

Round 3: Application Form

Local Government Innovation Fund

Step One: Fill out this Application Form in its entirety.

Step Two: Fill out the online submission form and submit your application materials. All supplemental application materials should be combined into one file for submission.

LGIF: Applicant Profile

Lead Applicant	
Project Name	
Type of Request	
Funding Request	
JobsOhio Region	
Number of Collaborative Partners	

Office of Redevelopment

Website: <http://development.ohio.gov/Urban/LGIF.htm>

Email: LGIF@development.ohio.gov

Phone: 614 | 995 2292

Lead Applicant		Round 3	
Project Name		Type of Request	

Lead Applicant				
Mailing Address:	Address Line 1			
	Address Line 2			
	City	State	Zip Code	
City, Township or Village			Population (2010)	
County			Population (2010)	
Did the lead applicant provide a resolution of support?		Yes (Attached)	No (In Process)	

Project Contact				
Complete the section below with information for the individual to be contacted on matters involving this application.				
	Project Contact		Title	
Mailing Address:	Address Line 1			
	Address Line 2			
	City	State	Zip Code	
Email Address			Phone Number	

Fiscal Officer				
Complete the section below with information for the entity and individual serving as the fiscal agent for the project.				
	Fiscal Officer		Title	
Mailing Address:	Address Line 1			
	Address Line 2			
	City	State	Zip Code	
Email Address			Phone Number	
Is your organization registered in OAKS as a vendor?		Yes	No	

Section 1
Contacts

Lead Applicant		Round 3	
Project Name		Type of	

Single Applicant		
Is your organization applying as a single entity?	Yes	No
Participating Entity: (1 point) for single applicants		

Collaborative Partners		
Does the proposal involve other entities acting as collaborative partners?	Yes	No
<p>Applicants applying with a collaborative partner are required to show proof of the partnership with a partnership agreement signed by each partner and resolutions of support from the governing entities. If the collaborative partner does not have a governing entity, a letter of support from the partnering organization is sufficient. Include these documents in the supporting documents section of the application.</p> <p>In the section below, applicants are required to identify population information and the nature of the partnership.</p> <p>Each collaborative partner should also be clearly and separately identified on pages 4-5.</p>		
Number of Collaborative Partners who signed the partnership agreement, and provided resolutions of support.		
Participating Entity: (5 points) allocated to projects with collaborative partners.		

Population		
The applicant is required to provide information from the 2010 U.S. Census information, available at: http://factfinder2.census.gov/		
Does the applicant (or collaborative partner) represent a city, township or village with a population of less than 20,000 residents?	Yes	No
	List Entity	
	Municipality/Township	Population
Does the applicant (or collaborative partner) represent a county with a population of less than 235,000 residents?	Yes	No
	List Entity	
	County	Population
Population: (3-5 points) determined by the smallest population listed in the application. Applications from (or collaborating with) small communities are preferred.		

Section 2 Collaborative Partners

Lead Applicant		Round 3	
Project Name		Type of Request	

Nature of Partnership (2000 character limit)

As agreed upon in the partnership agreement, please identify the nature of the partnership, and explain how the main applicant and the partners will work together on the proposed project.

Section 2
Collaborative Partners

List of Partners

The applicant applying with collaborative partners (defined in §1.03 of the LGIF Policies) must include the following information for each applicant:

- **Name of collaborative partners**
- **Contact Information**
- **Population data (derived from the 2010 U.S. Census)**

If the project involves more than 12 collaborative partners, additional forms are available on the LGIF website.

Lead Applicant		Round 3		
Project Name		Type of Request		

Collaborative Partners					
Number 1					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 2					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 3					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 4					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Section 2 Collaborative Partners

Lead Applicant		Round 3		
Project Name		Type of Request		

Collaborative Partners					
Number 5					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 6					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 7					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 8					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	

Section 2 Collaborative Partners

Lead Applicant		Round 3		
Project Name		Type of Request		

Collaborative Partners					
Number 9					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 10					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 11					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Collaborative Partners					
Number 12					
Address Line 1		Population			
Address Line 2		Municipality /Township		Population	
City	State	Zip Code	County	Population	
Email Address		Phone Number			
Resolution of Support		Signed Agreement		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Section 2 Collaborative Partners

Lead Applicant		Round 3	
Project Name		Type of Request	

Identification of the Type of Award	
Targeted Approach	

Project Description (4000 character limit)

Please provide a general description of the project. The information provided will be used for council briefings, program, and marketing materials.

Section 3
Project Information

Lead Applicant		Round 3	
Project Name		Type of Request	

Past Success	Yes	No
Past Success (5 points)		
Provide a summary of past efforts to implement a project to improve efficiency, implement shared services, coproduction, or a merger. (1000 character limit)		

Scalable/Replicable Proposal	Scalable	Replicable	Both
Scalable/Replicable (10 points)			
Provide a summary of how the applicant's proposal can be replicated by other local governments or scaled for the inclusion of other local governments. (1000 character limit)			

Section 3
Project Information

Probability of Success	Yes	No
Probability of Success (5 points)		
Provide a summary of the likelihood of the grant study recommendations being implemented. Applicants requesting a loan should provide a summary of the probability of savings from the loan request. (1000 character limit)		

Lead Applicant		Round 3	
Project Name		Type of Request	

Performance Audit Implementation/Cost Benchmarking	Yes	No
Performance Audit/Benchmarking (5 points)		
<p>If the project is the result of recommendations from a performance audit provided by the Auditor of State under Chapter 117 of the Ohio Revised Code or a cost benchmarking study, please attach a copy with the supporting documents. In the section below, provide a summary of the performance audit or cost benchmarking study. (1000 character limit)</p>		

Economic Impact	Yes	No
Economic Impact (5 points)		
<p>Provide a summary of how the proposal will promote a business environment (through a private business relationship) and/or provide for community attraction. (1000 character limit)</p>		

Section 3
Project Information

Response to Economic Demand	Yes	No
Response to Economic Demand (5 points)		
<p>Provide a summary of how the project responds to substantial changes in economic demand for local or regional government services. The narrative should include a description of the current service level. (1000 character limit)</p>		

Budget Information

General Instructions

- Both the Project Budget and Program Budgets are required to be filled out in this form.
- Consolidate budget information to fit in the form. Additional budget detail may be provided in the budget narrative or in an attachment in Section 5: Supplemental Information.

Project Budget:

- The Project Budget justification must be explained in the Project Budget Narrative section of the application. This section is also used to explain the reasoning behind any items on the budget that are not self explanatory, and provide additional detail about project expenses.
- The Project Budget should be for the period that covers the entire project. The look-back period for in-kind contributions is two (2) years. These contributions are considered a part of the total project costs.
- For the Project Budget, indicate which entity and revenue source will be used to fund each expense. This information will be used to help determine eligible project expenses.
- Please provide documentation of all in-kind match contributions in the supporting documents section. For future in-kind match contributions, supporting documentation will be provided at a later date.

Program Budget:

- Six (6) years of Program Budgets should be provided. The standard submission should include three years previous budgets (actual), and three years of projections including implementation of the proposed project. A second set of three years of projections (one set including implementation of this program, and one set where no shared services occurred) may be provided in lieu of three years previous if this does not apply to the proposed project.
- Please use the Program Budget Narrative section to explain any unusual activities or expenses, and to defend the budget projections. If the budget requires the combining of costs on the budget template, please explain this in the narrative.

Return on Investment:

- A Return on Investment calculation is required, and should reference cost savings, cost avoidance and/or increased revenues indicated in the budget projection sections of the application. Use the space designated for narrative to justify this calculation, using references when appropriate.

For Loan Applications only:

- Using the space provided, outline a loan repayment structure.
- Attach three years prior financial documents related to the financial health of the lead applicant (balance sheet, income statement, and a statement of cash flows).

Lead Applicant		Round 3	
Project Name		Type of Request	

Project Budget

Sources of Funds

LGIF Request:

Cash Match (List Sources Below):

Source:	<input style="width: 95%; height: 20px;" type="text"/>
Source:	<input style="width: 95%; height: 20px;" type="text"/>
Source:	<input style="width: 95%; height: 20px;" type="text"/>
Source:	<input style="width: 95%; height: 20px;" type="text"/>

In-Kind Match (List Sources Below):

Source:	<input style="width: 95%; height: 20px;" type="text"/>
Source:	<input style="width: 95%; height: 20px;" type="text"/>
Source:	<input style="width: 95%; height: 20px;" type="text"/>

Total Match:
Total Sources:

Uses of Funds

	<u>Amount</u>	<u>Revenue Source</u>
Consultant Fees:	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Legal Fees:	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Other: <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Other: <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Other: <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Other: <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Other: <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Other: <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Other: <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>

Total Uses:
Local Match Percentage:

* Please note that this match percentage will be included in your grant/loan agreement and cannot be changed after awards are made.

Local Match Percentage = (Match Amount/Project Cost) * 100 (10% match required)
10-39.99% (1 point) 40-69.99% (3 points) 70% or greater (5 points)

Project Budget Narrative: Use this space to justify expenses (1200 character max).

Section 4 Financial Information

Lead Applicant		Round 3
Project Name		Type of Request

Program Budget

Actual ___ Projected ___	FY _____	FY _____	FY _____
Expenses	Amount	Amount	Amount
Salary and Benefits			
Contract Services			
Occupancy (rent, utilities, maintenance)			
Training and Professional Development			
Insurance			
Travel			
Capital and Equipment Expenses			
Supplies, Printing, Copying, and Postage			
Evaluation			
Marketing			
Conferences, meetings, etc.			
Administration			
*Other - _____			
*Other - _____			
*Other - _____			
TOTAL EXPENSES			
Revenues	Revenues	Revenues	Revenues
Contributions, Gifts, Grants, and Earned Revenue			
Local Government: _____			
Local Government: _____			
Local Government: _____			
State Government			
Federal Government			
*Other - _____			
*Other - _____			
*Other - _____			
Membership Income			
Program Service Fees			
Investment Income			
TOTAL REVENUES			

Lead Applicant		Round 3	
Project Name		Type of Request	

Program Budget

Actual ___ Projected ___	FY _____	FY _____	FY _____
Expenses	Amount	Amount	Amount
Salary and Benefits			
Contract Services			
Occupancy (rent, utilities, maintenance)			
Training and Professional Development			
Insurance			
Travel			
Capital and Equipment Expenses			
Supplies, Printing, Copying, and Postage			
Evaluation			
Marketing			
Conferences, meetings, etc.			
Administration			
*Other - _____			
*Other - _____			
*Other - _____			
TOTAL EXPENSES			
Revenues	Revenues	Revenues	Revenues
Contributions, Gifts, Grants, and Earned Revenue			
<i>Local Government:</i> _____			
<i>Local Government:</i> _____			
<i>Local Government:</i> _____			
<i>State Government</i>			
<i>Federal Government</i>			
*Other - _____			
*Other - _____			
*Other - _____			
<i>Membership Income</i>			
<i>Program Service Fees</i>			
<i>Investment Income</i>			
TOTAL REVENUES			

Lead Applicant		Round 3
Project Name		Type of Request

Program Budget

Use this space to justify the program budget and/or explain any unusual revenues or expenses (6000 characters max).

Section 4: Financial Information Scoring

- (5 points) Applicant provided complete and accurate budget information and narrative justification for a total of six fiscal years.
- (3 points) Applicant provided complete and accurate budget information and for at least three fiscal years.
- (1 point) Applicant provided complete and accurate budget information for less than three fiscal years.

Lead Applicant		Round 3	
Project Name		Type of Request	

Return On Investment

Return on Investment is a performance measure used to evaluate the efficiency of an investment. To derive the expected return on investment, divide the net gains of the project by the net costs. For these calculations, please use the implementation gains and costs, NOT the project costs (the cost of the feasibility, planning, or management study)--unless the results of this study will lead to direct savings without additional implementation costs. The gains from this project should be derived from the prior and future program budgets provided, and should be justified in the return on investment narrative.

Return on Investment Formulas:

Consider the following questions when determining the appropriate ROI formula for the project. Check the box of the formula used to determine the ROI for the project. These numbers should refer to savings/revenues illustrated in projected budgets.

Do you expect cost savings from efficiency from the project?

Use this formula:
$$\frac{\text{Total \$ Saved}}{\text{Total Program Costs}} * 100 = \text{ROI}$$

Do you expect cost avoidance from the implementation of the project/program?

Use this formula:
$$\frac{\text{Total Cost Avoided}}{\text{Total Program Costs}} * 100 = \text{ROI}$$

Do you expect increased revenues as a result of the project/program?

Use this formula:
$$\frac{\text{Total New Revenue}}{\text{Total Program Costs}} * 100 = \text{ROI}$$

Expected Return on Investment = _____ * 100 = _____

Return on Investment Justification Narrative: In the space below, briefly describe the nature of the expected return on investment, using references when appropriate. (1300 character limit)

Expected Return on Investment is:

Less than 25% (10 points)
25%-74.99% (20 points)
Greater than 75% (30 points)

Questions about how to calculate ROI? Please contact the Office of Redevelopment at 614-995-2292 or lgif@development.ohio.gov

Section 4
Financial Information

Lead Applicant		Round 3	
Project Name		Type of Request	

Loan Repayment Structure

Please outline the preferred loan repayment structure. At a minimum, please include the following: the entities responsible for repayment of the loan, all parties responsible for providing match amounts, and an alternative funding source (in lieu of collateral). Applicants will have two years to complete the project upon execution of the loan agreement, and the repayment period will begin upon the final disbursement of the loan funds. A description of expected savings over the term of the loan may be used as a repayment source.

Section 4
Financial Information

Applicant demonstrates a viable repayment source to support loan award. Secondary source can be in the form of a debt reserve, bank participation, a guarantee from a local entity, or other collateral (i.e. emergency, rainy day, or contingency fund, etc).

Applicant clearly demonstrates a secondary repayment source (5 points)	Applicant does not have a secondary repayment source (0 points)
--	---

Lead Applicant		Round 3	
Project Name		Type of Request	

Scoring Overview

Section 1: Collaborative Measures

Collaborative Measures	Description	Max Points		Applicant Self Score
Population	Applicant's population (or the population of the area(s) served) falls within one of the listed categories as determined by the U.S. Census Bureau. Population scoring will be determined by the smallest population listed in the application. Applications from (or collaborating with) small communities are preferred.	5		
Participating Entities	Applicant has executed partnership agreements outlining all collaborative partners and participation agreements and has resolutions of support. (Note: Sole applicants only need to provide a resolution of support from its governing entity.	5		

Section 2: Success Measures

Past Success	Applicant has successfully implemented, or is following project guidance from a shared services model, for an efficiency, shared service, coproduction or merger project in the past.	5		
Scalable/Replicable Proposal	Applicant's proposal can be replicated by other local governments or scaled for the inclusion of other local governments.	10		
Probability of Success	Applicant provides a documented need for the project and clearly outlines the likelihood of the need being met.	5		

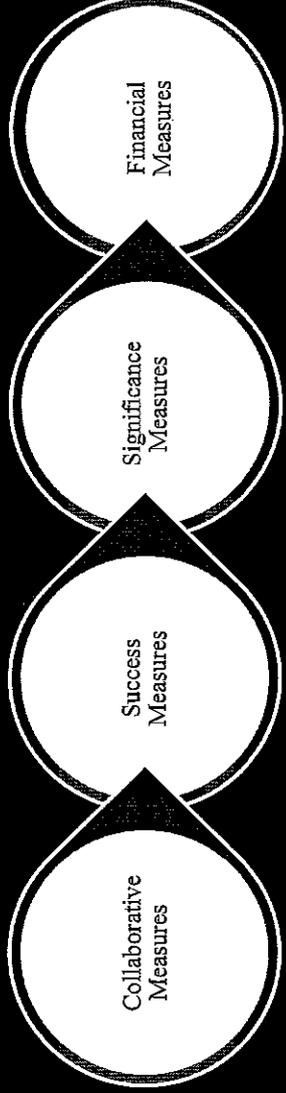
Section 3: Significance Measures

Performance Audit Implementation/Cost Benchmarking	The project implements a single recommendation from a performance audit provided by the Auditor of State under Chapter 117 of the Ohio Revised Code or is informed by cost benchmarking.	5		
Economic Impact	Applicant demonstrates the project will a promote business environment (i.e., demonstrates a business relationship resulting from the project) and will provide for community attraction (i.e., cost avoidance with respect to taxes)	5		
Response to Economic Demand	The project responds to current substantial changes in economic demand for local or regional government services.	5		

Section 4: Financial Measures

Financial Information	Applicant includes financial information (i.e., service related operating budgets) for the most recent three years and the three year period following the project. The financial information must be directly related to the scope of the project and will be used as the cost basis for determining any savings resulting from the project.	5		
Local Match	Percentage of local matching funds being contributed to the project. This may include in-kind contributions.	5		
Expected Return	Applicant demonstrates as a percentage of savings (i.e., actual savings, increased revenue, or cost avoidance) an expected return. The return must be derived from the applicant's cost basis.	30		
Repayment Structure (Loan Only)	Applicant demonstrates a viable repayment source to support loan award. Secondary source can be in the form of a debt reserve, bank participation, a guarantee from a local entity, or other collateral (i.e., emergency fund, rainy day fund, contingency fund, etc.).	5		

Total Points



Round 3: Application Form

Local Government Innovation Fund

Step One: Fill out this Application Form in its entirety.

Step Two: Fill out the online submission form and submit your application materials. All supplemental application materials should be combined into one file for submission.

LGIF: Applicant Profile	
Lead Applicant	Municipality of Carlisle
Project Name	Impact study of the Joint Emergency Services District Fire/EMS Consol ⁺
Type of Request	Grant
Funding Request	\$58,500
JobsOhio Region	Southwest
Number of Collaborative Partners	2

Office of Redevelopment

Website: <http://development.ohio.gov/Urban/LGIF.htm>

Email: LGIF@development.ohio.gov

Phone: 614 | 995 2292

Lead Applicant	Municipality of Carlisle	Round 3	
Project Name	Impact study of the Joint Emergency Services District Fire/EMS Consolidation Feasibility Study	Type of Request	Grant

Lead Applicant

Address Line 1	760 W Central Ave		
Address Line 2			
City	Carlisle	State	Oh
		Zip Code	45005
City, Township or Village	Village	Population (2010)	4,917
County	Warren	Population (2010)	212,693
Did the lead applicant provide a resolution of support?	<input checked="" type="checkbox"/> Yes (Attached) <input type="checkbox"/> No (In Process)		

Project Contact

Complete the section below with information for the individual to be contacted on matters involving this application.

Project Contact	Greg Wallace		Title	Director of Planning Zoning
Address Line 1	760 W Central Ave			
Address Line 2				
City	Carlisle	State	oh	Zip Code
				45005
Email Address	gwallace@carlisleoh.org		Phone Number	(937) 746-7809

Section 1	Contacts
-----------	----------

Fiscal Officer

Complete the section below with information for the entity and individual serving as the fiscal agent for the project.

Fiscal Officer	Julie Duffy		Title	Finance Director
Address Line 1	760 W Central Ave			
Address Line 2				
City	Carlisle	State	oh	Zip Code
				45005
Email Address	jduffy@carlisleoh.org		Phone Number	(937) 746-0555
Is your organization registered in OAKS as a vendor?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			

Lead Applicant	Municipality of Carlisle	Round 3
Project Name	Impact Study of the Joint Emergency Services District Fire/EMS Consultation Feasibility Study	Type of Grant

Single Applicant

Is your organization applying as a single entity? Yes No

Participating Entity: (1 point) for single applicants **1**

Collaborative Partners

Does the proposal involve other entities acting as collaborative partners? Yes No

Applicants applying with a collaborative partner are required to show proof of the partnership with a partnership agreement signed by each partner and resolutions of support from the governing entities. If the collaborative partner does not have a governing entity, a letter of support from the partnering organization is sufficient. Include these documents in the supporting documents section of the application.

In the section below, applicants are required to identify population information and the nature of the partnership.

Each collaborative partner should also be clearly and separately identified on pages 4-5.

Number of Collaborative Partners who signed the partnership agreement, and provided resolutions of support **1**

Participating Entity: (5 points) allocated to projects with collaborative partners. **5**

Population

The applicant is required to provide information from the 2010 U.S. Census information, available at: <http://factfinder2.census.gov/>

Does the applicant (or collaborative partner) represent a city, township or village with a population of less than 20,000 residents? Yes No

Does the applicant (or collaborative partner) represent a county with a population of less than 25,000 residents? Yes No

Population: (3-5 points) determined by the smallest population listed in the application. Applications from (or collaborating with) small communities are preferred. **5**

Municipality/Township	Population
Carlisle	4,917
County	Population
Warren	212,692

Lead Applicant	Municipality of Carlisle	Round 3
Project Name	Impact study of the Joint Emergency Services District Fire/EMS Consolidation Feasibility Study	Grant
		Type of Request

Nature of Partnership (2000 character limit)

As agreed upon in the partnership agreement, please identify the nature of the partnership, and explain how the main applicant and the partners will work together on the proposed project.

The Municipality of Carlisle and Franklin Township will join together to participate in a feasibility study to look at the possibility of a collaborative effort in providing fire and EMS services to the Municipality and the unincorporated areas of Franklin township. Currently the areas are serviced by two volunteer fire departments and JEMS a joint ambulance district that provides EMS. JEMS is presently made up of Carlisle Franklin Township and City of Franklin. In 2013 the City of Franklin is removing itself from the Joint District leaving only Carlisle and Franklin Township. We are joining together to look at the impact that Franklin City will have on the District

List of Partners

The applicant applying with collaborative partners (defined in §1.03 of the LGIF Policies) must include the following information for each applicant:

- Name of collaborative partners
- Contact Information
- Population data (derived from the 2010 U.S. Census)

If the project involves more than 12 collaborative partners, additional forms are available on the LGIF website.

Lead Applicant	Municipality of Carlisle	Round 3
Project Name	Impact study of the Joint Emergency Services District FireEMS Consolidation Feasibility Study	Type of Request
		Grant

Collaborative Partners Number 1	Franklin Township	Population	
Address Line 1	418 Fairview	Franklin Township	30,312
Address Line 2			
City	Carlisle, Ohio	Warren	212,692
Email Address	Traci.Stivers@cinci.rr.com		
Resolution of Support	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Signed Agreement	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Collaborative Partners Number 2		Population	
Address Line 1			
Address Line 2			
City			
Email Address			
Resolution of Support	<input type="checkbox"/> Yes <input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes <input type="checkbox"/> No

Collaborative Partners Number 3		Population	
Address Line 1			
Address Line 2			
City			
Email Address			
Resolution of Support	<input type="checkbox"/> Yes <input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes <input type="checkbox"/> No

Collaborative Partners Number 4		Population	
Address Line 1			
Address Line 2			
City			
Email Address			
Resolution of Support	<input type="checkbox"/> Yes <input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes <input type="checkbox"/> No

Lead Applicant	Municipality of Carlisle	Round 3
Project Name	Impact Study of the Joint Emergency Services District Fire/EMS Consolidation Feasibility Study	Type of Request
		Grant

Collaborative Partners Number 5						
Address Line 1					Population	
Address Line 2			Municipality / Township		Population	
City	State	Zip Code	County		Population	
Email Address			Phone Number			
Resolution of Support	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Collaborative Partners Number 6						
Address Line 1					Population	
Address Line 2			Municipality / Township		Population	
City	State	Zip Code	County		Population	
Email Address			Phone Number			
Resolution of Support	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Collaborative Partners Number 7						
Address Line 1					Population	
Address Line 2			Municipality / Township		Population	
City	State	Zip Code	County		Population	
Email Address			Phone Number			
Resolution of Support	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Collaborative Partners Number 8						
Address Line 1					Population	
Address Line 2			Municipality / Township		Population	
City	State	Zip Code	County		Population	
Email Address			Phone Number			
Resolution of Support	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Map View: [2010 Census Interactive Population Map](#)

2010 Census Interactive Population Search

OH - Carlisle city

	Population
Total Population	4,915

Housing Status (in housing units unless noted)

Total	2,066
Occupied	1,866
Owner-occupied	1,483
Population in owner-occupied (number of individuals)	3,969
Renter-occupied	383
Population in renter-occupied (number of individuals)	889
Households with individuals under 18	633
Vacant	200
Vacant: for rent	104
Vacant: for sale	38

Population by Sex/Age

Male	2,384
Female	2,531
Under 18	1,193
18 & over	3,722
20 - 24	248
25 - 34	501
35 - 49	1,047
50 - 64	1,076
65 & over	741

Population by Ethnicity

Hispanic or Latino	50
Non Hispanic or Latino	4,865

Population by Race

White	4,831
African American	21
Asian	7
American Indian and Alaska Native	3

Native Hawaiian and Pacific Islander	0
Other	12
Identified by two or more	41

OH - Franklin township

Population	30,312
-------------------	--------

Housing Status
(in housing units unless noted)

Total	12,684
Occupied	11,752
Owner-occupied	8,306
Population in owner-occupied (number of individuals)	21,929
Renter-occupied	3,446
Population in renter-occupied (number of individuals)	8,164
Households with individuals under 18	4,011
Vacant	932
Vacant: for rent	378
Vacant: for sale	179

Population by Sex/Age

Male	14,798
Female	15,514
Under 18	7,422
18 & over	22,890
20 - 24	1,675
25 - 34	3,718
35 - 49	6,339
50 - 64	6,156
65 & over	4,302

Population by Ethnicity

Hispanic or Latino	419
Non Hispanic or Latino	29,893

Population by Race

White	29,085
African American	493
Asian	159
American Indian and Alaska Native	56

Native Hawaiian and Pacific Islander	0
Other	112
Identified by two or more	407

OH - Ohio

Population	
Total Population	11,536,504

Housing Status
(in housing units unless noted)

Total	5,127,508
Occupied	4,603,435
Owner-occupied	3,111,054
Population in owner-occupied (number of individuals)	7,889,424
Renter-occupied	1,492,381
Population in renter-occupied (number of individuals)	3,340,814
Households with individuals under 18	1,438,580
Vacant	524,073
Vacant: for rent	184,143
Vacant: for sale	78,089

Population by Sex/Age

Male	5,632,156
Female	5,904,348
Under 18	2,730,751
18 & over	8,805,753
20 - 24	763,116
25 - 34	1,409,959
35 - 49	2,334,965
50 - 64	2,339,323
65 & over	1,622,015

Population by Ethnicity

Hispanic or Latino	354,674
Non Hispanic or Latino	11,181,830

Population by Race

White	9,539,437
African American	1,407,681
Asian	192,233
American Indian and Alaska Native	25,292

Native Hawaiian and Pacific Islander	4,066
Other	130,030
Identified by two or more	237,765

Map View: [2010 Census Interactive Population Map](#)

2010 Census Interactive Population Search

OH - Franklin township

	Population
Total Population	30,312

Housing Status (in housing units unless noted)

Total	12,684
Occupied	11,752
Owner-occupied	8,306
Population in owner-occupied (number of individuals)	21,929
Renter-occupied	3,446
Population in renter-occupied (number of individuals)	8,164
Households with individuals under 18	4,011
Vacant	932
Vacant: for rent	378
Vacant: for sale	179

Population by Sex/Age

Male	14,798
Female	15,514
Under 18	7,422
18 & over	22,890
20 - 24	1,675
25 - 34	3,718
35 - 49	6,339
50 - 64	6,156
65 & over	4,302

Population by Ethnicity

Hispanic or Latino	419
Non Hispanic or Latino	29,893

Population by Race

White	29,085
African American	493
Asian	159
American Indian and Alaska Native	56

Native Hawaiian and Pacific Islander	0
Other	112
Identified by two or more	407

OH - Ohio

	Population
Total Population	11,536,504

Housing Status
 (in housing units unless noted)

Total	5,127,508
Occupied	4,603,435
Owner-occupied	3,111,054
Population in owner-occupied (number of individuals)	7,889,424
Renter-occupied	1,492,381
Population in renter-occupied (number of individuals)	3,340,814
Households with individuals under 18	1,438,580
Vacant	524,073
Vacant: for rent	184,143
Vacant: for sale	78,089

Population by Sex/Age

Male	5,632,156
Female	5,904,348
Under 18	2,730,751
18 & over	8,805,753
20 - 24	763,116
25 - 34	1,409,959
35 - 49	2,334,965
50 - 64	2,339,323
65 & over	1,622,015

Population by Ethnicity

Hispanic or Latino	354,674
Non Hispanic or Latino	11,181,830

Population by Race

White	9,539,437
African American	1,407,681
Asian	192,233
American Indian and Alaska Native	25,292

Native Hawaiian and Pacific Islander	4,066
Other	130,030
Identified by two or more	237,765

A RESOLUTION AUTHORIZING THE MANAGER OR DESIGNEE TO APPLY FOR, ACCEPT AND APPROPRIATE GRANT FUNDS IN AN AMOUNT NOT TO EXCEED \$100,000.00 FROM THE OHIO DEPARTMENT OF DEVELOPMENT LOCAL GOVERNMENT INNOVATION FUND AND DECLARING AN EMERGENCY

WHEREAS, the State of Ohio Department of Development announced the availability of Local Government Innovation funds for grants up to \$100,000.00 to provide financial assistance to Ohio political subdivisions for planning and implementing projects that are projected to create more efficient and effective service delivery within a specific discipline of government services for one or more entities; and

WHEREAS, there is a need for funds to study the impact of possible changes in the JEMS organization; and

WHEREAS, the Carlisle Village Council have in the past expressed an interest in studying the feasibility and benefits of consolidating the Franklin Township, Franklin City and Carlisle Fire Departments and JEMS again find the mutual benefits to be worth pursuing.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE MUNICIPALITY OF CARLISLE, OHIO, THAT:

Section 1. The Village Manager or her designee is hereby authorized to submit an application to the Ohio Department of Development Local Government Innovation Fund Committee for up to \$100,000.00 in grant funds to be used to study the impact of Franklin City pulling out of JEMS and for the study of the feasibility and benefits of consolidation:

Section 2. The Village Manager or her designee is authorized to accept the Ohio Department of Development Local Government Innovation Funds, if awarded.

Section 3. This resolution is declared to be an emergency measure for the purpose of securing grant funds for the preservation of the public peace, health, safety, and welfare of the inhabitants of the Municipality of Carlisle and further provides for the usual in full force and effect from and after its passage.

Adopted this 28 day of January, 2012



Mayor

Attest: *Jo Etko*
Clerk of Council

Introduced by Council Person James Lickliter

**AN AGREEMENT BETWEEN THE
MUNICIPALITY OF CARLISLE,
FRANKLIN TOWNSHIP, WARREN COUNTY AND THE
JOINT EMERGENCY MEDICAL SERVICES DISTRICT (JEMS), WARREN COUNTY
TO SUBMIT A JOINT GRANT APPLICATION
FOR LOCAL GOVERNMENT INNOVATION FUNDS**

This agreement to submit a joint grant application for Local Government Innovation Funds is made by the Municipality of Carlisle with its offices located at 760 W. Central Avenue, Carlisle, Ohio 45005 and Franklin Township, Warren County, Ohio with its offices located at 418 Fairview Drive, Carlisle, Ohio 45005 and the Joint Emergency Medical Services District (JEMS), Warren County, Ohio with its offices at 201 E. Sixth Street, Franklin, Ohio 45005.

WHEREAS, the Municipality of Carlisle, JEMS, and Franklin Township are interested in a study to determine the impact and sustainability if one of the members of JEMS removes itself from the District; and

WHEREAS, the Municipality of Carlisle, JEMS and Franklin Township are also interested in the feasibility of a combined Fire/EMS district; and

WHEREAS, the parties desire to study the feasibility of a joint district, or other operating options and recommendations for the future of the Carlisle Fire Department, JEMS and the Township Fire Department; and

WHEREAS, the Local Government Innovation Fund has available grant funds to pay for such studies;

NOW, THEREFORE, the parties through their duly authorized representatives agree as follows:

Section 1. The parties agree to cooperate with each other and jointly submit a 2012 grant application for Local Government Innovation Fund grant funds to pay for a sustainability/feasibility study as described in the recital paragraphs. Should the grant application be denied, then this Agreement will be void.

Section 2. The parties will pay for the sustainability/feasibility study with grant funds. The budget for the feasibility study will be adjusted to match the amount of grant funds awarded. To the extent there is a requirement for the parties to match awarded grant funds with local funds of up to \$10,000.00, the parties agree to each contribute one-third of the required local match amount.

Section . In general, the study will determine the sustainability of the remaining members of JEMS if a member removes itself from the Joint Medical Services District and the study will address the feasibility and potential cost savings, benefits, and drawbacks of operating a joint district, make recommendations regarding operational options and the future of the Carlisle Fire Department, the Franklin Township Fire Department and JEMS.

Section 4. The parties agree to cooperate with each other in the process of consultant selection for the sustainability/feasibility study. The parties will jointly create one or more requests for proposals with study specifications and proposal evaluation criteria to solicit proposals for conducting the sustainability/feasibility study. One or more consultants maybe retained by the parties to work on all or portions of the study as agreed on by the parties. The Municipality of Carlisle will serve as the lead agency for acceptance and disbursement of grants funds and for contracting with consultants.

Section 5. This agreement will be effective as of the date it is signed by the last party to sign below. This agreement will terminate upon completion of the feasibility study.

Section 6. The parties may amend this agreement by a written instrument signed by authorized representatives of all parties.

IN WITNESS WHEREOF, the parties hereto, through their duly authorized representatives, have executed this Agreement.

Municipality of Carlisle, Ohio

By: 
Sherry Callahan
Village Manager

Franklin Township, Warren County, Ohio

By: 
Beth Callahan
President

By: 
Greg Samples
Vice-President

By: 
Ron Ruppert
Trustee

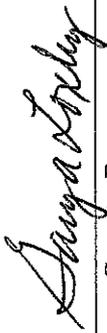
Joint Emergency Services District, Warren County, Ohio

By: 
Scott Boschert
Chairman

By: 
Jason Faulkner
Vice-Chairman

By: 
Ron Ruppert
Board Member

Approved as to Form:


Warren County Prosecutor
for Franklin Pop. Bd. of Trustees

RESOLUTION NO. 04-032812

_____ County, Ohio

Be It Resolved by the Township Trustees of Franklin Township

that Resolution No. 04-032812 be adopted to support and participate with the Village of Carlisle in submitting a grant application to the Ohio Department of Development, Local Government Innovation Fund for a feasibility study funding.

WHEREAS, Joint Emergency Medical Services aka J.E.M.S. was established in 1982 by the City of Franklin, Franklin Township, and the Village of Carlisle and jointly supported by a levy to provide emergency medical services, and

WHEREAS, funding from each subdivision is crucial to J.E.M.S. and now the City of Franklin has expressed desire and plans to pull out of the emergency medical services district to provide those services as a joint Fire/EMS in their city, and

NOW THEREFORE, BE IT RESOLVED, that funding for a feasibility study is an emergency measure to determine the cost and conditions necessary for the two remaining entities, Franklin Township and the Village of Carlisle to continue operating J.E.M.S. and also a feasibility study for a joint Fire/EMS district to provide adequate Emergency Services to protect the health, safety, and welfare of our citizens.

Mr. Ruppert moved to adopt the foregoing resolution.

Mr. Sample seconded the motion. Vote on the resolution was as follows:

Mr. Ruppert	-	Yes
Mr. Sample	-	Yes
Mrs. Callahan	-	Yes

Adopted the 28 day of March, 2012

YEAR

Attest: Scot Fromeyer, Fiscal Officer

Beth Callahan, President

Gregory Sample, Vice President

Ronald Ruppert, Trustee

Township Trustees

Proposal

MEMORANDUM

TO: MAYOR AND MEMBERS OF COUNCIL-VILLAGE OF CARLISLE

RE: PROPOSAL TO STUDY IMPACT OF JOINT EMERGENCY SERVICES (JEMS) WITH THE LOSS OF A MEMBER AND THE FEASIBILITY OF JOINING FIRE DISTRICTS WITH FRANKLIN TOWNSHIP

The Village of Carlisle and Franklin Township have discussed the need for examining the impact of the loss of the City of Franklin on the Joint Emergency Medical Services District (JEMS), of which Carlisle and the Township are members, and JEMS ability to continue to provide emergency medical services to the population of the remaining entities and the feasibility of forming a joint fire/ems district to serve both political entities.

The intent of the project is to create a plan that will provide efficient and effective fire and emergency medical services to the constituents of Carlisle and Franklin Township. I have outlined for your consideration a proposal to move forward with seeking professional services to assistance in helping us study our situation and make recommendations.

I am proposing the following:

The project would encompass five (5) primary tasks:

1. Assist and facilitate the efforts of an appointed committee in identifying the issues surrounding the establishment of a Joint Fire/EMS District – the consultant will address this matter through group examination of the following Issues:
 - A. Identify opportunities to maintain service levels at current cost, and/or maintain service levels while reducing cost, or enhancing service levels at current cost including non-emergency functions among the agencies. The study should determine if there are costs and/or service benefits to the taxpayers of these Agencies.
 - B. Personnel - employment of current paid staff, employment policy issues, retirement system participation, health and life insurance, file maintenance, compensation issues and assimilation of current employees and recruitment of additional personnel. The consultants will work with the members to address the critical and emotional issues inherent in a change of this magnitude.
 - C. Operational issues - merged fire department budgetary, operational, command issues; budgetary, operational issues facing the Joint Ambulance District without the City of Franklin organizational structure; housing, communications, equipment; website

creation/development, hosting; records transfer; property-casualty-liability insurance; departmental markings and identification issues and other matters as yet undetermined but deserving of exploration.

- D. Legal/administrative steps to be taken to effect the merged fire department 's smooth assimilation and integration into a joint fire district; asset transfer, municipal and township department dissolution requirements, documents transfer, financial reporting.
- E. Identify and recommend capital and operational items and approximate costs likely to be encountered by the pulling out of the City of Franklin from the district. And recommend capital and operational items and approximate costs likely to be encountered by the formation of a joint fire district in its initial operating period. Capital costs can include but may not be limited to physical facilities and communications system(s). Operational costs run the gamut and include personnel, equipment, supplies, contract services, etc. the feasibility study will examine and evaluate current district costs and revenue sources, and project both costs and revenues for the district and its citizens.
- F. Organizational/structural/legal forms: the feasibility study will examine all available legal organizational structures allowed by the Ohio Revised Code (ORC). These are: 1) ORC 505.37, the "Fire District"; ORC 505.371, the "Joint Fire District"; and ORC 505.375, the "Fire and Ambulance District." The feasibility study will examine the pros and cons of each of the above options to allow the committee to decide what structure best addresses the issues already identified and those that may come to light during the feasibility study.
- G. The consultants will also examine the pros and cons of organizational structures of the fire department(s) providing services. These options would include:
 - Maintaining the status quo
 - Merging the Carlisle Fire Department and the Franklin Township Fire Department into a joint Fire District.

2. The consultant shall report their findings and recommendations resulting from this examination to the Committee. The matters cited above are those known today. The consultants' investigation will likely reveal others deserving the attention of the jurisdictions; the consultant shall report on such other issues as come to light during the project. Findings and recommendations along with discussions will be reviewed monthly at committee meetings.

3. Provide assistance with the public relations surrounding the need for the district formation and the project as it unfolds – The consultant will coordinate the public relations aspect of the project through planning and preparation of news releases and interviews, along with conduct of stakeholder interviews and frequent contact with current members of the Committee, both formally and informally, in concert with all participating officials. The consultant will work with current fire unit members and Emergency Medical Services members to assure them that the tradition and pride they have developed will be recognized, valued and incorporated into the new organization in order to allow them "ownership" in this process. The consultant will account for unique circumstances and community identities as part of the issue identification process.

4. Develop the criteria for employing a fire chief, establish/determine the necessary pay scale to attract qualified candidates for the district's particular circumstances and assist in the hiring process - assist district in the Fire Chief recruitment and selection process - as we understand the project, the consultant would survey fire units/employers to determine current market pay rates for the position, place the advertisement for the position in journals and publications sufficient to attract the best candidate pool possible, contact known and referred qualified individuals to alert them to this opportunity, and conduct preliminary screening of candidates, then assist the district throughout the selection and interview process to fill the position. As part of the project effort, the consultant will develop a Fire Chief's position description for Committee approval. Present fire professionals will be invited to apply and be given particular consideration in the joint Fire Chief selection process.

5. Develop the criteria for any suggested restructuring that may be necessary for the joint emergency medical services district, which should include command and operational structure. Develop criteria for employing staff establish/determine the necessary pay scale for employees.

The consultant conducting an impact study of the joint emergency services district and feasibility study for the formation and implementation of a Joint Fire/EMS District comprised of the Municipality of Carlisle and Franklin Township Fire Departments will work through the steps outlined below.

1. SITUATIONAL ASSESSMENT

1.1 Review records – the consultant will examine the joint emergency services district records to identify run volume; current patterns of staff deployment; catalogue service and support functions; person-hours and duties undertaken to complete tasks required to provide emergency medical service; review service records and requests for service along with any other relevant information, related studies, activity reports, and review budgets and documents prepared for or by the district. The consultant will inventory department functions and services, human and fiscal resources used to support current services and the present allocation of responsibilities by type (managerial, supervisory and operational). The same will apply to the merger study.

1.2 Interview key stakeholders – The consultant will interview community and fire leaders/supervisors to determine fire service missions and views on services, policies or structures that might be modified to better adapt to the contemplated district's needs; interview the current chiefs, fire staff, Carlisle Village Council and Mayor and Franklin Township Trustees to discern their expectations, e.g., What do they look for in a "community benefit"? How do they desire to interact? What support can and will each participant entity provide? This step will also focus on the current functional interactions that result from overlap of issues and services across departmental boundaries. The purpose of these interviews is to determine if there are structural or stylistic barriers to effective functional interaction and if so, how to overcome them.

1.3 Examine coordination opportunities with Participant Committee – Through facilitated regular discussion sessions, the consultant will help develop a shared

understanding of the factors involved, potential costs and funding sources for the district and its citizens; areas of potential synergy and collaboration will be identified and strategies will be developed to ensure that district efforts have the maximum impact envisioned by the committee.

1.4 Consult external resources regarding organization options –The consultant will obtain and consider best practices alternatives in organizational design, management strategies, policies and other organizational responses to the challenge of providing public service in today’s municipal organizations.

2. ORGANIZATIONAL DESIGN OPTIONS

2.1 Review design options – Based on the situational assessment, the consultant will recommend organizational design, policy and operational alternatives along with organizational development strategies to support their successful implementation.

2.2 Present options to internal stakeholders – the consultant will present to the committee organizational and functional possibilities for their review and consideration.

3. PROJECT REPORT – The consultant will summarize its findings and recommendations for consideration and implementation.

4. ASSIST IN FIRE CHIEF AND/OR EMERGENCY SERVICES ADMINISTRATOR SEARCH AND APPOINTMENT PROCESS ONLY IF APPROPRIATE OR NECESSARY

4.1 Pre-search – Review and adopt Fire Chief and or Emergency services administrator job descriptions; Identify issues confronting the Fire Chief and or administrator; Identify desirable qualities in the positions; Develop a Profile incorporating the qualities needed.

4.2 Requirements Definition – Determine ad placement and search contacts; Advertise, seek out candidates.

4.3 Screening – Candidate field analyzed against minimum requirements; Field analyzed against desired qualities; Short list developed; References and other sources checked; Selection of candidates for interview

4.4 Interviews – Candidate visits, structured interviews conducted; itinerary host evaluations gathered, given to committee.

4.5 Selection – Committee Decision; Open negotiations with candidate.

Project Schedule

The consultant shall perform these services during a period of four months from the date of agreement. A timeline describing the incremental time necessary to complete all aspects of the

project and outline the sequencing of research and reporting efforts shall be provided by consultant.

Project Budget

The consultant will submit monthly progress reports to the Municipality during the project period. The billing cycle will coincide with the monthly report, on a net thirty (30) day basis. A separate and additional fee for conduct of a Fire Chief and or Emergency Services administrator search and selection process can be proposed and negotiated if desired by the Committee and the appropriate department organization. The Municipality will provide all physical space necessary for conduct of the project research, including meeting space for work sessions, and will handle scheduling of township personnel for all meetings.

OHIO DEPARTMENT OF DEVELOPMENT
LOCAL GOVERNMENT INNOVATION FUND
GRANT APPLICATION
FOR
MUNICIPALITY OF CARLISLE
FRANKLIN TOWNSHIP

**Impact study of the Joint Emergency Medical Services District
Fire/EMS Consolidation Feasibility Study**

Table of Contents:

TAB 1. . . .APPLICANT.	Page 2
	Page 2. . . .Contact Information
TAB 2. . . .COLLABORATIVE PARTNER. . . .	Page 3
	Page 3. . . .Collaborative Partners
TAB 3. . . .PROJECT PROPOSAL.	Page 4
	Page 4. . . .Project Information
	Page 4. . . .Project Name
	Page 4. . . .Type of Award
	Page 4. . . .Project Description
	Page 5. . . .Project Description (cont.)
	Page 6. . . .Project Description (cont.)
	Page 6. . . .Problem Statement
	Page 7. . . .Problem Statement (cont.)
	Page 7. . . .Targeted Approach
	Page 7. . . .Anticipated Return on Investment
	Page 8. . . .Anticipated Return on Investment (cont.)
	Page 8. . . .Probability of Success
	Page 8. . . .Inclusion of Collaborating Partners
	Page 8. . . .Economic Demand for Governmental Services
	Page 9. . . .Economic Demand for Governmental Services
	Page 9. . . .Implementation Recommendations
	Page 9. . . .Community Attraction
	Page 9. . . .Project Request/Local Fund Match
TAB 4. . . .FINANCIAL DOCUMENTATION	
TAB 5. . . .SUPPORTING DOCUMENTATION	

TAB 1: APPLICANT

CONTACT INFORMATION:

Main Applicant

Organization Name: Municipality of Carlisle

Address: 760 W. Central Avenue Carlisle Ohio 45005

Phone: Main Office Number 937-746-0555 Fax Number: 937-743-8178

Email: gwallace@carlisleoh.org

Population 2010 Census: 4,917

County: Warren

Contact Information

Applicant Name: Gregory A. Wallace

Title: Planning /Zoning Administrator

Address: 760 W. Central Avenue Carlisle Ohio 45005

Phone: Office Number 937-746-7809 Fax Number: 937-743-8178

Email: gwallace@carlisleoh.org

The Municipality of Carlisle has a history of collaborating with our neighboring communities in order to provide cost-efficient services when possible. With recent shrinking revenue and increasing expenses, it is more important now than ever to partner with other agencies to provide our citizens with the highest possible level of service in the most economical manner. Staff at the Municipality has been charged by the Council to continue to cooperate with the communities of Warren and Montgomery Counties and seek out additional areas of efficiencies through consolidation and collaboration. One specific area of potential collaboration relates to the delivery of Fire and Emergency Services. Currently, the Municipality and the neighboring area of Franklin Township maintain separate Fire Departments. The two entities also currently partner with the City of Franklin in a Joint Emergency Service District to provide emergency services to all of its residents. Effective 2013, the City of Franklin will no longer be a part of the joint district leaving the communities of Carlisle and Franklin Township to determine the best method of delivering these essential services to their constituents. A feasibility study is a critical first step in determining the best method to provide both Fire and Emergency Services as well as determine the potential impact to both communities by the withdrawal of the City of Franklin from the district. In addition study the possibility of combining fire/ems services.

TAB 2: COLLABORATIVE PARTNER

COLLABORATIVE PARTNER:

Name: Franklin Township Warren County

Address: 418 Fairview Dr. Carlisle Ohio 45005

Phone: 937-746-2852

Email: traci.stivers@cinci.rr.com

Population 2010 Census: 11,595

Relationship: Warren County Township in which the Municipality of Carlisle is located. Franklin Township has a Volunteer Fire department that provides fire protection to the residents of Franklin Township. Franklin Township is also a member of JEMS the joint emergency services district that serves Carlisle, City of Franklin and Franklin Township. The township fire department provides mutual aid to the City of Franklin, and Carlisle Fire departments.

Project Role:

Participate in study to:

- 1) Determine the benefit of combining fire and emergency medical services into one organization.
- 2) Determine the impact of the City of Franklin removing itself from the joint emergency medical services district (JEMS) and the viability of JEMS with the two remaining jurisdictions the Municipality of Carlisle and Franklin Township.
- 3) Determine the validity of a Carlisle, Franklin Township, combined Fire EMS District or other joint ways of operation.

TAB 3: PROJECT PROPOSAL

PROJECT INFORMATION:

Project Name:

Impact study of the Joint Emergency Medical Services District and Fire/EMS impact study

Type of Award:

Grant in the amount not to exceed \$65,000.00. To study the Impact to JEMS with the removal of the City of Franklin from the membership and a study of a more efficiently and effectively provide Fire and EMS services to the 17,000 plus residents of the area

Project Description:

Faced with increased costs and budgetary constraints of providing fire service, and the City Franklin removing itself from the present Joint Emergency Medical Services District (JEMS) of which is made up of the City of Franklin, the Municipality of Carlisle and Franklin Township. The Municipality of Carlisle and Franklin Township find it necessary to apply for the Local Government Innovation Funds in the amount of \$65,000.00 to conduct the following:

1. A study of the impact of Franklin City pulling out of JEMS in January 2013. The Joint District has provided Emergency Medical Services for the Municipality of Carlisle, Franklin Township and the City of Franklin since the 1980's. The formation of the joint district was to provide a cost effective way to provide emergency services to 28,000 plus residents that make up the three jurisdictions.

With the goal of using taxpayer dollars more efficiently and effectively and maintaining a joint emergency medical services district the consultant will assist and facilitate the efforts of a committee in identifying the issues surrounding the loss of the City of Franklin to the operational and financial status of JEMS. Assessing the feasibility of the continued operation of JEMS that will serve a population of 17,000.

2. A feasibility study for a potential, consolidation, contractual arrangement or partnership between Franklin Township, and the Municipality of Carlisle for Fire and Emergency Services. The two jurisdictions provide Fire Service to a total population of 17,000 according to the 2010 census in an area of approximately 15 plus square miles. Fire Service for the residents of Franklin Township is provided by Franklin Township Fire Department, the Municipality of Carlisle provides fire service for its residents. Both are volunteer departments with part-time Chiefs. The consultant will address these matters through examination of the following issues:

- A. Identify opportunities to maintain service levels at current cost, and/or maintain service levels while reducing cost, or enhancing service levels at current cost including non-emergency functions among the agencies. The study should determine if there are costs and/or service benefits to the taxpayers of these Agencies.
- B. Personnel - employment of current paid staff, employment policy issues, retirement system participation, health and life insurance, file maintenance, compensation issues and assimilation of current employees and recruitment of additional personnel. The consultant will work with the members to address the critical and emotional issues inherent in a change of this magnitude.
- C. Operational issues - consolidated fire department budgetary, operational, command issues; budgetary, operational issues facing JEMS without the City of Franklin; organizational structure; housing, communications, equipment; website creation/development hosting; records transfer; property-casualty-liability insurance; departmental markings and identification issues and other matters as yet undetermined but deserving of exploration.
- D. Legal/administrative steps that would need to be taken to effect the consolidate fire department's smooth assimilation and integration into a joint fire district; asset transfer, municipal and township department dissolution requirements, documents transfer, financial reporting.
- E. Identify and recommend capital and operational items and approximate costs likely to be encountered by the City of Franklin removing itself from JEMS. And recommend capital and operational items and approximate costs likely to be encountered by the formation of a joint fire district in its initial operating period. Capital costs can include but may not be limited to physical facilities and communications system(s). Operational costs run the gamut and include personnel, equipment, supplies, contract services, etc. The feasibility study will examine and evaluate current district costs and revenue sources, and project both costs and revenues for the district and its citizens.
- F. Organizational/structural/legal forms: the feasibility study will examine all available legal organizational structures allowed by the Ohio Revised Code (ORC). These are: 1) ORC 505.37, the "Fire District"; 2) ORC 505.371, the "Joint Fire District"; and 3) ORC 505.375, the "Fire and Ambulance District." The feasibility study will examine the pros and cons of each of the above options to allow the committee to decide what structure best addresses the issues already identified and those that may come to light during the feasibility study.
- G. The consultant will also examine the pros and cons of organizational structures of the fire department(s) providing services. These options would include:

- Maintaining the status quo
- Merging the Carlisle Fire Department and the Franklin Township Fire Department into a Joint Fire District.

Problem Statement:

The Municipality of Carlisle and Franklin Township, currently receive emergency medical services from a Joint Emergency Medical Services District (JEMS) currently made up of three entities that will be reduced to two January 2013. The Public Officials believe that the change of the makeup of the district will have a significant impact upon the emergency medical services currently provided. The Public Officials also believe that a consolidation of the two fire departments into one fire department within a new organizational structure under one of three sections of the Ohio Revised Code (ORC) listed below may offer operational efficiencies and cost reductions and/or cost avoidances. The three available structures to be studied are:

- ORC 505.37, Fire District
- ORC 505.371, Joint Fire District
- ORC 505.375 Fire and Ambulance District

Officials from the Municipality of Carlisle and Franklin Township have identified issues that prompted their investigation. The issues identified include, but are not limited to, the following:

- Would any services be diminished by a consolidation?
- Public perception: unfamiliarity with consolidation legislation and process.
- Duplication of equipment, supplies, and other costs.
- Lack of available volunteers to meet service needs.
- Possible need for more part-time, paid and/or full-time, paid personnel.
- Will there be a loss of history and identity by the current fire departments?
- How public fire departments can be consolidated?
- Identify current costs of fire services; staffing requirements, personnel training, administrative and technical support; facility requirements and responsibilities, joint purchasing and cost sharing.
- Cost allocation and apportionment options for all aspects of the proposal.
- Overall cost and potential areas of financial savings.
- Challenges, opportunities, weakness and strengths of two (2) single agencies or recommended option.
- Administrative oversight and cost, including legal, risk management, information systems and personnel.
- Transition costs, including: apparatus and equipment, computer hardware and software, system compatibility, record management system, facility size, physical upgrades, furniture/consoles, parking, transition task force.
- Address issues identified in needs assessment including but not limited to: Fire Responses, Paramedics, Career and Volunteer transition, recruitment and retention,

promotions, demotions, emergency planning, and vibrant sustainable volunteer program.

- Governance, command and control including but not limited to: board makeup, command staff, succession planning.
- Recommendations for further action and a detailed discussion of critical issues and variables that will be important in these efforts if the departments determine to proceed with this project.

In summary, the public officials have identified the need to study the impact on JEMS with the loss of one of the members and the feasibility of some form of consolidation with the intention that the study would guide them toward the most efficient and effective structure for deploying the limited, local resources available for providing fire protection, emergency medical, and rescue services. The Municipality of Carlisle as the “main applicant” for this Local Government Innovation Fund Grant request is asking for the necessary funds to proceed with the impact study and feasibility study as outlined in the attached proposal.

The Municipality of Carlisle and Franklin Township realize that they face challenges in continuing to provide a high level of fire protection, emergency medical, and rescue services to their citizens and visitors to their communities than they have provided in the past. It is with that realization that they have worked together to identify the issues facing them and to commit to an impact study and feasibility study, and therefore they have a high degree of confidence that the most effective and efficient course revealed by the feasibility study will be implemented.

A committee of stakeholders in Fire, EMS, and Government will be formed to review the request for Proposal. The Municipality will issue a Request for Proposal (RFP) and a qualified consultant will be hired to perform the actual study.

The Grant administrator expects the awarded contract to be completed within four months, and to include services as outlined in the proposal.

Targeted Approach:

Merger, consolidation, contractual arrangement or partnership through shared services

Anticipated Return on Investment:

The exact return on investment for this project is difficult to determine, we anticipate the results of the study and plan will allow an exact understanding of the return on investment for the recommended actions- which may include collaboration and/or efficiency changes to the existing system and protocols. The results of this study and their implementation will directly impact the Emergency Medical services provided to the Municipality and Franklin Townships and could have a significant impact on competitiveness in economic development.

The whole purpose of the Impact/Fire Ems Consolidation Feasibility Study is to thoroughly analyze existing financial data to determine the future of JEMS. And new opportunities for

shared or consolidated services will yield savings. The public officials believe that there likely will be a positive return on the funds invested in this study but until the study is completed, the public officials cannot with certainty, say what the degree or level of return will or may be. The public officials understand that the efficiencies may be attained in two general ways: 1) A consolidated entity that would provide the same level of services (output) currently in place at a lower expense (input) or; 2) the consolidated entity may provide a higher level of services (output) than is presently in place at the same/current expense (input). The public officials also realize that the results could fall somewhere in a range between these examples. It should be noted however, that the example of similar fire service mergers throughout Ohio, have often demonstrated cost savings and efficiencies and/or service gains from such combinations. It is the belief of the public officials that the impact study will show that the two remaining entities that make up the JEMS will be able to continue to provide cost effective and efficient services with little financial impact to the tax payers.

Probability of Success:

In the event this application for grant monies to fund a feasibility study is approved, it is the intention of the Municipality of Carlisle and Franklin Township to move forward as quickly as possible with the study. The Municipality and Franklin Township are committed to seriously examining the recommendations of this objective study. Both the Municipality and the Township are currently facing significant budget challenges and must be creative in addressing budgets. Although it is difficult to measure the exact expected cost savings, one of the key study deliverables, a cost savings is anticipated.

Inclusion of Collaborating Partners:

The collaborating communities have demonstrated a history of success and commitment to innovative combined local government service delivery. Examples of past and current shared service delivery model usage include:

- Establishment of designated Fire automatic aid areas;
- Contractual agreements for the provision of EMS coverage;
- Establishment of formal Fire and EMS mutual aid agreements;
- Joint Fire and EMS training opportunities;
- Joint Emergency Medical Services District (JEMS)
- Joint snow plowing operations;
- Participation in Cooperative Purchasing;
- Participation in Joint Drug Enforcement Organizations.

Economic Demand for Governmental Services

With the onset of reduced revenues at the Federal, State and Local level, there is an ever increasing demand on local governments to maintain existing services or in some cases, increasing service delivery in a cut-back environment. Local governments are being asked to do “more with less” in this financial environment. It is anticipated that the shared services will enhance the business environment and promote community attraction through providing EMS and Fire services in a more efficient and cost effective manner. The impact of fire on businesses, large and small, can be substantial in terms of lost sales, supply chain interruption

and temporary or permanent worker layoffs. Recovering from fire related losses can take months and in this economic environment, many businesses choose never to reopen. These potential negative effects have real consequences on local communities. These consequences can result in lost tax revenues, difficulty in attracting new businesses, blighted or vacant properties and increased unemployment levels. This proposed collaboration can potentially lead to better response times and improved service delivery and improved ISO ratings which can lead to savings for local citizens and businesses in the form of reduced residential and commercial insurance premiums. This lowering of ISO ratings also assists with community economic development efforts by decreasing the commercial insurance costs for businesses considering relocating to the collaborating communities.

Implementation Recommendations

It is the intent of the Municipality of Carlisle and Franklin Township to implement any recommendations that are developed as part of the proposed feasibility study. In addition, any audits of the feasibility study or project planning that would identify a need for project amendments would be strictly adhered to by the committee.

Community Attraction

It has been indicated in housing studies conducted throughout the country that one of the major indicators for purchasing and establishing residences and businesses within a community is the response capabilities and services provided by the local Public Safety Services. It is the intent of the committee that the study will provide guidance to the communities in providing ems and fire protection to the community in a more efficient way. Resulting in improved service delivery and reduction in cost of services.

Project Request/Local Fund Match

Proposal Request: The applicant (Municipality of Carlisle), hereby requests a Local Government Innovation Fund grant of \$58,500.00 as the Fund's ninety percent (90%) share of the \$65,000.00 cost to study the impact of JEMS and the feasibility of the consolidation of the Municipality of Carlisle Fire Department and the Franklin Township Fire Department as either a Fire District, Joint Fire District or Fire and Ambulance District under the respective provisions of the Ohio Revised Code. The Municipality of Carlisle and Franklin Township will each provide one half of the \$6,500.00 local share cost.

TAB 4: FINANCIAL DOCUMENTATION

The committee is anticipating a cost savings of 20 – 25 % to be the possible outcome a joint Fire/EMS consolidation:

Cost savings in the following areas;

- Anticipated elimination of some administrative cost
- Efficiencies attained is the possible elimination of competition for the same personnel pool by two organizations, a reduction in fund raising efforts and possible personnel costs.
- Potential cost savings in Operating expenses due to duplication of delivery services
- There will be other efficiencies identified as the study proceeds. A primary factor to have the study preformed is the conviction that there is definite cost duplication that can be eliminated.

CITY OF CARLISLE, OHIO

STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
 GOVERNMENTAL FUNDS
 FOR THE YEAR ENDED DECEMBER 31, 2010

	General	County Vehicle Tax	Police Services	Fire
Revenues:				
Income taxes	\$ 553,246	\$ -	\$ 276,625	\$ -
Property and other taxes	70,820	-	-	114,934
Licenses and permits	99,355	-	-	-
Fines and forfeitures	62,972	-	-	-
Intergovernmental	101,942	91,047	-	19,729
Special assessments.	36,109	-	-	-
Investment income	8,693	369	-	-
Payment in lieu of taxes	-	-	-	-
Other	29,219	100,000	1,569	6,077
Total revenues	962,356	191,416	278,194	140,740
Expenditures:				
Current:				
General government.	435,684	-	-	-
Security of persons and property	274,117	-	400,372	78,688
Transportation.	-	500,960	-	-
Community environment	110,947	-	-	-
Leisure time activity.	5,626	-	-	-
Capital outlay	-	-	-	-
Debt service:				
Principal retirement.	-	-	-	74,000
Interest and fiscal charges.	-	-	-	2,220
Total expenditures	826,374	500,960	400,372	154,908
Excess (deficiency) of revenues over (under) expenditures	135,982	(309,544)	(122,178)	(14,168)
Other financing sources (uses):				
Note issuance	-	-	-	37,000
Transfers in	-	-	-	-
Transfers out	(125,500)	-	-	-
Total other financing sources (uses)	(125,500)	-	-	37,000
Net change in fund balances	10,482	(309,544)	(122,178)	22,832
Fund balances (deficit) at beginning of year.	649,759	124,870	356,182	22,754
Fund balances (deficit) at end of year	\$ 660,241	\$ (184,674)	\$ 234,004	\$ 45,586

SEE ACCOMPANYING NOTES TO THE BASIC FINANCIAL STATEMENTS

CITY OF CARLISLE, OHIO
STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED DECEMBER 31, 2010

	Expenses	Program Revenues		
		Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions
Governmental activities:				
General government	\$ 641,370	\$ 99,399	\$ 140,771	\$ -
Security of persons and property.	794,958	-	7,646	-
Transportation	829,359	-	447,346	-
Community environment.	118,694	99,355	-	27,728
Leisure time activity.	8,905	-	-	-
Interest and fiscal charges.	130,651	53,130	-	-
Total governmental activities	2,523,937	251,884	595,763	27,728
Business-type activities:				
Sewer.	1,534,302	1,287,130	-	-
Water.	215,609	240,221	-	-
Refuse.	317,444	326,279	-	-
Total business-type activities	2,067,355	1,853,630	-	-
Total primary government.	\$ 4,591,292	\$ 2,105,514	\$ 595,763	\$ 27,728

General revenues:
 Property taxes levied for:
 General purposes.
 Fire.
 Income taxes levied for:
 General purposes.
 Police services
 Grants and entitlements not restricted to specific programs
 Payment in lieu of taxes
 Investment earnings
 Miscellaneous
 Total general revenues.
 Transfers.
 Change in net assets.
 Net assets at beginning of year.
 Net assets at end of year.

SEE ACCOMPANYING NOTES TO THE BASIC FINANCIAL STATEMENTS

CITY OF CARLISLE, OHIO
STATEMENT OF NET ASSETS
 DECEMBER 31, 2010

	Governmental Activities	Business-type Activities	Total
Assets:			
Equity in pooled cash and cash equivalents.	\$ 1,209,791	\$ 1,660,073	\$ 2,869,864
Receivables (net of allowances for uncollectibles):			
Income taxes	237,136	-	237,136
Property and other taxes	157,990	-	157,990
Payment in lieu of taxes	113,608	-	113,608
Accounts	65,444	156,086	221,530
Accrued interest	10,234	-	10,234
Special assessments	2,578	38,336	40,914
Due from other governments	221,076	-	221,076
Materials and supplies inventory	16,813	852	17,665
Prepayments	17,806	6,066	23,872
Capital assets:			
Land and construction in progress.	1,674,315	-	1,674,315
Depreciable capital assets, net	2,874,003	4,867,864	7,741,867
Total capital assets.	<u>4,548,318</u>	<u>4,867,864</u>	<u>9,416,182</u>
Total assets.	<u>6,600,794</u>	<u>6,729,277</u>	<u>13,330,071</u>
Liabilities:			
Accounts payable.	9,907	67,089	76,996
Accrued wages and benefits	7,601	5,162	12,763
Due to other governments	51,202	13,373	64,575
Unearned revenue	257,330	-	257,330
Accrued interest payable	47,055	-	47,055
Long-term liabilities:			
Due within one year	2,293,480	3,773	2,297,253
Due in more than one year	551,324	1,083	552,407
Total liabilities	<u>3,217,899</u>	<u>90,480</u>	<u>3,308,379</u>
Net assets:			
Invested in capital assets, net of related debt	2,310,620	4,867,864	7,178,484
Restricted for:			
Capital projects.	116,005	-	116,005
Transportation projects	359,019	-	359,019
Public safety.	541,137	-	541,137
Other purposes	24,321	-	24,321
Unrestricted (deficit)	31,793	1,770,933	1,802,726
Total net assets	<u>\$ 3,382,895</u>	<u>\$ 6,638,797</u>	<u>\$ 10,021,692</u>

SEE ACCOMPANYING NOTES TO THE BASIC FINANCIAL STATEMENTS

CITY OF CARLISLE, OHIO
 STATEMENT OF ACTIVITIES
 FOR THE YEAR ENDED DECEMBER 31, 2009

	Expenses	Program Revenues		
		Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions
Governmental Activities:				
General government	\$ 675,559	\$ 138,153	\$ 60,409	\$ -
Security of persons and property.	745,329	-	10,151	-
Transportation	272,018	-	292,346	-
Community environment.	133,369	99,804	-	21,235
Leisure time activity.	19,482	-	-	-
Interest and fiscal charges.	96,962	48,581	-	-
Total governmental activities	1,942,719	286,538	362,906	21,235
Business-type Activities:				
Sewer	1,528,992	1,436,126	-	-
Water	236,856	207,506	-	-
Refuse.	299,417	321,386	-	-
Total business-type activities	2,065,265	1,965,018	-	-
Total primary government.	\$ 4,007,984	\$ 2,251,556	\$ 362,906	\$ 21,235

General Revenues:

Property taxes levied for:

- General purposes.
- Fire.

Income taxes levied for:

- General purposes.
- Police services

Grants and entitlements not restricted to specific programs

Payment in lieu of taxes

Investment earnings

Miscellaneous

Total general revenues.

Transfers.

Change in net assets.

Net assets at beginning of year

Net assets at end of year.

SEE ACCOMPANYING NOTES TO THE BASIC FINANCIAL STATEMENTS

CITY OF CARLISLE, OHIO
 STATEMENT OF NET ASSETS
 DECEMBER 31, 2009

	Governmental Activities	Business-type Activities	Total
Assets:			
Equity in pooled cash and cash equivalents.	\$ 1,768,204	\$ 1,477,177	\$ 3,245,381
Receivables (net of allowances for uncollectibles):			
Income taxes	218,300	-	218,300
Property and other taxes	169,255	-	169,255
Accounts	69,915	241,245	311,160
Accrued interest	16,191	-	16,191
Special assessments	2,260	33,608	35,868
Due from other governments	203,059	-	203,059
Materials and supplies inventory.	23,000	2,344	25,344
Prepayments	16,387	4,245	20,632
Capital assets:			
Land and construction in progress.	1,534,653	-	1,534,653
Depreciable capital assets, net	3,001,610	5,210,377	8,211,987
Total capital assets.	<u>4,536,263</u>	<u>5,210,377</u>	<u>9,746,640</u>
Total assets.	<u>7,022,834</u>	<u>6,968,996</u>	<u>13,991,830</u>
Liabilities:			
Accounts payable.	15,851	72,404	88,255
Accrued wages and benefits	7,488	2,988	10,476
Due to other governments	57,506	19,264	76,770
Unearned revenue	155,228	-	155,228
Accrued interest payable	25,142	-	25,142
Long-term liabilities:			
Due within one year	2,441,025	2,879	2,443,904
Due in more than one year	600,769	929	601,698
Total liabilities	<u>3,303,009</u>	<u>98,464</u>	<u>3,401,473</u>
Net assets:			
Invested in capital assets, net of related debt	2,150,263	5,210,377	7,360,640
Restricted for:			
Capital projects.	259,688	-	259,688
Debt service	4,219	-	4,219
Transportation projects	579,394	-	579,394
Public safety.	583,047	-	583,047
Other purposes	24,175	-	24,175
Unrestricted	119,039	1,660,155	1,779,194
Total net assets	<u>\$ 3,719,825</u>	<u>\$ 6,870,532</u>	<u>\$ 10,590,357</u>

SEE ACCOMPANYING NOTES TO THE BASIC FINANCIAL STATEMENTS

CITY OF CARLISLE, OHIO

STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
GOVERNMENTAL FUNDS
FOR THE YEAR ENDED DECEMBER 31, 2008

	General	Police Services	Carlisle Business Park	SR 123 Phase V
Revenues:				
Income taxes	\$ 550,637	\$ 275,319	\$ -	\$ -
Property and other taxes	81,605	-	-	-
Charges for services	-	-	-	-
Licenses and permits	83,946	-	-	-
Fines and forfeitures	61,591	-	-	-
Intergovernmental	157,359	-	-	-
Special assessments.	49,023	-	-	-
Investment income	111,281	-	-	-
Payment in lieu of taxes	-	-	-	-
Other	90,555	1,046	6,000	-
Total revenues	<u>1,185,997</u>	<u>276,365</u>	<u>6,000</u>	<u>-</u>
Expenditures:				
Current:				
General government.	574,298	-	-	-
Security of persons and property	317,303	269,463	-	-
Transportation.	-	-	-	-
Community environment	150,282	-	7,302	1,184
Leisure time activity.	12,894	-	-	-
Capital outlay	-	-	-	-
Debt service:				
Principal retirement.	-	-	1,299,097	480,000
Interest and fiscal charges.	-	-	48,780	19,357
Total expenditures	<u>1,054,777</u>	<u>269,463</u>	<u>1,355,179</u>	<u>500,541</u>
Excess (deficiency) of revenues over (under) expenditures	<u>131,220</u>	<u>6,902</u>	<u>(1,349,179)</u>	<u>(500,541)</u>
Other financing sources (uses):				
Notes issued	-	-	1,218,750	480,000
Premiums on notes	-	-	149	672
Transfers in	-	-	124,000	-
Transfers out	(124,000)	-	-	-
Total other financing sources (uses)	<u>(124,000)</u>	<u>-</u>	<u>1,342,899</u>	<u>480,672</u>
Net change in fund balances	7,220	6,902	(6,280)	(19,869)
Fund balances at beginning of year	868,290	363,078	11,775	46,387
Fund balances at end of year	<u>\$ 875,510</u>	<u>\$ 369,980</u>	<u>\$ 5,495</u>	<u>\$ 26,518</u>

SEE ACCOMPANYING NOTES TO THE BASIC FINANCIAL STATEMENTS

CITY OF CARLISLE, OHIO

STATEMENT OF ACTIVITIES
 FOR THE YEAR ENDED DECEMBER 31, 2008

	Expenses	Program Revenues		
		Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions
Governmental Activities:				
General government	\$ 820,922	\$ 114,140	\$ -	\$ -
Security of persons and property	670,847	3,333	14,048	-
Transportation	421,264	126,454	354,527	-
Community environment	184,869	-	-	186,567
Leisure time activity	16,173	-	-	-
Interest and fiscal charges	122,330	44,909	-	-
Total governmental activities	2,236,405	288,836	368,575	186,567
Business-type Activities:				
Sewer	1,607,372	1,237,703	-	-
Water	155,899	103,378	-	-
Refuse	276,015	316,996	-	-
Total business-type activities	2,039,286	1,658,077	-	-
Total primary government	\$ 4,275,691	\$ 1,946,913	\$ 368,575	\$ 186,567

General Revenues:

Property taxes levied for:

- General purposes
- Fire

Income taxes levied for:

- General purposes
- Police services

Grants and entitlements not restricted to specific programs

Payment in lieu of taxes

Investment earnings

Miscellaneous

Total general revenues

Transfers

Change in net assets

Net assets at beginning of year

Net assets at end of year

SEE ACCOMPANYING NOTES TO THE BASIC FINANCIAL STATEMENTS

CITY OF CARLISLE, OHIO

STATEMENT OF NET ASSETS
 DECEMBER 31, 2008

	Governmental Activities	Business-type Activities	Total
Assets:			
Equity in pooled cash and cash equivalents	\$ 1,805,406	\$ 1,332,829	\$ 3,138,235
Receivables (net of allowances for uncollectibles):			
Income taxes	240,839	-	240,839
Property and other taxes	190,554	-	190,554
Accounts	77,332	130,383	207,715
Accrued interest	35,765	-	35,765
Special assessments	1,435	21,342	22,777
Due from other governments	208,778	-	208,778
Materials and supplies inventory	23,773	2,169	25,942
Prepayments	20,974	5,092	26,066
Capital assets:			
Land	1,471,040	-	1,471,040
Depreciable capital assets, net	3,064,701	5,546,982	8,611,683
Total capital assets	4,535,741	5,546,982	10,082,723
Total assets	7,140,597	7,038,797	14,179,394
Liabilities:			
Accounts payable	24,394	71,138	95,532
Accrued wages and benefits	9,560	1,973	11,533
Due to other governments	55,904	10,296	66,200
Unearned revenue	172,093	-	172,093
Accrued interest payable	37,252	-	37,252
Long-term liabilities:			
Due within one year	2,627,647	1,841	2,629,488
Due in more than one year	650,127	839	650,966
Total liabilities	3,576,977	86,087	3,663,064
Net assets:			
Invested in capital assets, net of related debt	1,970,991	5,546,982	7,517,973
Restricted for:			
Capital projects	76,203	-	76,203
Debt service	5,025	-	5,025
Transportation projects	513,755	-	513,755
Public safety	565,390	-	565,390
Other purposes	22,271	-	22,271
Unrestricted	409,985	1,405,728	1,815,713
Total net assets	\$ 3,563,620	\$ 6,952,710	\$ 10,516,330

SEE ACCOMPANYING NOTES TO THE BASIC FINANCIAL STATEMENTS

**FRANKLIN TOWNSHIP
 WARREN COUNTY**

**COMBINED STATEMENT OF CASH RECEIPTS, CASH DISBURSEMENTS, AND
 CHANGES IN FUND CASH BALANCES
 ALL GOVERNMENTAL FUND TYPES
 FOR THE YEAR ENDED DECEMBER 31, 2010**

	Governmental Fund Types				Totals (Memorandum Only)
	General	Special Revenue	Capital Projects	Permanent	
Cash Receipts:					
Property and Other Local Taxes	\$357,765	\$408,583	\$0	\$0	\$766,348
Licenses, Permits, and Fees	125,805	59,766			185,571
Intergovernmental	185,891	338,772	156,800		681,463
Special Assessments		34,123			34,123
Earnings on Investments	991	115		433	1,539
Miscellaneous	7,581	55,126	11,000		73,707
Total Cash Receipts	678,033	896,485	167,800	433	1,742,751
Cash Disbursements:					
Current:					
General Government	398,718	177,817			576,535
Public Safety	124,470	610,383			734,853
Public Works	35,742	139,291			175,033
Health	65,008				65,008
Human Services		108,686			108,686
Conservation - Recreation	70,447				70,447
Capital Outlay	47,217	1,624	167,800		216,641
Total Cash Disbursements	741,602	1,037,801	167,800	0	1,947,203
Total Receipts Over/(Under) Disbursements	(63,569)	(141,316)	0	433	(204,452)
Other Financing Receipts / (Disbursements):					
Advances-In	20,000	20,000			40,000
Advances-Out	(20,000)	(20,000)			(40,000)
Total Other Financing Receipts / (Disbursements)	0	0	0	0	0
Excess of Cash Receipts and Other Financing Receipts Over / (Under) Cash Disbursements and Other Financing Disbursements	(63,569)	(141,316)	0	433	(204,452)
Fund Cash Balances, January 1	633,443	546,539	380	53,693	1,234,055
Fund Cash Balances, December 31	\$569,874	\$405,223	\$380	\$54,126	\$1,029,603
Reserve for Encumbrances, December 31	\$51,947	\$19,714	\$0	\$0	\$71,661

The notes to the financial statements are an integral part of this statement.

**FRANKLIN TOWNSHIP
 WARREN COUNTY**

**COMBINED STATEMENT OF CASH RECEIPTS, CASH DISBURSEMENTS, AND
 CHANGES IN FUND CASH BALANCES
 ALL GOVERNMENTAL FUND TYPES
 FOR THE YEAR ENDED DECEMBER 31, 2009**

	<u>Governmental Fund Types</u>				<u>Totals (Memorandum Only)</u>
	<u>General</u>	<u>Special Revenue</u>	<u>Capital Projects</u>	<u>Permanent</u>	
Cash Receipts:					
Property and Other Local Taxes	\$384,913	\$453,040	\$0	\$0	\$837,953
Licenses, Permits, and Fees	119,925	68,227			188,152
Intergovernmental	226,077	420,764			646,841
Special Assessments		33,356			33,356
Earnings on Investments	3,832	435		222	4,489
Miscellaneous	20,945	106,088	12,500		139,533
Total Cash Receipts	<u>755,692</u>	<u>1,081,910</u>	<u>12,500</u>	<u>222</u>	<u>1,850,324</u>
Cash Disbursements:					
Current:					
General Government	405,672	2,565			408,237
Public Safety	80,652	216,253			296,905
Public Works	2,610	524,658			527,268
Health	52,902	128,264			181,166
Human Services		112,297			112,297
Conservation - Recreation	56,943				56,943
Capital Outlay	83,268	2,680	25,120		111,068
Total Cash Disbursements	<u>682,047</u>	<u>986,717</u>	<u>25,120</u>	<u>0</u>	<u>1,693,884</u>
Total Receipts Over/(Under) Disbursements	<u>73,645</u>	<u>95,193</u>	<u>(12,620)</u>	<u>222</u>	<u>156,440</u>
Fund Cash Balances, January 1	<u>559,783</u>	<u>451,221</u>	<u>13,000</u>	<u>53,471</u>	<u>1,077,475</u>
Fund Cash Balances, December 31	<u>\$633,428</u>	<u>\$546,414</u>	<u>\$380</u>	<u>\$53,693</u>	<u>\$1,233,915</u>
Reserve for Encumbrances, December 31	<u>\$47,300</u>	<u>\$14,151</u>	<u>\$0</u>	<u>\$0</u>	<u>\$61,451</u>

The notes to the financial statements are an integral part of this statement.

**FRANKLIN TOWNSHIP
WARREN COUNTY**
**COMBINED STATEMENT OF CASH RECEIPTS, CASH DISBURSEMENTS, AND
CHANGES IN FUND CASH BALANCES
ALL GOVERNMENTAL FUND TYPES
FOR THE YEAR ENDED DECEMBER 31, 2008**

	Governmental Fund Types				Totals (Memorandum Only)
	General	Special Revenue	Capital Projects	Permanent	
Cash Receipts:					
Property and Other Local Taxes	\$425,410	\$549,581	\$0	\$0	\$974,991
Charges for Services	0	2,075	0	0	2,075
Licenses, Permits, and Fees	109,992	67,618	0	0	177,610
Intergovernmental	223,294	229,369	88,006	0	540,669
Special Assessments	0	30,336	0	0	30,336
Earnings on Investments	25,895	3,264	0	817	29,976
Miscellaneous	16,053	84,763	10,000	0	110,816
Total Cash Receipts	800,644	967,006	98,006	817	1,866,473
Cash Disbursements:					
Current:					
General Government	437,764	0	0	0	437,764
Public Safety	132,153	177,250	0	0	309,403
Public Works	105,138	483,471	0	0	588,609
Health	61,373	119,964	0	0	181,337
Human Services	0	69,158	0	0	69,158
Conservation - Recreation	47,493	0	0	0	47,493
Capital Outlay	48,379	97,957	98,006	0	244,342
Total Cash Disbursements	832,300	947,800	98,006	0	1,878,106
Total Receipts Over/(Under) Disbursements	(31,656)	19,206	0	817	(11,633)
Other Financing Receipts / (Disbursements):					
Transfers-In		10,000	0	0	10,000
Transfers-Out	(10,000)	0	0	0	(10,000)
Advances-In	25,000	25,000	0	0	50,000
Advances-Out	(25,000)	(25,000)	0	0	(50,000)
Total Other Financing Receipts / (Disbursements)	(10,000)	10,000	0	0	0
Excess of Cash Receipts and Other Financing Receipts Over / (Under) Cash Disbursements and Other Financing Disbursements	(41,656)	29,206	0	817	(11,633)
Fund Cash Balances, January 1	613,701	421,140	0	52,654	1,087,495
Fund Cash Balances, December 31	\$572,045	\$450,346	\$0	\$53,471	\$1,075,862
Reserve for Encumbrances, December 31	\$19,821	\$4,865	\$0	\$0	\$24,686

The notes to the financial statements are an integral part of this statement.

**JOINT EMERGENCY MEDICAL SERVICE DISTRICT
 WARREN COUNTY, OHIO
 STATEMENT OF CASH RECEIPTS, CASH DISBURSEMENTS, AND
 CHANGES IN FUND CASH BALANCES
 YEARS ENDED DECEMBER 31, 2010 AND 2009**

	<u>2010</u>	<u>2009</u>
Cash receipts:		
Local taxes	\$ 470,611	\$ 469,185
Intergovernmental	68,743	67,832
Charges for services	<u>732,488</u>	<u>693,172</u>
Total cash receipts	<u>1,271,842</u>	<u>1,230,189</u>
Cash disbursements:		
Current:		
General government	1,362,790	1,385,782
Human services	4,090	4,099
Debt service:		
Redemption of principal	12,618	21,748
Interest	2,270	896
Capital outlay	<u>205,452</u>	<u>14,723</u>
Total cash disbursements	<u>1,587,220</u>	<u>1,427,248</u>
Total cash disbursements over cash receipts	(315,378)	(197,059)
Other financing receipts:		
Sale of notes	82,000	-
Other financing sources	241,891	161,013
Other financing uses	<u>(120)</u>	<u>-</u>
Total other financing receipts	<u>323,771</u>	<u>161,013</u>
Excess of cash receipts and other financing receipts over cash disbursements (cash disbursements over cash receipts and other financing receipts)	8,393	(36,046)
Fund cash balances, January 1	<u>366,191</u>	<u>402,237</u>
Fund cash balances, December 31	<u>\$ 374,584</u>	<u>\$ 366,191</u>
Reserves for encumbrances, December 31	<u>\$ 27</u>	<u>\$ 3,800</u>

See accompanying notes and independent auditor's report.

**JOINT EMERGENCY MEDICAL SERVICE DISTRICT
 WARREN COUNTY, OHIO
 STATEMENT OF CASH RECEIPTS, CASH DISBURSEMENTS, AND
 CHANGES IN FUND CASH BALANCES
 YEARS ENDED DECEMBER 31, 2008 AND 2007**

	<u>2008</u>	<u>2007</u>
Cash receipts:		
Local taxes	\$ 592,016	\$ 600,811
Intergovernmental	74,245	55,217
Charges for services	672,554	648,930
Total cash receipts	<u>1,338,815</u>	<u>1,304,958</u>
Cash disbursements:		
Current:		
General government	1,280,169	1,168,517
Human services	3,941	3,981
Debt service:		
Redemption of principal	34,407	50,089
Interest	3,409	3,506
Capital outlay	27,869	68,270
Total cash disbursements	<u>1,349,795</u>	<u>1,294,363</u>
Total cash receipts over (under) cash disbursements	(10,980)	10,595
Other financing receipts:		
Sale of notes	-	55,000
Other financing sources	38,316	27,630
Other financing uses	(5,088)	-
Total other financing receipts	<u>33,228</u>	<u>82,630</u>
Excess of cash receipts and other financing receipts over cash disbursements	22,248	93,225
Fund cash balances, January 1	<u>379,989</u>	<u>286,764</u>
Fund cash balances, December 31	<u>\$ 402,237</u>	<u>\$ 379,989</u>
Reserves for encumbrances, December 31	<u>\$ 27</u>	<u>\$ 3,133</u>

See accompanying notes and report of independent auditors.

**JOINT EMERGENCY MEDICAL SERVICE DISTRICT
 WARREN COUNTY
 STATEMENT OF CASH RECEIPTS, CASH DISBURSEMENTS, AND
 CHANGES IN FUND CASH BALANCES
 FOR THE YEARS ENDED DECEMBER 31, 2006 AND 2005**

	<u>2006</u>	<u>2005</u>
Cash receipts:		
Local taxes	\$ 576,298	\$ 572,665
Intergovernmental	59,376	73,197
Charges for services	634,624	466,227
Licenses, permits, fees and other	17,645	31,868
State grant - MARCS communication grant	-	100,000
Total cash receipts	<u>1,287,943</u>	<u>1,243,957</u>
Cash disbursements:		
Current:		
General government	1,162,547	1,026,660
Human services	4,544	4,309
Debt service:		
Redemption of principal	55,915	20,372
Interest	4,989	2,230
Capital outlay	181,790	133,626
Total cash disbursements	<u>1,409,785</u>	<u>1,187,197</u>
Total cash receipts over (under) cash disbursements	<u>(121,842)</u>	56,760
Other financing receipts:		
Sale of notes	85,492	-
Other financing sources	5,309	-
Total other financing receipts	<u>90,801</u>	<u>-</u>
Excess of cash receipts and other financing receipts over cash disbursements (excess of cash disbursements over cash receipts and other financing receipts)	<u>(31,041)</u>	56,760
Fund cash balances, January 1	<u>317,805</u>	<u>261,045</u>
Fund cash balances, December 31	<u>\$ 286,764</u>	<u>\$ 317,805</u>
Reserves for encumbrances, December 31	<u>\$ 2,586</u>	<u>\$ 2,232</u>

See accompanying notes and report of independent auditors.

TAB 5: SUPPORTING DOCUMENTAION

**AN AGREEMENT BETWEEN THE
MUNICIPALITY OF CARLISE,
FRANKLIN TOWNSHIP, WARREN COUNTY AND THE
JOINT EMERGENCY MEDICAL SERVICES DISTRICT (JEMS), WARREN COUNTY
TO SUBMIT A JOINT GRANT APPLICATION
FOR LOCAL GOVERNMENT INNOVATION FUNDS**

This agreement to submit a joint grant application for Local Government Innovation Funds is made by the Municipality of Carlisle with its offices located at 760 W. Central Avenue, Carlisle, Ohio 45005 and Franklin Township, Warren County, Ohio with its offices located at 418 Fairview Drive, Carlisle, Ohio 45005 and the Joint Emergency Medical Services District (JEMS), Warren County, Ohio with its offices at 201 E. Sixth Street, Franklin, Ohio 45005.

WHEREAS, the Municipality of Carlisle, JEMS, and Franklin Township are interested in a study to determine the impact and sustainability if one of the members of JEMS removes itself from the District; and

WHEREAS, the Municipality of Carlisle, JEMS and Franklin Township are also interested in the feasibility of a combined Fire/EMS district; and

WHEREAS, the parties desire to study the feasibility of a joint district, or other operating options and recommendations for the future of the Carlisle Fire Department, JEMS and the Township Fire Department; and

WHEREAS, the Local Government Innovation Fund has available grant funds to pay for such studies;

NOW, THEREFORE, the parties through their duly authorized representatives agree as follows:

- Section 1. The parties agree to cooperate with each other and jointly submit a 2012 grant application for Local Government Innovation Fund grant funds to pay for a sustainability/feasibility study as described in the recital paragraphs. Should the grant application be denied, then this Agreement will be void.
- Section 2. The parties will pay for the sustainability/feasibility study with grant funds. The budget for the feasibility study will be adjusted to match the amount of grant funds awarded. To the extent there is a requirement for the parties to match awarded grant funds with local funds of up to \$10,000.00, the parties agree to each contribute one-third of the required local match amount.
- Section . In general, the study will determine the sustainability of the remaining members of JEMS if a member removes itself from the Joint Medical Services District and the study will address the feasibility and potential cost savings, benefits, and drawbacks of operating a joint district, make recommendations regarding operational options and the future of the Carlisle Fire Department, the Franklin Township Fire Department and JEMS.
- Section 4. The parties agree to cooperate with each other in the process of consultant selection for the sustainability/feasibility study. The parties will jointly create one or more requests for proposals with study specifications and proposal evaluation criteria to solicit proposals for conducting the sustainability/feasibility study. One or more consultants maybe retained by the parties to work on all or portions of the study as agreed on by the parties. The Municipality of Carlisle will serve as the lead agency for acceptance and disbursement of grants funds and for contracting with consultants.

Section 5. This agreement will be effective as of the date it is signed by the last party to sign below. This agreement will terminate upon completion of the feasibility study.

Section 6. The parties may amend this agreement by a written instrument signed by authorized representatives of all parties.

IN WITNESS WHEREOF, the parties hereto, through their duly authorized representatives, have executed this Agreement.

Municipality of Carlisle, Ohio

By: _____
Sherry Callahan
Village Manager

Franklin Township, Warren County, Ohio

By: _____
Beth Callahan
President

By: _____
Greg Samples
Vice-President

By: _____
Ron Ruppert
Trustee

Joint Emergency Services District, Warren County, Ohio

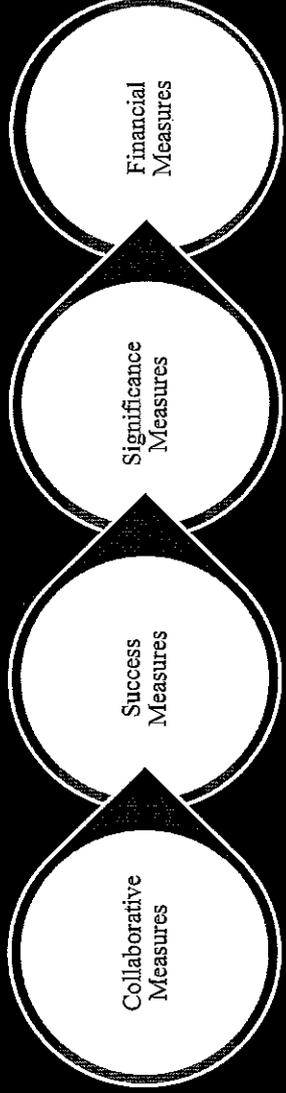
By: _____
Scott Boschert
Chairman

By: _____
Jason Faulkner
Vice-Chairman

By: _____
Ron Ruppert
Board Member

Approved as to Form:

Warren County Prosecutor



Round 3: Application Form

Local Government Innovation Fund

Step One: Fill out this Application Form in its entirety.

Step Two: Fill out the online submission form and submit your application materials. All supplemental application materials should be combined into one file for submission.

LGIF: Applicant Profile

Lead Applicant	Municipality of Carlisle
Project Name	Impact study of the Joint Emergency Services District Fire/EMS Consol
Type of Request	Grant
Funding Request	\$58,500
JobsOhio Region	Southwest
Number of Collaborative Partners	2

Office of Redevelopment

Website: <http://development.ohio.gov/Urban/LGIF.htm>

Email: LGIF@development.ohio.gov

Phone: 614 | 995 2292

Lead Applicant	Municipality of Carlisle	Round 3	
Project Name	Impact study of the Joint Emergency Services District Fire/EMS Consolidation Feasibility Study	Type of Request	Grant

Lead Applicant

Address Line 1: 760 W Central Ave

Address Line 2:

City: Carlisle State: Oh Zip Code: 45005

City, Township or Village: Village Population (2010): 4,917

County: Warren Population (2010): 212,693

Did the lead applicant provide a resolution of support? Yes (Attached) No (In Process)

Project Contact

Complete the section below with information for the individual to be contacted on matters involving this application.

Project Contact: **Greg Wallace** Title: Director of Planning Zoning

Address Line 1: 760 W Central Ave

Address Line 2:

City: Carlisle State: oh Zip Code: 45005

Email Address: gwallace@carlisleoh.org Phone Number: (937) 746-7809

Section 1	Contacts
-----------	----------

Fiscal Officer

Complete the section below with information for the entity and individual serving as the fiscal agent for the project.

Fiscal Officer: **Julie Duffy** Title: Finance Director

Address Line 1: 760 W Central Ave

Address Line 2:

City: Carlisle State: oh Zip Code: 45005

Email Address: jduffy@carlisleoh.org Phone Number: (937) 746-0555

Is your organization registered in OAKS as a vendor? Yes No

Lead Applicant	Municipality of Carlisle	Round 3
Project Name	Impact Study of the Joint Emergency Services District Fire/EMS Consultation Feasibility Study	Grant
	Type of	

Single Applicant

Is your organization applying as a single entity? Yes No

Participating Entity: (1 point) for single applicants **1**

Collaborative Partners

Does the proposal involve other entities acting as collaborative partners? Yes No

Applicants applying with a collaborative partner are required to show proof of the partnership with a partnership agreement signed by each partner and resolutions of support from the governing entities. If the collaborative partner does not have a governing entity, a letter of support from the partnering organization is sufficient. Include these documents in the supporting documents section of the application.

In the section below, applicants are required to identify population information and the nature of the partnership.

Each collaborative partner should also be clearly and separately identified on pages 4-5.

Number of Collaborative Partners who signed the partnership agreement, and provided resolutions of support **1**

Participating Entity: (5 points) allocated to projects with collaborative partners. **5**

Population

The applicant is required to provide information from the 2010 U.S. Census information, available at: <http://factfinder2.census.gov/>

Does the applicant (or collaborative partner) represent a city, township or village with a population of less than 20,000 residents? Yes No

List Entity

yes

Municipality/Township Population

Carlisle 4,917

Does the applicant (or collaborative partner) represent a county with a population of less than 25,000 residents? Yes No

List Entity

County Population

Warren 212,692

Population: (3-5 points) determined by the smallest population listed in the application. Applications from (or collaborating with) small communities are preferred. **5**

Lead Applicant	Municipality of Carlisle	Round 3
Project Name	Impact study of the Joint Emergency Services District Fire/EMS Consolidation Feasibility Study	Grant
		Type of Request

Nature of Partnership (2000 character limit)

As agreed upon in the partnership agreement, please identify the nature of the partnership, and explain how the main applicant and the partners will work together on the proposed project.

The Municipality of Carlisle and Franklin Township will join together to participate in a feasibility study to look at the possibility of a collaborative effort in providing fire and EMS services to the Municipality and the unincorporated areas of Franklin township. Currently the areas are serviced by two volunteer fire departments and JEMS a joint ambulance district that provides EMS. JEMS is presently made up of Carlisle Franklin Township and City of Franklin. In 2013 the City of Franklin is removing itself from the Joint District leaving only Carlisle and Franklin Township. We are joining together to look at the impact that Franklin City will have on the District

List of Partners

The applicant applying with collaborative partners (defined in §1.03 of the LGIF Policies) must include the following information for each applicant:

- Name of collaborative partners
- Contact Information
- Population data (derived from the 2010 U.S. Census)

If the project involves more than 12 collaborative partners, additional forms are available on the LGIF website.

Lead Applicant	Municipality of Carlisle	Round 3
Project Name	Impact study of the Joint Emergency Services District FireEMS Consolidation Feasibility Study	Type of Request
		Grant

Collaborative Partners Number 1	Franklin Township	Population	
Address Line 1	418 Fairview	Franklin Township	30,312
Address Line 2			
City	Carlisle	Warren	212,692
Email Address	Traci.Stivers@cinci.rr.com		
Resolution of Support	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Signed Agreement	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Collaborative Partners Number 2		Population	
Address Line 1			
Address Line 2			
City			
Email Address			
Resolution of Support	<input type="checkbox"/> Yes <input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes <input type="checkbox"/> No

Collaborative Partners Number 3		Population	
Address Line 1			
Address Line 2			
City			
Email Address			
Resolution of Support	<input type="checkbox"/> Yes <input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes <input type="checkbox"/> No

Collaborative Partners Number 4		Population	
Address Line 1			
Address Line 2			
City			
Email Address			
Resolution of Support	<input type="checkbox"/> Yes <input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes <input type="checkbox"/> No

Lead Applicant	Municipality of Carlisle	Round 3
Project Name	Impact Study of the Joint Emergency Services District Fire/EMS Consolidation Feasibility Study	Type of Request
		Grant

Collaborative Partners Number 5						
Address Line 1					Population	
Address Line 2	Municipality /Township		Population		Population	
City	State	Zip Code	County		Population	
Email Address			Phone Number			
Resolution of Support	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Collaborative Partners Number 6						
Address Line 1					Population	
Address Line 2	Municipality /Township		Population		Population	
City	State	Zip Code	County		Population	
Email Address			Phone Number			
Resolution of Support	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Collaborative Partners Number 7						
Address Line 1					Population	
Address Line 2	Municipality /Township		Population		Population	
City	State	Zip Code	County		Population	
Email Address			Phone Number			
Resolution of Support	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Collaborative Partners Number 8						
Address Line 1					Population	
Address Line 2	Municipality /Township		Population		Population	
City	State	Zip Code	County		Population	
Email Address			Phone Number			
Resolution of Support	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Signed Agreement	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Map View: [2010 Census Interactive Population Map](#)

2010 Census Interactive Population Search

OH - Carlisle city

	Population
Total Population	4,915

Housing Status (in housing units unless noted)

Total	2,066
Occupied	1,866
Owner-occupied	1,483
Population in owner-occupied (number of individuals)	3,969
Renter-occupied	383
Population in renter-occupied (number of individuals)	889
Households with individuals under 18	633
Vacant	200
Vacant: for rent	104
Vacant: for sale	38

Population by Sex/Age

Male	2,384
Female	2,531
Under 18	1,193
18 & over	3,722
20 - 24	248
25 - 34	501
35 - 49	1,047
50 - 64	1,076
65 & over	741

Population by Ethnicity

Hispanic or Latino	50
Non Hispanic or Latino	4,865

Population by Race

White	4,831
African American	21
Asian	7
American Indian and Alaska Native	3

Native Hawaiian and Pacific Islander	0
Other	12
Identified by two or more	41

OH - Franklin township

Population	30,312
-------------------	--------

Housing Status
(in housing units unless noted)

Total	12,684
Occupied	11,752
Owner-occupied	8,306
Population in owner-occupied (number of individuals)	21,929
Renter-occupied	3,446
Population in renter-occupied (number of individuals)	8,164
Households with individuals under 18	4,011
Vacant	932
Vacant: for rent	378
Vacant: for sale	179

Population by Sex/Age

Male	14,798
Female	15,514
Under 18	7,422
18 & over	22,890
20 - 24	1,675
25 - 34	3,718
35 - 49	6,339
50 - 64	6,156
65 & over	4,302

Population by Ethnicity

Hispanic or Latino	419
Non Hispanic or Latino	29,893

Population by Race

White	29,085
African American	493
Asian	159
American Indian and Alaska Native	56

Native Hawaiian and Pacific Islander	0
Other	112
Identified by two or more	407

OH - Ohio

Population	
Total Population	11,536,504

Housing Status
(in housing units unless noted)

Total	5,127,508
Occupied	4,603,435
Owner-occupied	3,111,054
Population in owner-occupied (number of individuals)	7,889,424
Renter-occupied	1,492,381
Population in renter-occupied (number of individuals)	3,340,814
Households with individuals under 18	1,438,580
Vacant	524,073
Vacant: for rent	184,143
Vacant: for sale	78,089

Population by Sex/Age

Male	5,632,156
Female	5,904,348
Under 18	2,730,751
18 & over	8,805,753
20 - 24	763,116
25 - 34	1,409,959
35 - 49	2,334,965
50 - 64	2,339,323
65 & over	1,622,015

Population by Ethnicity

Hispanic or Latino	354,674
Non Hispanic or Latino	11,181,830

Population by Race

White	9,539,437
African American	1,407,681
Asian	192,233
American Indian and Alaska Native	25,292

Native Hawaiian and Pacific Islander	4,066
Other	130,030
Identified by two or more	237,765

Map View: [2010 Census Interactive Population Map](#)

2010 Census Interactive Population Search

OH - Franklin township

	Population
Total Population	30,312

Housing Status (in housing units unless noted)

Total	12,684
Occupied	11,752
Owner-occupied	8,306
Population in owner-occupied (number of individuals)	21,929
Renter-occupied	3,446
Population in renter-occupied (number of individuals)	8,164
Households with individuals under 18	4,011
Vacant	932
Vacant: for rent	378
Vacant: for sale	179

Population by Sex/Age

Male	14,798
Female	15,514
Under 18	7,422
18 & over	22,890
20 - 24	1,675
25 - 34	3,718
35 - 49	6,339
50 - 64	6,156
65 & over	4,302

Population by Ethnicity

Hispanic or Latino	419
Non Hispanic or Latino	29,893

Population by Race

White	29,085
African American	493
Asian	159
American Indian and Alaska Native	56

Native Hawaiian and Pacific Islander	0
Other	112
Identified by two or more	407

OH - Ohio

	Population
Total Population	11,536,504

Housing Status
 (in housing units unless noted)

Total	5,127,508
Occupied	4,603,435
Owner-occupied	3,111,054
Population in owner-occupied (number of individuals)	7,889,424
Renter-occupied	1,492,381
Population in renter-occupied (number of individuals)	3,340,814
Households with individuals under 18	1,438,580
Vacant	524,073
Vacant: for rent	184,143
Vacant: for sale	78,089

Population by Sex/Age

Male	5,632,156
Female	5,904,348
Under 18	2,730,751
18 & over	8,805,753
20 - 24	763,116
25 - 34	1,409,959
35 - 49	2,334,965
50 - 64	2,339,323
65 & over	1,622,015

Population by Ethnicity

Hispanic or Latino	354,674
Non Hispanic or Latino	11,181,830

Population by Race

White	9,539,437
African American	1,407,681
Asian	192,233
American Indian and Alaska Native	25,292

Native Hawaiian and Pacific Islander	4,066
Other	130,030
Identified by two or more	237,765

A RESOLUTION AUTHORIZING THE MANAGER OR DESIGNEE TO APPLY FOR, ACCEPT AND APPROPRIATE GRANT FUNDS IN AN AMOUNT NOT TO EXCEED \$100,000.00 FROM THE OHIO DEPARTMENT OF DEVELOPMENT LOCAL GOVERNMENT INNOVATION FUND AND DECLARING AN EMERGENCY

WHEREAS, the State of Ohio Department of Development announced the availability of Local Government Innovation funds for grants up to \$100,000.00 to provide financial assistance to Ohio political subdivisions for planning and implementing projects that are projected to create more efficient and effective service delivery within a specific discipline of government services for one or more entities; and

WHEREAS, there is a need for funds to study the impact of possible changes in the JEMS organization; and

WHEREAS, the Carlisle Village Council have in the past expressed an interest in studying the feasibility and benefits of consolidating the Franklin Township, Franklin City and Carlisle Fire Departments and JEMS again find the mutual benefits to be worth pursuing.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE MUNICIPALITY OF CARLISLE, OHIO, THAT:

Section 1. The Village Manager or her designee is hereby authorized to submit an application to the Ohio Department of Development Local Government Innovation Fund Committee for up to \$100,000.00 in grant funds to be used to study the impact of Franklin City pulling out of JEMS and for the study of the feasibility and benefits of consolidation:

Section 2. The Village Manager or her designee is authorized to accept the Ohio Department of Development Local Government Innovation Funds, if awarded.

Section 3. This resolution is declared to be an emergency measure for the purpose of securing grant funds for the preservation of the public peace, health, safety, and welfare of the inhabitants of the Municipality of Carlisle and further provides for the usual in full force and effect from and after its passage.

Adopted this 28 day of January, 2012



Mayor

Attest: *Jo Etko*
Clerk of Council

Introduced by Council Person James Lickliter

**AN AGREEMENT BETWEEN THE
MUNICIPALITY OF CARLISLE,
FRANKLIN TOWNSHIP, WARREN COUNTY AND THE
JOINT EMERGENCY MEDICAL SERVICES DISTRICT (JEMS), WARREN COUNTY
TO SUBMIT A JOINT GRANT APPLICATION
FOR LOCAL GOVERNMENT INNOVATION FUNDS**

This agreement to submit a joint grant application for Local Government Innovation Funds is made by the Municipality of Carlisle with its offices located at 760 W. Central Avenue, Carlisle, Ohio 45005 and Franklin Township, Warren County, Ohio with its offices located at 418 Fairview Drive, Carlisle, Ohio 45005 and the Joint Emergency Medical Services District (JEMS), Warren County, Ohio with its offices at 201 E. Sixth Street, Franklin, Ohio 45005.

WHEREAS, the Municipality of Carlisle, JEMS, and Franklin Township are interested in a study to determine the impact and sustainability if one of the members of JEMS removes itself from the District; and

WHEREAS, the Municipality of Carlisle, JEMS and Franklin Township are also interested in the feasibility of a combined Fire/EMS district; and

WHEREAS, the parties desire to study the feasibility of a joint district, or other operating options and recommendations for the future of the Carlisle Fire Department, JEMS and the Township Fire Department; and

WHEREAS, the Local Government Innovation Fund has available grant funds to pay for such studies;

NOW, THEREFORE, the parties through their duly authorized representatives agree as follows:

Section 1. The parties agree to cooperate with each other and jointly submit a 2012 grant application for Local Government Innovation Fund grant funds to pay for a sustainability/feasibility study as described in the recital paragraphs. Should the grant application be denied, then this Agreement will be void.

Section 2. The parties will pay for the sustainability/feasibility study with grant funds. The budget for the feasibility study will be adjusted to match the amount of grant funds awarded. To the extent there is a requirement for the parties to match awarded grant funds with local funds of up to \$10,000.00, the parties agree to each contribute one-third of the required local match amount.

Section . In general, the study will determine the sustainability of the remaining members of JEMS if a member removes itself from the Joint Medical Services District and the study will address the feasibility and potential cost savings, benefits, and drawbacks of operating a joint district, make recommendations regarding operational options and the future of the Carlisle Fire Department, the Franklin Township Fire Department and JEMS.

Section 4. The parties agree to cooperate with each other in the process of consultant selection for the sustainability/feasibility study. The parties will jointly create one or more requests for proposals with study specifications and proposal evaluation criteria to solicit proposals for conducting the sustainability/feasibility study. One or more consultants maybe retained by the parties to work on all or portions of the study as agreed on by the parties. The Municipality of Carlisle will serve as the lead agency for acceptance and disbursement of grants funds and for contracting with consultants.

Section 5. This agreement will be effective as of the date it is signed by the last party to sign below. This agreement will terminate upon completion of the feasibility study.

Section 6. The parties may amend this agreement by a written instrument signed by authorized representatives of all parties.

IN WITNESS WHEREOF, the parties hereto, through their duly authorized representatives, have executed this Agreement.

Municipality of Carlisle, Ohio

By: 
Sherry Callahan
Village Manager

Franklin Township, Warren County, Ohio

By: 
Beth Callahan
President

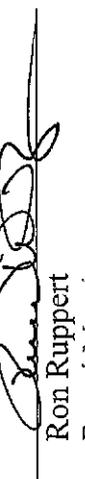
By: 
Greg Samples
Vice-President

By: 
Ron Ruppert
Trustee

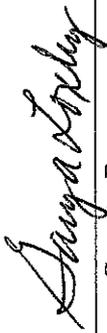
Joint Emergency Services District, Warren County, Ohio

By: 
Scott Boschert
Chairman

By: 
Jason Faulkner
Vice-Chairman

By: 
Ron Ruppert
Board Member

Approved as to Form:


Warren County Prosecutor
for Franklin Pop. Bd. of Trustees

RESOLUTION NO. 04-032812

_____ County, Ohio

Be It Resolved by the Township Trustees of Franklin Township

that Resolution No. 04-032812 be adopted to support and participate with the Village of Carlisle in submitting a grant application to the Ohio Department of Development, Local Government Innovation Fund for a feasibility study funding.

WHEREAS, Joint Emergency Medical Services aka J.E.M.S. was established in 1982 by the City of Franklin, Franklin Township, and the Village of Carlisle and jointly supported by a levy to provide emergency medical services, and

WHEREAS, funding from each subdivision is crucial to J.E.M.S. and now the City of Franklin has expressed desire and plans to pull out of the emergency medical services district to provide those services as a joint Fire/EMS in their city, and

NOW THEREFORE, BE IT RESOLVED, that funding for a feasibility study is an emergency measure to determine the cost and conditions necessary for the two remaining entities, Franklin Township and the Village of Carlisle to continue operating J.E.M.S. and also a feasibility study for a joint Fire/EMS district to provide adequate Emergency Services to protect the health, safety, and welfare of our citizens.

Mr. Ruppert moved to adopt the foregoing resolution.

Mr. Sample seconded the motion. Vote on the resolution was as follows:

Mr. Ruppert	-	Yes
Mr. Sample	-	Yes
Mrs. Callahan	-	Yes

Adopted the 28 day of March, 2012

YEAR

Attest: Scot Fromeyer Fiscal Officer

Beth Callahan, President

Gregory Sample, Vice President

Ronald Ruppert, Trustee

Township Trustees