STAFF REPORT

DATE: September 22, 2026

FROM: Joe Barna
Deputy Executive Director

TO: Administrative Committee

SUBJECT: APPROVAL OF ADMINISTRATIVE COMMITTEE POLICY AMENDMENTS

Recommended Action

Staff recommends that the Administrative Committee approve revisions to AP 1.001, AP 2.001, AP 2.002, AP 2.003, AP 2.004, AP 2.005, and AP 3.009 to conform the Administrative Committee Policy Manual to the Personnel Rules adopted by the Board of Directors. The approval would also authorize non-substantive formatting, numbering, title, and cross-reference corrections that do not alter the approved policy substance, employee rights, or controlling authority.

Staff separately recommends approval of AP 1.004, Record Retention, because that policy includes a comprehensive records-management update in addition to the conforming changes to the Personnel Rules. Separate approval allows the Administrative Committee to distinguish the broader records-management action from the narrower personnel-policy-conforming amendments while considering both in the same agenda item.

Background Information

The Board of Directors' adoption of the CONFIRE Personnel Rules requires corresponding amendments to the Administrative Committee policies addressing personnel administration, classification, records, and organizational authority. The existing Administrative Committee manual was developed under an earlier personnel structure and includes terminology, authority references, and document concepts that no longer fully align with the Board-approved Rules.

Most of the proposed amendments are conforming changes rather than expansions of Administrative Committee policy. The revisions preserve the existing purpose of each policy while updating Executive Director and Human Resources terminology, removing obsolete Special District and personnel-manual assumptions, and aligning the policies with the authority, employment status, records, and position control framework established by the Personnel Rules.

Conforming Policy Amendments

AP 1.001 aligns the Administrative Committee policy hierarchy with the Personnel Rules and CONFIRE's controlled-document structure. The revision clarifies the respective authority of Board and Administrative Committee policies, recognizes the controlling effect of applicable memoranda of understanding within their lawful scope, and confirms that enterprise policies, procedures, job aids, forms, and the employee handbook may implement but not supersede controlling authority.

AP 2.001 aligns the Executive Director's duties with the Personnel Rules' appointing-authority and personnel-administration framework. The revision updates the Director title, confirms the Executive Director's authority over CONFIRE employees subject to the Personnel Rules and controlling agreements, limits staffing actions to the authorized budget and position-control framework, and replaces the obsolete annual requirement for the Personnel Procedures Manual with controlled implementation procedures.

AP 2.002 replaces the prior policy's duplicative at-will position list with the classified and unclassified service structure established by the Personnel Rules and Exempt Compensation Plan. The revised policy recognizes that classified positions may be represented or nonrepresented, confirms that unclassified service is at-will, places exempt classification listings in the Board-approved Exempt Compensation Plan, and requires employment-status changes to occur through the authority and documentation established by controlling sources.

AP 2.003 and AP 2.004 require only limited conforming changes to the new personnel framework. AP 2.003 retains the existing nondiscrimination standard while updating Human Resources, complaint, investigation, and disciplinary references, and AP 2.004 retains the existing employee political-activity standard while adding the Personnel Rules and other controlling authority as governing references.

AP 2.005 aligns personnel-record custody, employee access, written responses, confidentiality, and authorized disclosure with Rule 17 of the Personnel Rules. Human Resources is designated as the custodian of official personnel records, and access, inspection, copying, withholding, and disclosure are governed by applicable law, the Personnel Rules, and any controlling memorandum of understanding.

AP 3.009 aligns organizational chart and position control administration with the Personnel Rules while preserving Executive Director flexibility within existing approvals. The Executive Director may manage vacancies, reporting relationships, assignments, and position or organizational changes within the approved budget, staffing authorization, classification plan, salary schedule, and delegated authority, while changes requiring a budget or staffing amendment, a new or abolished classification, a salary-range change, or other governing-body action remain subject to the appropriate approval process.

AP 1.004 Record Retention

AP 1.004 is presented for separate approval because its revision is a comprehensive records-management update rather than merely a Personnel Rules-conforming amendment. The proposed policy establishes an agency-wide framework for record retention, storage, security, legal holds, public records requests, destruction, and compliance across operational, administrative, financial, personnel, technology, and EMS records.

The revised AP 1.004 substantially expands the retention schedule to reflect CONFIRE's current operations and EMS implementation. It addresses CAD and 911 records; radio and dispatch records; EMS patient and clinical records; ambulance billing and reimbursement records; HIPAA and CMIA documentation; contracts and administrative records; personnel records; cybersecurity and system records; and the relationship among backups, archival retention, legal holds, and authorized destruction.

The Personnel Rules-related portion of AP 1.004 recognizes Rule 17 and AP 2.005 as part of the personnel-record framework, while leaving the retention schedule as the controlling operational source for record retention periods. This keeps personnel-record custody and employee-access requirements coordinated with the Personnel Rules, without duplicating the detailed rights and procedures set forth in the retention policy.

Separate approval of AP 1.004 provides appropriate visibility for the broader records-policy decision without creating a second agenda item. The Administrative Committee can first act on the personnel-policy-conforming amendments and then take a separate action on the comprehensive Record Retention policy within the same staff report and presentation.

The proposed policy amendments preserve negotiated employee rights and do not independently supersede an applicable memorandum of understanding, compensation plan, employment agreement, or law. Where a controlling employment source establishes a different right, procedure, timeline, or standard within its lawful scope, that source continues to control as provided by the Personnel Rules and the revised policy hierarchy.

Approval of these amendments will complete the Administrative Committee's immediate policy alignment needed to implement the Board-approved Personnel Rules. The conforming changes will allow CONFIRE to continue development of enterprise policies, departmental procedures, job aids, and the employee handbook using a consistent personnel and governance framework.

Financial Impact

Approval of the Administrative Committee policy amendments is not expected to create a direct fiscal impact. Implementation will primarily involve routine policy administration, records management, document control, and staff communication within existing resources; any future expenditures for systems, staffing, technology, or programs will remain subject to the adopted budget and applicable approval and procurement requirements.

Attachments

1. AP 1.001 - Administrative Committee Policy Establishment and Numbering
2. AP 2.001 - Executive Director - Duties and Responsibilities
3. AP 2.002 - Classification and Employment Status
4. AP 2.003 - Nondiscrimination in Employment
5. AP 2.004 - Political Activities of Employees
6. AP 2.005 - Restricted Access to Personnel Information
7. AP 3.009 - Organizational Chart
8. AP 1.004 - Record Retention (separate recommended action)

~~AP 1.001 Administrative Committee Policy Establishment and Numbering~~

Document Number	AP 1.001	**Issue Date**	~~[6.~~06/22~~.~~/2021~~]~~
Title	Administrative Committee Policy Establishment and Numbering	**Review Date**	To Be Determined
Section	Series 1000~~:~~ - General	**Revision Date**	To Be Determined
Policy Owner	~~To Be Determined~~Executive Administration / Board Clerk	**Approved By**	Administrative Committee
~~**Applicability**~~	~~To Be Determined~~		
Applicability	Administrative Committee members, Executive Director, policy owners, and persons administering controlled Administrative Committee documents	**Required Reviews**	~~To Be Determined~~Executive Director; Board Clerk; Legal Counsel
Related Policy / Authority / Standards	~~To Be Determined~~Joint Powers Agreement; BP 1.001; BP 6.001; CONFIRE Personnel Rules	**Supersedes**	AP 1.001, Administrative Committee Policy Establishment and Numbering, adopted 06/22/2021
~~**Supersedes**~~**DRAFT FOR LEGAL, LABOR, AND GOVERNANCE REVIEW - NOT APPROVED**		~~To Be Determined~~	

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The Board of the Consolidated Fire Agencies of the Greater Inland Empire ("CONFIRE") established the Administrative Committee of CONFIRE and vested the Administrative Committee with the authority to:

- Direct and supervise the operations of CONFIRE~~;~~.
- Establish rules for its own procedures.

Such authority is limited by the laws of California, Board Policies, and the Joint Powers Agreement governing CONFIRE. These Administrative Policies are established pursuant to this vested authority.

The Administrative Committee shall submit the Manual of Administrative Policies to the Board annually for its review and consideration ~~on an annual basis~~.

The definitions in this Administrative Policy shall apply to the entire Manual of Administrative Policies. For personnel matters, terms defined in the CONFIRE Personnel Rules shall be applied consistently with those Rules unless a controlling Administrative Committee policy provides otherwise.

Interpretation

~~1. In the event of a conflict between this Manual of Administrative Policies and the Manual of Board Policies, the Manual of Board Policies shall control.~~

1. Where a Board Policy and an Administrative Committee Policy address the same matter, each shall be applied within the authority assigned to that body by the Joint Powers Agreement. A Board Policy controls to the extent the matter is reserved to the Board of Directors.
2. In the event of a conflict between this Manual of Administrative Policies and the Joint Powers Agreement governing CONFIRE, the Joint Powers Agreement shall control.
3. In the event of a conflict between this Manual of Administrative Policies and a memorandum of understanding ("MOU") entered into between CONFIRE and a duly recognized employee organization pursuant to the Meyers-Milias-Brown Act ~~(Government Code Sections 3500-3510),~~, the MOU shall control within its lawful and stated scope.
4. The CONFIRE Personnel Rules govern the personnel system within their approved scope. Enterprise policies, procedures, standard operating procedures, forms, job aids, administrative practices, and the employee handbook may implement higher authority but may not amend or supersede a controlling source.

Numbering

1. The first set of digits reflects the Series (i.e., General, Personnel, etc~~.);~~.).
2. The second set of digits reflects the Policy number~~; and~~.
3. The third set of digits, if any, memorializes revisions to the Administrative Policy. Using this Policy as an example, 1.001.01 would reflect the first revision.

Related Documents

- Third Amended and Restated Joint Powers Agreement for CONFIRE, as amended.
- BP 1.001, Policy Establishment and Numbering.
- BP 6.001, Administrative Committee.
- CONFIRE Personnel Rules.

Revision History

Date	Action	Summary of Change	Approval Authority
06/22/2021	Adopted	Original policy adopted.	Administrative Committee
[MM/DD/YYYY]	Revised	Added Personnel Rules and controlled-document hierarchy references while preserving the Administrative Committee's delegated authority.	Administrative Committee

~~AP 2.001 Director - Duties and Responsibilities~~

Document Number	AP 2.001	**Issue Date**	~~[6.~~06/22~~.~~/2021~~]~~
Title	Executive Director - Duties and Responsibilities	**Review Date**	To Be Determined
Section	Series 2000~~:~~ - Personnel	**Revision Date**	To Be Determined
Policy Owner	~~To Be Determined~~Executive Administration	**Approved By**	Administrative Committee
~~**Applicability**~~	~~To Be Determined~~		
Applicability	Executive Director and officials acting under delegated executive authority	**Required Reviews**	~~To Be Determined~~Executive Director; Human Resources; Legal Counsel
Related Policy / Authority / Standards	~~To Be Determined~~Joint Powers Agreement; BP 6.001; BP 7.001; CONFIRE Personnel Rules	**Supersedes**	AP 2.001, Director - Duties and Responsibilities, adopted 06/22/2021
~~**Supersedes**~~**DRAFT FOR LEGAL, LABOR, AND GOVERNANCE REVIEW - NOT APPROVED**		~~To Be Determined~~	

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1. The Executive Director ~~is employed by the Board to serve~~serves as the executive officer of CONFIRE~~.~~ in accordance with the Joint Powers Agreement, Board policy, and Administrative Committee policy. The Executive Director shall attend all regular and special meetings of the Board of Directors and Administrative Committee unless there is good cause for absence.
2. The Executive Director shall prepare an annual budget for consideration and approval by the Administrative Committee and Board.
3. The Executive Director, consistent with the budget adopted by the Board, shall:
   - Implement the policies of the Board and Administrative Committee and administer the CONFIRE Personnel Rules.
   - Provide day-to-day leadership for CONFIRE.
   - Plan the short- and long-term work of CONFIRE.
   - Communicate the goals and objectives of ~~the Board~~CONFIRE's governing bodies to the community.
   - Manage the CONFIRE budget.
   - As approved in the adopted budget:
     - Employ assistants and other employees deemed necessary for the proper administration of CONFIRE and ~~the proper~~ operation of ~~the works of~~ CONFIRE, consistent with the authorized staffing, classification, salary, and position-control framework.
     - Incur expenses and enter into contracts on behalf of CONFIRE as set forth in Board Policies 4.003 and 4.004. All contracts ~~will~~shall be submitted ~~to the Board within thirty (30) days after execution~~as required by those policies.
   - Establish and maintain a motivating work climate for CONFIRE employees~~;~~.
   - Maintain effective working relationships with all persons entitled to the services of CONFIRE.
   - Facilitate constructive and harmonious relations with the Board and Administrative Committee.
4. The Executive Director is the Appointing Authority for all CONFIRE employees other than the Executive Director and has authority over~~,~~ and directs the work of~~, all~~ employees. This includes ~~the power~~authority to impose appropriate discipline, up to and including termination, subject to the Personnel Rules, applicable memoranda of understanding, compensation plans, law, and other controlling sources.
5. The Executive Director has general charge, responsibility, and control over all property of CONFIRE.

6. The Executive Director may delegate authority ~~at his/her discretion.~~

~~7. The Director shall prepare a "Personnel Procedures Manual" that is~~ consistent with ~~this Manual of Administrative Policies and the Manual of Board Policies, and shall submit~~ the Personnel ~~Procedures Manual to the Board for its review~~Rules and ~~consideration on an annual basis~~other controlling sources.

7. The Executive Director may approve administrative procedures, forms, manuals, and workflows necessary to implement the Personnel Rules and governing policies. Such documents shall be maintained separately and shall not create or alter employment rights, service status, or authority established by a controlling source.

8. The Executive Director shall be required to work during such hours as necessary to carry out the duties of the position, as designated by the Chairperson of the Administrative Committee. Such hours may be varied so long as the work requirements and efficient operations of CONFIRE are assured.

9. Executive Director leave requests or other scheduled time off, including work schedule adjustments, should be submitted to the Chairperson of the Administrative Committee for approval and communicated to the Administrative Committee.

Related Documents

- BP 6.001, Administrative Committee.
- BP 7.001, Executive Director.
- CONFIRE Personnel Rules, Rule 2.
- Applicable Executive Director employment agreement or compensation plan.

Revision History

Date	Action	Summary of Change	Approval Authority
06/22/2021	Adopted	Original policy adopted.	Administrative Committee
[MM/DD/YYYY]	Revised	Updated Director terminology, aligned Appointing Authority and personnel administration with the Personnel Rules, and replaced the obsolete Personnel Procedures Manual requirement with controlled implementation procedures.	Administrative Committee

~~AP 2.002 Classification Descriptions~~

Document Number	AP 2.002	**Issue Date**	~~[6.~~06/22~~.~~/2021~~]~~
Title	Classification ~~Descriptions~~and Employment Status	**Review Date**	To Be Determined
Section	Series 2000~~:~~ - Personnel	**Revision Date**	~~[10.27.2025]~~To Be Determined
Policy Owner	~~To Be Determined~~Human Resources	**Approved By**	Administrative Committee
~~**Applicability**~~	~~To Be Determined~~		
Applicability	All CONFIRE classifications, positions, and appointments	**Required Reviews**	~~To Be Determined~~Executive Director; Human Resources; Legal Counsel; Labor Relations
Related Policy / Authority / Standards	~~To Be Determined~~CONFIRE Personnel Rules, Rules 4, 5, and 11; Exempt Compensation Plan; applicable MOUs; Board-approved classification and salary actions	**Supersedes**	AP 2.002, Classification Descriptions, adopted 06/22/2021 and revised 10/27/2025
~~**Supersedes**~~**DRAFT FOR LEGAL, LABOR, AND GOVERNANCE REVIEW - NOT APPROVED**		~~To Be Determined~~	

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Purpose

~~Purpose~~The purpose of this policy is to ~~define the~~ align classification and employment ~~-~~status ~~for designated positions within~~ administration with the CONFIRE ~~that are not covered by civil service protections, collective bargaining agreements, or~~ Personnel Rules and other ~~statutory~~controlling employment ~~provisions. This policy ensures that both~~ sources.

Classification

CONFIRE ~~and the employee~~shall maintain ~~flexibility in the employment relationship consistent with California law and public employment standards~~classification descriptions and a classification plan in accordance with the Personnel Rules. Classification actions shall be administered by Human Resources and the Executive Director within delegated authority, with Board or Administrative Committee action obtained when required by the Personnel Rules, governing policy, the approved budget, or another controlling source.

~~Policy Statement~~

~~Employment with CONFIRE for the positions listed below is considered "at-will." This means that employment may be terminated by either employee or CONFIRE at any time, with or without cause, and with or without advance notice. Likewise, the agency reserves the right to modify the terms and conditions of employment, including compensation, duties, and assignments, at its sole discretion.~~

~~The at-will employment status of these positions cannot be altered except through a written agreement approved by the Administrative Committee and signed by both the employee and Executive Director or designee.~~

~~Positions~~

~~The following positions are designated as "at-will" by the Administrative Committee:~~

Employment Status

Positions and appointments shall be assigned to the classified or unclassified service in accordance with the Personnel Rules and other controlling sources. A classified position may be represented or non-represented and may confer regular status after successful completion of the applicable probationary period. Unclassified service is at-will and does not confer regular status. A regular position may be classified or unclassified.

Exempt Classifications

Classifications included in the Board-approved Exempt Compensation Plan are unclassified and at-will. The Exempt Compensation Plan and its approved classification schedule, rather than this policy, identify the classifications covered by that Plan. This policy shall not maintain a duplicative list of exempt position titles.

Status Changes and Appointment Method

No classification or employment status shall be created or changed except through the authority and documentation required by the Personnel Rules, applicable memorandum of understanding, compensation plan, employment agreement, Board or Administrative Committee action, or other controlling source. Direct hire and waiver of competition shall be governed by the Personnel Rules and any applicable MOU or compensation plan.

Related Documents

- CONFIRE Personnel Rules, Rules 4, 5, 6, and 11.
- CONFIRE Exempt Compensation Plan.
- Applicable memoranda of understanding.
- Board-approved classification plan and salary schedule.

Revision History

~~Executive Director~~Date	~~Deputy Executive Director~~Action	Summary of Change	Approval Authority
~~Finance/Administration Director~~06/22/2021	~~Communications Director~~Adopted	Original policy adopted.	Administrative Committee
10/27/2025	Revised	Prior revision establishing at-will employment provisions for identified classifications.	Administrative Committee
~~Management Information Systems Director~~[MM/DD/YYYY]	Revised	~~Clerk of the Board~~Removed the duplicative exempt-position title table and Civil Service/Special District assumptions; aligned classified and unclassified service with the Personnel Rules and Exempt Compensation Plan.	Administrative Committee
~~Management Information Systems Manager~~	~~Executive Assistant~~		
~~Finance Manager~~	~~Human Resources Manager~~		
~~Human Resources Generalist~~			

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~~This policy will apply to Exempt classifications not listed but added at a later date.~~

~~As per Government Code § 18500 the principles of the Civil Service Act, which includes the merit-based selection process; exempt appointments are an exception to this system. As such the Executive Director is authorized to direct fill all at-will positions.~~

~~Exclusions~~

~~This policy does not apply to employees who are:~~

- ~~Covered under a Memorandum of Understanding (MOU) or Collective Bargaining Agreement providing just-cause protections~~
- ~~Covered under Civil Service or Merit System rules~~
- ~~Serving under fixed-term employment contracts that specify termination provisions inconsistent with at-will status.~~

~~AP 2.003 Nondiscrimination in Employment~~

Document Number	AP 2.003	**Issue Date**	~~[6.~~06/22~~.~~/2021~~]~~
Title	Nondiscrimination in Employment	**Review Date**	To Be Determined
Section	Series 2000~~:~~ - Personnel	**Revision Date**	To Be Determined
Policy Owner	~~To Be Determined~~Human Resources	**Approved By**	Administrative Committee
~~**Applicability**~~	~~To Be Determined~~		
Applicability	All CONFIRE employees and job applicants	**Required Reviews**	~~To Be Determined~~Executive Director; Human Resources; Legal Counsel
Related Policy / Authority / Standards	~~To Be Determined~~CONFIRE Personnel Rules, Rule 3; applicable nondiscrimination and anti-retaliation law; applicable complaint procedures	**Supersedes**	AP 2.003, Nondiscrimination in Employment, adopted 06/22/2021
~~**Supersedes**~~**DRAFT FOR LEGAL, LABOR, AND GOVERNANCE REVIEW - NOT APPROVED**	~~To Be Determined~~		

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CONFIRE prohibits:

- CONFIRE employees from discriminating against or harassing any other CONFIRE employee or job applicant based on race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status~~;~~.
- ~~discrimination~~Discrimination against any employee or job applicant, based on any of the categories listed above, in compensation, terms, conditions, and other privileges of employment~~;~~.
- ~~taking of~~Taking any adverse employment action, including~~,~~ but not limited to~~,~~ termination or ~~the~~ denial of employment, promotion, job assignment, or training, against an employee or job applicant based on any of the categories listed above.

Prohibited discrimination on the basis of religious creed includes discrimination based on the religious beliefs or observances ~~(~~, including ~~his/her~~ religious dress or grooming practices~~)~~, of an employee or ~~a~~ job applicant.

Prohibited sex discrimination includes discrimination based on ~~the~~ pregnancy, childbirth, breastfeeding, or any related medical condition of an employee or ~~a~~ job applicant.

Harassment consists of unwelcome verbal, physical, or visual conduct that is based on any of the prohibited categories of discrimination listed above that:

1. ~~is~~Is so severe or pervasive that it adversely affects an individual's employment opportunities~~; or~~.
2. ~~has~~Has the purpose or effect of unreasonably interfering with the individual's work performance~~; or~~.
3. ~~creates~~Creates an intimidating, hostile, or offensive work environment.

Complaints concerning employment discrimination, harassment, or retaliation shall be reported to Human Resources, the Executive Director, or another designated CONFIRE ~~Management~~coordinator and ~~will~~shall be investigated in accordance with ~~procedures specified in Administrative~~applicable enterprise policy and procedure.

Any supervisory or management employee who observes or has knowledge of an incident of prohibited discrimination or harassment shall report the incident to Human Resources, the Executive Director, or designated CONFIRE coordinator as soon as practical after the incident. All other employees are strongly encouraged to immediately report such incidents ~~to their supervisor.~~through an available reporting channel. CONFIRE shall protect from retaliation any employee who reports such incidents in good faith.

The Executive Director or designee shall use ~~all~~ appropriate means to reinforce CONFIRE's nondiscrimination policy~~. He/she~~ and shall provide training and information to employees about~~:~~

- how to recognize and respond to harassment and discrimination~~;~~
- ~~how to respond appropriately; and~~

~~• information~~ and about CONFIRE's applicable policies and ~~regulations regarding discrimination~~procedures.

The Executive Director ~~or designee~~and Human Resources shall regularly review CONFIRE's employment practices and, as necessary, ~~shall~~ take action to ensure ~~CONFIRE~~ compliance with nondiscrimination laws.

Any CONFIRE employee who engages in prohibited discrimination, harassment, or retaliation~~(~~, or who aids, abets, incites, compels, or coerces another to engage or attempt to engage in such behavior~~)~~, is subject to ~~discipline,~~corrective or disciplinary action up to and including dismissal~~.~~, consistent with the Personnel Rules, applicable MOU, and law.

Related Documents

- CONFIRE Personnel Rules, Rule 3.3.
- Applicable enterprise discrimination, harassment, retaliation, and complaint procedures.
- Applicable memorandum of understanding.

Revision History

Date	Action	Summary of Change	Approval Authority
06/22/2021	Adopted	Original policy adopted.	Administrative Committee
[MM/DD/YYYY]	Revised	Updated Director/Human Resources terminology and aligned complaint, investigation, and discipline references with the Personnel Rules; substantive nondiscrimination standard otherwise retained.	Administrative Committee

~~AP 2.004 Political Activities of Employees~~

Document Number	AP 2.004	**Issue Date**	~~[6.~~06/22~~.~~/2021~~]~~
Title	Political Activities of Employees	**Review Date**	To Be Determined
Section	Series 2000~~:~~ - Personnel	**Revision Date**	To Be Determined
Policy Owner	~~To Be Determined~~Human Resources	**Approved By**	Administrative Committee
~~**Applicability**~~	~~To Be Determined~~		
Applicability	All CONFIRE employees	**Required Reviews**	~~To Be Determined~~Executive Director; Human Resources; Legal Counsel
Related Policy / Authority / Standards	~~To Be Determined~~CONFIRE Personnel Rules, Rule 3.8; applicable political-activity law and CONFIRE policy	**Supersedes**	AP 2.004, Political Activities of Employees, adopted 06/22/2021
~~**Supersedes**~~**DRAFT FOR LEGAL, LABOR, AND GOVERNANCE REVIEW - NOT APPROVED**		~~To Be Determined~~	

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CONFIRE respects the right of employees to engage in political discussions and activities on their own time and at their own expense. On such occasions, employees shall make it clear that they are acting as individuals and not as representatives of CONFIRE. Employees shall not engage in such activities while in uniform or otherwise attired with items identifying CONFIRE.

This policy shall be applied consistently with applicable law, the CONFIRE Personnel Rules, and other controlling CONFIRE policies.

Related Documents

- CONFIRE Personnel Rules, Rule 3.8.
- Applicable conflict-of-interest and use-of-public-resources policies.

Revision History

Date	Action	Summary of Change	Approval Authority
06/22/2021	Adopted	Original policy adopted.	Administrative Committee
[MM/DD/YYYY]	Revised	Added a conforming reference to the Personnel Rules and other controlling authority; substantive political-activity standard retained.	Administrative Committee

~~AP 2.005 Restricted Access to Personnel Information~~

Document Number	AP 2.005	**Issue Date**	~~[6.~~06/22~~.~~/2021~~]~~
Title	Restricted Access to Personnel Information	**Review Date**	To Be Determined
Section	Series 2000~~:~~ - Personnel	**Revision Date**	To Be Determined
Policy Owner	~~To Be Determined~~Human Resources	**Approved By**	Administrative Committee
~~**Applicability**~~	~~To Be Determined~~		
Applicability	Current and former CONFIRE employees and authorized users of personnel information	**Required Reviews**	~~To Be Determined~~Executive Director; Human Resources; Legal Counsel; Records Custodian
Related Policy / Authority / Standards	~~To Be Determined~~CONFIRE Personnel Rules, Rule 17; AP 1.004; applicable personnel-record, privacy, and public-records law	**Supersedes**	AP 2.005, Restricted Access to Personnel Information, adopted 06/22/2021
~~**Supersedes**~~**DRAFT FOR LEGAL, LABOR, AND GOVERNANCE REVIEW - NOT APPROVED**	~~To Be Determined~~		

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~~The Director or designee~~ Human Resources is the custodian of official personnel records and shall maintain ~~a~~the official personnel file systems and authorized custodians for ~~all current~~CONFIRE employees ~~at CONFIRE's central office~~in accordance with the Personnel Rules and approved records-retention requirements.

~~The Director or designee~~Human Resources shall determine the types of information to be included in ~~personnel files. This includes,~~official personnel records consistent with the Personnel Rules, applicable law, an applicable MOU, and approved administrative procedures.

An employee may submit a written response or other material for placement in the personnel record when authorized by ~~way of illustration and not limitation, records~~ the Personnel Rules, an applicable MOU, or law. Human Resources shall place authorized material in the official record as required by ~~law~~the controlling source.

~~Any request by an employee to include materials in his/her personnel file shall be in writing and must be approved by the Director or his/her designee.~~

An employee may ~~initiate~~submit a written response to an evaluation, disciplinary action, counseling~~any~~ document or other adverse material as provided by the Personnel Rules, an applicable MOU, or law. The response shall be maintained with, electronically linked to, or otherwise associated with the underlying document for as long as the underlying document is retained. When the underlying document is reviewed or relied upon in connection with a personnel decision, the employee's response shall also be made available and considered.~~placed in his/her~~~~the employee's personnel file, including his/her~~~~a performance evaluation. The response shall be placed in the employee's personnel file, as provided by the Personnel Rules, an applicable MOU, or law.~~

Persons with Authorized Access

~~The Director or designee~~Human Resources shall maintain the confidentiality of ~~those~~ personnel records ~~which, if inappropriately disclosed, would constitute an unwarranted invasion of~~ to the ~~employee's privacy~~extent required by law and CONFIRE policy.

Access to ~~an employee's~~ personnel ~~file~~information shall be ~~granted only~~limited to:

- ~~the~~The employee~~;~~
- ~~persons~~ or authorized ~~by the employee,~~representative.

- CONFIRE ~~personnel (~~officials and ~~others)~~authorized service providers with a ~~"right to know" or "~~legitimate need to know~~" who have been authorized access by either the Director or by the Board, or~~.
- ~~• a person who has a present, existing right~~• An employee organization entitled to ~~access the employee's personnel file~~relevant and necessary information under applicable law or an MOU.
- A government agency, court, or other person with lawful authority.
- Another person when disclosure is otherwise permitted or required by law.

Any authorized reviewer shall maintain ~~strict confidence~~the confidentiality of ~~the contents of a~~ personnel ~~file~~information and use it only for the authorized purpose.

File Review ~~bv~~by Employee

An employee or authorized representative who wishes to inspect ~~his/her~~or obtain copies of personnel ~~file~~records shall contact ~~the Director or his/her designee. Personnel file review is available to the employee at reasonable intervals and~~ Human Resources. Access shall be provided at reasonable times~~. Typically, review takes place during non-working time~~ and within the time required by applicable law or an applicable MOU, subject to lawful verification, redaction, exclusions, location requirements, and copying costs.

~~With the exceptions noted below, all records in the personnel file that are related~~Subject to ~~either (a)~~lawful exclusions, records relating to the employee's performance, ~~or (b) any grievance concerning the employee~~education or training, or grievances shall be made available for inspection or copying as required by law or the ~~employee~~applicable MOU.

~~The Director or designee is not required to, and shall not, make available to the employee (Labor Code 1198.5):~~

CONFIRE may withhold or redact records only as permitted by law, including, where applicable:

1. Records related to the investigation of a possible criminal offense.
2. Letters of reference.
3. Ratings, reports, or records ~~that were~~ obtained prior to ~~the employee's~~ employment, prepared by identifiable examination committee members, or obtained in connection with a promotional examination.

Requests for ~~a copy~~copies of ~~any material in a~~ personnel ~~file~~records shall be ~~made in writing.~~submitted to Human Resources and processed in accordance with applicable law, the Personnel Rules, and any controlling MOU.

Related Documents

- CONFIRE Personnel Rules, Rule 17.
- AP 1.004, Record Retention.
- BP 2.003, Board Member Access to CONFIRE Records.

Revision History

Date	Action	Summary of Change	Approval Authority
06/22/2021	Adopted	Original policy adopted.	Administrative Committee
[MM/DD/YYYY]	Revised	Assigned official personnel-record custody to Human Resources and aligned employee access, responses, confidentiality, and authorized disclosure with the Personnel Rules.	Administrative Committee

~~AP 3.009 Organizational Chart~~

Document Number	AP 3.009	**Issue Date**	~~[6.~~06/22~~.~~/2021~~]~~
Title	Organizational Chart	**Review Date**	To Be Determined
Section	Series 3000~~:~~ - Administration	**Revision Date**	To Be Determined
Policy Owner	~~To Be Determined~~Executive Administration / Human Resources	**Approved By**	Administrative Committee
~~**Applicability**~~	~~To Be Determined~~		
Applicability	CONFIRE organizational structure and authorized reporting relationships	**Required Reviews**	~~To Be Determined~~Executive Director; Human Resources; Finance; Legal Counsel
Related Policy / Authority / Standards	~~To Be Determined~~Joint Powers Agreement; BP 6.001; CONFIRE Personnel Rules, Rules 4, 5, and 11; approved budget and salary schedule	**Supersedes**	AP 3.009, Organizational Chart, adopted 06/22/2021
~~**Supersedes**~~**DRAFT FOR LEGAL, LABOR, AND GOVERNANCE REVIEW - NOT APPROVED**		~~To Be Determined~~	

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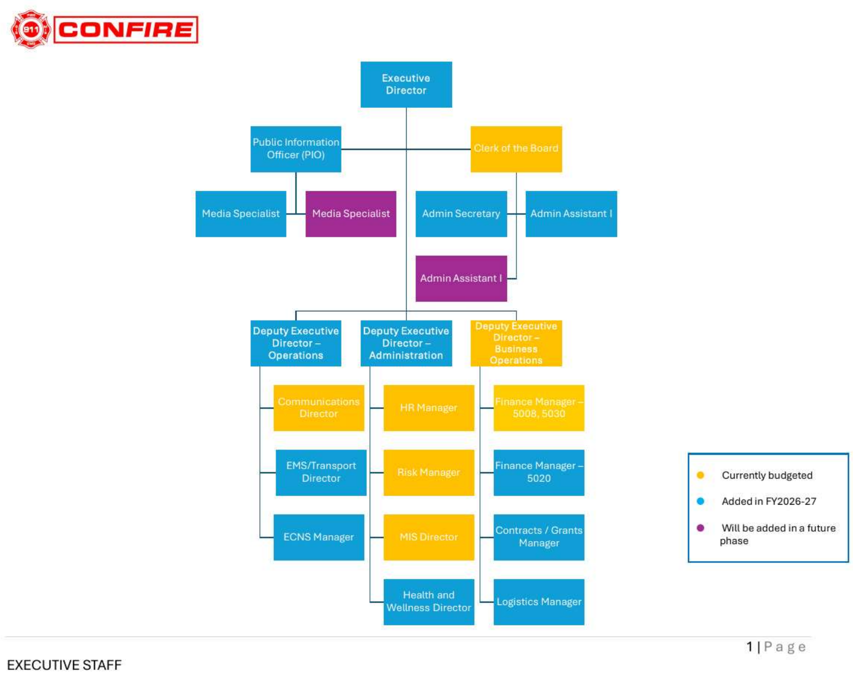
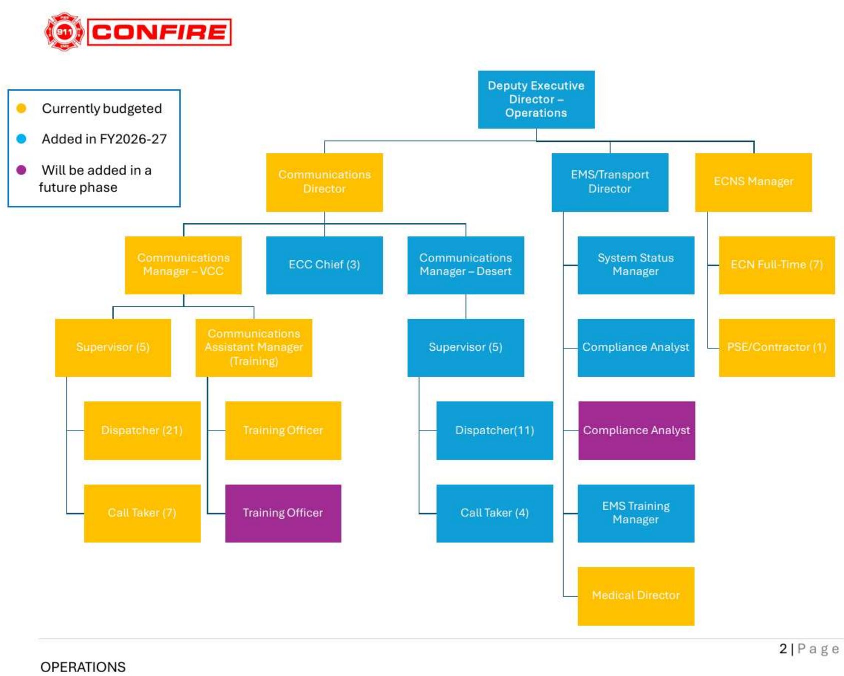
~~The following is an organizational chart which sets forth the CONFIRE chain of command:~~

The Administrative Committee approves organizational changes when approval is required by the Joint Powers Agreement, Board policy, Administrative Committee policy, or another controlling source. Within the approved budget, staffing authorization, classification plan, salary schedule, and delegated authority, the Executive Director may implement position and organizational changes and manage vacancies, reporting relationships, assignments, and administrative organizational structure.

Changes requiring a budget amendment, an increase in authorized staffing, creation or abolition of a classification, a change to an approved salary range, or other governing-body action shall be presented to the appropriate governing body as required by the Personnel Rules, governing policy, or another controlling source. Human Resources shall maintain the official position-control record. The current organizational chart is incorporated below for reference and shall be updated following approved organizational changes.

Current Organizational Chart - July 2, 2026




CONFIRE
Currently budgeted
Added in FY2026-27
Will be added in a future phase
Deputy Executive Director – Operations
Communications Director
EMS/Transport Director
ECNS Manager
Communications Manager – VCC
ECC Chief (3)
Communications Manager – Desert
System Status Manager
ECN Full-Time (7)
Supervisor (5)
Communications Assistant Manager (Training)
Supervisor (5)
Compliance Analyst
PSE/Contractor (1)
Dispatcher (21)
Training Officer
Dispatcher(11)
Compliance Analyst
Call Taker (7)
Training Officer
Call Taker (4)
EMS Training Manager
Medical Director
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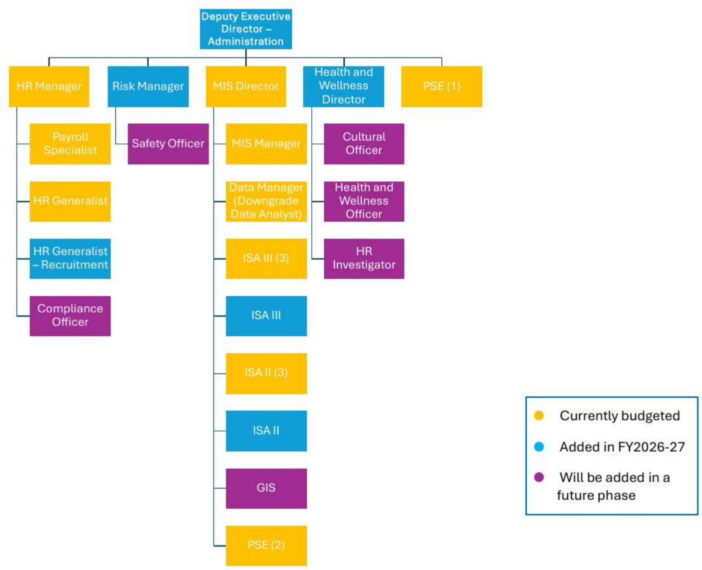
OPERATIONS



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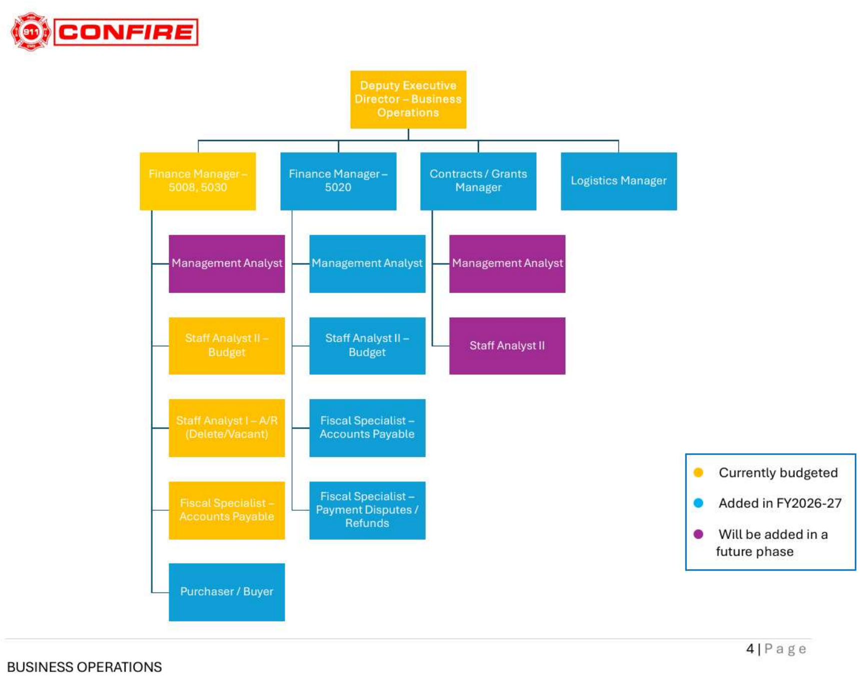
ADMINISTRATION



Related Documents

- CONFIRE Personnel Rules, Rules 4, 5, and 11.
- BP 6.001, Administrative Committee.
- AP 2.001, Executive Director - Duties and Responsibilities.
- Board-approved budget, classification plan, salary schedule, and position-control records.

Revision History

Date	Action	Summary of Change	Approval Authority
06/22/2021	Adopted	Original policy adopted.	Administrative Committee
[MM/DD/YYYY]	Revised	Updated the organizational approval framework to align with the Personnel Rules and replaced the obsolete organizational chart with the July 2, 2026 CONFIRE organizational chart.	Administrative Committee

Document Number	AP 1.004	**Issue Date**	06/22/2021
Title	Record Retention	**Review Date**	To Be Determined
Section	Series 1000 - General	**Revision Date**	To Be Determined
Policy Owner	Executive Administration / Records	**Approved By**	Administrative Committee
Applicability	All CONFIRE departments and official record custodians	**Required Reviews**	Executive Director; Records Custodian; Human Resources; Legal Counsel
Related Policy / Authority / Standards	Government Code sections 60200-60203 and 12236; CONFIRE Personnel Rules, Rule 17; AP 2.005	**Supersedes**	AP 1.004, Record Retention, adopted 06/22/2021

DRAFT FOR LEGAL, LABOR, AND GOVERNANCE REVIEW - NOT APPROVED

Purpose

The purpose of this policy is to establish a consistent framework for the retention, management, disclosure and lawful disposition of records maintained by CONFIRE.

This policy ensures that CONFIRE:

- Maintains records necessary for operational, administrative, legal, fiscal, and historical purposes.
- Complies with the California records management and public records laws.
- Protects sensitive information, including 911 call data, CJIS data, protected health information, and confidential operational information.
- Reduces operational and legal risk by properly retaining and disposing of records .
- Supports transparency, accountability, and continuity of public safety operations.

This policy also authorizes the Executive Director or designee to approve the destruction of records in accordance with this policy.

Authority

This policy is established pursuant to the following authorities, including but not limited to:

- California Public Records Act (Government Code §7920 et seq.)
- California Government Code §§60200–60204 relating to the retention and destruction of local agency records
- California Government Code §60201 and other applicable California records retention statutes
- California Code of Regulations, Title 2, Division 7, Chapter 8 (State Records Management)
- Criminal Justice Information Services (CJIS) Security Policy
- Applicable National Fire Protection Association (NFPA) Public Safety standards related to public safety communications and records management
- Health Insurance Portability and Accountability Act (HIPAA) and California Confidentiality of Medical Information Act (CMIA), where applicable

Scope

This policy applies to all CONFIRE records regardless of format, including:

- Paper records
- Electronic records
- Email communications
- Computer-Aided Dispatch (CAD) data

- 911 call recordings
- Radio recordings and dispatch logs
- GIS and mapping data
- Personnel files
- Financial records
- Administrative documents
- System logs and cybersecurity records
- Cloud-hosted or vendor-managed records maintained on behalf of CONFIRE
- EMS billing and reimbursement records
- Patient care reporting records
- Clinical quality assurance documentation
- HIPAA and CMIA protected records

This policy applies to:

- CONFIRE employees
- Contractors
- Vendors managing CONFIRE systems
- Member and Contract agencies generating records within CONFIRE systems

Definitions

Record - Any recorded information created, received, or maintained by CONFIRE that documents official business activities, regardless of physical form or characteristics.

Electronic Record - Any record stored in digital form, including emails, databases, recordings, system-generated data, cloud-hosted records, and scanned images.

Retention Period - The length of time a record must be kept before it may be destroyed or archived.

Disposition - The final action taken regarding a record after its retention period has expired, including destruction or permanent archiving.

Permanent Record - Records required to be retained indefinitely due to legal, historical, administrative, operational, or fiscal significance.

Litigation Hold - A directive requiring suspension of normal destruction procedures due to pending or reasonably anticipated litigation, investigation, audit, claim, or public records request.

Public Record – A writing that contains information related to the conduct of the public's business that is prepared, owned or retained by CONFIRE, unless otherwise exempt by the Public Records Act. (Gov. Code § 7920.530 (a).)

Roles and Responsibilities

Executive Director / Administration

Responsible for:

- Ensuring compliance with applicable legal and regulatory requirements
- Authorizing record destruction when permitted by law and policy
- Responding to public records requests
- Ensuring preservation of records subject to audits, investigations, claims, or legal preservation requirements

MIS Division

The MIS Division is responsible for managing electronic record systems and ensuring proper data retention.

Responsibilities include:

- Managing system backups and archives
- Maintaining CAD, logging, and digital systems
- Ensuring data integrity and security
- Supporting retention configurations within vendor systems
- Managing cybersecurity-related records and audit logs
- Supporting disaster recovery and continuity systems

MIS currently maintains system backup retention of approximately 90 days unless extended by operational, legal, or regulatory requirements.

Division Managers

Division managers are responsible for ensuring that records created within their divisions are maintained in accordance with this policy.

Responsibilities include:

- Ensuring compliance with retention schedules
- Coordinating record archiving and destruction
- Supporting public records requests and litigation holds

Employees

All employees must:

- Properly maintain records as required by their assigned duties
- Protect confidential and sensitive information
- Preserve records subject to legal preservation requirements
- Not destroy records outside of approved procedures

Contractors and Subcontractors

<u>Records created, maintained, or managed by contractors or subcontractors performing services on behalf of CONFIRE may be subject to this policy and applicable public records laws where required by contract or law.</u>

<u>Record Storage and Security</u>

CONFIRE records must be stored in a manner that ensures:

- Confidentiality
- Integrity
- Availability
- Accessibility for authorized business purposes

Security controls include:

- Secure network storage
- Role-based access control
- Physical security for paper records
- Data encryption where applicable

- Offsite backups and disaster recovery protections
- Secure cloud or hosted protections where applicable

Sensitive records must comply with applicable standards including:

- CJIS Security Policy
- HIPAA and CMIA requirements where applicable
- Public safety operational security practices

Electronic System Records

CONFIRE maintains operational records in several critical systems, including:

- Computer Aided Dispatch (CAD)
- 911 call handling systems
- Radio logging systems
- GIS systems
- Email platforms
- Financial systems
- Administrative systems
- Cybersecurity and monitoring systems

Electronic records shall be maintained, where reasonably feasible, with associated metadata necessary to preserve authenticity, integrity, and evidentiary value.

System backups are intended for disaster recovery and operational restoration purposes and are not considered archival retention systems.

Record Retention Schedule

Where federal law, state law, contractual obligations, audit requirements, litigation holds, regulatory requirements, or operational needs require a longer retention period, the longer retention period shall apply.

Operational Public Safety Records

Record Type	Retention Period
CAD Incident Records	Minimum 7 years
911 Call Recordings	Minimum 3 years
Flagged Critical Incident Audio	Minimum 7 years
Radio Dispatch Recordings	Minimum 3 years
Dispatch Incident Reports	Minimum 7 years
Incident Call Logs	Minimum 7 years
EMD Quality Assurance Audits	Minimum 7 years
GIS Operational Data	Until replaced or superseded
EMS Patient Care Records (Adults)	Minimum 10 years
EMS Patient Care Records (Minors)	Minimum 10 years, and until age 25, whichever is later, or longer if required by law, audit, contract, litigation hold, or payer requirement
EMS Clinical QA/QI Reviews	Minimum 7 years
EMS Refusal of Care Documentation	Minimum 10 years

Controlled Substance Inventory and Dispensing Logs	Minimum 2 years under 21 CFR §1304.04, unless longer retention is required by law, contract, audit, investigation, litigation hold, or agency policy
EMS Controlled Substance Administration Documentation	Retain with the associated EMS Patient Care Record
Controlled Substance Waste / Destruction Documentation	Minimum 2 years; 7 years by agency policy
Ambulance Daily Unit Logs / Shift Logs	Minimum 7 years
EMS Training and Credential Verification	Duration of employment/association + 7 years
Ambulance deployment plans / system status plans	Superseded + 7 years
Response-time compliance reports	10 years
Ambulance contract compliance reports	Duration of contract + 10 years
Hospital offload / APOT records	10 years
Alternate destination / ECNS clinical records	10 years, or minor rule if applicable
Medical director approvals / standing orders / protocols	Permanent for final adopted versions; superseded + 10 years
Controlled-substance discrepancy/loss/diversion investigations	Minimum 7 years or until final resolution, whichever is later
Equipment inspection records	7 years
Vehicle maintenance and safety records	Life of vehicle + 3 years, or 7 years, whichever longer
Patient complaints / clinical complaints	10 years
Sentinel event / adverse event investigations	10 years, or permanent for major incidents
HIPAA policies and procedures	6 years from creation or last effective date
Notices of Privacy Practices	6 years from last effective date
HIPAA training records	6 years
HIPAA risk analyses and risk management plans	6 years from last effective date
Breach risk assessments and notification documentation	6 years
Business Associate Agreements	Termination + 6 years, or contract + 7 years if longer
Accounting of disclosures documentation	6 years

Administrative Records

Record Type	Retention Period
Board Resolutions	Permanent
Board Agendas and Final Staff Reports	Permanent
Policies and Procedures	Permanent for adopted policy record; superseded versions + 5 years minimum
Administrative Correspondence	3 years
Strategic Plans	Permanent
JPA agreement and amendments	Permanent
Bylaws / governance policies	Permanent
Board member appointments / oaths	Permanent
Form 700 Originals/Copies/Tracking Logs	7 years or as required by FPPC or other applicable law

Committee agendas/minutes/staff reports	Permanent if Brown Act/governing committee; otherwise 5 to 7 years
Executed Agreements and Contracts	Duration + 7 years; permanent for real property, governance, JPA, major capital, bond/financing, ambulance system, or historically significant agreements
Public Records Requests and Responses	3 years after closure
Legal Opinions / Counsel Guidance	Permanent or as directed by counsel
PRA request log	3 years after closure
PRA response file	3 years after closure, longer if disputed
Litigation hold notices	Final resolution + 7 years
Claims against agency	Final resolution + 7 years
Subpoenas and responses	7 years after closure
Settlement agreements	Permanent or 10 years, depending on type
Insurance claims	Final resolution + 7 years

Financial Records

Record Type	Retention Period
Budgets	Permanent for adopted budgets; 5 years for working papers
Invoices and Receipts	7 years
Financial Statements	7 years
Audit Reports	Permanent
Contracts and Agreements	Duration of contract + 7 years
Grant Records	Close of grant + 7 years
Payroll Records	7 years
Ambulance Billing Records	Minimum 10 years from the latest applicable date, including date of service, claim submission, cost-report submission, final settlement, audit completion, or contract closeout
Medicare/Medi-Cal/GEMT Documentation	Minimum 10 years from the latest applicable date, including date of service, claim submission, cost-report submission, final settlement, audit completion, or contract closeout
Cost Reports and Supplemental Reimbursement Records	Minimum 10 years
Accounts Receivable Records	7 years

Personnel Records

Record Type	Retention Period
Personnel Files	Duration of employment + 7 years
Payroll Records	7 years

Training Records	Duration of employment + 5 years; +7 for EMS, safety, HIPAA, CJIS, harassment, discipline-related, or mandatory certification training
Disciplinary Records	Duration of employment + 7 years
Employee Medical Files	Duration of employment + 30 years where OSHA/Cal-OSHA exposure/medical-record rules apply; otherwise duration + 7 years
Workers' Compensation Records	Claim closure + 30 years where medical/exposure records apply; otherwise as required by law and counsel
Exposure Reporting / Occupational Injury Documentation	Minimum 30 years where required by OSHA or applicable law

Technology and Security Records

Record Type	Retention Period
System Backups	90 days
Security Logs	Minimum 1 year; 6 years where retained as HIPAA-required documentation, ePHI security incident evidence, audit evidence, investigation evidence, or legal-hold material
Network Monitoring Logs	1 year minimum, longer if tied to ePHI, CJIS, incident, investigation, or legal hold
Cybersecurity Incident Reports	7 years
Vendor System Maintenance Logs	3 years; 6 years if system contains ePHI, CJIS, financial, payroll, or critical infrastructure data
Access Control / Authentication Logs	1 year minimum; 3 years preferred; 6 years for ePHI/CJIS/security investigations
Privileged Access Logs	3 years minimum; 6 years where tied to HIPAA systems, incident response, or audit evidence
CJIS Audit Documentation	Minimum 1 year; 3 years to support the CJIS audit cycle; 7 years by agency policy where tied to audit findings, investigations, corrective action, litigation holds, or legal preservation requirements
System Configuration Documentation	Until superseded + 6 years for regulated/critical systems; +3 years for ordinary systems

<u>Holds on Destruction</u>

Records relating to the following matters shall not be destroyed until the matter is resolved and all applicable retention requirements have been satisfied:

- Pending litigation
- Public records requests
- Active investigations
- Audits
- Claims or disputes
- Personnel actions
- Real property matters

- Contractual disputes or obligations

No records subject to a litigation hold, audit, investigation, claim, or public records request may be altered or destroyed until the hold is formally released. A hold will be formally issued by Administration or legal counsel.

Public Records Requests

CONFIRE records may be subject to disclosure under the California Public Records Act (CPRA).

All requests must be coordinated through the CONFIRE Administration or designated Public Records Officer.

Employees must not release records independently without authorization.

Records subject to pending public records requests shall not be destroyed until the request and any associated legal proceedings have been fully resolved.

Certain CONFIRE records may be exempt from disclosure under applicable law (e.g. Public Records Act). By way of illustration and not limitation, exemptions include public safety operational sensitivity, protected health information, CJIS restrictions, cybersecurity security protections, investigative confidentiality, personnel privacy protections, or critical infrastructure security concerns.

Requests involving potentially exempt or sensitive records shall be reviewed by Administration and, where appropriate, legal counsel prior to release.

Record Destruction

Records that have reached the end of their retention period and are not subject to a litigation hold or preservation requirement may be destroyed.

Approved destruction methods include:

- **Paper Records**
  - Cross-cut shredding
  - Secure destruction vendor
  - Other approved secure destruction methods
- **Electronic Records**
  - Secure deletion from systems
  - Data wiping according to industry standards
  - Destruction of storage media where necessary

MIS shall ensure the destruction of electronic data meets security standards.

Duplicate records that are no longer operationally necessary may be destroyed, provided the official record is retained in accordance with this policy.

The destruction of records shall occur in a manner that protects confidential, sensitive, protected, or legally restricted information.

Compliance

Failure to comply with this policy may result in:

- Administrative action
- Disciplinary action
- Legal consequences

CONFIRE may conduct periodic audits to ensure compliance with record retention requirements.

Policy Review

This policy will be reviewed every three (3) years or sooner if required due to:

- Changes in laws or regulations
- Technology system changes
- Operational needs
- Audit or compliance recommendations

Effective Date

This policy becomes effective upon approval by the CONFIRE Administrative Board.

Revision History

Date	Action	Summary of Change	Approval Authority
06/22/2021	Adopted	Original policy adopted.	Administrative Committee
[MM/DD/YYYY]	Revised	Updated Executive Director terminology and replaced obsolete Personnel Board record categories with neutral personnel appeal/hearing record categories; retention periods otherwise unchanged.	Administrative Committee