



**CITY OF SURPRISE**  
**PSPRS Fire**  
**16000 N. Civic Center Plaza**  
**Surprise, AZ 85374**  
 Wednesday, August 16, 2023 @ 9:00 AM  
**COUNCIL CHAMBERS**

- A. Call To Order
- B. Roll Call
- C. Pledge of Allegiance
- D. Current Events and Reports
- E. Staff Reports
- F. Public Safety Retirement Commission- Fire Agenda

**CALL TO THE PUBLIC:**

**INSTRUCTIONS:** In order to address the Board\Commission, you will need to fill out a Call to the Public Form available at the front counter, and then turn it in to the Secretary before the meeting begins.

Note: A.R.S. 38-431.01(H) - During this time members of the public may address the Board\Commission only on issues within the jurisdiction of the Board\Commission which are not an item on the agenda. At the conclusion of the open call, the Board\Commission may respond to criticism, may ask staff to review the matter or may ask that the matter be put on a future agenda. No discussion or action shall take place on any item raised.

**CONSENT AGENDA:**

- 1. Internal Considerations and action pertaining to the review and approval of the April 12, 2023 Public Safety Retirement Commission – Fire Meeting Minutes Human Resources

**REGULAR AGENDA ITEM - NON-PUBLIC HEARING:**

- 2. Internal Consideration and possible action pertaining to the review and approval of PSPRS retiree Lawrence A. Subervi alternate contribution rate (ACR) to the system pursuant to A.R.S. § 38-843.05 Human Resources

- G. Other Business and Future Agenda Items
- H. Executive Session

For information purposes: Upon a public majority vote of a quorum of the Public Safety Personnel Retirement Commission (“Commission”), the Commission may hold an executive session, which will not be open to the public, but for only the following purposes: discussion or consideration of records exempt by law from public inspection (A.R.S. §38-431.03(A)(2)); or discussion or consultation for legal advice with the Commission’s attorneys (A.R.S. §38-431.03(A)(3)).

Confidentiality Requirements: Pursuant to A.R.S. §38-431.03(C)(D), any person receiving executive session information pursuant to A.R.S. §38-431.02 shall not disclose that information except to the Attorney General or County Attorney or by agreement of the Commission, or as otherwise ordered by a court of competent jurisdiction.

The Commission may vote to hold an executive session for the purpose of obtaining legal advice from the Commission’s attorney on any matter listed on the agenda pursuant to A.R.S. § 38-431.03(A)(3).

- I. Adjournment

POSTED: Thursday August 10, 2023 @ 3:00 PM

**SPECIAL NOTE: PERSONS WITH SPECIAL ACCESSIBILITY NEEDS, INCLUDING LARGE PRINT MATERIALS OR INTERPRETER, SHOULD CONTACT THE CITY CLERK'S OFFICE @ 623.222.1200 OR TTY 623.222.1002, BY NO LATER THAN 24 HOURS IN ADVANCE OF THE REGULAR SCHEDULED MEETING TIME.**



**CITY OF SURPRISE  
PSPRS Fire**

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Council Meeting Date: August 16, 2023  
Submitting Department: Human Resources  
Staff Recommendations:

Contact Person:  
District: Internal

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Consent: Yes      Regular: No      Public Hearing: No      Report/Discussion: No

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**Agenda Wording:**

Considerations and action pertaining to the review and approval of the April 12, 2023 Public Safety Retirement Commission – Fire Meeting Minutes

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**Motion:**

I motion to approve the April 12, 2023 Public Safety Retirement Commission – Fire Meeting Minutes

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**Background:**

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**Objective Analysis:**

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**Policy Compliant:**

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**Financial Impact:**

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**Budget Impact:**

**FTE Impact:**

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**ATTACHMENTS:**

1. Fire DRAFT Minutes 4.12.23
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The following are the minutes from the Public Safety Retirement Commission – Fire Board Meeting held at 9:30 a.m. Wednesday, April 12, 2023. The meeting was held in City Hall, Council Chambers.

**A. Call To Order**

Chair Hall called meeting to order at 9:30 a.m.

**B. Roll Call:** Skip Hall, Chair – Present  
Kim Drayden, Citizen Board Member – Absent  
James Conner, Citizen Board Member – Absent  
Christopher Preest, Fire Member – Present (*telephonically*)  
Ricardo “Rick” Valdez, Fire Member – Present

**In attendance:** Ariana Reyna, PSPRS Board Secretary

**C. Pledge of Allegiance** –Completed

**D. Current Events Reports** – None.

**E. Staff Reports** – Review of FY23 Legal Counsel and IME fees.

**F. Call to the Public** - None

**Consent Agenda:**

- 1. Considerations and action pertaining to the review and approval of the March 8, 2023 Public Safety Retirement Commission - Fire meeting minutes – APPROVED**

**Motion to Approve:** Kim Drayden

**Second:** Christopher Preest

**Opposed:** None

**Regular Agenda:**

- 2. Re-consideration and possible amended action pertaining to the review of medical examinations and the acceptance of four (4) Firefighter Recruits: Garrett Andrew Dickens, Brennan Todd Franklin, Kailee Ann Matlock, and**



**PUBLIC SAFETY RETIREMENT SYSTEM  
CITY OF SURPRISE LOCAL BOARD – FIRE**

Minutes, Wednesday, April 12, 2023  
16000 N. Civic Center Plaza, Surprise, Arizona 85374

**Scout Alexander Smith into the PSPRS system pursuant to A.R.S. § 38-859.  
– APPROVED.**

Ariana Reyna stated that During the March 8 Local Board meeting, Firefighter Recruits Smith, Dickens, Franklin, and Matlock were approved into the system without preexisting conditions. The Board needs to review the records and consider revision of the previous motion made.

A motion was made to amend the previous motion made and to approve Tier 3 Firefighter recruits into the PSPRS system as follows:

Garrett A. Dickens with preexisting conditions

Brennan T. Franklin with preexisting conditions

Kailee A. Matlock with preexisting conditions

Scout A. Smith with preexisting conditions

**Motion to Approve:** Rick Valdez

**Second:** Christopher Preest

**Opposed:** None

**3. Review of the City of Surprise Fire Department’s Actuarial – Financial Status and Projections Report as presented by the Public Agency Retirement Solutions – DISCUSSION ONLY.**

Ariana Reyna stated that During the 2023 annual Employer-Local Board conference, members of the Local Board met Charles D. Francis who is a Senior Consultant with Public Agency Retirement Solutions (PARS). Charles has also provided a user guide for understanding the ratios and a flier about the Section 115 Trust program offered through PSPRS. Charles and his colleague is with us today and has graciously offered to discuss the report, answer questions and talk about strategies for the future.

Charles D. Francis introduced himself as a former City Finance Director and now is a consultant who has partnered with PSPRS and administers the Section 115 program which his colleague, Maureen would discuss. Charles mentioned that in his experience as a former City Finance Director he was made aware that it could be difficult for City officials to interpret the actuarial report and in order to help make this information more accessible and easier to understand, he developed the a presentation through PARS which was shown to some of the Local PSPRS Board Members during the most recent PSPRS Local Board – Employer conference and was asked by several City of Surprise



**PUBLIC SAFETY RETIREMENT SYSTEM  
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Local Board Members to visit and present the information to the rest of the Local Board Members. Charles did a presentation and summarized the official actuarial report from PSPRS demonstrating that the Surprise Fire Department is 80.1% funded and summarized payroll and total costs as well. Charles mentioned the City's actuarial charts as provided to PSPRS and clarified that the information presented and discussed would only pertain to Tiers 1 and 2. He also provided information on support ratio, which equates to the number of active vs. inactive employees who are actually contributed to the pension plan as opposed to the ones that are not contributing and just collecting from it. Other projections discussed in terms of historic records and future projections for the Surprise Fire Department were asset volatility ratio (market value of assets compared to payroll), accrued liability ratio (inactive vs. total liabilities), net cash flow ratio (contributions going in vs. benefits going out), and other general data for the Local Board's review and consideration.

Maureen Toal explained the Section 115 program. In 2020, legislation changes allowed for Section 115 Trust under the IRS code to become a new option besides having money just sit in pension reserve like it had done thus far. Section 115 is a new plan that allows another option to manage liabilities and PARS was asked to set it up and administer it as a contractor working with PSPRS. Once the money is invested in the Section 115 trust plan it is irrevocable, it cannot be diverted for any other purposes other than pension/retirement. Assets can only be accessed for pension costs. For defined benefit plans, it can set funds for state or individual pension systems. As an exclusive benefit, assets are protected for the exclusive benefit of employees, retirees, and beneficiaries. Diversified investments are directed per Arizona law. The trust is sponsored by PSPRS but the it is locally controlled. The investment managers of the trust are US Bank and Vanguard. If the City wanted to move forward and implement the trust, there is no cost to set it up; the fees are based on assets. PARS would provide the trust documents and the City Council would approve the official implementation of the trust and once the documents are executed then, at that time the City would make a decision on investment and management approach.

**G. Other Business and Future Agenda Items – None**

**H. Executive Session – None**

**I. Adjournment**

Motion to adjourn at 10:07 a.m. – **APPROVED**

**Motion:** Jim Conner

**Second:** Rick Valdez

**Opposed:** None



**Meeting Minutes Approval:**

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Skip Hall, Chair  
Public Safety Retirement Commission – Fire

**CERTIFICATION:**

I, Ariana Reyna, Board Secretary and Human Resources Business Partner for the City of Surprise, Maricopa County, Arizona, do hereby verify that these are true and correct minutes of the Public Safety Retirement Commission – Fire Meeting of **Wednesday, April 12, 2023.**

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Ariana Reyna, Board Secretary  
Public Safety Retirement Commission – Fire



CITY OF SURPRISE  
PSPRS Fire

Council Meeting Date: August 16, 2023  
Submitting Department: Human Resources  
Staff Recommendations:

Contact Person:  
District: Internal

Consent: No      Regular: Yes      Public Hearing: No      Report/Discussion: No

**Agenda Wording:**

Consideration and possible action pertaining to the review and approval of PSPRS retiree Lawrence A. Subervi alternate contribution rate (ACR) to the system pursuant to A.R.S. § 38-843.05

**Motion:**

**IF APPROVED:**

I motion to approve the ACR payment from the City of Surprise to PSPRS for Lawrence A. Subervi as his position of Battalion Chief is a Public Safety eligible position, effective his hire date with the Surprise Fire Department of June 12, 2023.

**IF DENIED:**

I motion to deny the ACR payment from the City of Surprise to PSPRS for Lawrence A. Subervi, Battalion Chief because \_\_\_\_\_.

**Background:**

Lawrence A. Subervi was hired as a Battalion Chief with the Surprise Fire Department effective June 12, 2023. He retired from City of Phoenix.

**Objective Analysis:**

**Policy Compliant:**

**Financial Impact:**

**Budget Impact:**

**FTE Impact:**

**ATTACHMENTS:**

1. Retiree ARS and ACR-BC



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# VIEW DOCUMENT

The Arizona Revised Statutes have been updated to include the revised sections from the 55th Legislature, 2nd Regular Session. Please note that the next update of this compilation will not take place until after the conclusion of the 56th Legislature, 1st Regular Session, which convenes in January 2023.

## DISCLAIMER

This online version of the Arizona Revised Statutes is primarily maintained for legislative drafting purposes and reflects the version of law that is effective on January 1st of the year following the most recent legislative session. The official version of the Arizona Revised Statutes is published by Thomson Reuters.

### 38-843.05. Retired members; return to work; employer contributions

A. An employer shall pay contributions at an alternate contribution rate on behalf of a retired member who returns to work in any capacity in a position ordinarily filled by an employee of the employer of an eligible group, unless the retired member is required to participate in another state retirement system and the retired member returned to work before July 20, 2011. For the purposes of this subsection, "returns to work in any capacity" includes a retired member who returns to work and is ineligible for benefits pursuant to section 38-849, subsection E.

B. The alternate contribution rate shall be equal to that portion of the individual employer's total required contribution that is applied to the amortization of the unfunded actuarial accrued liability for the fiscal year beginning July 1, based on the system's actuary's calculation of the total required contribution for the preceding fiscal year ended on June 30. The alternate contribution rate shall be applied to the compensation, gross salary or contract fee of a retired member who meets the requirements of this section.

C. The alternate contribution rate shall not be less than eight percent in any fiscal year.

D. All contributions made by the employer and allocated to the fund are irrevocable and shall be used as benefits under this article or to pay the expenses of the system. Payments made pursuant to this section by employers become delinquent after the due date prescribed in section 38-843, subsection D, and thereafter shall be increased by interest from and after that date until payment is received by the system.

E. An employer of a retired member shall immediately notify the local board after the employment of a retired member and shall submit any reports, data, paperwork or materials that are requested by the board or the local board that are necessary to determine the compensation, gross salary or contract fee associated with a retired member who returns to work or to determine the function, use, efficacy or operation of the return to work program.



[Home](#) > [Employers & Local Boards](#) > Contribution Rates & Reporting

## Contribution Rates & Reporting

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### Alternate Contribution Rate (ACR)

Legislation passed in 2011 which requires employers to pay an Alternate Contribution Rate (ACR) when they employ a PSPRS, CORP or EORP retiree. This rate is strictly charged to the employer as a way to lessen any potential actuarial impact caused by hiring a retiree in a position that would normally be filled with a contributing employee.

The ACR is individually set for each participating employer group and determined each year during the system's annual actuarial valuation. The ACR is meant to help pay the unfunded liability amortization payment, and is calculated by combining the amortized unfunded liability contribution rates for both the cost of pension and health, with a minimum amount of 8% in PSPRS and 6% in CORP. Employers can access this information from the Contribution Requirement section in their annual [Individual Actuarial Valuation Report](#). For the EORP ACR and Retirement Path information, see [EODCRS](#).

Employers must report ACR data and payments using their normal payroll reporting processes to the system. This would include uploading data through the [Employer Payroll Portal](#). Employers who submit late ACR payments are subject to interest being charged against those payments.

For more information on contribution reporting and payment remittance, please contact our [Active Members Department](#).

\* <https://www.psprs.com/employers--local-boards/contribution-rates-reporting>



# BATTALION CHIEF (FIRE- MEDICAL)

Class Code:  
BC

CITY OF SURPRISE  
Established Date: May 19, 2021  
Revision Date: May 19, 2021

## SALARY RANGE

\$41.98 - \$47.22 Hourly

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**Job Title:** BATTALION CHIEF

**Department:** Fire-Medical

**Reports To:** Assistant Fire Chief

**FLSA Status:** Non-Exempt

**Job Status:** Full-time; Non Classified; Safety Sensitive

**Pay Grade:** BC

### SUMMARY

To perform a wide variety of administrative and managerial duties for the Fire Department; to serve as chief field officer in directing the response and readiness of multiple fire companies; administers all functions of a specific division or functional area of the Fire Department such as EMS, personnel management, budget, training or coordination of the Haz-Mat response team; and to provide technical and responsible staff assistance to the Fire Chief.

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**ESSENTIAL DUTIES AND RESPONSIBILITIES** The duties listed below are intended only as general illustrations of the various types of work that may be performed. Specific statements of duties not included does not exclude them from the position if the work is similar, related, or a logical assignment to the position. Job descriptions are subject to change by the City as the needs of the City and requirements of the job change.

- Communicate with supervisors and subordinates both in writing and verbally on a daily basis
- Recommend goals and objectives; assist in the development of and implement policies and procedures
- Share information and experience with supervisor and subordinates
- Develop and implement work schedules including fire prevention and inspection, training, maintenance, and public relations activities

- Manage and deploy Department volunteers, including the Chaplain and Crisis Response personnel
- Work with other management staff to maintain, revise, or improve the overall operations of the department
- Prepare the budget of assigned area of command; assist in budget implementation; participate in the forecast of additional funds needed for staffing, equipment, materials and supplies. Administer the approved budget
- Interpret and apply departmental policies and procedures; enforce staff compliance.
- Prepare and review forms, reports, schedules, recommendations and other administrative records related to fire suppression, prevention and emergency medical services
- Participate in recommending the appointment of personnel; participate in establishing and monitoring employee performance objectives; prepare and present employee performance reviews; provide or coordinate staff training; work with employees to correct deficiencies; implement discipline procedures; recommend employee terminations
- Respond to alarms as required by departmental policy; act as incident commander unless relieved by a superior officer
- Prepare special research reports and develop programs as assigned including public education
- Perform public speaking duties at civic functions, community meetings, groups and schools as assigned
- Assist on special projects as assigned
- May serve as Public Information Officer for the Department
- Attend professional meetings, workshops and conferences
- May work a 56 or 40-hour work schedule
- Works mandatory overtime as required
- Cultivate inclusive and respectful working relationships that support a sense of belonging for all employees and community members.
- Performs the essential duties of the job in the conditions described in the physical demands and work environment sections below
- Maintains regular attendance and punctuality
- Performs other duties of a similar nature or level

**SUPERVISORY RESPONSIBILITIES** Exercises supervision of personnel in related area of responsibility.

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### **QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions. Knowledge of:

- Modern Fire Suppression, prevention, administrative principles, methods, practices and techniques
- Rules, regulations and operational procedures of the Fire Department related to modern fire fighting activities
- Proper utilization and maintenance requirements of fire apparatus, equipment, tools, devices and facilities
- Principles and practices of supervision, training and personnel management
- Local geography including the location of water mains, hydrants and the major fire hazards of the City
- Modern office practices, procedures, methods and equipment including computerized data entry and retrieval systems

Ability to:

- Effectively communicate with superiors and subordinates
- Make sound decisions and direct operations at the scene of a fire or emergency
- Plan, coordinate and organize training activities and develop procedures for departmental improvement through the distribution of information
- Properly interpret and make decisions in accordance with laws, regulations and policies
- Administer and evaluate suppression, prevention and emergency medical programs
- Prepare and administer a Departmental budget
- Supervise, train and evaluate assigned personnel
- Establish and maintain effective working relationships with those contacted in the course of work

### **EDUCATION and/or EXPERIENCE**

Associate's degree in Fire Science, Management, Public Administration, Human Resources Management or equivalent from an accredited college or technical school; ten (10) years fire suppression and Emergency Medical Service (EMS) experience in the Phoenix Regional Automatic Aid System including three (3) year at the rank of Captain or above; or equivalent combination of education and experience. Additional education cannot be substituted for experience.

### **CERTIFICATIONS, LICENSES, REGISTRATIONS**

Possession of a valid EMT certificate. Must have at the time of hire and be able to maintain a valid Arizona r's license.

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### **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential

functions. Heavy Work: Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

**WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally exposed to wet and/or humid conditions, moving mechanical parts, fumes or airborne particles, toxic or caustic chemicals, outside weather conditions, extreme heat, risk of electrical shock, explosives, risk of radiation and vibration. The noise level in the work environment is usually moderate.

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This is a safety-sensitive position that requires candidates to successfully pass a pre-employment drug screen prior to start date. Candidates must successfully pass a Fire Medical Exam prior to start date.

**I HAVE REVIEWED AND UNDERSTAND THE DUTIES, RESPONSIBILITIES, AND REQUIREMENTS OF MY JOB DESCRIPTION.**

**Employee Name (Printed)**

\_\_\_\_\_

**Employee Signature**

\_\_\_\_\_ **Date** \_\_\_\_\_