PUBLIC EMPLOYEES' RETIREMENT BOARD
April 9, 2015

Topic: **Lewis and Clark Volunteer Fire Department**
Acceptance of past Certificates that increase members' years of service

Staff recommendation:

Staff recommends the 4 members of the Lewis and Clark VFD be granted the year of credited service for FY2013. The members were listed on the late filed FY2012-2013 Annual Certificate and verified to receive credit for that fiscal year within 19-17-112(5), MCA.

Board Motion:

☐ Uphold Staff Recommendation

☐ Other.

_____
Moved by

_____
Seconded by

_____
Vote

INFORMAL CONSIDERATION

April 9, 2015

Petitioner: **Lewis and Clark Volunteer Fire Department**
Fire Chief: **Walter Jester**
Contact: **Walter Jester**

Retirement System: **VFCA**

Request for Board Consideration: **The Lewis and Clark VFD is requesting that the Board accept the late filed Annual Certificate filed originally on October 28, 2013 for the fiscal year 2013. The Annual Certificate was signed by the Fire Chief and notarized. Included was the training documentation by fiscal year as is required. See details below.**

How many fiscal years is the department requesting to file?
One; 2013
How many specific years of service are being requested?
1 year; 4 members
Has the actuary evaluated the impact of these years of service on the VFCA plan?
NO
Has the volunteer fire department filed the necessary qualifications as required by State law?
Yes
Was the appropriate training documentation submitted?
Yes
How many times has the department filed late in the last 10 years?
One year – FY2013

Give details of any problems:
No problems were encountered

Correspondence:

October 28, 2013 – Annual Certificate, letter of explanation, roster, and training documentation received from Fire Chief Walter Jester, for FY2013; considered late because was not received by the filing date, September 1, 2013.

November 26, 2013 – Email received from Fire Chief Walter Jester following up on status of late filed annual certificate.

November 26, 2013 – Email sent from Diann Levandowski advising Walter Jester due to the staff being in the middle of an annual audit and putting the annual financial report together, they would be looking at the late certificate once these two duties were completed.

February 12, 2014 – Email received from Fire Chief Walter Jester following up on status of late filed annual certificate.

February 18, 2014 – Email sent from Diann Levandowski advising Walter Jester the late filed certificate and information had not been looked at and he would be contacted when the date of the certificate being presented to the board.

October 27, 2014 – Received an email from Fire Chief Walter Jester asking about the status of the annual certificate delivered to MPERA on October 28, 2013.

October 29, 2014 – Email sent from Diann Levandowski to Fire Chief Walter Jester explaining that more detailed training documentation will be needed.

November 7, 2014 – Fire Chief Walter Jester delivered training documentation to MPERA

November 10, 2014 – Fire Chief Walter Jester sent an email as follow-up to the training documentation delivered on November 7, 2014.

January 16, 2015 – Email received from Fire Chief Walter Jester requesting an update on the status of their late filed annual certificate.

January 16, 2015 – Email sent from Diann Levandowski advising Walter Jester due to MPERA staff being in the middle of an annual audit and putting the annual financial report together, they would be looking at the late certificate once these two duties were completed.

February 20, 2015 – Email received from Fire Chief Walter Jester requesting an update on the status of their late filed annual certificate.

February 24, 2015 – Email sent from Diann Levandowski notifying Fire Chief Walter Jester that the training documentation received on November 7, 2014 was for the incorrect fiscal year and MPERA will need new training documentation.

February 24, 2015 – Received training documentation from Fire Chief Walter Jester and Training Officer Jerry Shepherd. Notification was given that only persons with an "X" by their names had been active the entire year. The documentation was certified at this time.

March 3, 2015 – Email sent from Ali Rice to Walter Jester asking for additional explanation of training.

March 5, 2015 – Email received from Fire Chief Walter Jester with explanation of some training.

March 6, 2015 – Fire Chief Walter Jester delivered additional training documentation to MPERA.

March 26, 2015 – Email sent from Ali Rice to Walter Jester informing him that "truck duty" is a maintenance activity and cannot be counted as training. Walter Jester will not be eligible for credit for FY2013.

Lewis and Clark Volunteer Fire Department

Acceptance of past Certificates that increase members' years of service

Summary:

Pursuant to § 19-17-112 (5), MCA any late or amended annual certificates and the associated certified training records shall be filed within 3 years of the original annual certificate due date. FY2013 Annual Certificate was due on September 1, 2012 and must be filed no later than September 1, 2015. The original, notarized filed Annual Certificate was received on October 28, 2013.

RELEVANT LAW AND RULES:

Montana Code Annotated (Effective before July 1, 2011)

19-17-108. Credit for service as volunteer firefighter – records. (1) The annual period of service that may be credited under this chapter is the fiscal year. A fractional part of a year may not count toward the service required for participation in this system. To be eligible to receive credit for any particular year, a volunteer firefighter shall serve with a fire company throughout the entire fiscal year.

(2) The years of service are cumulative and need not be continuous. Separate periods of service properly credited with different fire companies must be credited toward a member's eligibility for full or partial benefits.

(3) A volunteer firefighter must receive credit for service during any fiscal year if:

(a) during the fiscal year, the volunteer firefighter completes a minimum of 30 hours of training in matters pertaining to firefighting under a formal program that has been formulated, supervised, and certified to the board by the chief or designated official of the fire company;

(b) the volunteer firefighter's participation in the training program is documented in the fire company's records filed and maintained by the chief or designated official; and

(c) the fire company maintained firefighting equipment that is in serviceable condition and owns, rents, or uses one or more buildings used for the storage of that equipment that all together are valued at $12,000 or more.

(4) The chief or designated official of each fire company shall keep and maintain training records for each current and former volunteer firefighter who is or was a member of the fire company.

Montana Code Annotated (Effective July 1, 2011)

19-17-108. Credit for service as a volunteer firefighter – records. (1) The annual period of service that may be credited under this chapter is the fiscal year. A fractional part of a year may not count toward the service required for participation in this system. To be eligible to receive credit for any particular year, a volunteer firefighter shall serve throughout the entire fiscal year with a single fire company that is organized under Title 7, chapter 33, and continues to meet the requirements of 19-17-109.

(2) The years of service are cumulative and need not be continuous. Separate periods of service properly credited with different fire companies must be credited toward a member's eligibility for benefits.

(3) A volunteer firefighter may not receive credit for service during any fiscal year unless:

(a) during the fiscal year, the volunteer firefighter completes a minimum of 30 hours of training in firefighting duties as outlined in 19-17-105 under a formal program that has been formulated, supervised, and certified to the board by the chief or designated official of the fire company; and

(b) the volunteer firefighter's participation in the training program is documented in the fire company's records maintained pursuant to 19-17-111 by the chief or designated official.

Montana Code Annotated (Effective July 1, 2011)
19-17-112. Filing required reports – limitations. (1) The chief or designated official of each fire company that claims eligibility under this chapter shall, on or before September 1 of each year, file with the board an annual certificate, the current year's roster, and a membership card for each new member.

(2) (a) The annual certificate is a form reporting a fire company's membership eligibility for the previous fiscal year.

(b) The annual certificate must be completed on a form prescribed by the board and contain the date of organization of the fire company and the full name, social security number, and date of birth of each member of the fire company who was a member for the entire fiscal year and who successfully completed 30 hours of training during the preceding fiscal year, as required by 19-17-108.

(c) The chief of designated official shall subscribe and verify under oath, before a notary, that the fire company and members qualified under 19-17-108 and 19-17-109.

(d) The board shall maintain the certificate for the purpose of establishing service for members and eligibility for benefits.

(3) The roster must be signed by the fire chief or designated official, filed with the board, and contain information in writing that provides the names of the fire company, its date of organization, officers, and roll of active and inactive members for the current fiscal year. A roster may be updated to report new members but may not be retroactive.

(4) A membership card must be completed and filed with the board for each member who was a member on or before July 1, 2011, and for each new member who joins after July 1, 2011.

(5) The current fire chief shall file any late or amended annual certificates and the associated certified training records within 3 years of the original annual certificate due date. An annual certificate may be amended only once. The board shall consider and may approve late filings. Information provided to the board by the fire chief must be in accordance with the board's rules.

(6) The current fire chief may request to appear before the board for consideration of the request to file a late or amended annual certificate.

Montana Code Annotated (Effective before July 1, 2011. Repealed in 2011 Legislature and added to 19-17-112, MCA)
19-17-402. Certificate of eligibility. The chief or designated official of each fire company that claims eligibility under this chapter shall, on or before September 1 of each year, file a certificate on a form to be provided by the board, subscribed and verified under oath before a notary, stating whether the company qualified under 19-17-108(3) during the preceding fiscal year. The certificate must contain the date of organization. The certificate must list the full name, social security number, and date of birth of each member of the fire company who was a member for the entire fiscal year and satisfactorily completed 30 hours of training during the preceding fiscal year, as required by 19-17-108(3). The certificate must be maintained by the board for the purpose of establishing service for members and eligibility for benefits.

MPERA ARM

2.43.5001 BASIC UNIT OF SERVICE (1) As of July 1, 1965, the basic unit of service for volunteer firefighters is one fiscal year. Volunteer firefighters not continuously on the active membership list of a single qualifying volunteer fire company for the entire fiscal year shall not be listed on the annual certificate and shall not receive credit for service under the Volunteer Firefighters' Compensation Act (VFCA) for that fiscal year. A volunteer fire company qualifies to participate in the VFCA if the requirements of 19-17-402, MCA, are met.

(2) A volunteer firefighter shall receive one year of credit for service under the VFCA for each two full fiscal years of service performed prior to July 1, 1965. (History: 19-17-203, MCA; IMP, 19-17-201, 19-17-401, 19-17-402, MCA; NEW, 1986 MAR p. 1454, Eff.8/29/86; AMD, 2003 MAR p. 1188, Eff. 6/13/03; AMD & TRANS, from ARM 2.43.801, 2008 MAR p. 2467, Eff. 12/01/08.)

2.43.5002 FAILURE TO FILE REQUIRED REPORTS (1) In order to receive credit for service under the VFCA, volunteer fire companies must file an "annual certificate" with MPERA. The certification is a report by the fire chief that the members listed on the certificate were active for the full fiscal year and also had the required 30 hours of training. This report is on a fiscal year basis (July through June) and is due by September 1 of each year. The annual certificate is signed by the fire chief and notarized. Annual certificate forms are provided by MPERA.

(2) Annual certificates filed after the September 1 due date must be appealed to and considered by the board for approval. Information provided to the board by the fire chief or designated official must include:

(a) the original, notarized annual certificate;

(b) certified training documents showing the required 30 hours of training per listed member;

(c) a letter from the fire chief explaining why the annual certificate was not filed timely; and

(d) if requested by the fire chief, oral argument before board. (History: 19-17-203, MCA; IMP, 19-17-201, 19-17-402, MCA; NEW, 1986 MAR p. 1454, Eff. 8/29/86; AMD, 2003 MAR p. 1188, Eff. 6/13/03; AMD & TRANS, from ARM 2.43.802, 2008 MAR p. 2467, Eff. 12/01/08.)

Lewis and Clark County VFD

Training records for FY2013

date	class	ANTONICH, LOU	BACHINI, JODY	BERG, CHASE	DARGAN, SHAINA	DEFORD, BRIDGET	HAMILTON, DAVE	JESTER, WALLY	LANIGAN, MAT	MESSER, NATE	WILLCOCKSON, KATIE	Description	Questions/Comments	
16-Jul		?						?				Water Exercise - tanker shuttle	What is water exercise?	Tanker Shuttle
24-Jul			3	3								Tanker Shuttle - Drivers Training		
														Rope Rescue - rescuing people who are trapped and maybe in need of medical assistance. I think this should count for credit.
21-Aug			2.5					2.5	2.5			Med Kits - Rope Rescue (firefighter training)	Medical and Firefighter Training	
25-Sep		2	2			2	2		2	2		Engine Tender Hookup		
2-Oct	FF1	2.5	2.5		?		2.5			2.5		Hydrant - hooking to hydrants		Hooking to Hydrants
23-Oct	FF1	3				3			3			Mayday Training		
1-Nov	FF1					3	3	3		3		Organization & Safety		
6-Nov	FF1			2.5			2.5			2.5		Engine ops, Rookie - PPE, SCBA		
15-Nov	FF1	4			4				4	4		PPE/SCBA		
												Fire Training - Auto Ext Tools - Air Bags - Power Haul - Holmatro		
27-Nov	FF1					3	3		3	3		(Brand Name)		
29-Nov	FF1				?	3.5	3.5		3.5	3.5		ICS/Radio Communications		
1-Dec	FF1					6	6		6			Water Supply - Fire Streams - Hydrant Ops		
4-Dec	FF1	3				3				3		PPE/SCBA		Both Happened on this day
4-Dec	FF1	?	3	3								Review Tools & Equipment		Both Happened on this day
6-Dec	FF1	3			3	3			3			Portable Extinguishers		
13-Dec	FF1	3.5				3.5			3.5	3.5		Forcible Entry/Tools		
3-Jan	FF1				3	3	3		3		3	Ventilation		
22-Jan	FF1					3	3	3		3	3	Northwestern Energy - Electrical Safety and Natural Gas		
24-Jan	FF1	3			3	3					3	Highway Safety		
5-Feb	FF1	3		3			3		3		3	Building Search, RIT Pack - Buddy Breathing		
26-Feb	FF1	3	3	3			3	3	3	3	3	Standards of Survival		
19-Mar	FF1	2	2							2		BDLS Training - HazMat	Basic Disaster Life Support, Is this medical?	Government training Hazmat, incident training for disasters
19-Mar	FF1				2.5	2.5	2.5					Hazmat Ops		Both Happened on this day
21-Mar	FF1	2	2							2		BDLS Seminar - Day 2 HazMat	Basic Disaster Life Support, Is this medical?	Government training Hazmat, incident training for disasters
26-Mar	FF1	2	?						?	?		BDLS - Webex Day 3 HazMat	Basic Disaster Life Support, Is this medical?	Government training Hazmat, incident training for disasters
26-Mar	FF1			2	?		2		?			Ventitator & Fire Behavior		Both Happened on this day
28-Mar	FF1		2							2		BDLS - Webex Day 4 HazMat	Basic Disaster Life Support, Is this medical?	Government training Hazmat, incident training for disasters
2-Apr	FF1	2.5		2.5				2.5		2.5		Brush Trucks & Tender, Pumps & water		Both Happened on this day
2-Apr	FF1					2.5	2.5					Auto - Ext - Class Room		Both Happened on this day
23-Apr	FF1			3	3	3	3					Auto EXT Training	What is this? Auto Ext?	Auto Ext - with tools
7-May	FF1	3	3	3		3	3	3				Highway Incident Management	What is this?	safe zones and incident management
28-May	FF1	3	3	3	3	3	3		3	?		Fire training - wildland hose lay - chain saw - 6332-6331-6131-6851 pumps		
5-Jun	FF1	3		3			3	3				Ladder/SCBA/Trailer/Draft Training		
														Rope Rescue - rescuing people who are trapped and maybe in need of medical assistance. I think this should count for credit.
18-Jun	FF1			2.5			2.5		2.5	2.5		EMS - Rope	Medical Training	
25-Jun	FF1	3				3	3			3		Drivers Training		
Less: Medical training														
TOTALS		**50.5**	**28**	**33.5**	**21.5**	**56**	**59**	[redacted]	**45**	**47**	**15**			

ANTONICH, LOU | BACHINI, JODY | BERG, CHASE | DARGAN, SHAINA | DEFORD, BRIDGET | HAMILTON, DAVE | JESTER, WALLY | LANIGAN, MAT | MESSER, NATE | WILLCOCKSON, KATIE

Lewis and Clark County VFD

Training records for FY2013

date	class	ANTONICH, LOU	BACHINI, JODY	BERG, CHASE	DARGAN, SHAINA	DEFORD, BRIDGET	HAMILTON, DAVE	JESTER, WALLY	LANIGAN, MAT	MESSER, NATE	WILLCOCKSON, KATIE	Description
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22-Jan	FF1					3	3	3		3	3	Northwestern Energy - Electrical Safety and Natural Gas
24-Jan	FF1	3			3	3					3	Highway Safety
5-Feb	FF1	3		3			3		3		3	Building Search, RIT Pack - Buddy Breathing
26-Feb	FF1	3	3	3			3	3	3	3	3	Standards of Survival
19-Mar	FF1	2	2							2		BDLS Training - HazMat
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21-Mar	FF1	2	2							2		BDLS Seminar - Day 2 HazMat
26-Mar	FF1	2	?							?	?	BDLS - Webex Day 3 HazMat
26-Mar	FF1			2	?		2		?			Ventitator & Fire Behavior
28-Mar	FF1		2							2		BDLS - Webex Day 4 HazMat
2-Apr	FF1	2.5		2.5				2.5		2.5		Brush Trucks & Tender, Pumps & water
2-Apr	FF1					2.5	2.5					Auto - Ext - Class Room
23-Apr	FF1			3	3	3	3					Auto EXT Training
7-May	FF1	3	3	3		3	3	3				Highway Incident Management
28-May	FF1	3	3	3	3	3	3		3	?		Fire training - wildland hose lay - chain saw - 6332-6331-6131-6851 pumps
5-Jun	FF1	3		3			3	3				Ladder/SCBA/Trailer/Draft Training
18-Jun	FF1			2.5			2.5		2.5	2.5		EMS - Rope
25-Jun	FF1	3				3	3			3		Drivers Training
	Less: Medical training											
	TOTALS	**51**	**28**	**34**	**22**	**56**	**59**	**20**	**45**	**47**	**15**	

ANTONICH, LOU | BACHINI, JODY | BERG, CHASE | DARGAN, SHAINA | DEFORD, BRIDGET | HAMILTON, DAVE | JESTER, WALLY | LANIGAN, MAT | MESSER, NATE | WILLCOCKSON, KATIE

RECEIVED
OCT 28 2015
RETIREMENT BOAR

LEWIS AND CLARK COUNTY

Volunteer Fire Department

10/22/2013

To the PERS Board Members:

It was recently brought to my attention that I failed to turn in the annual report by September. That is my fault entirely; in my mind I had just turned in that information, which turned out to be an audit of my department, not my annual report.

In the past summer I have opened my new fire station.....Witlatch Station #1 at 1952 Second Wind Lane on July 1st. That project was almost 19 years on my "to do list." It is not finished yet because I still need to burn the two large slash piles from the building project, and then there are the landscaping issues to finish too.
My department simo pages with West Valley VFD for the last 6 or 7 years. Our pagers go off an average of 585 times a year. The majority of pages are medical calls, motor vehicle accidents, and of course structure/wildland fire calls. We meet every Tuesday night for either training or business meetings. I also work for a living; the department is all volunteer man hours.

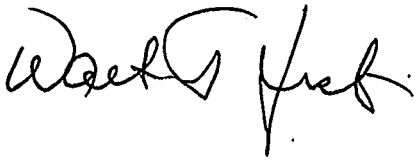
I am also involved in saving the old school house built in 1897 next to my home in Unionville. I applied for years for grants

and this year I finally landed a $4,000 grant to roof and paint the building. I am nearly done with the roof; the painting will have to wait until spring.

The bottom line is I have too much on my list, and things like reports are easy to overlook.
I have enclosed all the information that I believe you are asking for concerning my department. If you have any further questions please send me an e-mail or call.

RECEIVED
OCT 28 2013
RETIREMENT BOARD

Thanks
Wally Jester
Chief of Lewis & Clark VFD



Lewis & Clark VFD

Recap of Each Firefighters Hours
From July 1, 2012 to June 30, 2013

RECEIVED
OCT 28 2013
RETIREMENT BOARD

	Fire Training	Medical Training	Total Training Hrs	Meeting & Events Hrs	Fire & Med Calls Hrs	Total Hours	Fire & Med Calls
Antonick, Lou	54.0	24.0	78.0	28	195	301	178
Bachini, Jody	32.0	22.0	54.0	22	8	84	14
Berg, Chase	33.5	11.0	44.5	16	102	162	76
Dargan, Shina	38.0	0.0	38.0	9	1	48	1
DeFord, Bridget	73.0	0.0	73.0	8	0	81	0
Hamilton, Dave	78.5	17.5	96.0	67	81	244	100
Jester, Wally	18.5	17.5	36.0	21	145	202	164
Lanigan, Mat	74.5	11.5	86.0	14	24	124	36
Messer, Nate	44.5	16.0	60.5	29	112	201	87
Willcockson, Katie	22.0	8.0	30.0	4	0	34	0

Total Hours - 1,481

Dollar amount of time donated to the community by the Firefighters - $25,858.26

Average amount of time donated to the community by each Firefighter - 135

Total Calls for 598 Medical - 363 / Fire & MVA's - 235

From: Levandowski, Diann
Sent: Tuesday, November 26, 2013 7:34 AM
To: Jester, Walter
Subject: RE: Question

Walter,

This is the busy time of year for our office, with our annual audit, annual actuarial valuation and putting together the annual financial report for the Board and the Governor that we usually don't get to these until after the beginning of the new calendar year. Let him know that he will need to wait until after the beginning of the new calendar year and we will be in contact with you, as the fire chief, if we are in need of any more information and when this will be considered by the Board.

You have a blessed Thanksgiving!

Diann Levandowski | Assistant Fiscal Services Bureau Chief
DLevandowski@mt.gov | tel: 406.444.3193 | fax: 406.444.5428

Montana Public Employee Retirement Administration
100 N Park Avenue, Suite 200, Helena, MT 59601
www.mpera.mt.gov

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From: Jester, Walter
Sent: Tuesday, November 26, 2013 7:21 AM
To: Levandowski, Diann
Subject: Question

Hi Diann,
My assistant Chief left a message yesterday that he checked and found that we have not received credit for last year's volunteer time for PERS. I assured him that although I was late turning in the paperwork, it was being handled. I also sent him a copy of the letter that I sent for your board to consider. Would you please check the status of the paperwork for me and let me know if there is anything further that I need to do to remedy my assistant Chief's concerns.
Thanks.....and have a great Thanksgiving.
wj

From: Levandowski, Diann
Sent: Tuesday, February 18, 2014 9:28 AM
To: Jester, Walter
Subject: RE: Question

We are still working on late filings with Lewis & Clark VFD being one of the many. Our office will contact you if there is need of any more information and when this is expected to be presented to the Board.

Diann Levandowski | Assistant Fiscal Services Bureau Chief
DLevandowski@mt.gov | tel: 406.444.3193 | fax: 406.444.5428

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From: Jester, Walter
Sent: Wednesday, February 12, 2014 2:23 PM
To: Levandowski, Diann
Subject: RE: Question

Hi Diann,
I am just following up, just to make sure the board didn't have any issues with my missing the documentation deadline.
Thanks.....Friday is getting closer! ☺
Have a great day.

Rice, Ali

From: Levandowski, Diann
Sent: Wednesday, October 29, 2014 7:46 AM
To: Jester, Walter
Cc: Levandowski, Diann
Subject: RE: Missing PERS retirement for last year

Walter,

Many things have happened in the past year that kept us from getting to your late filed certificate for FY2013. In reviewing what you sent into our office, see that we do not have detailed information for the training sheet you provided. Please refer to the information below for what is needed for **certified** training documentation.

> The Board has decided that late or amended certificates must be accompanied by a letter of explanation from the fire chief and **certified** training documentation for the 30 or more hours of training before it will be considered for acceptance. The **certified** training information must be based on fiscal years (July 1st thru June 30th) and in an easily readable format. Training documentation must include the following:
>
> - The date the training was offered;
> - Title of the training;
> - Description of the training;
> - Hours of training;
> - Each member's hours of training for each class.
>
> Training does **not** include business meetings, emergency calls, or vehicle or hall maintenance.

When you sent your information, you included a letter from our Hollie Koehler, MPERA's Internal Auditor; this letter is for a separate issue than the FY2013 late Annual Certificate.

Please send your certified training documentation in and we can then review the information and present to the Board for consideration.

Thank you!

Diann

Diann Levandowski | Assistant Fiscal Services Bureau Chief
DLevandowski@mt.gov | tel: 406.444.3193 | fax: 406.444.5428

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From: Jester, Walter
Sent: Monday, October 27, 2014 9:04 AM
To: Levandowski, Diann

Cc: Dutton, Leo; Jester, Walter
Subject: Missing PERS retirement for last year

Hi Diann,
I received my MPERA document Saturday and I noticed that last years' service was missing. If I didn't receive credit, I will bet my crew didn't either.
I was audited that summer, and thought that I had submitted the document that is due in November. When I called to check I found I was late and had to send a letter explaining why, which I did. I also sent several follow up letters to you asking the status to make sure my small crew received their time earned for that year for MPERA. We set a new record of over 600 calls that year, and for a volunteer fire department that is quite an accomplishment. Your replies at the time were the board was very busy and if there was a problem, I would hear something after the first of the year.
Being I never heard anything after providing all the documentation, it was taken care of.
I have a meeting tomorrow after work with Helena Fire and the Forest Service, but I can meet with you any day after 3:45 for the rest of the week.
My crew and I have earned that credit and I will do whatever is needed to correct this issue.
I have copied in Sheriff Dutton because my VFD is under the Sheriff's department, and the County Commissioners are my trustees.
Please let me know what I need to do.
Thanks wj
431-3601

Rice, Ali

From: Jester, Walter
Sent: Monday, November 10, 2014 10:41 AM
To: Levandowski, Diann
Subject: RE: Missing PERS retirement for last year

Hi Diann,
I stopped by Friday and dropped off the records for you. One set of documents is the actual attendance sheets for each night of training. The other is for all the training offered each month. Our regular schedule is fire training the first Tuesday, the second week is the business meeting, the third Tuesday is medical training, and the fourth Tuesday evening is regular fire training again. We also run our rookie class each week on the training nights as well. After about three months, what rookies that complete the FF1 training can begin hands on calls.
If you need anything else please give me a call or e-mail for any additional information.
Thanks wj
431-3601

From: Levandowski, Diann
Sent: Wednesday, October 29, 2014 7:46 AM
To: Jester, Walter
Cc: Levandowski, Diann
Subject: RE: Missing PERS retirement for last year

Walter,

Many things have happened in the past year that kept us from getting to your late filed certificate for FY2013. In reviewing what you sent into our office, see that we do not have detailed information for the training sheet you provided. Please refer to the information below for what is needed for **certified** training documentation.

> The Board has decided that late or amended certificates must be accompanied by a letter of explanation from the fire chief and **certified** training documentation for the 30 or more hours of training before it will be considered for acceptance. The **certified** training information must be based on fiscal years (July 1st thru June 30th) and in an easily readable format. Training documentation must include the following:
>
> - The date the training was offered;
> - Title of the training;
> - Description of the training;
> - Hours of training;
> - Each member's hours of training for each class.
>
> Training does **not** include business meetings, emergency calls, or vehicle or hall maintenance.

When you sent your information, you included a letter from our Hollie Koehler, MPERA's Internal Auditor; this letter is for a separate issue than the FY2013 late Annual Certificate.

Please send your certified training documentation in and we can then review the information and present to the Board for consideration.

Thank you!

Diann

Rice, Ali

From: Levandowski, Diann
Sent: Tuesday, February 24, 2015 8:46 AM
To: Jester, Walter
Cc: Levandowski, Diann
Subject: RE: Question

Good Morning Walter,

I am looking over your information so the training documentation could be summarized and noticed that the dates on the training is for fiscal year 2014 and not 2013. Fiscal year 2013 is July 1, 2012 thru June 30, 2013. I will need the **certified** training documentation for FY2013 (7/1/2012 thru 6/30/2013) before we can proceed to the Board on this matter.

> The Board has decided that late or amended certificates must be accompanied by a letter of explanation from the fire chief and **certified** training documentation for the 30 or more hours of training before it will be considered for acceptance. The **certified** training information must be based on fiscal years (July 1st thru June 30th) and in an easily readable format. Training documentation must include the following:
>
> - The date the training was offered;
> - Title of the training;
> - Description of the training;
> - Hours of training;
> - Each member's hours of training for each class.
>
> Training does **not** include business meetings, emergency calls, or vehicle or hall maintenance.

Apparently from what we have received already, the Lewis & Clark County Rural Fire Dept. trains with other departments in the Helena Valley. Please provide a list of the names of all the firefighters belonging to the Lewis & Clark Co. RFD that we need to be looking for on the training sheets, this will help in compiling the summary of the training.

If you would like this to be presented to the PERB at the April 9th meeting, we need to receive this information by March 11, 2015. This gives us time to compile and make sure that the information received is adequate to go forward to the Board.

Thanks!
Diann

Diann Levandowski | Assistant Fiscal Services Bureau Chief
DLevandowski@mt.gov | tel: 406.444.3193 | fax: 406.444.5428

Montana Public Employee Retirement Administration
100 N Park Avenue, Suite 200, Helena, MT 59601
www.mpera.mt.gov

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From: Jester, Walter
Sent: Friday, February 20, 2015 12:29 PM
To: Levandowski, Diann
Subject: RE: Question

Hi there,
I am wondering if we have resolved this issue yet?
Thanks wj

From: Levandowski, Diann
Sent: Friday, January 16, 2015 3:12 PM
To: Jester, Walter
Subject: RE: Question

I will let you know if there is anything else that is needed and you will receive a letter when this is ready to go to the Board for approval.

Diann Levandowski | Assistant Fiscal Services Bureau Chief
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From: Jester, Walter
Sent: Friday, January 16, 2015 2:57 PM
To: Levandowski, Diann
Subject: RE: Question

Don't you just love legislature? They affect our operation through budget.....and employees too.
Please let me know if I need to come for any meeting or if there is a need for more information.
Thanks wj

From: Levandowski, Diann
Sent: Friday, January 16, 2015 2:47 PM
To: Jester, Walter
Cc: Dutton, Leo
Subject: RE: Question

Walter,

We are working on at least 10 of these late filings and other issues that are volunteer related. In the meantime, I am also busy with our audit, legislature, and the annual financial report. We are working as fast as we can on these.

Thanks!
Diann

Diann Levandowski | Assistant Fiscal Services Bureau Chief

DLevandowski@mt.gov | tel: 406.444.3193 | fax: 406.444.5428

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From: Jester, Walter
Sent: Friday, January 16, 2015 2:36 PM
To: Levandowski, Diann
Cc: Jester, Walter; Dutton, Leo
Subject: RE: Question

Hi there,
I have yet to hear from you Diann. This needs to get taken care of; my people worked hard last year and earned their credits. I personally dropped off the printed material that you requested quite a while ago.
We set another record this year of 630 calls for a volunteer department.
Please give me a call next week....I am off on Monday as I believe you are also.
431-3601

From: Levandowski, Diann
Sent: Tuesday, February 18, 2014 9:28 AM
To: Jester, Walter
Subject: RE: Question

We are still working on late filings with Lewis & Clark VFD being one of the many. Our office will contact you if there is need of any more information and when this is expected to be presented to the Board.

Diann Levandowski | Assistant Fiscal Services Bureau Chief
DLevandowski@mt.gov | tel: 406.444.3193 | fax: 406.444.5428

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From: Jester, Walter
Sent: Wednesday, February 12, 2014 2:23 PM
To: Levandowski, Diann
Subject: RE: Question

Hi Diann,
I am just following up, just to make sure the board didn't have any issues with my missing the documentation deadline.
Thanks.....Friday is getting closer! ☺
Have a great day.

Rice, Ali

From: Rice, Ali
Sent: Tuesday, March 03, 2015 3:26 PM
To: Jester, Walter
Cc: Levandowski, Diann; Koehler, Hollie
Subject: RE: VFCA

Walter,

I have been reviewing the training documentation that you and Jerry Shepherd delivered on February 25th. I have some questions/comments about the training that I am hoping you may be able to address. If I am able to have the responses back and all information accounted for by March 11, I will still be able to have this presented to the board at their April meeting. Attached you will find a spreadsheet of the documentation that I received, for your reference. The problems that I encountered are:

- *There were no hours listed for a number of the trainings, these are entered as question marks.*
- *Some of the training sign-in sheets have check marks, UX, EX, and RA, what do these mean?*
- *There is a training titled CPR Review – 20 hours. This has no dates listed for it.*
- *I received multiple training documentation for some days. Was there more than one training on these days? (August 21, December 4, March 19, March 26, April 2, and May 21)*
- *July 16th – What is water training?*
- *July 17th – This is a medical training and does not qualify for credit*
- *August 21st – This appears to be a training for both firefighters and medical staff, so credit will be awarded.*
- *September 18th – I believe this was Diabetes training, but I am not certain. It does appear to be medical training and does not qualify for credit.*
- *November 27th – What is Holmatro?*
- *December 18th - This is a medical training and does not qualify for credit*
- *March 19th, 21st, 26th, and 28th – I need a description of BDLS training. Does BDLS stand for Basic Disaster Life Support?*
- *April 16th – This is a medical training and does not qualify for credit*
- *April 23rd – Is Auto BXT training supposed to be Auto Extraction training?*
- *May 7th – Need more description of Highway Incident Management*
- *May 21st – Need more description for FR Ambulance End Class, FR Transitions, and EMT B Monitoring. These appears to be medical and may not qualify for credit.*
- *June 18th – Is this the same rope training as the one on August 21st? Please provide an explanation of the training.*
- *MPERA only considers basic medical training for credit (ie. CPR and basic first aid). This may impact the total hours received by some members, which could potentially render them unqualified.*

If you have any questions, please call or email me.

Thanks!

Ali Rice
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Rice, Ali

From: Jester, Walter
Sent: Thursday, March 05, 2015 11:25 AM
To: Rice, Ali
Subject: RE: VFCA

Hi Ali,
Chief Shepherd went back into the Red Alert program that we used to use before he went on to a different recording system. Red Alert was a very expensive program that not only hit your budget the first time for a large chunk of change, they required an annual fee to keep using their product.
So....Shep uses a different program now.
I was provided another set of documents for you to work with. He also reminded me that was the year that I was involved heavily building my new fire station, which is why I am short on some of the training. I will also provide a document to show other training that I had to do called "truck duty" on my 6 fire trucks.
A few years ago West Valley Trustees (whom we simo page with) voted to change the first Tuesday training each month from "Truck Duty" to specific fire training. They hired a mechanic to perform those duties on West Valley equipment only. We used to split the fire crews up between all three fire stations and go through all equipment on each vehicle, running each chain saw, air fan, extrication equipment motors, and doing an inventory for specific vehicle. It was good training for the newer members because they would know where each tool and piece of equipment was stored. We also provided newcomers drivers training on those nights after we completed the truck checks. The crews were rotated each month to a different station so they would get to know each piece of equipment for both departments. The problem was the seasoned FF's were not gaining much knowledge for their time invested and participation on that night was showing a need for improvement. The down side of that was my small department can't afford to hire someone to do those tasks, so for years now on the first Tuesday of each month I start truck checks at my County Fire Station at 4:00 and work straight through finishing up at the Witlatch Fire Station in Unionville at 8:00 or later, depending on what needs I find.
I just found that tonight I will have to stay to supervise at my paying job.....so I hope to drop the paperwork off to you tomorrow after work.
Thanks....and have a great weekend.....above freezing I hope!
wj

From: Rice, Ali
Sent: Tuesday, March 03, 2015 3:29 PM
To: Jester, Walter
Subject: VFCA

I forgot to send the attachment. Here is it.

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RECEIVED
MAR 06 2015
RETIREMENT BOARD

LEWIS AND CLARK COUNTY

Volunteer Fire Department

3/5/2015

Hi Dian and Ali,

After our meeting with Ali the other day, Chief Shepherd checked the other computer program that he used to use to record our fire departments operational information. That company was called Red Alert. That company's software was very expensive and the annual fee finally became prohibitive.
I will provide you with that information that he printed out in the near future.

Chief Shepherd reminded me that I failed to record the first Tuesday of the month that I was performing truck duty on Lewis and Clark VFD equipment. I really never thought about it.
Until a few years ago, part of our regular training program was the first Tuesday of each month was dedicated to a program we called "truck duty."
We broke the membership into three groups that rotated each month to one of the three fire stations. The program consisted of going through each truck checking all the equipment, ensuring that all motorized and electrical equipment was in running condition, weather it was the truck itself or any portable equipment on board to ensure it was ready for emergency use. That equipment list includes the positive pressure fans, extrication equipment, portable generators, chain saws and other equipment.
It was good training for each member to learn how to start and use each tool, not to mention how to find every tool that we use at an incident and where it was located on each fire truck.

A few years ago the trustees of our co-partner in this fire department partnership, West Valley VFD, decided to change the training schedule on the first Tuesday to a more structured type of training. They hired a FF from West Valley to come in to their two stations and do the truck duty and equipment checks on their equipment. The down side

was all 7 pieces of equipment that my department (Lewis and Clark VFD) have, was left without monthly checks.
The schedule used to be:

First Tuesday was truck duty followed by drivers training for rookies if they had the time
Second Tuesday was the regular business meeting
Third Tuesday was medical training
Fourth Tuesday was Fire training
Now, the first Tuesday is also Fire training.

My Assistant Chief is Dave Hamilton who is the dedicated training officer for both departments. I told Dave to keep dealing with the training for both Tuesdays that are dedicated to fire training each month, and I will personally take care of making sure our equipment has the "truck duty" performed on L&C equipment on the first Tuesday of each month. There are times that one of my crew will offer to give me a hand but most of the time I just take care of it. In the past I have not thought about documenting the training.....I just get caught up in getting the job done.

My monthly schedule is on the first Tuesday of each month I leave my job at MDT at 3:30, and head to the County Shops where I have three of my trucks stored:

Engine 6111
Tender 6121
Brush 6131

It takes me about two hours to go through the equipment at that station, including the SCBA's on the engine, filling out the paperwork and then I head to the new Witlatch fire station near Unionville to take care of the three units located at that station:

Rescue 6151
Tender 6122
UNIMOG (loader/backhoe) used for rescue, flooding control, and at fire scenes removing metal roofs and burning haystacks

On the average it takes me a minimum of four hours to take care of all six pieces of equipment.

The command unit that I drive daily is loaded with equipment too, but I do not fill out a check sheet for it.

The dates that you are concerned about are from July 1st of 2012 through July 1st 2013. I now perform the task that we used to use as fire training for all members of the fire department, so they knew what the tools were, and where they were located.
The dates that I performed the truck duty for benefit year of 2012-2013 are:

2012
July 3rd
Aug 7th
Sept 4th
Oct 2nd

Nov 6th
Dec 4th

2013
Jan 1st
Feb 5th
March 5th
April 2nd
May 7th
June 4th

I hope this clears up the issue regarding my training record. If you have any further needs please feel free to contact me at 431-3601 or e-mail me at landcvfdchief@qwest.net.

Walter Jester
L & C VFD Chief

Rice, Ali

From: Rice, Ali
Sent: Thursday, March 26, 2015 8:21 AM
To: Jester, Walter; 'landcvfdchief@qwest.net'
Cc: Levandowski, Diann
Subject: Amended Years of Service

Walter,

In response to the letter received from you on March 6, 2015, we are unable to count "truck duty" as a training activity. Per your statement, "The program consisted of going through each truck checking all the equipment, ensuring that all motorized and electrical equipment was in running condition," this would qualify as maintenance, which is excluded from training. We are still planning to present this amendment to the board on April 9, 2015. Currently you do not have enough training hours to qualify for credit for this year, so you will not be listed on the Annual Certificate to receive credit. Please let me know if you have any questions or comments.

Thanks!

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