

**BOARD MEETING AGENDA ITEM SUMMARY**

**Board Meeting Date: January 21, 2026**

**(Select All that Apply)    X    Decision Making Agenda Item**

**\_\_\_ Discussion Purposes Only Agenda Item**

**\_\_\_ Walk On Agenda Item**

**SUBJECT:** Topic of possible merger between Iona McGregor Fire District (Iona) and Fort Myers Beach Fire District (Fort Myers Beach).

**PERSON(S) MAKING SUBMITTAL OF AGENDA ITEM:** Chief Comer and Richard Pringle, Esquire

**BACKGROUND/DETAIL OF AGENDA ITEM:** In December of 2025, the J. Angle Group, LLC completed and presented its Feasibility Study on the possible merger of Iona and Fort Myers Beach. The final Feasibility Study was provided to the Board members for their review. This is the first Board of Commissioners meeting at Iona since the final Feasibility Study was presented to the Board members.

The Feasibility Study is very comprehensive in its review of the facts and circumstances of the Iona McGregor Fire District and the Fort Myers Beach Fire District concerning the current services, operations, revenue and structure of the two Districts. The Feasibility Study is also very comprehensive in its review of the impacts of a possible merger of the two Districts. The Feasibility Study has indicated that there will be an impact on the services provided by the Districts, especially with regard to the probable loss of the ambulance services at Fort Myers Beach. The Feasibility Study has indicated that a merger will result in additional costs. The Feasibility Study has indicated that a merger will result in higher ad valorem tax rates being charged to the landowners in the Iona Fire District for at least the five (5) years of the merger study period. The Feasibility Study has indicated that there are “no compelling reasons” for a merger to occur and a merger will not result in any compelling benefit to the landowners/taxpayers and the residents of the District. The Feasibility Study does not support a merger of the Districts. In addition to all of the above, the Feasibility Study does provide that instead of a merger, the Districts can possibly benefit from additional joint activities, especially with regard to training facilities, through the use of interlocal agreements between the Districts in their current configuration as separate operating Districts. (See especially pages 5, 11, 235, 273, 274, 275, and 276 of the Feasibility Study for specific references to several of the items referenced above.)

At this time, the Board has the opportunity to render decisions on at least two items, in particular, which are pending before the District related to the merger topic.

First, based upon the findings and conclusions of the Merger Feasibility Study, the Board can take action at this time to describe the Board's decision on the next step the District is going to take in the voluntary merger process. A voluntary merger process is governed by Florida law, especially Section 191.014, Florida Statutes. Remember, some time ago, the Board at Iona and the Board at Fort Myers Beach elected to move forward with the acquisition of a Feasibility Study on a voluntary merger of the two Districts as a first step in a possible voluntary merger occurring in the future. Now that the Feasibility Study has been completed by the J. Angle Group, LLC, the Board can take official action to describe the next step the Board is going to take in the voluntary merger process. As an example, based upon the Findings of Fact and Conclusions in the Feasibility Study, the Board can take official action to terminate the voluntary merger activities at this time, or, in the alternative, the Board can take official action to proceed further with the voluntary merger activities at this time. There are also other decisions that the Board can make on the voluntary merger topic; however, the two decisions described above are the two over-arching decisions the Board can take to either stop the voluntary merger process at this time or to proceed further with the voluntary merger process at this time.

Second, based upon the findings and conclusions of the Merger Feasibility Study, the Board can take official action to respond to Representative Botana's pending local bill which mandates the merger of Fort Myers Beach Fire District into the Iona McGregor Fire District subject to voter approval by the voters of both Districts in the general election that is to be held in November, 2026. As an example, based upon the findings and conclusions of the Merger Feasibility Study, the Board can take official action to request Representative Botana to withdraw his pending local bill mandating the merger of the two Districts, or, in the alternative, the Board can take official action to support Representative Botana's local bill mandating the involuntary merger of the two Districts. Again, the two positions stated above are the two over-arching positions; however, there are a number of other decisions the Board can also take related to Representative Botana's local bill calling for the involuntary merger of the two Districts.

In light of the completion of the Merger Feasibility Study and considering the fact that Representative Botana's local bill calling for the involuntary merger of the Districts is pending in the current session of the Florida Legislature, it is timely for the Board to consider actions on the two topics described above at this time.

**BUDGET IMPACT: Yes / No / Unknown – If Yes, how much? From where?**

**REQUESTED BOARD ACTION:**



# Iona McGregor Fire District

6061 South Pointe Blvd., Fort Myers, FL 33919



## Management Response

### Introduction

The Iona-McGregor Fire Protection & Rescue Services District (IMFD) Board of Fire Commissioners and executive management appreciate the comprehensive effort undertaken by the J. Angle Group, LLC (JAG) to evaluate the feasibility of a potential merger between IMFD and the Fort Myers Beach Fire Control District (FMBFD). This study reflects a thorough, independent review of operational, financial, governance, and community considerations and provides an objective assessment of whether consolidation would be beneficial to the taxpayers and communities served by both districts.

The Board of Fire Commissioners has reviewed the report and concurs with the findings presented. This management response is provided as a public-facing cover letter to accompany the report and is intended to acknowledge the study's conclusions, affirm areas of agreement, and clarify some statements from the District's perspective.

### Acknowledgment of Key Findings

IMFD concurs with JAG's primary conclusion that there are no compelling operational or financial reasons to pursue a legal merger of the two districts at this time. The study further demonstrates that a full legal merger would result in increased overall costs to taxpayers, with projected millage increases for IMFD residents when compared to the status quo model. The study clearly demonstrates that:

- \* Current station locations, staffing models, and deployment strategies for both districts already meet industry standards for response times and critical response force requirements.
- \* A merged organization would not realize meaningful operational efficiencies or service delivery improvements.
- \* Financial modeling indicates that a merger would result in increased costs and upward millage pressure for IMFD taxpayers, while providing limited or no corresponding benefit.
- \* Internal and external stakeholder feedback does not reflect a strong desire or mandate for consolidation.

IMFD believes these conclusions validate the district's existing service delivery model and long-term strategic direction.



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# Iona McGregor Fire District

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## Accreditation, Culture, and Service Quality

IMFD places significant value on maintaining its accreditation through the Commission on Fire Accreditation International (CFAI), its positive organizational culture, and its strong labor–management relationship. The study appropriately identifies these elements as critical considerations and risks in any merger scenario. IMFD management agrees that preserving these attributes is essential to sustaining high performance, accountability, and community trust.

The district also acknowledges, and places significant weight on, concerns identified in the study regarding the loss of EMS transport services for FMBFD and the loss of accredited agency status for IMFD through the Commission on Fire Accreditation International (CFAI) in a consolidated model. These risks further support the conclusion that a legal merger is not in the best interest of IMFD or its residents at this time.

## Financial Stewardship and Taxpayer Impact

IMFD concurs with JAG’s financial analysis indicating that a consolidated district would result in higher millage rates for IMFD taxpayers over the forecast period compared to maintaining the status quo. The Board and management remain committed to prudent fiscal stewardship, maintaining appropriate reserves, and balancing service levels with affordability for residents.

The district also recognizes the ongoing financial challenges associated with post–Hurricane Ian recovery, capital improvements, and rising operational costs. These realities reinforce the importance of retaining local governance and financial control to respond effectively to district-specific needs.

## Collaboration opportunities

While executive management of IMFD does not support pursuing a legal merger, the executive management of the district agrees with JAG’s recommendation to continue to evaluate collaboration opportunities through interlocal agreements and shared initiatives where practical and mutually beneficial. The executive management of IMFD views collaboration—not consolidation—as the most appropriate strategy to achieve efficiencies, strengthen regional capabilities, and maintain local accountability.

Any collaborative initiatives will be evaluated carefully, implemented incrementally, and governed by clear interlocal agreements that protect the interests of IMFD personnel, taxpayers, and the community.



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## Clarifications and Response to Specific Elements of the Study

In the interest of transparency and accuracy, the executive management of the Iona-McGregor Fire Protection & Rescue Services District wishes to clarify or formally respond to the following specific elements contained within the Merger Feasibility Study. These items do not alter the overall conclusions of the report, but are offered to ensure technical precision, contextual clarity, and accurate public understanding.

1. **Page 5 – Executive Summary (Staffing Levels):** The statement indicating that current “staffing levels are appropriate” should be interpreted as meaning that staffing levels are *adequate* to meet current service delivery standards and response requirements. There would be no opportunity to reduce staffing levels in a merged scenario.
2. **Page 6 – Overview of the Fire Districts (IMFD Description):** In the first paragraph under the Iona-McGregor Fire District overview, the description of services should include that IMFD provides **BLS- and ALS-level medical first response**.
3. **Page 7 – Key Findings: Demographics:** The demographic discussion would benefit from clarification regarding tourism. Seasonal and transient tourism significantly influences the *type, frequency, and volume* of emergency service requests within both districts and should be recognized as a contributing factor beyond resident population figures.
4. **Page 21 – Operations & Services:** In the first paragraph, the service description should include **BLS- and ALS-level medical first response** as part of IMFD’s operational responsibilities.
5. **Page 26 – Figure 10:** The consultant did not intend this chart to be a complete listing of apparatus inventory, but rather reflect “some” of the resources available for the area fire stations responding for automatic-aid. To accurately reflect the district’s fleet and operational capabilities, the district would like the reader to understand the apparatus inventory includes a Truck and rescue vehicle operating out of Station 74, as well as an Engine out of Station 71.
6. **Page 42 – Figure 17:** Under the IMFD column, the entry for **Community Newsletter** should be corrected from “No” to “Yes.” This community newsletter can be found and subscribed to on the districts website.

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7. Page 48 – Community Risk Reduction Narrative: In the paragraph beginning with “Once the community’s...”, the sentence should be expanded to state that this process involves both strategic and tactical planning, reflecting the full scope of district efforts.
8. Page 48 – Pre-Fire Planning: This section should clarify that pre-fire planning occurs for all types of structures and is conducted through multiple functions and operational activities of the fire department, not as a single standalone process.
9. Page 56 – Figure 27: Under the IMFD column, the Fire Marshal position should reflect a value of 1.
10. Page 57 – Figure 28: Under the IMFD column, the organizational chart should include Deputy Chief of Operations – 1.
11. Page 214 – Fire & Life Safety: In the first paragraph, first sentence, the description of regulated occupancies should be expanded to include public assembly structures.
12. Page 267 – Figure 196: The chart legend should reflect the dotted yellow line indicates the target fund balance, and the dotted grey line represents the forecasted fund balance.

These clarifications are provided to enhance the accuracy and completeness of the report for public reference and do not materially change the study’s conclusions or recommendations.

## Conclusion

The executive management of the Iona-McGregor Fire Protection & Rescue Services District thanks the J. Angle Group for its independent analysis. The study confirms that a full legal merger would increase taxpayer costs, eliminate Fort Myers Beach ambulance transport services, and result in the loss of Iona-McGregor’s CFAI accreditation. As such, the executive management of the District agrees that a merger does not provide sufficient benefit to justify consolidation at this time.

On behalf of the Iona McGregor Fire Protection,  
and Rescue Service District,  
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Fire Chief | Iona McGregor Fire District



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