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# Strategic Scan #2

Fire Department Leadership  
Perspectives on Apparatus  
Capital Purchasing

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# Overview

## Fire Apparatus Capital Purchasing

The fire and emergency service is a public function heavily reliant on capital assets, including the fire apparatus that are ubiquitous across these services. These assets are often the most visible, and also among the most expensive when considering initial purchase price and ongoing maintenance costs. Rapid cost increases and lead-time for delivery have emerged as a core focus of fire departments, elected officials, leadership associations, and labor. Calls for action have risen to the United States Senate, where the Subcommittee on Disaster Management, District of Columbia, and Census of the Senate Homeland Security and Governmental Affairs Committee held a hearing in September 2025 titled "Sounding the Alarm: America's Fire Apparatus Crisis."

This strategic scan will detail fire chiefs' perspectives with several areas of operations and administration related to apparatus purchasing, including operational challenges associated with apparatus availability, alternatives to new apparatus purchasing, and the concerns of key internal and external stakeholders. This report is not intended to be representative of the full fire and emergency service, but to provide a snapshot of current perspectives from a broad range of leaders who are highly engaged in management, planning, and budgeting. Data were gathered in October and November of 2025 from fire chiefs representing agencies accredited by the Center for Public Safety Excellence® (CPSE®) Commission on Fire Accreditation International® (CFAI®) and those holding the Chief Fire Officer® (CFO) credential from the CPSE Commission on Professional Credentialing® (CPC®).

Results indicate that nearly all respondents, 98%, consider apparatus capital purchasing a significant concern, that apparatus availability has created the need for operational changes, and that departments are seeking out alternative strategies like cooperative purchasing programs or purchasing stock apparatus. Key stakeholders have also expressed concern to fire chiefs, including elected officials from their authorities having jurisdiction and front-line firefighters, company officers, and union officials. Approximately two thirds of respondents plan to sign a contract for or take delivery of new apparatus in the next 12 months.

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### Survey Respondents

**Total distributed:** 885

**Responses:** 195

**Response Rate:** 22%

**Total Designated CFOs:** 140

**From Accredited Department:** 88

### Service Area Characteristics

**Population:** 350 – 1 million

*Median:* 49,000

**Square Miles:** 0.5 – 1,043

*Median:* 36

**Density** (pop. / sq. mi.): 10.4 – 13,157.9

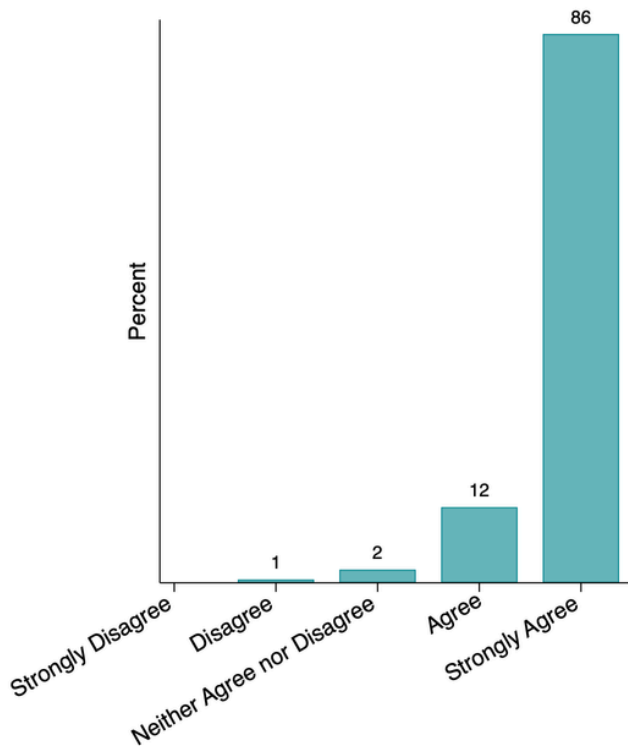
*Median:* 1,851.9

# Table of Contents

<b>Fire Apparatus Capital Purchasing</b>	<b>4</b>
Fire Apparatus <b>Current Challenges</b>	<b>5</b>
Apparatus Availability & <b>Operational Changes</b>	<b>6</b>
Alternatives using <b>Current Apparatus</b>	<b>7</b>
<b>Vendor Loyalty</b>	<b>7</b>
Alternatives to <b>New Apparatus Purchases</b>	<b>8</b>
<b>Stock Apparatus Purchasing</b>	<b>9</b>
Concerns: <b>Front-Line Personnel &amp; AHJ</b>	<b>10</b>
Apparatus Purchasing: <b>Looking to the Future</b>	<b>11</b>
<b>Actionable Takeaways</b>	<b>12</b>
<b>Conclusion</b>	<b>13</b>

# Fire Apparatus Capital Purchasing

## Apparatus Purchasing is a Significant Concern



Fire apparatus capital purchasing has emerged as an important management and budgeting topic in the fire and emergency service. Fire chiefs responding to this survey were asked whether apparatus capital purchases are "... a significant concern for fire department leaders in my agency." Approximately **86%** of respondents indicated that they "strongly agree" that apparatus purchasing is a significant concern, while 12% indicated that they "agree" with the statement. Combined, nearly all of the 195 respondents to the survey indicated agreement with this statement.

Fire chiefs were also asked about the extent of their concern with several specific facets of apparatus purchasing. Nearly all respondents indicated that both **price** and **lead-time to delivery** were concerning "to a great extent." Underlying supply chain issues and market consolidation also garnered concern, with 60% and 41% of respondents providing the same "to a great extent" response.

## Areas of Concern



Price	97%
Lead-time	94%
Supply Chain Issues	60%
Market Consolidation	41%

# Fire Apparatus Capital Purchasing

## Current Challenges

Respondents were asked about the extent to which a number of challenges currently exist related to apparatus, maintenance, and personnel. Almost half of chiefs (48%) responded with the highest scale item (“to a great extent”) when asked about apparatus aging and strain on the fleet, and more than half indicated the same for increasing maintenance costs (61%) and lack of specialized personnel for repairs (57%). Nearly all respondents indicated some level of challenges for each of these when combining the top two responses of “somewhat” and “to a great extent” (89%, 97%, and 94%, respectively).

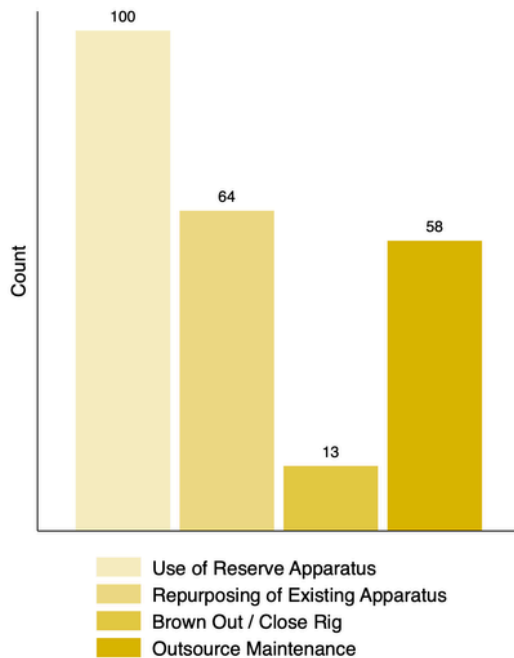
General Fleet and Operational Challenges	“Somewhat”	“To a Great Extent”	Combined
Aging Fleet / Strain on Current Apparatus	41%	48%	89%
Changes to Operational Models Based on Apparatus Availability	44%	29%	73%

Maintenance Challenges	“Somewhat”	“To a Great Extent”	Combined
Increasing Maintenance Costs	35%	61%	97%
Need for Frequent Repairs for Older Apparatus	43%	46%	89%
Lead time for Parts / Parts Availability	43%	28%	71%

Personnel / Cost Challenges	“Somewhat”	“To a Great Extent”	Combined
Lack of Available Specialized Personnel for Maintenance	37%	57%	94%
Increased Personnel Costs for Apparatus Mechanics	38%	35%	73%

# Fire Apparatus Availability and Operational Changes

## Operational Changes - Internal



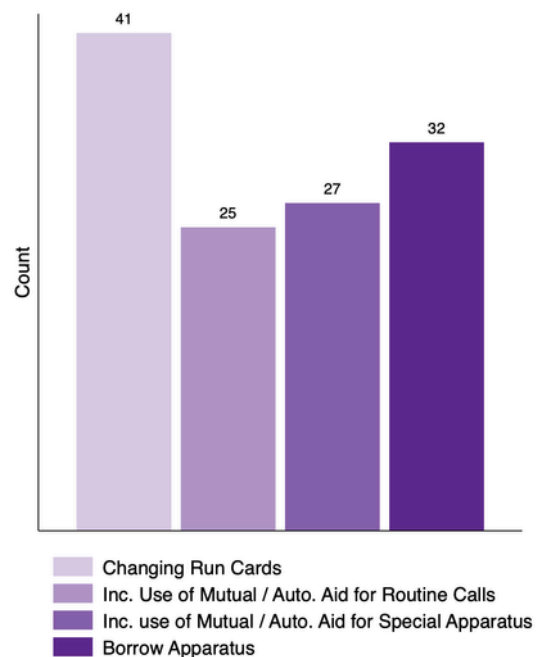
## Operational Changes - Internal

Respondents were asked about changes their agencies have made as a result of apparatus availability. More than half of the chiefs responding to the survey (**51%**) have turned to reserve apparatus to account for availability issues of front-line apparatus. Smaller, yet still significant proportions have taken efforts to repurpose existing apparatus to fill operational holes (33%) or outsource maintenance to return apparatus to service more quickly (30%). A smaller proportion (7%) have had to temporarily take vehicles or stations out of service to account for apparatus availability.

## Operational Changes - External

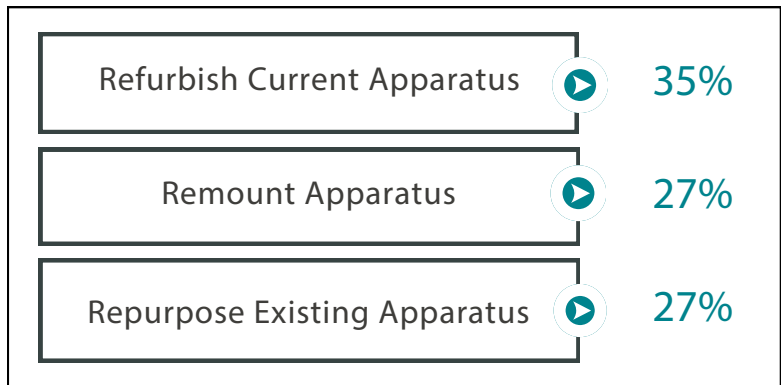
Fire chiefs were also asked about changes to operations that involved external agencies. Just over **21%** of respondents indicated that run cards were changed to account for apparatus availability. Several also indicated an increased use of mutual or automatic aid in responding to routine calls (13%) and calls involving specialized apparatus (14%). Approximately 16% of respondents indicated that they had borrowed apparatus from neighboring agencies as a result of availability of their own apparatus.

## Operational Changes - External



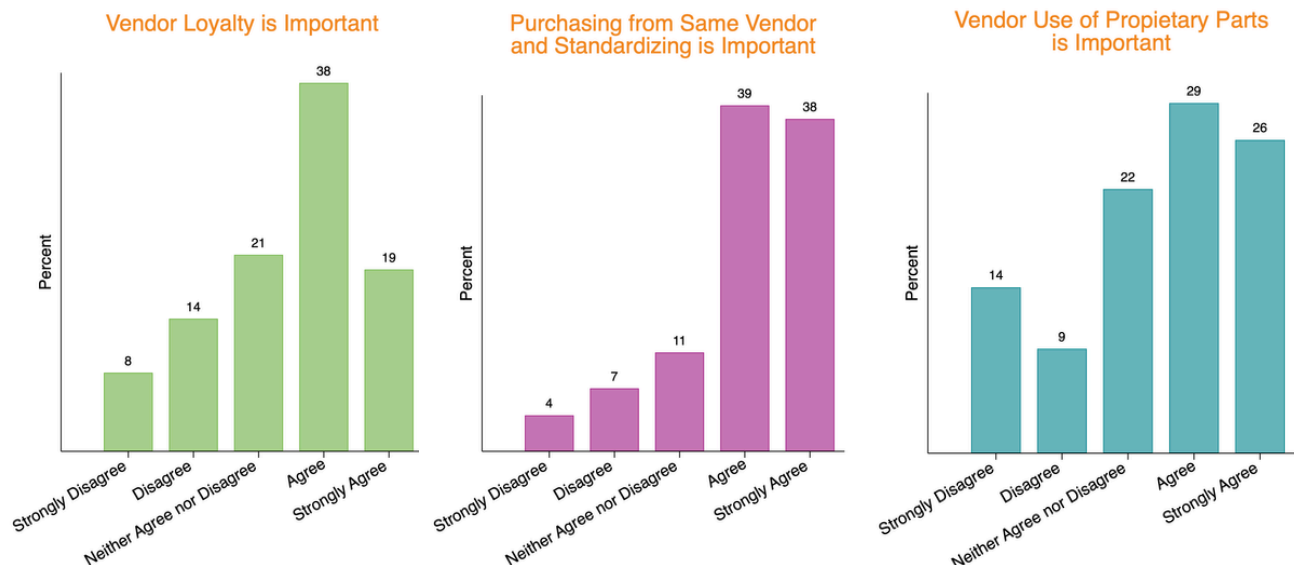
# Fire Apparatus Capital Purchasing Alternatives Using Current Apparatus

Respondents were asked whether they currently use or plan to use any of the following strategies that employ current apparatus rather than purchasing new. Just over one third of respondents (79) indicated that refurbishing current apparatus was a strategy, while just over a quarter (53) indicated consideration of either remounting apparatus, or repurposing existing apparatus.



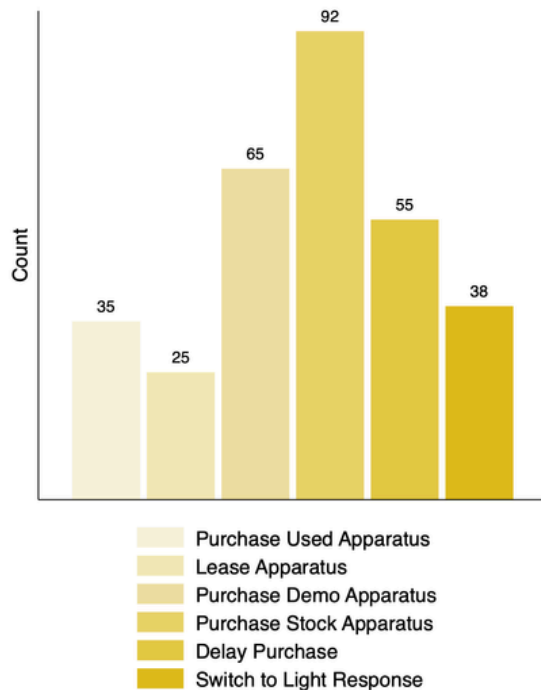
## Fire Apparatus Capital Purchasing Vendor Loyalty

Vendor selection is an important component of how fire chiefs consider capital purchases. Respondents were asked to indicate their agreement with several statements on vendor loyalty, standardization, and use of proprietary parts. Across each question, the most frequent responses were in the “agree” and “strongly agree” categories indicating that vendor considerations are important, though not universally so.



# Fire Apparatus Capital Purchasing Alternatives to New Apparatus Purchases

Alternatives to New Apparatus Purchase



Alternatives to New Apparatus Purchase

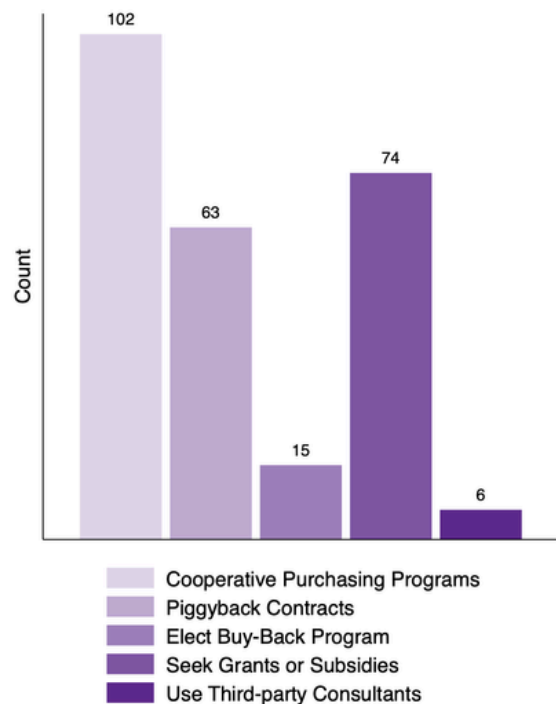
Survey respondents were asked about several possible alternatives to purchasing new apparatus. Just over **47%** of respondents indicated considerations of purchasing stock apparatus, while smaller numbers indicate an interest in purchasing demo units (33%), used apparatus (18%), or leasing (13%).

Approximately **28%** indicated that they would consider delaying a purchase of new apparatus, or switching to light response vehicles to reduce costs (19%).

## Cooperative Alternatives

Chiefs responding to the survey were asked about apparatus purchasing alternatives that involve the cooperative efforts of organizations. More than **52%** of respondent indicated an interest in cooperative purchasing programs or related piggyback contracts (32%), while nearly 38% indicated an interest in seeking out grants or subsidies for new apparatus purchases. Far fewer numbers indicate a desire to pursue buy-back programs elected at the time of purchase (8%), or use of third-party consultants in making a purchase (3%).

Cooperative Alternatives

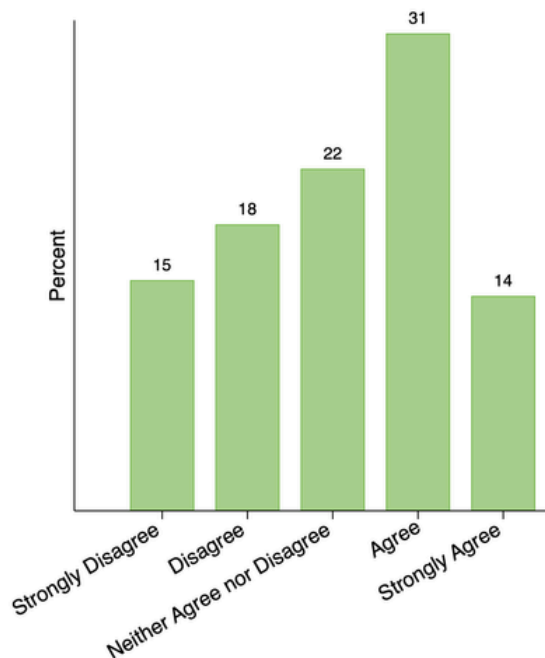




# Fire Apparatus Capital Purchasing

## Stock Apparatus

### Prioritize Purchase of Stock Apparatus

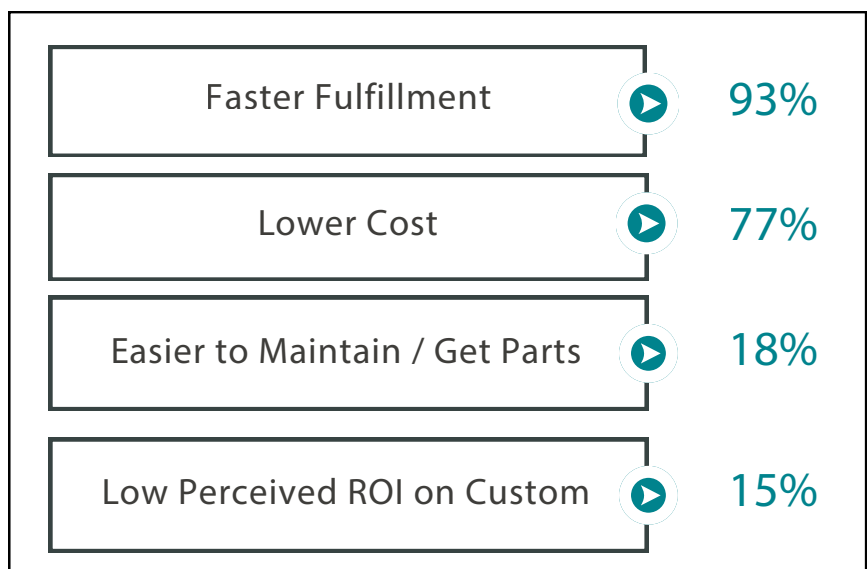


### Stock Apparatus

As noted previously, nearly half of respondents considered the purchase of stock apparatus. Respondents were asked about whether this was a strategy that they would prioritize given recent challenges with the purchase of new apparatus. Approximately **45%** of chiefs indicated agreement (31%) or strong agreement (14%) with this statement, while approximately one-third of respondents indicated some level of disagreement. Just under one quarter of chiefs responded in a neutral manner.

### Reasons for Prioritizing Stock Apparatus Purchases

Of those who responded with some level of agreement, a majority indicated that faster fulfillment (93%) and lower costs (77%) were primary drivers. Smaller proportions indicated that easier maintenance and lower perceived return on investment (ROI) were factors.



# Fire Apparatus Capital Purchasing Stakeholder Concerns

Fire chiefs were asked about the concerns of key stakeholder groups as related to fire apparatus, including front-line personnel who operate apparatus on a day-to-day basis and officials from their authority having jurisdiction (AHJ). Over 55% of respondents (107) indicated that front-line personnel, including firefighters, company officers, and IAFF leaders had expressed some type of concern with existing apparatus, while just over 69% of fire chiefs indicated that concerns from their AHJ were evident.

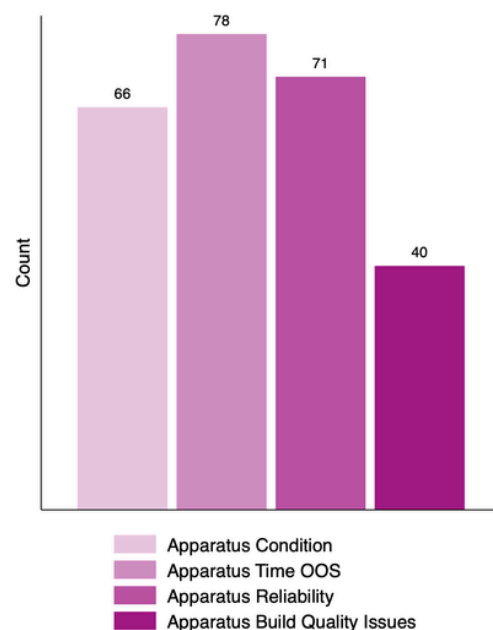
Front-Line Personnel Concerns	
Yes	No
55%	45%

AHJ Concerns	
Yes	No
69%	31%

## Front-Line Personnel

Of those that responded “yes” when asked about concern from front-line personnel, 73% indicated apparatus time out-of-service (OOS) and apparatus reliability (66%) were key concerns. General apparatus condition was also cited as a concern by 62% of respondents. A smaller proportion (37%) indicated that general issues about apparatus build quality were a concern.

Front-Line Concerns with Apparatus



## Authority Having Jurisdiction

Of the several categories of concerns from elected officials, cost (97%), lead-time for delivery (92%), and apparatus life expectancy (58%) were widely cited. Concerns around new apparatus or maintenance cost comparisons with neighboring agencies were lower, but still present. Likewise, more technical concerns, including vendor standardization and the importance of specific standards used in decision-making were notable.



## Fire Apparatus Capital Purchasing Looking to the Future

The context of these perspectives on fire apparatus capital purchase is important. Fire chiefs were asked about their plans to contract for or take delivery of new apparatus, and their forward-planning efforts via adopted capital budgeting. Approximately **two-thirds of respondents** will sign a contract for new apparatus or take delivery in the next 12 months. Just under 92% of respondents report having an adopted capital plan, which is unsurprising given requirements of the accreditation process.



# Fire Apparatus Capital Purchasing

## Actionable Takeaways

- **Prioritize proactive capital planning.** With nearly all respondents identifying apparatus purchasing as a significant concern, driven primarily by rising costs and extended lead-times, fire chiefs should strengthen multi-year capital plans, regularly update assumptions about cost, and clearly communicate procurement timelines with governing authorities.
- **Evaluate stock apparatus as a strategic alternative to fully custom builds.** Given strong interest in stock apparatus driven by faster delivery and lower costs, agencies should reassess specifications and determine where standardized configurations can meet operational needs without sacrificing performance or safety.
- **Extend apparatus service life where feasible through refurbishment and remounting.** Departments should systematically assess refurbishment, remounting, and repurposing options as part of apparatus management, particularly when new apparatus delivery timelines create challenges for operational continuity.
- **Engage front-line personnel early in apparatus replacement and maintenance decisions.** With reliability, out-of-service time, and apparatus condition cited as primary concerns, departments should incorporate input from firefighters and company officers into capital planning and fleet replacement discussions.
- **Strengthen communication with elected officials around cost, timelines, and service life.** Fire department leaders should proactively brief governing bodies on apparatus market conditions, vehicle life expectancy, and cost pressures to align expectations and support informed decision-making.
- **Consider the use of cooperative purchasing and alternative funding mechanisms.** Fire chiefs should actively pursue cooperative purchasing programs, piggyback contracts, and grant opportunities to reduce costs, shorten procurement timelines, and reduce fiscal strain on local budgets.

Find related performance indicators in the  
CFAI 11<sup>th</sup> edition

# Fire Apparatus Capital Purchasing

## Conclusion

This strategic scan of fire apparatus capital purchasing highlights the extent to which apparatus purchasing, availability, and fleet management have emerged as persistent and complex challenges for fire department leadership. Nearly all respondents identified apparatus purchasing as a significant concern, driven primarily by escalating costs and extended delivery timelines. These findings underscore the degree to which capital purchasing decisions have direct operational implications.

In response to these pressures, fire chiefs report adopting a range of adaptive strategies. Some agencies are extending the service life of existing apparatus through refurbishment, remounting, and repurposing, while others are adjusting operational practices through increased use of reserve fleets, mutual aid, and modified run cards. At the same time, interest in alternative procurement approaches, including cooperative purchasing, grant funding, and consideration of stock apparatus, suggests a shift toward standardization, and risk mitigation in capital decision-making.

Fire chiefs also report that concerns surrounding apparatus purchasing extend beyond executive leadership. Front-line personnel frequently raise issues related to reliability, time out-of-service, and overall apparatus condition, while elected officials remain focused on cost, delivery timelines, and apparatus life expectancy. These findings reinforce the importance of transparent communication, shared expectations, and inclusive planning processes that account for both operational realities and fiscal oversight.

As with prior strategic scans, these results are not intended to be representative of the fire and emergency service as a whole, but rather provide a focused snapshot of perspectives from accredited agencies and credentialed chief officers. Nonetheless, the findings indicate that CFAI® agencies and CPC® designees are actively engaging with emerging challenges in apparatus purchasing and fleet management.

Fire apparatus purchasing remains one of the most visible and resource-intensive capital investments in the fire and emergency service. This strategic scan creates an opportunity for continued dialogue about sustainable procurement models, evolving market conditions, and the long-term budgeting and operational implications of capital decision-making. As agencies navigate an increasingly constrained and uncertain purchasing environment, thoughtful planning, collaboration, and adaptive strategies will remain essential to maintaining operational readiness and public trust.



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