Management Staff Training – ***Cottage Grove***
- Sept. 2 | ***SDAO Offices Closed***
- Sept. 4 | SDIS Board of Trustees Meeting – ***Tigard***
- Sept. 12 | SDAO Board of Directors Meeting – ***Salem***
- Sept. 13 | SDAO Member Scholarship Golf Tournament – ***Newberg***